

Education

External Data

Description

Enter and update academic information from external sources, such as transcripts, in the Education component. You can record general and specific external education data, such as schools attended, academic summaries, subjects, degrees, courses, dates of attendance, and so forth. You can also link the appropriate data from these pages to actual applications.

Note. The education information on this component is linked to a *person* as opposed to an *application*, so that you can consider the information when you evaluate specific applications for the person.

This information can be reported on a transcript, self-reported, or reported from another source and linked to specific applications on the Application Materials page.

Process Steps

Navigations:

Student Admissions > Application Entry > Academic Information > Education
Student Recruiting > Maintain Prospects > Academic Information > Education
Student Admissions > Application/Transcript Loads > Education
Records and Registration > Transfer Credit Evaluation > Education

Step 1: The Education Search Page

First, locate the individual in the database.

1.1 Entering Search Criteria

1.1.5 **First Name:** You can enter a portion of the first name as search criteria.

1.1.6 Click **Search** to continue or **Clear** to have the system clear all of the text boxes so you can start again.

Step 2: External Data

After locating the individual in the database, the following page will appear. If you have navigated here directly from the Prospect School/Recruiting page, or if another staff member has already entered a new prospect and populated the last school attended, this page will display the Org ID and name of that school.

2.1 External Data

The screenshot shows a web application interface for 'External Data'. At the top, there are tabs for 'External Data', 'External Academic Summary', 'External Subjects', 'External Degrees', and 'External Courses'. The main content area displays the name 'Hoshi Sato' and ID '0137401'. Below this, there is a search bar with 'Org ID: 0137006' and a search icon, followed by the text 'Sacred Heart School Of Halifax'. There are also checkboxes for 'Checklist Item Update' and 'Org Primary Location'. The form includes several input fields and dropdown menus: 'Career' (High Schl), 'Term Type' (Quarter), 'Data Nbr' (1), 'Acad Level' (12th Grade), and 'Term Year' (2005). There are also sections for 'Dates of Attendance' (From Date: 09/01/2001, To Date: 06/01/2005), 'Transcript' (Desired), and 'Receipt' (Received). At the bottom, there is a 'Transfer To' dropdown set to 'Prospect Data' and a 'Go' button. Navigation buttons like 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh' are also present.

2.1.1 Select the school name from the External Organization lookup list next to **Org ID**. There are thousands of external organizations so some care and precision will be necessary (as illustrated by the screenshot below). You may want to keep a list of your most often used **Org IDs** handy. If the organization you wish to use is not found, you will need to have it added. Consult your PeopleSoft Project coordinator.

Organization Table
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

External Org ID: begins with [] []

Search Name: contains [BANGOR]

Organization Type: = [] []

FICE Code: begins with [] []

ATP Code: contains [] []

City: begins with [] []

State: begins with [] []

Country: begins with [] []

Include History Correct History Case Sensitive


Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Search Results



View All First [] 1-6 of 6 [] Last

External Org ID	Description	Search Name	Organization Type	FICE Code	ATP Code	City	State	Country
0123548	Bangor Area Senior High School	BANGORAREASENIORHIGHSCHOOL	School	(blank)	390190	Bangor	PA	USA
0112650	Bangor Christian Schools	BANGORCHRISTIANSCHOOLS	School	(blank)	200043	Bangor	ME	USA
0112655	Bangor High School	BANGORHIGHSCHOOL	School	(blank)	200060	Bangor	ME	USA
0113934	Bangor High School	BANGORHIGHSCHOOL	School	(blank)	230150	Bangor	MI	USA
0130026	Bangor High School	BANGORHIGHSCHOOL	School	(blank)	500135	Bangor	WI	USA
0100425	University College Of Bangor	UNIVERSITYCOLLEGEOFBANGOR	School	(blank)	003930	Bangor	ME	USA

- 2.1.2 Select the **Checklist Item Update** check box to indicate that the checklist related to this row of external data (or transcript) is updated when the Checklist Item Update Automated process is run. Select this option if the Received check box in the Receipt group box is selected.
- 2.1.3 By clicking on the [Org Primary Location](#) hyperlink, you can see more detail about the location of the external organization (school).

Organization Primary Location			
Org ID:	0137006	Sacred Heart School Of Halifax	
Primary Location			
Location Nbr:	1	Sacred Heart School Of Halifax 	
Address Line 1:	5820 Spring Garden Rd.		
Address Line 2:			
Address Line 3:			
Address Line 4:			
City:	Halifax	State:	NS
Postal Code:	B3H 1X8	Country:	CAN
Return			

- 2.1.4 **Career**, *external* career here, information will default from the External Organization tables after the organization is selected. In the example above “High Schl” filled in after selecting “Sacred Heart School of Halifax.” If Hoshi in our example were simply someone on the database that we happen to know went to Sacred Heart, then leaving “High Schl” alone is fine. However, because most of the need for this information is related to the individual as a prospect, applicant or transfer student in a particular UMS institution, it is important to record that we either desire, or have received, the transcript at a particular UMS university. For this reason we have established career codes to signify that the interest in this record is from UM by changing **Career** to “O HighSchl.” Prospects and Applicants may have multiple rows for the same high school record because multiple UMS careers may be looking for, or have received, the transcript.
- 2.1.5 The system populates **Data Nbr** automatically. It is incremented if you have requested additional transcripts from the same organization. (e.g., Data Nbr 1 is a Mid-Year transcript, Data Nbr 2 is the second row, a final transcript). **NOTE: The External Academic Summary and External Subjects pages are tied to the Org ID, Career (external), and Data Number.**
- 2.1.6 **Acad Level** defaults to “Unknown,” and should be changed to the highest level completed for this school.
- 2.1.7 **Term Type** may be selected from the drop-down list. This field is optional, but is especially important for transfer credit evaluation. Values are:
- Full Year
 - Miniterm
 - Other
 - Quarter
 - Quinmester
 - Semester
 - Trimester
 - Unknown
- 2.1.8 **Ext Term** Select the external term to which this data relates. The values available to you in this field depend on what you entered in the Term Type field. This field is optional.

- 2.1.9 **Term Year** should be left blank unless you are doing term-by-term transfer credit evaluation. Most records/transcripts will be for multiple years. This field is also optional.
- 2.1.10 **Dates of Attendance** are fairly straightforward. You may enter dates, with or without punctuation, or click on the calendars () next to **From Date** and **To Date**.
- 2.1.11 In the **Transcript** section:
- 2.1.11.1 Select the **Desired** check box if you are entering data for a transcript that you requested. The remaining fields in the Transcript group box become available.
- 2.1.11.2 In **Transcript Date**, enter the date that the transcript was issued. The transcript date cannot come after the received date
- 2.1.11.3 Select a **Transcript Type**. Values are Official or Unofficial. (You can define a user default for this field on the User Defaults 3 page. The user default populates once you select the **Desired** option.)
- 2.1.11.4 Select a **Transcript Status**. Values are 1st Term, 3rd Qtr, Final, In Progress, Incomplete, or Mid-Year
- 2.1.12 In the **Receipt** section:
- 2.1.12.1 Select the **Received** check box if the data you are entering is for a transcript you have received. The remaining fields in the **Receipt** group box become available.
- 2.1.12.2 In **Received Date**, enter the date that your office received the transcript. The received date cannot come before the transcript date. When you save the page, the system populates this field, but you can override it.
- 2.1.12.3 Enter the **data source** for this transcript. (You can define a user default for this field. The user default populates once you select the **Received** check box.)
- 2.1.12.4 In **Data Medium** select the format by which you received the transcript. (You can define a user default for this field on the User Defaults 3 page. The user default populates once you select the **Received** check box.)
- 2.1.13  your work.

Note. PeopleBooks says, “If you are entering two careers, one or both of the **Desired** or **Received** check boxes must be selected before saving the page.” In writing this document, we tried to save without checking **Desired** or **Received** and got a warning, but the data did get saved.

External Academic Summary

Description

You can record GPA (grade point average), units, and class rank details from an external institution, which is received on a transcript or another documented source. You can enter multiple transcripts (or similar data) for each external institution. The page allows you flexibility to define how you want to represent a person's academic transcripts. You can enter one or more summaries regarding a single transcript. You can record just the summary GPA, units, and rank of a person's entire career; or you can insert rows to create individual summaries that capture data for various segments of a person's academic career. Enter as many summary types as needed. This structure enables you to capture the GPA, rank, and units for each individual year of school, in addition to the overall summary, on one transcript.

Note. The system automatically populates many of the values on this page according to your user defaults and what you entered on the External Data page. If you determined that data from the prospect record be copied to the application (on the Installation Defaults - AD page), some fields are populated from the person's prospect record.

This process assumes that AR 010 External Data is already done.

Process Steps

Navigations:

Student Admissions > Application Entry > Academic Information > Education >

External Academic Summary

Student Recruiting > Maintain Prospects > Academic Information > Education >

External Academic Summary

Student Admissions > Application/Transcript Loads > Education >

External Academic Summary

Records and Registration > Transfer Credit Evaluation > Education >

External Academic Summary

Step 3: External Academic Summary

After locating the individual in the database, go to the **External Academic Summary** tab.

3.1 External Academic Summary

The screenshot shows a web-based form for 'External Academic Summary'. At the top, there are navigation tabs: 'External Data', 'External Academic Summary' (selected), 'External Subjects', 'External Degrees', and 'External Courses'. The user's name 'Hoshi Sato' and ID '0137401' are displayed. Below this, the organization information is 'Org ID: 0137006 Sacred Heart School Of Halifax'. The form contains several sections: 'Career' (High School, Data Nbr: 1), 'Trans Date', 'Trans Type', and 'Status'. A search section includes 'Sum Type' (HSOV), 'Acad Level' (12th Grade), 'Institution' (UMS05), 'Ext Term', and 'Ext Year'. The 'GPA' section has 'GPA Type' (100C), 'Ext GPA' (95.000), and 'Conv GPA' (4.000). The 'Units' section shows 'Unit Type' (Units), 'Attempted' (22.00), and 'Completed' (21.00). The 'Rank' section includes 'Rank Type' (Unweighted), 'Class Rank' (5), 'Class Size' (100), and 'Percentile' (95). At the bottom, there is a 'Transfer To' dropdown set to 'Prospect Data' and a 'Go' button. A toolbar contains buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'. Navigation links are provided at the bottom: 'External Data | External Academic Summary | External Subjects | External Degrees | External Courses'.

3.1.1 **Org ID, Career, Data Nbr, Trans Date, Trans Type, and Status** all pull in from the [External Data](#) page.

3.1.2 **Sum Type** can be selected from the lookup list and should be chosen based on what the available information for the school is (often not the final transcript).

Code	Long Description	Short Descr	Purpose
HS3Y	HS 3-Year Summary	HS3YrSum	End of Junior Year
HS4Y	HS Senior Preliminary	HSSrPrelim	Any term in Senior Year
HSOV	High School Overall	HSOverall	Final High School
HSPG	High School Post Graduate	HSPostGrad	Any term Post-Graduate
LAW	Law Summary	LawSummary	Reserved for Law School
PBOV	Post-Baccalaureate Overall	PostBaccOV	Reserved for Graduate School
UGOV	Undergraduate Overall	UGOverall	Any undergraduate cumulative GPA

3.1.3 **Acad Level** will pull in from [External Data](#). This value may be overridden if you are doing a summary of a different kind. For instance, the transcript might be a complete high school record, but you may want to record just a 9th grade summary.

3.1.4 **Institution** will be the institution that has received the transcript. (This will initially be populated with your operator default value.)

3.1.5 **Ext Term** and **Ext Year** may be entered or left blank, but generally the record is for multiple terms and years and these fields would be left blank. A practice to record the last term and last year of attendance could be used, if desired for collegiate-level study.

3.1.6 The **GPA** section:

GPA type will appear, coming from setup tables for the organization. In this case, the type is 100C, meaning 100-point scale, where 93 = A.

Enter the external GPA in **EXT GPA**, just as it appears on the transcript, in this case "95."

The system will automatically convert the 95 to a 4.00 scale GPA, exactly 4.00 for the GPA type in this example. **Conv GPA** will not fill in until you save or refresh.

3.1.7 The **Units** section:

Select the **Unit Type** from the drop-down menu. Valid values are:

Adult
CEU
Carnegie
No credit
Other
Quarter
Semester
Units
Unknown
Vocational


Enter the number of units of this type **Attempted** (usually including all those failed and withdrawn) and **Completed** (often called "earned").

3.1.8 The **Rank** Section:

Enter the **Rank Type** (weighted or unweighted) you wish to report for this record.

Enter the **Class Rank** and the **Class Size** and it will automatically calculate **Percentile**.

If you only know the **Percentile**, enter just that. Or you may only know that the student was number one or two (Valedictorian or Salutatorian) in his or her class, but not the class size.

3.1.9  your work.

External Subjects

Description

This page allows you to enter detail about previous education subjects. This is not transfer credit. This page is especially useful for recording the number of units in academic subject areas from the high school transcript, or pre-requisite subject areas for graduate school (such as accounting classes pre-requisite for the MBA). Admissions decisions often require this information and it is useful to first-year student advisors who help new students select classes. Even if the UMS implements a document

management/imaging system, there is value in entering this information because you can't report from an imaged document. (It will be useful later, for academic planning and advising, to examine patterns of preparation in relation to success or failure at the university. For instance: how many students with three versus four years of math preparation achieved success in university math courses?)

Process Steps

Navigations:

Student Admissions > Application Entry > Academic Information > Education >

External Subjects

Student Recruiting > Maintain Prospects > Academic Information > Education >

External Subjects

Student Admissions > Application/Transcript Loads > Education >

External Subjects

Records and Registration > Transfer Credit Evaluation > Education >

External Subjects

Step 4: External Subjects

After you have located the individual, the **External Data** page is returned. Navigate to the third tab--the **External Subjects** page.

4.1 External Subjects

This is what the External Subjects page looks like at first, pulling in a few values from other pages and defaults:

The screenshot displays the 'External Subjects' page. At the top, there are five tabs: 'External Data', 'External Academic Summary', 'External Subjects' (which is active), 'External Degrees', and 'External Courses'. Below the tabs, the user's name 'Hoshi Sato' and ID '0137401' are shown. The main content area features a table with the following columns: 'External Subject Area', 'Course Level', 'Nbr Crses', 'Units', 'Ext GPA', and 'Conv GPA'. The 'Career' is set to 'High School' and 'Data Nbr' is '1'. There are search and navigation controls throughout the interface.

4.1.1 **Org ID** (and the name of the school), **Career**, and **Data Nbr** fill in from previous pages or defaults.

4.1.2 You will want to enter rows of subject detail in the inner box area starting with **External Subject Area**. The level of detail entered is up to individual offices. The example provided below is a “middle” level of detail; you could do more (every specific course) or less (just the math classes).

The screenshot shows the 'External Subjects' section of the system. At the top, there are navigation tabs: External Data, External Academic Summary, External Subjects (selected), External Degrees, and External Courses. Below the tabs, the user's name 'Hoshi Sato' and ID '0137401' are displayed. The main content area shows the organization 'Sacred Heart School Of Halifax' with Org ID '0137006'. A filter for 'Career: High School' is applied, showing 'Data Nbr: 1'. Below this, a table lists subject areas with the following columns: External Subject Area, Course Level, Nbr Crses, Units, Ext GPA, and Conv GPA. Each row includes a 'Lookup' icon and a link to 'External Subject Detail'. At the bottom, there is a 'Transfer To:' dropdown set to 'Prospect Data' with a 'Go' button, and a row of action buttons: Save, Return to Search, Previous in List, Next in List, Notify, and Refresh.

*External Subject Area	*Course Level	Nbr Crses	Units	Ext GPA	Conv GPA
MATH Math	High Schol	4	4.00		
HIST History	High Schol	2	2.00		
FORL ForLang	High Schol	4	4.00		
ART TheArts	High Schol	2	2.00		
ENGL English	High Schol	4	4.00	85.000	3.000
MUS Music	High Schol	2	2.00		
NATS NatSci	High Schol	2	2.00		
PHYS PhysSci	High Schol	2	2.00		

4.1.2.1 Select an **External Subject** area from the lookup list. There are over 100 of them so you may want to narrow your search by entering some partial information before clicking **Lookup**. It might also be helpful to make a “cheat sheet” of frequently used values.

4.1.2.2 Select a **Course Level** from the drop-down menu. For most work, of the type in the example, this value will be “High Schol” (high school).

4.1.2.3 To record the number of courses in the subject area, click on the hyperlink [External Subject Detail](#).

External Subject Detail

Institution:	<input type="text" value="UMS05"/>	University of Maine	
GPA Type:	<input type="text" value="100C"/>	100 Point Sc +/- 93-83-73-63	
External GPA:	<input type="text" value="0.000"/>		
Converted GPA:	<input type="text" value="0.000"/>		
Unit Type:	<input type="text" value="Units"/>		

Course Totals			
Number of Courses		Units / Credits	
Attempted	Completed	Attempted	Completed
<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value="4.00"/>	<input type="text" value="4.00"/>

- 4.1.2.3.1 **Institution** and **GPA Type** fill in automatically if it was entered on the External Academic Summary page.
- 4.1.2.3.2 **External GPA** is probably a level of detail you don't have and don't want to calculate and don't want to enter, but you may. This would be the average GPA of the courses in this subject area. For instance, if the student has 4 English courses graded 90, 95, 85, and 70, you would calculate that the average is 85.000 and enter 85 in **External GPA**.
- 4.1.2.3.3 **Converted GPA** will calculate automatically when you return to the External Subjects page. Leave it at 0.000.
- 4.1.2.3.4 Select a **Unit Type** from the drop-down list. For most of this work, high school courses, the value will be "Units."
- 4.1.2.3.5 Enter the **Number of Courses** and **Units/Credits Attempted** and **Completed**.
- 4.1.2.3.6 Click to return to the **External Subjects** page.
- 4.2 your work.

External Degrees

Description

Enter information about a person's degrees, including high school diploma—either those that have been received or those that are still in progress. Fields of study, honors, and degree status are examples of

information you might want to record. The system enables you to link degree data on this page to a particular transcript or other type of reported information from the [External Data](#) page.

Process Steps

Navigations:

Student Admissions > Application Entry > Academic Information > Education >

External Degrees

Student Recruiting > Maintain Prospects > Academic Information > Education >

External Degrees

Student Admissions > Application/Transcript Loads > Education >

External Degrees

Records and Registration > Transfer Credit Evaluation > Education >

External Degrees

Step 5: External Degrees

After you have located the individual, the [External Data](#) page is returned. Navigate to the fourth tab--the [External Degrees](#) page.

5.1 External Degrees


The screenshot shows a web application interface for 'External Degrees'. At the top, there are tabs for 'External Data', 'External Academic Summary', 'External Subjects', 'External Degrees' (selected), and 'External Courses'. Below the tabs, the user's name 'Hoshi Sato' and ID '0137401' are displayed. The main form area is titled 'External Degrees' and contains the following fields and controls:

- Org ID:** 0137006 Sacred Heart School Of Halifax
- 'Degree Nbr':** 1
- 'Degree Date':** 06/01/2005
- 'Data Source':** School
- Degree:** HSD (High School Diploma)
- 'Honors Category':** None
- 'Degree Status':** Complete
- External Subject 1:** (Empty)
- Field of Study 1:** (Empty)
- External Subject 2:** (Empty)
- Field of Study 2:** (Empty)
- External Career:** HighSchl
- Data Nbr:** (Empty)

At the bottom of the form, there is a 'Transfer To:' dropdown menu set to 'Prospect Data' and a 'Go' button. Below the form are several utility buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'. At the very bottom, there are links for 'External Data', 'External Academic Summary', 'External Subjects', 'External Degrees', and 'External Courses'.

5.1.1 **Org ID** displays the school with which you are working.

5.1.2 **Degree Nbr** is a counter that will increment automatically as you add multiple degrees for the same school.

- 5.1.3 Enter the date the degree or diploma was or will be awarded in **Degree Date**. If day is not provided or known, use the 1st day of the month (e.g., 06/01/2005).
- 5.1.4 Select a **Data Source** from the drop-down list. The most-used values will be School and Self-Reported.
- 5.1.5 **Degree** can be entered in two ways: A value may be selected from the lookup list, after which the description will appear, grayed and non-modifiable, to the right. Or, if the appropriate degree does not exist in the table, it can be entered free-form in the description area on the right. It is strongly recommended to use a value from the list, if possible, so that it can be used in reporting.
- 5.1.6 If appropriate, select a value from the drop-down menu for **Honors Category**. Valid values are None, Cum Laude, Magna Cum Laude, and Summa Cum Laude.
- 5.1.7 Select a **Degree Status** from the drop-down menu. Valid values are In Progress or Complete.
- 5.1.8 **External Subject 1** and **2** may be used to record majors or specializations of the degree, and like **Degree**, above, may be selected from the lookup list on the left or entered as text in **Field of Study 1** and **2**. The subject lookup list is the same as that used on the **External Subjects** page, but here you are selecting the subject(s) in which the degree was earned.
- 5.1.9 The two fields that you can populate in the **External Data Information** group box are used to tie the degree to a specific transcript. If it is not there, leave it alone or enter it exactly as it appears from the other page.
- 5.1.10  your work.

UMS is not currently using the **External Courses** page. It may be used later for processing transfer credit.

Source Documents

Transcripts, Admissions application, Prospect Cards, Test Score Results

Security Roles

Maintained by: (update/display)

S_RA_SUPERUSER

S_RA_APPLICATION_REVIEWER

S_RA_DATA_ENTRY

Student Records Office

Transfer Offices

Viewable by: (display only)

Admissions Staff, Academic Advising, Placement Staff, Academic Departments, Financial Aid, Registrars, Athletics, Academic Support Services, International Programs.

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