## Student Contact - Data Input for SARS

<table>
<thead>
<tr>
<th>* SARS Reason Code</th>
<th>Contact Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic</strong></td>
<td>Academic Advising</td>
</tr>
<tr>
<td></td>
<td>High peak drop-in, new matric student, program planning, 1&lt;sup&gt;st&lt;/sup&gt; semester/initial SEP matric waivers, continuing – 1 semester SEP, prereq/coreq clearance, etc</td>
</tr>
<tr>
<td><strong>Assessment</strong></td>
<td>Assessment Advising</td>
</tr>
<tr>
<td></td>
<td>Interpretation of assessment, /SRW – prereq/coreq clearance, etc</td>
</tr>
<tr>
<td><strong>Career</strong></td>
<td>Career Counseling</td>
</tr>
<tr>
<td></td>
<td>Interpretation of interest inventories, EUREKA, matching major with career, career counseling, letters of recommendation, etc</td>
</tr>
<tr>
<td><strong>Grad</strong></td>
<td>Associate/Certificate Petitions</td>
</tr>
<tr>
<td></td>
<td>Paper work required for filing the petition.</td>
</tr>
<tr>
<td><strong>No Show</strong></td>
<td>Student did not show for appt or not present when called from drop-in list</td>
</tr>
<tr>
<td><strong>Personal</strong></td>
<td>Personal Counseling</td>
</tr>
<tr>
<td></td>
<td>Crisis intervention, referral, life skill strategies, letters of recommendation, etc</td>
</tr>
<tr>
<td><strong>Progress</strong></td>
<td>Progress Check</td>
</tr>
<tr>
<td></td>
<td>Discussion re: probation, improvement strategies, clearance /HCR, withdrawal, problem in class, etc</td>
</tr>
<tr>
<td><strong>Prospective</strong></td>
<td>Prospective Student</td>
</tr>
<tr>
<td></td>
<td>Student not enrolled in PCCD colleges.</td>
</tr>
<tr>
<td><strong>Re-admit</strong></td>
<td>Re-admission Counseling – Dismissal</td>
</tr>
<tr>
<td></td>
<td>Discussion re: dismissal, improvement strategies, readmit petition, etc</td>
</tr>
<tr>
<td><strong>SEP–Initial</strong></td>
<td>Student Education Plan–Initial</td>
</tr>
<tr>
<td></td>
<td>1&lt;sup&gt;st&lt;/sup&gt; semester/initial SEP, 1&lt;sup&gt;st&lt;/sup&gt; time SEP developed, excess units, prereq/coreq clearance, etc</td>
</tr>
<tr>
<td><strong>SEP–Update</strong></td>
<td>Student Education Plan – Update</td>
</tr>
<tr>
<td></td>
<td>SEP update, excess units, prereq/coreq clearance, IGETC/CSU GE Certification, substitution/waiver petition, etc</td>
</tr>
<tr>
<td><strong>Transcript</strong></td>
<td>Transcript Evaluation</td>
</tr>
<tr>
<td></td>
<td>Out of district transcript review, referral for evaluation of foreign documents, A&amp;R initial evaluation, prereq/coreq clearance, etc</td>
</tr>
<tr>
<td><strong>Transfer</strong></td>
<td>Transfer Counseling</td>
</tr>
<tr>
<td></td>
<td>IGETC/CSU-GE Breadth course requirement review, ASSIST major prep, referral to 4-year rep, concurrent enrollment, letters of recommendation, etc</td>
</tr>
</tbody>
</table>

*All reason codes are important to Matriculation and State MIS reporting, remember to ‘highlight’ all appropriate reasons for each student contact.*
<table>
<thead>
<tr>
<th>MIS (Data Elements)</th>
<th>SARS Reason Code</th>
<th>/CSC Description</th>
<th>Contact Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placement/ Academic Advising</td>
<td>Academic</td>
<td>Initial Contact/Placement</td>
<td>Academic Advising</td>
</tr>
<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td>Follow-up Activities</td>
<td>Grad</td>
<td>Student Education Plan Update</td>
<td>Associate/Certificate Petitions</td>
</tr>
<tr>
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<td></td>
<td></td>
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<td>Student Education Plan Creation</td>
<td>Student Education Plan - Initial</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1st semester/initial SEP, 1st time SEP developed, excess, prreq/coreq, etc</td>
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RE: Passport testing questions

Adrienne Riley

Sent: Tuesday, February 26, 2008 10:33 PM
To: Kerry Compton; Allene Young; Steve Pantell; Hermia Yam; Terrance Greene; Shirley Robinson; Ponnie Rasmussen; Trule Thompson; Lesley Scurry
Cc: Howard Perdue; riltonjuwitt@rwd.com; Josue Hoyos; Mario Rivas

Thank you for sharing that information and I look forward to working with Josue. I guess I and others feel there is some urgency in getting counselors scheduled into training sessions and am not sure if we need to have a meeting before that is accomplished, at least as of 2/21 no counselor had been informed on their campus re: training. It seems training scheduling would be handled or implemented by each college???

At the counseling BRT system testing on Feb. 21st, it was explained that in addition to the working BRT’s, the conversion is being coordinated with the colleges through the PIT Committee that meets weekly on Tuesdays.

Examples of several topics include:

- Names of counselors to be trained (contract & hourly) have been (or should have been) submitted to RWD by college VPSS

- District-wide training schedule by college location has been developed and distributed, (training for A&R, Counselor, and Financial Aid)

- Colleges should be confirming scheduling of appropriate staff

- Working on the framework for the go-live support plan

- Need to develop training schedule for such groups as:

  Counseling/EOPS/DSPS classified support staff, Student Ambassadors, Welcome Center staff, Student Services Dean, VP & other support staff

- RWD encourage counselors to attend as many of the 4-hour sessions as they would like

Counselors are eager & ready to assist, according to any implementation guidelines set by the PCCD VPSS, in assisting with the scheduling of counselors into training sessions as soon as possible.

**Several questions that have been asked:**
- will contract counselors be scheduled at their home campus only
- will hourly be paid for the training (can they be scheduled outside of their work schedule)
- is attendance of multiple sessions only limited by space available – at home campus &/or other PCCD campus
- can counselors take comp time for training outside of scheduled work hours, etc.

Adrienne

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From: Kerry Compton
Sent: Tue 2/26/2008 5:56 PM
To: Adrienne Riley; Allene Young; Steve Pantell; Hermia Yam; Terrance Greene; Shirley Robinson; Ponnie
Rasmussen; Trulie Thompson; Lesley Scurry  
Cc: Howard Perdue; rlitonjuawitt@rwd.com; Josue' Hoyos; Mario Rivas  
Subject: RE: Passport testing questions

At the VPSS/Deans meeting this morning Josue Hoyos agreed to convene the Counselor BRT and the appropriate functional leads and get answers or create answers to the issues listed. Thank you for identifying the issues!

Kerry Compton, Ed.D.  
Vice-President, Student Services  
College of Alameda  
555 Atlantic Ave.  
Alameda, CA 94501

(510) 748-2204  
kcompton@peralta.edu

From: Adrienne Riley  
Sent: Monday, February 25, 2008 7:54 PM  
To: Kerry Compton; Howard Perdue  
Subject: FW: Passport testing questions

FYI from Counselor BRT System Testing

From: Allene Young  
Sent: Mon 2/25/2008 6:49 PM  
To: Lesley Scurry; rlitonjuawitt@rwd.com; Adrienne Riley; Steve Pantell; Hermia Yam; Terrance Greene; Shirley Robinson; Ponnie Rasmussen; Trulie Thompson; Mary Shaughnessy  
Subject: RE: Passport testing questions

I had two statements: 1) Is there a screen to view Peralta transcripts in their entirety (thi) as well as transferable only courses (thd) and 2) Will counselors be able to navigate from one screen to another without re-entering student ID. I was unable to do this in the training and thought it might be a system problem during testing; but if not, I think that we should be able to navigate without this repeat. Sorry for the delay, but I left on Thursday for a conference. I think Shirley had a few as well.

From: Lesley Scurry  
Sent: Mon 2/25/2008 6:09 PM  
To: rlitonjuawitt@rwd.com; Adrienne Riley; Steve Pantell; Hermia Yam; Terrance Greene; Allene Young; Shirley Robinson; Ponnie Rasmussen; Trulie Thompson; Mary Shaughnessy  
Subject: Passport testing questions

Hello everyone,

Here are the questions we generated from testing Passport last Thursday. I have not yet received a response from Ally and Shirley, however I know that Rachael needed this information on Tuesday in preparation for a meeting. Ally and Shirley, if you have any questions to contribute that were not stated on the testing sheets already submitted, please send them to me as soon as possible and I will add them to our list.

Thanks to everyone for your time and invaluable input!

-Lesley and Adrienne
Counseling/AR/IS BRT
Adrienne Riley

Sent: Monday, September 29, 2008 1:50 PM
To: Josue’ Hoyos
Cc: Kerry Compton; Steve Pantell; Lesley Scurry; Terrance Greene; Hermia Yam; Steve Salisbury's RWD Email
Attachments: Counselor FAQ 1jun2008.doc (108 KB); Counselor FAQ - Parking Lo~1.doc (88 KB)

Per your request I did canvas the counselors from last year’s BRT for best time & day for BRT meeting - which is WED pm or FRI am or FRI pm (with a minimum of one week notice). Our goal was 2 counselors from each college. My understanding is that Allene Young cannot serve, Trulie has been asked to reconsider and Hector Corrales will be replacing Shirley who is on sabbatical. It is also our understanding that Joyce Willis-Brown is the technical support person for the BRT.

It is suggested that a communication is sent asap to the entire group (combined BRT's) to schedule a meeting at the district on one of the following days/times:
Wed - Oct 15th - 10:30am to 12:30pm or Fri - Oct 17th - 9:00am to 11:00am.

In terms of the agenda we would like to also suggest additions to those suggested below - plans for training on milestone (prerequisites) and how to get information to address weak answers in the FAQ's, eg: A&R front end transcript evaluator, transcript queries (THD) and parking lot questions.

Hope this information is helpful, as the counselors do feel some urgency to re-establish some sort of communication link.

Adrienne Riley
Counselor
Laney College
900 Fallon Street
Oakland, CA 94607
Office (510) 464-3136
Fax (510) 986-6927

From: Josue’ Hoyos
Sent: Tue 7/22/2008 4:30 PM
To: 'Salisbury, Steve'; Adrienne Riley; 'Steve Pantell'; Lesley Scurry; Trulie Thompson; Terrance Greene; Hermia Yam; Shirley Robinson; Allene Young; Susana De La Torre; Rene Rivas; Drew Gephart; Susana De La Torre; Rene Rivas; Kerry Compton
Subject: Counseling/AR/IS BRT

Some issues are coming up that we have to address. The meeting will be conducted in Student Services Building R room R112A. As you walk in from Parking lot 6, continue to the end of the building and it's between Financial Aid and Admission and Records.

Agenda

1. Developing the Transcript for Passport.
2. Training Beyond Basic Training
3. Security, who has what and who should have what(!)
4. Other

IT is working on the Transcript, they need our input.
Counselor BRT - Questions
Adrienne Riley

Sent: Sunday, March 02, 2008 8:41 AM
To: Josue Hoyos; Kerry Compton; Mario Rivas; James M. Bracy
Cc: Lesley Scurry; Steve Pantell; Shirley Robinson; Allene Young; Sheryl Queen; Howard Perdue; SSalisbury@RWD.com; rltonjuawitt@rwd.com
Attachments: training sched3e_rev3.1.xls (22 KB); System Testing Questions.doc (28 KB); STAFF DEVELOPMENT.doc (22 KB)

As you know there is a district-wide counseling professional development planned for this coming Thursday, March 6th (agenda attached), an opportunity to clarify conversion concerns and questions to the counseling faculty in the field. We were wondering, in the event any of the questions generated from the counseling system testing come up, is there any plan on the part of the Vice Presidents of Student Services to be present to address the discussion? Or is that a discussion that should be recorded and taken up later with Josue and the Counselor BRT group?

In addition there are three particular issues that seem should definitely be addressed clearly at this session, and someone needs to be present to either bring the message or tell us what should be announced/shared.

1) In relation to the Passport Training for the classified/clerical support staff for the Counseling Depts and the categorical programs (EOPS, DSPS, Cal Works) & Welcome Centers - are there plans to conduct special training sessions for them in particular? Should they be attending the Campus Community training sessions?

2) In relation to the MIS data input - currently we are required to "double input" transferring the student contact data from SARS and also input the same data into the /CSC mainframe screen for student contacts. (This probably needs to be reinforced in the field because there is a good chance this is not clear and not being done as areas begin to implement SARS.) The question is at what point (what is the date) when the data no longer has to be input into the mainframe and the PCCD MIS reporting will be generated directly from the PASSPORT system (from the interface between SARS & PASSPORT) to the State; which will obviously be the date that all should be fully converted to SARS & no longer using /CSC.

3) In relation to SARS, when will it be networked district-wide, so that all student contacts and associated student contact comments, can be viewed district-wide by any counselor/VPSS/DeanSS at any college. (There should also be the reminder to be sure not to make the comments 'confidential' in SARS input, which will prevent such viewing.)

Your time and attention is appreciated.

Adrienne Riley
Articulation Officer/Counselor
Laney College
900 Fallon Street
Oakland, CA 94607
Office (510) 464-3136
Fax (510) 986-6927

https://mail.peralta.edu/cwa/?ae=Item&t=IPM.Note&id=RgAAAAAfq6blHRn0RbQAJS... 10/14/2009
RE: Passport testing questions

Kerry Compton

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Cc: Howard Perdue; riltonjuawitt@rwd.com; Josue Hoyos; Mario Rivas

At the VPSS/Deans meeting this morning Josue Hoyos agreed to convene the Counselor BRT and the appropriate functional leads and get answers or create answers to the issues listed. Thank you for identifying the issues!

Kerry Compton, Ed.D.
Vice-President, Student Services
College of Alameda
555 Atlantic Ave.
Alameda, CA 94501

(510) 748-2204
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From: Lesley Scurry
Sent: Mon 2/25/2008 6:06 PM
To: riltonjuawitt@rwd.com; Adrienne Riley; Steve Pantell; Hermia Yam; Terrance Greene; Allene Young; Shirley Robinson; Ponnie Rasmussen; Trulie Thompson; Mary Shaughnessy
Subject: Passport testing questions

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Here are the questions we generated from testing Passport last Thursday. I have not yet received a response from Ally and Shirley, however I know that Rachael needed this information on Tuesday in preparation for a meeting. Ally and Shirley, if you have any questions to contribute that were not stated on the testing sheets

https://mail.peralta.edu/owa/?ae=Item&t=IPM.Note&id=RgAAAAAsfq6bHRn0RbQAIJ... 10/14/2009
already submitted, please send them to me as soon as possible and I will add them to our list.

Thanks to everyone for your time and invaluable input!

-Lesley and Adrienne

Lesley Scurry, MSW
Matriculation Counselor
Merritt College
12500 Campus Drive
Oakland, CA. 94619
Tel: (510) 436-2686
Fax: (510) 436-2685
Counselor BRT - System Testing
Adrienne Riley

Sent: Wednesday, February 20, 2008 8:40 AM
To: Steve Pantell [spantell@merritt.edu]; Hermia Yam; Terrance Greene; Allene Young; Shirley Robinson; Ponnie Rasmussen; Trulie Thompson; Mary Shaughnessy
Cc: Howard Perdue; Litionju-Witt, Rachael [RLitionjuawilt@RWD.com]; Lesley Scurry; SSalisbury@RWD.com

REMINDER of scheduled Passport system testing for Counseling functions tomorrow morning -

Thursday, FEBRUARY 21st from 9 am to approximately 1 pm

Location: the trailer just to the south of the IT building

Adrienne and Lesley

From: Adrienne Riley
Sent: Tue 2/5/2008 1:21 PM
To: Steve Pantell; Hermia Yam; Laura Bollentino; Terrance Greene; Allene Young; Shirley Robinson; Ponnie Rasmussen; Trulie Thompson
Cc: Howard Perdue; Litionju-Witt, Rachael; Lesley Scurry; SSalisbury@RWD.com
Subject: Counselor BRT Meeting

The Counseling BRT met yesterday and identified a group of counselors to take part (as a group) in 'system testing' on Thursday, FEBRUARY 21st from 9 am to approximately 1 pm - location at the district to be determined. (That means we will be working together as a group with the 'system' experts with us during the testing.) Lunch will be provided!

Each component of the new Passport system has to be tested by the appropriate functional/field folks to make sure the system is working as designed & expected. Any problems need to be identified ASAP and resolved before we 'go live' to the public.

The counseling BRT has identified counselors to participate in the system testing:

BCC - Ponnie Rasmussen, Allene Young, Hermia Yam
COA - Shirley Robinson, Trulie Thompson, Laura Bollentino (& BCC) Mary Shaughnessy
Laney - Adrienne Riley and Terrance Greene
Merritt - Lesley Scurry and Steve Pantell

We volunteered a few of you without advance permission, please forgive us! We need your help and remember you've been identified by your colleagues. So please consider participating and block your schedule out now. I know this will not be the case, but if anyone cannot participate please contact Lesley or me no later than Monday, Feb 11th.

Thank you,
Lesley and Adrienne
Summary of Questions/Concerns Raised
Counseling BRT System Testing 2-21-08

1) Excess units – ‘policy’ has not changed (unit limit – counselor vs. VP approval), but system does not differentiate by user. Is there a user id associated with the approval that can be viewed on a screen?

2) Be sure glossary is part of training. Should also include even a partial glossary at the March 6th professional development.

3) Prereq clearance (milestone) should be associated with the ‘user id’ that input clearance; concerned that open to any counselor and/or A&R security level to ‘clear’ with no association back to person is not a good situation.

   How differentiate between A&R Challenge (counselor not involved) and a counselor clearing a prereq, some of the reasons we could access were for A&R only e.g.: ‘challenge process’, some never seen – waiver delay, etc.

4) Transcript Credit – where/how will system display transfer credit (out of district class) when there is not an equivalent PCCD course, yet accepted as a transfer course?

5) What screen will be used by A&R evaluators and counselors for summary of degree applicable credit & UC/CSU transfer info – (same as the mainframe /THD)?

6) How/when are the ‘logistics’ of scheduling the counselors’ training going to be shared by VFs – so we know how to help implement, e.g.: first come first serve availability, attend any campus or by space available or only on your own campus; hourly paid to attend if not held during their work schedule, etc?

7) Probably need to develop some sort of plan for support/refresher training/practice as return in August during high peak after long break.

8) Concerned about the training of student services classified support staff, e.g.: counselling/eops/dspc departments, welcome center, etc

8) Other System Testing, e.g.: MIS & Matric related reporting, interface link between SARS & Passport, new “hold/svc indicator” designed for the readmit student

9) Follow through on any business practice changes that the Passport implementation has/will affect – for instance revisions/edits to District A&R forms, e.g.: “Affidavit of Pre/Co-req Completion” - written as a prereq clearance for one specific course; whereas in the new system prereq clearance/milestone will clear for any course with that same pre/co-req
10) Where will assessment scores be posted? Under transfer credit, test results?

11) We need to see a full transcript screen that shows the entire academic history, along with the unit break down.

12) Where do we look to see if a student is exempt or matriculating?

13) On MIS data elements, exemptions all say “directed to Orientation”. This should be specific to each component, i.e. directed to Assessment, directed to Counseling.

14) How are students assigned to a campus?

15) What are matriculation assessment, study and aptitude?

16) How does MIS data get from SARS to Passport?

17) How does a student know that they are missing components? Does it show on their self-service?
# Summary of Screens used by Counseling Faculty

### Information/Data

<table>
<thead>
<tr>
<th>Matriculation Screens</th>
<th>U</th>
<th>V</th>
<th>Mainframe Screen</th>
<th>Peoplesoft Screen/Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary of student matric status, record exemptions &amp; refusals.</td>
<td>X</td>
<td>X</td>
<td>/MSS Matric Svcs Status</td>
<td></td>
</tr>
<tr>
<td>Update student matric status</td>
<td>X</td>
<td>X</td>
<td>/SMD Update matric data</td>
<td></td>
</tr>
</tbody>
</table>

### Assessment Screens

| Used by assessment staff to display & update assessment test scores | X | X | /ATR Assessment Test Score Summary Report |                        |
| Summary of test scores and course recommendation | X | | /ATS Assessment Test Scores |                        |

### Counseling Screens

| Record the result of counselor contact with student | X | | /CSC Counselor Student Contact Detail |                        |
| Review student's counseling contact history | X | | /CSH COUNSELOR STUDENT CONTACT DETAIL |                        |
| List of counselor name and id #s | X | | /CSL Counselor ID List |                        |
| Used by st svsc staff to schedule counselors' appts & view contacts by counselor ID # | X | X | /CSS Counselor Student Contact Scheduling |                        |

### Orientation Screen

| Used by assessment staff to display & update orientation attendance | X | X | /OSS Orientation Svcs Data Collection |                        |

### Special Populations

<p>| Used by DPSS staff to view and update students served by dsps by term | X | X | /DPSS DPSS Students |                        |
| Used st svscs staff to record the result of Early Alert Calls to students | X | X | /EAC Early Alert Calls |                        |
| Used to browse and used by EOPS staff to update students served by EOPS by term | X | X | /EOP EOP Students |                        |
| Used by student placement staff to view &amp; update students served by job placement by term | X | X | /PLM Student Job Placement |                        |
| Used by CalWORKS staff to enter and review data pertaining to CalWORKS students | X | X | /SPC CALWORKS Students |                        |
| Used by trsf ctr staff to browse and update list of students served by Transfer Center by term | X | X | /SPT Transfer Center Students |                        |
| Used by Veterans' staff to browse and update list of students receiving Veterans' Educational Benefits by term | X | X | /SPV Students with Veterans Benefits |                        |</p>
<table>
<thead>
<tr>
<th>Information/Data</th>
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<th>V</th>
<th>Mainframe Screen</th>
<th>Peoplesoft Screen/Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pre/Co-requisites Screens</strong></td>
<td></td>
<td></td>
<td>/SRW Student Requisite Waivers</td>
<td></td>
</tr>
<tr>
<td>Used to record student requisite waivers</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counselors view only - Used by Educational Development Office staff to maintain course prerequisite definitions (selected) Registration Screens</td>
<td></td>
<td></td>
<td>/RFP COURSE PREREQUISITES</td>
<td></td>
</tr>
<tr>
<td>Used to view add and drop students from a class, early alert data by term</td>
<td>X</td>
<td></td>
<td>/CVR Class Verification Roster</td>
<td></td>
</tr>
<tr>
<td>Used to view students' original admission application data</td>
<td>X</td>
<td></td>
<td>/SBD STUDENT BASIC DATA</td>
<td></td>
</tr>
<tr>
<td>Used to view students' current or past term and class data &amp; student address, phone #, etc</td>
<td>X</td>
<td></td>
<td>/SCD STUDENT CLASS DATA</td>
<td></td>
</tr>
<tr>
<td>Used to view students' term and class data</td>
<td>X</td>
<td></td>
<td>/SRS Student Regis Schedule</td>
<td></td>
</tr>
<tr>
<td>Used to display and print unofficial transcripts</td>
<td>X</td>
<td></td>
<td>/THI Student Transcript Data</td>
<td></td>
</tr>
<tr>
<td>Used to view degree applicable courses &amp; transfer course info</td>
<td>X</td>
<td></td>
<td>/THD Degree Applicable Courses</td>
<td></td>
</tr>
<tr>
<td><strong>Miscellaneous Screens</strong></td>
<td></td>
<td></td>
<td>/HCR Student Hold Maintenance</td>
<td></td>
</tr>
<tr>
<td>Used to view or dear student holds</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Used to browse through the class schedule, and check enrollment figures for each class</td>
<td></td>
<td></td>
<td>/SCI Section Count Inquiry</td>
<td></td>
</tr>
<tr>
<td>Used to update student matriculation data</td>
<td>X</td>
<td>X</td>
<td>/SMD STUDENT MATRIC DATA</td>
<td></td>
</tr>
<tr>
<td>Used to view Terr calendar, ie: holidays and deadlines</td>
<td>X</td>
<td></td>
<td>/CAL Calendar</td>
<td></td>
</tr>
<tr>
<td>Displays address list of students enrolled in class</td>
<td>X</td>
<td></td>
<td>/CAR Class Address Roster</td>
<td></td>
</tr>
<tr>
<td>Used to view grade data for current or past term</td>
<td>X</td>
<td></td>
<td>/CGR CLASS GRADE ROSTER</td>
<td></td>
</tr>
<tr>
<td>Used to display a list of screens, reports and documents available at Peralta</td>
<td>X</td>
<td></td>
<td>/DOC Documentation</td>
<td></td>
</tr>
<tr>
<td>Used to display PCCD phone directory</td>
<td>X</td>
<td></td>
<td>PHON PCCD Phone Directory</td>
<td></td>
</tr>
<tr>
<td>Used to display of course repository data</td>
<td>X</td>
<td></td>
<td>/RFM REPOSITORY FILE MAINTENANCE</td>
<td></td>
</tr>
<tr>
<td>Used to display all records of the Course Repository File</td>
<td>X</td>
<td></td>
<td>/RFI REPOSITORY FILE INQUIRY</td>
<td></td>
</tr>
</tbody>
</table>
Summary of Screens used by Counseling Faculty

<table>
<thead>
<tr>
<th>Information/Data</th>
<th>U</th>
<th>V</th>
<th>Mainframe Screen</th>
<th>Peoplesoft Screen/Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miscellaneous Screens cont'd</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Used to add, update or delete new enrollment appointments or view continuing students' appointments</td>
<td>X</td>
<td>X</td>
<td>/RAP Enrollment Appointment</td>
<td></td>
</tr>
<tr>
<td>Displays alphabetical list of students admitted to Peralta in the last five years, with SSNs</td>
<td></td>
<td>X</td>
<td>/STX STUDENT ALPHA CROSS REFERENCE</td>
<td></td>
</tr>
<tr>
<td>Used to display the transcript alpha index</td>
<td></td>
<td>X</td>
<td>/THX Transcript History Index</td>
<td></td>
</tr>
<tr>
<td>W-Drive</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>List of out-of-district transcripts</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Initial Evaluation Results</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Major Worksheets</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Credit by Exam List</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Advanced Placement Results</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
COUN BRT meeting - Oct 14 - 9:30 am

Adrienne Riley

Sent: Monday, October 05, 2009 2:13 PM
To: Minh Lam; Lesley Scunny; Steve Pantell; Hermione Yam; Terrance Greene; Trulee Thompson; Hector Corrales; Sheryl Queen; Joyce Brown-Wilks; Kenny Compton; Jo Ann Phillips; James M. Brady; Donald Moore; Tina Vasconcellos; Eric Grauenberg; Ray Chen; Wise E. Allen; Pat Jameson
Importance: High
Categories: Red Category
Attachments: BRT meeting Agenda (18 KB) ; Counselor FAQ (11 KB) ; Parking Lot (10 KB) ; BRT meeting April 1.doc (32 KB) ; BRT meeting May 17 2009.doc (12 KB)

Minn

We organized this meeting under the impression that you wanted a briefing on our work to date and also developing protocol for setting student services priorities related to queries and requests. Attached are documents that were attached to the original meeting notification with status of where the group left off in its work in spring 2009, that priority for us was getting the three transcript queries corrected and reissuance for Admission and Records evaluators & counselors, as also correcting the FAQ's on the Passport help website - none of which has been done as planned. I have also inserted the response that counselors do not input data for student contacts into the Peoplesoft MIS Matriculation Page but rather into SARS. It seems that it may be difficult to accomplish all of that and a demo in 1.5 hours.

Adrienne

From: Minh Lam
Sent: Monday, October 05, 2009 10:32 AM
To: Adrienne Riley; Lesley Scunny; Steve Pantell; Hermione Yam; Terrance Greene; Trulee Thompson; Hector Corrales; Sheryl Queen; Joyce Brown-Wilks; Kenny Compton; Jo Ann Phillips; James M. Brady; Donald Moore; Tina Vasconcellos; Eric Grauenberg; Ray Chen; Wise E. Allen; Pat Jameson
Subjects Re: COUN BRT meeting - Oct 14 - 9:30 am

All,

Since Academic Advising is one of the key topics for discussion, I have made arrangements with Oracle to perform a demo for us. They have already been given the first draft document that was prepared by Peralta and Cheri as a baseline. If you have any other topics or concerns, please forward them to me. If anyone else is interested in joining the 10 a.m. demo, please let me know. Currently the IT Conference room is limited in space, thus I may have to make other accommodations if more people are joining.

Thank you,

Minh Lam | 510-464-7262
Associate Vice Chancellor of Information Technology
Peralta Community College District
Email: mlam@peralta.edu

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From: Adrienne Riley
Sent: Saturday, October 03, 2009 10:39 AM
To: Lesley Scunny; Minh Lam; Steve Pantell; Hermione Yam; Terrance Greene; Trulee Thompson; Hector Corrales
Cc: Sheryl Queen; Joyce Brown-Wilks; Kenny Compton; Jo Ann Phillips; James M. Brady; Donald Moore; Tina Vasconcellos
Subject: RE: COUN BRT meeting - Oct 14 - 9:30 am

Just wondering - shouldn't this also be a priority concern of the District Matriculation Committee, much more urgent than the scope of the Counseling BRT?

Adrienne Riley
Counselor/Instructor
Laney College
900 Fallon Street
Oakland, CA 94607
Office: (510) 464-3136
Fax: (510) 989-6927

Not everyone can be famous, but everyone can be great because greatness is determined by service.

-Malcolm X

From: Lesley Scunny
Sent: Friday, October 02, 2009 5:01 PM
To: Minh Lam; Adrienne Riley; Steve Pantell; Hermione Yam; Terrance Greene; Trulee Thompson; Hector Corrales; Sheryl Queen; Joyce Brown-Wilks; Kenny Compton; Jo Ann Phillips; James M. Brady; Donald Moore
Subjects Re: COUN BRT meeting - Oct 14 - 9:30 am

Hello all,

I checked the data from the State Chancellor’s office for Fall 08 and Spring 09. The number of students seen for Counselor Services is 0 or 1, Academic Follow-up 0 or 1, and SEPs are 0 for all colleges.

-Lesley

Lesley Scunny, MSW
Counselor/Matriculation
Hemet College
12500 Campus Drive
Oakland, CA. 94619

Et lux in tenebris facet

From: Adrienne Riley
Sent: Wednesday, September 30, 2009 9:26 AM
To: Minh Lam; Steve Pantell; Hermione Yam; Terrance Greene; Trulee Thompson; Hector Corrales; Sheryl Queen; Joyce Brown-Wilks; Lesley Scunny; Kenny Compton; Jo Ann Phillips; James M. Brady
Subject: RE: COUN BRT meeting - Oct 14 - 9:30 am

We do not input data into the MIS screen displayed below, so I do not know how to answer your question. We input into SARS and that data is transferred to Peoplesoft for MIS purposes. Perhaps Jo Ann or Sheryl would be able to better answer your question, or I’m not understanding what is being asked.

https://mail.peralta.edu/owa/?ae=Item&t=IPM.Note&id=RgAAAAAAAAfs6bHRn0RbQAJS... 10/14/2009
COUN BRT meeting - Oct 14 - 9:30 am

Adrienne Riley  
Counselor/Faculty  
Lasry College  
500 Fulton Street  
Oakland, CA 94612  
Office (510) 484-3196  
Fax (510) 986-6927

Nota everyone can be famous, but everyone can be great because greatness is determined by service.  
-AHK

From: Minh Lam  
Sent: Wednesday, September 30, 2009 2:14 AM  
To: Adrienne Riley; Steve Pannell; Hernia Yee; Terrance Greene; Truie Thompson; Hector Carales  
Cc: Sheryl Queen; Joyce Brown-Wills; Lesley Scarry; Kerry Compton; Jo Ann Phillips; James H. Bracy  
Subject: RE: COUN BRT meeting - Oct 14 - 9:30 am

Counseling Team,

Please assist me in defining the data elements within the SARS database that counselors normally have to input into the PeopleSoft MIS Masculination page. Below is a screenshot:

I am currently working on automating the import process. The outcome should eliminate the manually data entry for counselors and also streamline the collection/submission process for state reporting purposes.

Thanks,

Minh Lam  |  510-466-7261  
Associate Vice Chancellor of Information Technology  
Peralta Community College District  
Email: mlam@peralta.edu

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From: Adrienne Riley  
Sent: Monday, September 28, 2009 2:03 PM  
To: Steve Pannell; Hernia Yee; Terrance Greene; Truie Thompson; Hector Carales  
Cc: Sheryl Queen; Joyce Brown-Wills; Lesley Scarry; Kerry Compton; Jo Ann Phillips; Minh Lam; James H. Bracy  
Subject: COUN BRT meeting - Oct 14 - 9:30 am  
Importance: High

Message from Lesley and Adrienne:

Based on the responses the Counselor BRT meeting is being scheduled for WED - October 14th - 9:30 am to 11:00 am - In the IT Conference Room.

Hopefully this will be enough advance notice for all to attend. Thank you Sheryl for reserving the conference room.

Attached are email/documents related to CCUN BRT 3'09 meetings.

From: Adrienne Riley

https://mail.peralta.edu/owa/?ae=Item&t=IPM.Note&id=RgAAAAYAfq6blHRn0RbQAJS...  10/14/2009
COUN BRT meeting - Oct 14 - 9:30 am

Sent: Wednesday, September 23, 2009 12:49 PM
To: Steve Pantell; Hermione Yarn; Terrance Greene; Trulie Thompson; Hector Corales
Cc: Joseph Bedaliski; Sheryl Queen; Joyce Brown-Willis; Lesley Scurry; Kerry Compton; Donald Moore; Eric Gravenberg; Muy Chen; Jo Ann Phillips; Minh Lam; James M. Bracy
Subject: RE: PIT Agenda 9/15/09

Counseling BRT

Listed below are possible meeting times that Minh Lam would be available to meet with our group. He is interested in a briefing on our 'work' to date and also developing 'protocol' for setting student services priorities, e.g.: queries, reports, modifications, implementations, etc, etc, etc

We all know how difficult it is to set a meeting with a group – so please reply with your availability and preference asap.

WED - October 7th – 1:30 pm to 3:00 pm

or

WED – October 14th – 9:30 am to 11:00 am

It is our hope the VPSS's will identify who among them will be working with the Counseling BRT.

Naturally we assume that the vital support staff we depend on and have worked with will also be able to attend as a continued part of our work group.

We assume the IT Conference room will be reserved for the meeting location. Once meeting is set we will send out a confirmation.

Thank you,
Lesley Scurry and Adrienne Riley

---

From: Minh Lam
Sent: Wednesday, September 23, 2009 6:20 AM
To: Adrienne Riley; James M. Bracy
Cc: Joseph Bedaliski; Sheryl Queen; Joyce Brown-Willis; Janet Craig; Karen Guiley; Lesley Scurry; Steve Pantell; Hermione Yarn; Terrance Greene; Trulie Thompson; Hector Corales; Kerry Compton; Donald Moore; Eric Gravenberg; Muy Chen
Subject: RE: PIT Agenda 9/15/09

Hi Adrienne,

Please let me know if would like to meet today.

Thanks,

Minh Lam | 510.466.7263
Associate Vice Chancellor of Information Technology
Peralta Community College District
Email: mlan@peralta.edu

The information contained in this message is confidential and may be legally privileged. The message is intended solely for the addressee(s). If you are not the intended recipient, you are hereby notified that any use, dissemination, or reproduction is prohibited and may be unlawful. If you are not the intended recipient, please contact the sender by return email and destroy all copies of the original message.
We are offering this as 'prep' & starting point of tomorrow’s BRT meeting. A&R may have additional issues of priority.

Lesley & Adrienne

Counselor FAQ’s and Parking Lot issues are comprehensive (a lot of work went into them) and they should guide the BRT in prioritizing future meetings. See where highlighted in red on the attachment and cut & pasted below.

Main issue for meeting on Wed-2/18th .... should be report on the status of group's last discussion of the revisions needed on the 3 transcript queries (THD). [Question # 13 on the FAQ’s; Questions 3 thru 13 on the Parking Lot]

Additional issues that have come up since development of the FAQ’s? Others?

• class search be modified, (default to current semester (as done thru public/student access) and ability for class search to remain in one college)
• User Survey for Counselors
• Clarify official communication to the field, sharing of benefit from questions/user experience, responsibility of updating FAQ’s & online help

Pending issues:

FAQ’s (copied from document) [Need to edit online FAQs]
3. What is the process for external transcripts to be evaluated up front/early when they student begins coursework at Peralta?
Howard Perdue has stated that there will be a transcript evaluator at the District A&R office whose main purpose is to evaluate official external transcripts as they come into the office and enter the courses into the PeopleSoft system. Specific procedures to be developed.

4. Can external transcripts be scanned and attached to a student’s record?
In Phase 2 the Implementation Team will be looking at third party vendors such as Image Now that will interface with PeopleSoft.

5. How will degree applicable courses that aren’t equivalent to a specific PCCD course, but are counted toward an equivalent subject area, be recorded as transfer credit?
Specific procedures to be developed with transcript evaluator – see question #3.

6. How are automatic drops in a future term due to failed grade in a prerequisite course taken in the current term communicated to the student? Will a student be notified when they are automatically un-enrolled from a class?
-S’09 received letter, when will auto drop be enforced & email notification vs letter?

8. Need detailed explanation of how to identify which milestone to apply to a student’s record. The most current/updated milestone list should be accessible online, need notification when updated, when will all pre/co-reqs listed in PCCD catalogs be added.

11. On the transcript, will information such as UC/CSU transferable, area information or completion of CSUGE IGEC be displayed?
No, there is no change in current business practice. Are there plans to change?

22. Can counselors record exemptions or refusals on the MIS Matriculation pages?
No, there is no charge in current practice. Counselors should complete the bottom portion of the pink matriculation checklist for any exemptions/waivers or matric refusal form and forward the checklist/form to the Assessment Center for data entry.

**What is status/plan; data not currently being entered!**

24. How does a student access their Peralta email account?
   Student email accounts are not yet activated. They will be available soon.
   **Status?**

27. How does a student enroll in a multiple unit class, (must select a choice of units)?
   Therefore if a student wants to enroll in more than one course in such an example they should be referred to Admissions & Records for enrollment in # of units they desire, (A&R will override time conflict).
   **Any change is status?**

29. What is the process for students to repeat a course, enroll in course they have taken previously?
   In order to repeat a course (to enroll more than once for any reason) students will go to Admissions & Records office to enroll. A&R staff will evaluate and if permitted, they will override the block and then enroll the student in the course.
   **Any change is status?**

**Parking Lot - FAQ’s (copied from document)**: 

1. For counselors adding milestones, will they be able to select any of the How Attempted values? Today, they are limited to a select few.
   Problem -- access to *all* reasons, should have limit linked to user id security profile – refer to VPSS, PCCD Team & Ciber.

2. Milestone pages should display the UserID of the person who added the milestone. Does a report or query exist that provides this audit information? If so, which report?
   Problem -- should have easy view access to the user id that cleared prereq – refer to VPSS, PCCD Team & Ciber. *(Difficult to follow-up on problems, complaints & monitoring of training.)*

14. Will counselors have access to view if a student has a fee waiver?
   **Status?**

15. Will counselors have access to class rosters for which they are not the instructor?
   Counselors have view access only. This was fixed???

17. Need to define the process/timing of when assessment scores are entered into PASSPORT so that information is available online during counseling sessions.
   Decision of VPSS & Assessment?

18. Can a student forward their Peralta email to another preferred personal account? If yes, how is this done? **Status?**

20. Approving excess units should indicate the counselor’s name that gave approval.
   Problem -- access to all reasons, should have limit linked to user id security profile – refer to VPSS, PCCD Team & Ciber.

22. Counselors need to know the number of students in EOPS programs. Is there a report that lists the student names in the special populations?
   Yes; a query/report is being created to replace the SB482. Once completed, users will be notified how to use. **Status?**
From: Adrienne Riley  
Sent: Tuesday, February 17, 2009 1:08 PM  
To: Josue Hoyos; Drew Gephart; Hector Corrales; Hermia Yam; Rene Rivas; Steve Pantell;  
Susana De La Torre; Terrance Greene; Trulle Thompson  
Cc: Lesley Scurry; James M. Bracy; Charlotte Smith; Sheryl Queen; Joyce Brown-Willis;  
J Kearney@clb.com  
Subject: Counselor BRT

We are offering this as 'prep' & starting point of tomorrow's  
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Any change is status?

*Parking Lot - FAQ’s (copied from document): [Need answers & then add to online FAQs]*

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Yes; a query/report is being created to replace the SB482. Once completed, users will be notified how to use. Status?
From: Lesley Scurry
Sent: Wednesday, February 25, 2009 12:56 PM
To: Adrienne Riley; Josue Hoyos; Drew Gephart; Hector Corrales; Hermia Yam; Rene Rivas; Steve Pantell; Susana De La Torre; Terrance Greene; Trulie Thompson; Charlotte Smith; Sheryl Queen; jkarney@cder.com; James M. Bracy; Joyce Brown-Willis
Subject: Counseling & Admissions BRT

Hello BRT members!
Those of us who attended the Feb 18th meeting scheduled our next meeting for Wednesday, April 1st from 9:30am-11:00am at the District IT Conference room. Please “reply all” to confirm your attendance. We are hopeful that booking our next meeting that far in advance will allow everyone to clear their schedule so that all of the Counseling and Admissions BRT members can attend. We have some important problems and concerns that need to be followed up on but it is necessary to have more committee members and the managers with oversight in attendance in order to generate productive and effective outcomes. It was noted that having Minh on the committee may contribute to the meetings efficiency as well.

Thank you so very much, Joyce, for the information you were able to provide and for noting some of the concerns that were discussed.

Following is a short summary of the meeting (that reviewed the information and attachments sent via email on Tues 2/17/09):

- Main issue – status of the transcript queries (THD) We were advised although progress has been made, the consultant could not join us to report because of the work being done on preparing for the PCCD Cal Grant GPA report with a time sensitive due date.

- Discussion regarding desired modification suggestions related to the class search function.

- The need for clarity on communication procedures to the field on pertinent information.

- Official transcript inaccuracies

  **HIGH PRIORITY NEEDS IMMEDIATE ATTENTION & RESOLUTION** *
  Discussion related to discovery of various examples of inaccurate official transcripts, this presents an immediate problem especially for those transfer students accepted for Fall ’09 admission & sending final transcripts. (Differences in the legacy/mainframe vs. PASSPORT transcript) Example; any changes posted after the legacy transcript migration last April are not on the PASSPORT transcripts, e.g. 4-year concurrent grades, grade changes, academic alleviation, etc). Hermia brought an example of a BCC student transcript. There are reports of other examples, e.g.: all enrolled classes are not displayed on the PASSPORT transcripts. Counselors were asked to collect other examples from their colleges and pass student ID Joyce.

- Pending issues

  Discussion of the listed FAQ’s some of the answers need to be updated and clarified, then corrections posted online and Parking Lot - FAQ’s some of the questions & answers need to be clarified and then added to the posting online.

* It is our hope that we will receive information on the status of resolving the problem with the inaccuracies on the official transcripts asap, before the April meeting.

We recognize that many of you are totally overwhelmed with the amount of work you have to do but are hopeful that you’ll be able to attend the next meeting. Please let us know either way, whether you will or will not be able to attend the 4/1 meeting. Thanks a bunch.

- Adrienne & Lesley
Following is a summary of the April 1st Counseling BRT meeting:

- **Status of the three transcript queries** – (Subject, GPA Type and Campus) (THD)
  
  Kim has completed her work with the technical staff that includes
  
  - Incorporating original BRT testing results, suggestions & concerns submitted previously
  - Testing in both a 'test' database and an updated database (that reflects the real population), and cleaning up problems discovered
  
  Within the next few days, Kim will send each BRT member individualized instructions on how to enter database to test the revised queries to ensure all is working correctly and accurate. Also suggested that contact needs to be made with Charlotte on how to include A&R evaluators' testing of the queries, since this is what they will be using to evaluate certificates and degrees. (Approximately 50 test cases are available.)
  
  All involved in testing should "reply to all" with comments (include Counseling BRT members, Charlotte, Joyce, Sheryl and CiBER project lead (Kim will provide name on her email).

  _Concern:_ Kim will be leaving the project as of next week. Who is the functional lead (Consultant and Peralta staff) that the Counseling BRT will be working with, in particular to complete the work on the transcript queries and in general to continue other work pending.

  Agreement that in the future, as the ‘Academic Advising Module’ is implemented that there should be a modification to changes from 3 separate queries to a report.

- **Counseling FAQ’s**

  Discussed all of the questions identified for review on the meeting handout and reached agreement on appropriate revisions and editing with the assistance of Sheryl and Joyce.
  
  Question #29 - in addition to rewording the answer related to repeating courses - the message students receive needs to be changed to refer them for assistance to A&R not counselors.

  Joyce agreed to distribute the editing to the BRT members for proofing (within the next week or so) and once finalized work to get them re-posted on the PROMT website.

  Suggestions for future consideration:
  
  1. Is there a way to ‘id’ the students who have been contacted re: failed grade on a prerequisite course (Question #6), e.g.: soft hold – service indicator, needs more discussion.
  2. Is there a way to include most current milestone list in the drop down menu, so no need to refer to a different location on the web or paper copy, (Question #8).
  3. Are there future plans to ‘id’ individual courses with transfer GE designation, e.g.: IGETC, CSU GE, etc.

- **Pending issues (Postponed for future meeting, need clarification on who BRT group should be working with in regards to VPSS, functional lead [PCCD staff & CiBER]):**

  Discussion regarding desired modification suggestions related to the class search function.

  The need for clarity on communication procedures to the field on pertinent information.

  Parking Lot - FAQ’s some of the questions & answers need to be clarified and then added to the posting online.

Agreement that the BRT should draft a letter describing concerns regarding status of work and how group should proceed; To: J. Bracy & W. Allen and CC: VPSS's, presidents, Charlotte, Sheryl, Joyce, CiBER project lead. Draft will be routed to BRT members for input.

Next meeting scheduled for May 6th - 9:30 a.m. to 11:00 a.m. – IT Conference room
From: Adrienne Riley
Sent: Tuesday, April 21, 2009 11:15 PM
To: James M. Bracy; Gordon Poon; Josue' Hoyos; Kerry Compton; Donald Moore
Cc: Wise E. Allen; Hermia Yam; Steve Pantell; Lesley Scurry; Trulie Thompson; Hector Corrales; Adrienne Riley; Terrance Greene; Sheryl Queen; Joyce Brown-Willis; Charlotte Smith
Subject: Counseling BRT Concerns

James M. Bracy; Gordon Poon; Josue’ Hoyos; Kerry Compton; Donald Moore:

We’re writing following our most recent Counseling BRT meeting to share with you some issues and concerns we have going forward. While acknowledging that there has been some good work done to date, there is some very important work that remains in order to make the Passport system as functional as possible for us to serve students properly. In no particular order, the Counseling BRT identified the following concerns that need your immediate attention:

1. Joyce (Kim) Kearney’s contract w/ Ciber has expired as of April 12, 2009. She was an invaluable member of the team, our liaison w/ Ciber and a person we could count on to implement some of our suggestions and to resolve problems (e.g.: transcript queries, milestone input, etc). There absolutely needs to be someone in her capacity, a _functional_ lead, either a PCCD employee or another consultant who will work with the Counseling BRT to execute our recommendations according to identified priorities.

2. We need managers with decision-making ability at Counseling BRT meetings. We do a good job of identifying concerns and posing possible solutions but without someone at the meeting with the ability to make decisions, we cannot move forward.

3. As an extension of #2, we need strong representation on the PIT to advocate for the issues the Counseling BRT identifies as the priorities for the entire district are decided. While we recognize that the existing system needs attention and maintenance on a variety of issues, the issues identified by the Counseling BRT need representation as priorities are determined. An example would be our interest in working with Admissions & Records on the pending implementation of the Academic Advising module.

Your time and attention is appreciated.

Counselor BRT:

Berkeley City College: Hermia Yam
College of Alameda: Hector Corrales and Trulie Thompson
Laney College: Terrance Greene and Adrienne Riley
Merritt College: Steve Pantell and Lesley Scurry
Hi Pradeep,

Adrienne sent the comments below. The classes that the counselors can’t find are dropped classes. We need to exclude those. In STDNT_ENRL there is ENRL_DROP_DT which should be null. This would also exclude the W grades.

The other point is that they would like to see the Ys for ASSOC, CSU and COMB (UC) shown for the pending classes.

Thanks,
Jo Ann

Jo Ann Phillips  
Research Data Specialist  
Peralta Community College District  
Phone: 510.466.7389  
Fax: 510.466.7304

From: Adrienne Riley  
Sent: Sunday, April 26, 2009 7:24 PM  
To: Hector Corrales; Hermia Yam; Steve Pantell; Terrance Greene; Trulie Thompson; Lesley Scurry  
Cc: Charlotte Smith; Sheryl Queen; Jo Ann Phillips; Joyce Brown-Willis; JHoulihan@ciber.com  
Subject: BRT - Review of Queries (THD) - NEXT meeting May 6th

BRT Members:
Here are a few comments related to the test cases on the Queries we were asked to review and then share comments, (re: our April 1st mtg notes and Kim’s email to us on 4/11/09). Although I can access the ‘live’ database from home, I am unable to access the test database from home, so I’ve copied a few transcripts and queries to review at home. (I just cannot seem to find uninterrupted focused time to review at work.) I will attempt to make my comments clear, since I can’t cut & paste pictures of the queries to demonstrate what I am referring to. Look forward to your review comments as well.

Jo Ann is proposing to rename COMB to UC, I agree it is a good idea & would agree with terms used on the old /THD... (As you know if a class is transferable to UC it is transferrable to CSU, although the reverse is not always necessarily true.)

One general comment about the BY SUBJECT query - shouldn't the pending classes (classes in progress) have Ys in the appropriate ASSC, CSU or UC (COMB) column also? Seems the 'Y's' are only appearing if the course is complete and there is a grade.

Review Comments.................

Sarah Nighswander (10029223)

By GPA Type
The row for CSU should agree with the COMB row: 7 total units taken & earned; and 28 Grade Points.

By Subject
NUTR 10 should have a ‘Y’ in the CSU column.

Shouldn’t all the pending classes (classes in progress) also have Ys in the appropriate ASSC, CSU or UC (COMB3) column? Seems the ‘Y’s’ are only appearing if the course is complete and there is a grade.
By Campus
Looks ok

Tina Martin (10636437)
Noticed anything prior to F88 is not included in the queries, I'm assuming that is correct and the way it is programmed.

By GPA Type
When I review transcript, for both the COMB & CSU rows I get 14 units taken, 14 units earned, 44 grade points and 3.142 GPA. All classes (14 units) from S96 and F08 are UC & CSU transferable.

By Subject
Should have 'Y' in CSU column: AFRAM 14B, ART 1, ART 20, ART 40.

Should have 'Y' in UC column: ART 141 (UC transferable effective F07)

Shouldn't all the pending classes (classes in progress) also have Ys in the appropriate ASSC, CSU or UC (COMB) column? Seems the 'Y's are only appearing if the course is complete and there is a grade.

Where did these course come from, not on transcript: DANCE 20, DANCE 45 and PE 40?

Why isn't the list of ART courses in sequential order by course number?

By Campus
Looks ok

Lisa Anderson (10630058)
Noticed anything prior to F88 is not included in the queries, I'm assuming that is correct and the way it is programmed.

By GPA Type
There should be a row for CSU and it should include same info numbers as COMB row: 7 total units taken & earned; 28 Grade Points; and 4.00 GPA

By Subject
Should have 'Y' in CSU column: ART 1 and ENGL 1A.

Shouldn't all the pending classes (classes in progress) also have Ys in the appropriate ASSC, CSU or UC (COMB) column? Seems the 'Y's are only appearing if the course is complete and there is a grade.

Where did this course come from, not on transcript for S09 enrollment: BIOL 10?

By Campus
Looks ok

Lakietha Hockenhull (10740248)

By GPA Type
The row for CSU should agree with the COMB row: 12 total units taken & earned; 48 Grade Points and 4.00 GPA

By Subject
FORGOT TO PRINT OUT THIS QUERY and bring home to review!!

By Campus
Looks ok
Here is my feedback to the queries. I only listed comments for queries in which I found inaccurate information.

**Sarah Nighswander (10029223)**
*By subject:* According to BCC's catalog, Engl 73A is CSU transferable only and not UC.

**Lakletha Hockenhull (10740248)**
*By subject:* CIS 233 is not a transferable class to CSU. It is AA degree applicable only but there is a Y in the CSU column.
*By GPA type:* CIS 233's two units should not be included in the CSU column.

**Breanna Mohamed (10740274)**
*By subject:* There are several classes listed that are not on her transcript (i.e. Astr 1, Cis 1 (twice), Cis 234A, Possi 1 F08, Rlest 8).

**Marya Edgar (10740293)**
*By subject:* Polsci 1 is listed four times for F08 but should only be listed once with a C grade.

**Peter Jdanov (10740371)**
*By subject:* Student withdrew from Cis 5 and Engl 1A but they are both listed on the spreadsheet like they are still in progress. Math 203 is listed twice (F08 & S09) but is not listed on his transcript for F08. Span 1A is listed for S09 but is not on students transcript.

See you next Wednesday and have a great weekend!
-Lesley

Here's my audit.
_Keatlin Cowan (10740454)_
*By subject:* ENGL 1A (F08) and ASL 200A (M08) show on query but not on transcript; no grade shown on query for PHYSC 20
*By campus:* shows only COA course, not BCC course(s)
*By GPA:* hard to say since all courses from query don't show on transcripts

_Cynthia Davis (10630350)_
*By subject:* BUS 1A (S09) should have a Y in both the CSU & UC (COMB) columns
No appropriate courses for By Campus and By GPA

_Cheryl Workman (10630331)_
*By subject:* shows courses for F08 (CHDEV 50, 51; CIS1, 234A, GEOG 1, HUMAN 2, PSYCH 1A) and S09 (HIST 7A) that aren't on transcript; GPA type is OK
*By campus:* OK
*By GPA:* OK

_Gina Tarver-Lewis (10630175)_
*By subject:* ANTHR 1 should have Y in CSU along w/ existing ASSC & UC;
2 COUN courses (207B-C) show on query but not on transcript
*By campus:* OK
*By GPA:* OK
-Steve
Following is a summary of the May 27th Counseling BRT meeting:

**Status of the three transcript queries – (Subject, GPA Type and Campus)** (/THD)

Discussion and review of the corrections made based on review of problems since last meeting. It was agreed that the "W's" and the "F's" should be removed from the Subject Query. It was noted that the "W's" could be removed but the problem issue with the "F's" is that they need to be calculated into the other query - GPA Type. It might not be possible to include in one and not the other at this time. Consensus reached that it would be acceptable to have the "F's" listed on the query reports for now and that on the future customized report this problem could be resolved.

Plan for next steps:

- Since the queries are a primary tool for the degree and certificate evaluations, A&R evaluators need an opportunity to ‘test’ the queries before releasing to the field for use. A&R will be invited to test in July (after peak enrollment for summer) and any corrections/problems they identify will be addressed.

- Once A&R has tested queries and any necessary corrections are completed, communication will be sent to all counselors via respective college counselors group email addresses.

- Sheryl Queen will send the communication to the field referring counselors to the directions in their PASSPORT training manual, a link on the PROMT help page to the training directions and if available any 'short cuts' to access the three queries.

**Counseling FAQ's**

Plan for next steps:

- As agreed at the April 1st meeting, Joyce will distribute the editing work done to the BRT members for proofing (within the next week).

- Joyce will re-post the revised FAQ's on the PROMT website with a more user friendly access, easy to find location. (Several suggested possibilities were discussed.)

- Once posted on the website, Kerry Compton will send notification to all counselors via respective college counselors group email addresses advising them of the revised FAQ's.

It was noted that the academic year for counseling faculty members of the BRT ends this month, they will not be available during June & July, and will be returning various dates in August for high peak enrollment.

**Next Counseling BRT meeting is scheduled for September 16, 2009.**
# Counseling Training FAQs

(Frequently Asked Questions)

## System Access

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Navigation</th>
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</table>
| 1. How do I log onto Passport? | **Access the PROMT website**  
- From campus, type PROMT into your web browser.  
- From home, use [https://staff.veralta.edu](https://staff.veralta.edu)  
**Enter your username and password**  
- Username = first part of your Peralta email  
  (John Smith = jsmith)  
- Password = the password you use for your Peralta email  
  **Under Enterprise Menu, choose the PeopleSoft link.**  
  **Under the PeopleSoft menu, choose the Student Administration 8.9 link.**  
  The PASSPORT window will open to the main menu home page. Start Navigation from this page. | **Access the PROMT website**  
[https://staff.veralta.edu](https://staff.veralta.edu)  
**Enter your username and password**  
**Under Enterprise Menu, choose the PeopleSoft link.**  
**Under the PeopleSoft menu, choose the Student Administration 8.9 link.** |
<p>| 2. How should I logoff of Passport? | Make sure to click the Sign Out links on both the PASSPORT page and the PROMT menu page. | Click “sign out” in upper right hand corner of the screen. |</p>
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<td>3. What is the process for external transcripts to be evaluated up front/early when they student begins coursework at Peralta? Example: Official transcript is mailed or student brings official transcript to counselor and then counselor forwards to A&amp;R.</td>
<td>Howard Perdue has stated that there will be a transcript evaluator at the District A&amp;R office whose main purpose is to evaluate official external transcripts as they come into the office and enter the courses into the PeopleSoft system. The District A&amp;R office will not accept unofficial transcripts for evaluation. Any external official transcript will be kept at the office and not returned to the student. Specific procedures to be developed.</td>
<td>NAVIGATION to view Transfer Credit: Records &amp; Enrollment&gt;Transfer Credit Evaluation&gt;Transfer Credit Summary</td>
</tr>
<tr>
<td>4. Can external transcripts be scanned and attached to a student’s record?</td>
<td>In Phase 2 the Implementation Team will be looking at third party vendors such as Image Now that will interface with PeopleSoft.</td>
<td></td>
</tr>
<tr>
<td>5. How will degree applicable courses that aren’t equivalent to a specific PCCD course, but are counted toward an equivalent subject area, be recorded as transfer credit?</td>
<td>Specific procedures to be developed with transcript evaluator – see question #3.</td>
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<tr>
<td>6. How are automatic drops in a future term due to failed grade in a prerequisite course taken in the current term communicated to the student? Will a student be notified when they are automatically un-enrolled from a class?</td>
<td>Yes, the student is notified via Peralta email.</td>
<td>This is a custom process run at the end of the term by the system.</td>
</tr>
<tr>
<td>7. Are recommended courses listed in Passport based on student assessment scores?</td>
<td>No, refer to your copy of the cut-off scores for assessment testing. This is also available on the PCCD website.</td>
<td>On PCCD homepage <a href="http://www.peralta.cc.ca.us/homex.asp?Q=Homepage">http://www.peralta.cc.ca.us/homex.asp?Q=Homepage</a></td>
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<td>Scroll down and link to 'District Info' (bottom of page)</td>
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<td>Select link to 'Institutional Research' (middle column)</td>
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<td>Select link to Matriculation • Either in Quick Launch box on the left 'Research/Matriculation' or • In the right column under Research 'Matriculation'</td>
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<td></td>
<td>Scroll down in middle column to Assessment and select 'Assessment Test Cut-off Scores'</td>
</tr>
<tr>
<td>8. Need detailed explanation of how to identify which milestone to apply to a student's record. The naming convention is confusing.</td>
<td>Milestones match the name of the prerequisite being waived. Generally if the prerequisite includes more than 1 course, the name is an alpha character. If the prerequisite is only 1 course, it is that course name, e.g. ENGL 1A. Milestone explanation will be circulated by Fall, 2008. You can find milestones on the Course Catalog Information pages (see navigation below) as well as in the printed College Catalog.</td>
<td>Curriculum Management&gt;Course Catalog&gt;Search for specific class&gt;Offerings tab</td>
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## PCCD Transcripts

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<tr>
<td>9. How do I print an unofficial PCCD transcript?</td>
<td>Use the transcript request function in PASSPORT. See Passport navigation for menu path. <em>Make sure you have noted the student's entire ID number before starting the request</em></td>
<td>Records and Enrollment&gt; Transcripts&gt; Transcript Request</td>
</tr>
<tr>
<td>10. Can students request an official transcript from the Student Center?</td>
<td>No. They still have to request official transcripts through A&amp;R.</td>
<td></td>
</tr>
<tr>
<td>11. On the transcript, will information such as UC/CSU transferable, area information or completion of CSUGE IGETC be displayed?</td>
<td>No, there is no change in current business practice.</td>
<td></td>
</tr>
<tr>
<td>12. Do FERPA restrictions apply to transcripts? i.e. address, DOB will not display on transcript if FERPA restriction is designated by student.</td>
<td>FERPA restrictions do not apply to the Student transcript. If a student signs a release to send an official transcript to a third party, then they are giving their written consent. Peralta staff that has access to unofficial transcripts meets the FERPA policy of having a &quot;need to know&quot; the information in order to do their official functions on campus.</td>
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## PCCD Degree Audit

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<tr>
<td>13. Where will the detail from the /THD screen display?</td>
<td>Queries will be available in Fall 2008 to provide this information. They are: transcript data by subject, degree applicable units by campus, and transcript data by GPA type.</td>
<td>Reporting Tools&gt; Query&gt; Query Viewer</td>
</tr>
<tr>
<td>14. Will there be any easier way to view queries as opposed to typing in lengthy report names? For example, select the query name from a list of existing queries?</td>
<td>You can enter the first few characters of the query name and then click the Lookup button. A list of queries matching the criteria specified display and then you can select from the results list.</td>
<td>Reporting Tools&gt; Query&gt; Query Viewer</td>
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<td></td>
<td>Queries can also be added to the &quot;Favorite Query&quot; section of the Query Viewer page for quicker access.</td>
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<tr>
<td>15. Will the Major worksheets found on the W drive be put in PASSPORT?</td>
<td>No, you will still have access to these worksheets in the W drive for degree evaluation. This is planned for phase II with the degree audit feature in Academic Advising.</td>
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### Rosters and Class Information

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<tr>
<td>16. /IAS screen – where do counselors see this information in PASSPORT</td>
<td>Faculty Center will display an instructor’s schedule. Counselors have access to this page.</td>
<td>Self Service&gt; Faculty Center /</td>
</tr>
<tr>
<td>17. Will historical course detail be listed in the online course catalog?</td>
<td>The Passport course catalog contains all course data for courses offered with enrollment from fall 1988. Counselors have view access to Course Catalog</td>
<td>Curriculum Management&gt; Course Catalog&gt; Course Catalog</td>
</tr>
<tr>
<td>18. Can the student’s access be restricted to online viewing of the schedule of classes only?</td>
<td>The catalog search function will not be active in production for anyone.</td>
<td></td>
</tr>
<tr>
<td>19. Will counselors have access to class information previously available on the SCI legacy screen?</td>
<td>Can view SCI, as they exist in Passport, as queries</td>
<td>Reporting Tools&gt; Query&gt; Query Viewer&gt; PCC_SA_SCI</td>
</tr>
<tr>
<td>20. Will counselors have access to class information previously available on the SF legacy screen?</td>
<td>Can view SFI, as they exist in Passport, as queries.</td>
<td>Reporting Tools&gt; Query&gt; Query Viewer&gt; PCC_SA_SFI</td>
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### Student Education Plan (SEP)

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<tbody>
<tr>
<td>21. Is there an SEP in PASSPORT?</td>
<td>Not at this time.</td>
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### MIS / Matriculation

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<tr>
<td>22. Can counselors record exemptions or refusals on the MIS Matriculation pages?</td>
<td>No, there is no change in current practice. Counselors should complete the bottom portion of the pink matriculation checklist for any exemptions/waivers or matric refusal form.</td>
<td></td>
</tr>
<tr>
<td>23. Will a student be able to view his or her Assessment Score from the student center?</td>
<td>Not at this time.</td>
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</table>
## Student & PCCD E-Mail

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<tbody>
<tr>
<td>24. How does a student access their Peralta email account?</td>
<td>Student email accounts are not yet activated. They will be available soon.</td>
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## Enrollment

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<tbody>
<tr>
<td>25. What is the process for an instructor to request a student be allowed to enroll in a class when the capacity limit is reached?</td>
<td>There is no change in business practice. Students will need the instructor’s signature on an ADD Slip and submit at the A&amp;R Office.</td>
<td></td>
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<tr>
<td>26. How is enrollment for locked classes being processed?</td>
<td>There is no change in business process. Students cannot enroll through self-service; they must enroll in person.</td>
<td></td>
</tr>
<tr>
<td>27. How does a student enroll in a multiple unit class, (must select a choice of units)?</td>
<td>Previously courses we knew in legacy/mainframe as variable unit or self paced courses – students could initially enroll in their choice of # or units or add later in the semester. As you know, in the new Passport system, each level in such courses is now a separate course – e.g.: MATH 251A, MATH 251B, MATH 251C, and MATH 251D (with distinct content). If the student attempts to enroll in more than one, Passport will prevent because it recognizes as a time conflict. Therefore if a student wants to enroll in more than one course in such an example they should be referred to Admissions &amp; Records for enrollment in # of units they desire, (A&amp;R will override time conflict).</td>
<td></td>
</tr>
<tr>
<td>28. Will counselors have access to enrollment information previously available on the /ENR legacy screen?</td>
<td>Can view ENR, as they exist in Passport, as queries. .</td>
<td>Reporting Tools&gt; Query&gt; Query Viewer&gt; PCC_S_A_ENR</td>
</tr>
<tr>
<td>29. What is the process for students to repeat a course, enroll in course they have taken previously?</td>
<td>In order to repeat a course (to enroll more than once for any reason) students will go to Admissions &amp; Records office to enroll. A&amp;R staff will evaluate and if permitted, they will override the block and then enroll the student in the course. (Passport cannot evaluate if the repeat is allowable.)</td>
<td></td>
</tr>
<tr>
<td>30. Is the .5 minimum enrollment limit enforced for drops prior to the Drop deadline?</td>
<td>There is no minimum; students can drop to zero units.</td>
<td></td>
</tr>
</tbody>
</table>
### Question 31
Will students be able to go back and take a lower level course (that they have not taken before) after they have taken the next higher-level course?

For example, a student receives assessment placement recommendation of ESL21A. The student then enrolls and completes ESL21A. They now want to take ESL201B; will the new system prevent them from doing this in the future?

**Answer**
There is no change in business practiced.

The system will prevent enrollment in ESL201B unless ESL201A is completed or the milestone is cleared for ESL201B.

**PASSPORT Navigation**

### Question 32
Can a field for the number of counselor contacts be added to the CAL Works pages?

**Answer**
Counselor contacts are input into SARS.

**PASSPORT Navigation**

### Question 33
What service indicators can counselors clear?

**Answer**
Counselors can clear service indicators associated with holds for new matriculation students, progress probation and/or academic probation.

**PASSPORT Navigation**
Campus Community> Student Services Ctr (student)> Enter student information to search/access student record> General Info tab> Edit Service Indicators

### Question 34
What is a new matric hold? When/who should clear the service indicator for new matric hold?

**Answer**
No change in business practice, continued clearance for A&R and/or counselors. This procedure mirrors the RAP screen clearance (scheduling an enrollment appt). A&R should clear new matric service indicator hold (or schedule an appt in RAP screen) when the student brings the completed pink matric checklist - steps completed. While this can be performed in A&R, counselor ability to clear should also continue. For example, when the student brings the pink matric checklist & counselor contact is last step to be completed or when counselor is approving an exemption waiver for matric step(s) and filling out the bottom portion of the matric checklist that is to be sent to the Assessment Center for data input.

**PASSPORT Navigation**
Campus Community> Student Services Ctr (student)> Enter student information to search/access student record> General Info tab> Edit Service Indicators
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>35. Where do counselors add notes and comments?</td>
<td>Comments/notes should be added to the &quot;notepad&quot; or comment line in SARS.</td>
<td></td>
</tr>
<tr>
<td>36. Where does faculty see FSA data online?</td>
<td>There is not a place in the student system to record this. FSA's are in HR.</td>
<td></td>
</tr>
</tbody>
</table>
Counseling Training FAQs
(Frequently Asked Questions)

These are the follow-up questions – those that require more work.

### Prerequisites and Milestones

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. For counselors adding milestones, will they be able to select any of</td>
<td>New “How attempted” values have been added to the translate values in</td>
<td>ADD to list of FAQ’s – Prerequisites and Milestones</td>
</tr>
<tr>
<td>the How Attempted values? Today, they are limited to a select few.</td>
<td>production. The new values are there for the go-live. (Problem – access to all reasons, should have limited linked to user id security profile – refer to VPSS, PCCD Team &amp; Ciber)</td>
<td>Refer problem</td>
</tr>
<tr>
<td>2. Milestone pages should display the UserID of the person who added</td>
<td>Currently, there is not a delivered audit of the milestone page entry.</td>
<td>ADD to list of FAQ’s – Prerequisites and Milestones</td>
</tr>
<tr>
<td>the milestone. Does a report or query exist that provides this audit</td>
<td>(Problem – should have easy view access to the user id that cleared prereq – refer to VPSS, PCCD Team &amp; Ciber)</td>
<td>Refer problem</td>
</tr>
<tr>
<td>information? If so, which report?</td>
<td></td>
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</tbody>
</table>

### PCCD Degree Audit

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Degree Applicable Units by Campus query should display all campus on</td>
<td>CIBER developers are currently looking at what improvements can be made at this point before go-live.</td>
<td>Need answer &amp; ADD to list of FAQ’s - PCCD Degree Audit</td>
</tr>
<tr>
<td>one screen and list degree applicable courses taken at each campus.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Transcript Units by GPA needs to identify which GPA is displayed</td>
<td>CIBER developers are currently looking at what improvements can be made at this point before go-live.</td>
<td>Need answer &amp; ADD to list of FAQ’s - PCCD Degree Audit</td>
</tr>
<tr>
<td>(UC, CSU, Peralta - degree applicable or cum).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Degree Applicable Units query should display Course, Course Number,</td>
<td>CIBER developers are currently looking at what improvements can be made at this point before go-live.</td>
<td>Need answer &amp; ADD to list of FAQ’s - PCCD Degree Audit</td>
</tr>
<tr>
<td>Campus, Units for each campus, and a total of all degree applicable units</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Transcript report does not show labels for the Attempted and Completed</td>
<td>PDF version – shows this information HTML version – does not show this information would a major modification to the system</td>
<td>Need answer &amp; ADD to list of FAQ’s - PCCD Degree Audit</td>
</tr>
<tr>
<td>columns</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. The /THD in legacy displays AA degree applicable information. The new</td>
<td>Information given to PASSPORT project team</td>
<td>Need answer &amp; ADD to list of FAQ’s - PCCD Degree Audit</td>
</tr>
<tr>
<td>queries should identify this information also.</td>
<td></td>
<td></td>
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<tr>
<td>Question</td>
<td>Answer</td>
<td>PASSPORT Screen</td>
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<td>-------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>9. On the Transcript Data by Subject query, what does a blank GPA Type reflect? PCCD Degree Applicable course or PCCD non-degree applicable course</td>
<td>Information given to PASSPORT project team</td>
<td>PARKING LOT</td>
</tr>
<tr>
<td></td>
<td>Need answer &amp; add to FAQs</td>
<td></td>
</tr>
<tr>
<td>10. On the Transcript Data by Subject query, basic skills courses and F and W grades should not display</td>
<td>Information given to PASSPORT project team</td>
<td>PARKING LOT</td>
</tr>
<tr>
<td></td>
<td>Need answer &amp; add to FAQs</td>
<td></td>
</tr>
<tr>
<td>11. On the Transcript Data by Subject query, in progress courses should display * (asterisk) in grade column</td>
<td>Information given to PASSPORT project team</td>
<td>PARKING LOT</td>
</tr>
<tr>
<td></td>
<td>Need answer &amp; add to FAQs</td>
<td></td>
</tr>
<tr>
<td>12. On the Degree Applicable by Units query, add a campus field, show all campuses on one page; and cumulative degree applicable units</td>
<td>Information given to PASSPORT project team</td>
<td>PARKING LOT</td>
</tr>
<tr>
<td></td>
<td>Need answer &amp; add to FAQs</td>
<td></td>
</tr>
<tr>
<td>13. On the Transcript Units by GPA Type query, there should be a line entry for PCCD cum GPA, PCCD degree applicable GPA, CSU GPA and cum total, and UC GPA and cum total</td>
<td>Information given to PASSPORT project team</td>
<td>PARKING LOT</td>
</tr>
<tr>
<td></td>
<td>Need answer &amp; add to FAQs</td>
<td></td>
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</tbody>
</table>

**Financial Aid**

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<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>14. Will counselors have access to view if a student has a fee waiver?</td>
<td>Financial aid and the development of Regent will address this question. Financial Aid will not be viewable in Passport.</td>
<td>This is currently under discussion.</td>
</tr>
</tbody>
</table>

**Rosters and Class Information**

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<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
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</thead>
<tbody>
<tr>
<td>15. Will counselors have access to class rosters for which they are not the instructor?</td>
<td>Counselors have view access only.</td>
<td>Curriculum Management&gt; Class Roster</td>
</tr>
<tr>
<td></td>
<td>SHERYL WILL CHECK THIS</td>
<td></td>
</tr>
<tr>
<td>16. Can we look at only online courses (sorted by online) included in the PASSPORT catalog/schedule of classes?</td>
<td>Information given to PASSPORT project team</td>
<td>PARKING LOT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Roster &amp; Class Information</td>
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</tbody>
</table>

**Student Education Plan (SEP)**

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<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
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</table>
### MIS / Matriculation

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<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
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</thead>
<tbody>
<tr>
<td>17. Need to define the process/timing of when assessment scores are entered into PASSPORT so that information is available online during counseling sessions.</td>
<td>This is a Peralta business practice issue. Need answer Decision of VPSS &amp; Assessment???</td>
<td>PARKING LOT Need answer &amp; add to FAQs</td>
</tr>
</tbody>
</table>

### Student & PCCD E-Mail

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<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
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</thead>
<tbody>
<tr>
<td>18. Can a student forward their Peralta email to another preferred personal account? If yes, how is this done?</td>
<td>It-is-not-done. ???</td>
<td>PARKING LOT</td>
</tr>
</tbody>
</table>

### Miscellaneous

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<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
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</thead>
<tbody>
<tr>
<td>19. Counselors would like to see a link to a hyperlink to <a href="http://www.collegecourse.com">www.collegecourse.com</a> on the Student Services Center page in the Important Academic Links box.</td>
<td>Submit request to add URL to Joyce Brown-Willis to update Student Center setup. <strong>Suggested business practice??—</strong> Requests to add URL should go to the Counseling BRT for Joyce Brown-Willis to update Student Center setup.</td>
<td>PARKING LOT ADD to list of FAQ's – Miscellaneous</td>
</tr>
</tbody>
</table>

### Enrollment

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<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>20. Approving excess units should indicate the counselor's name that gave approval.</td>
<td>Problem – access to all reasons, should have limit linked to user id security profile – refer to VPSS, PCCD Team &amp; Ciber.</td>
<td>DELETE and Refer</td>
</tr>
</tbody>
</table>

### Service Indicators

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>21. Is there a history of service indicators available to counselors?</td>
<td>Not at this time.</td>
<td>Need query or report / refer to VPSS</td>
</tr>
<tr>
<td></td>
<td>Need answer</td>
<td></td>
</tr>
</tbody>
</table>

### Miscellaneous
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>PASSPORT Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>22. Counselors need to know the number of students in EOPS programs. Is there a report that lists the student names in the special populations?</td>
<td>Yes; a query/report is being created to replace the SB482. Once completed, users will be notified how to use.</td>
<td>ADD to list of FAQ's - Categorical Programs</td>
</tr>
<tr>
<td>23. Where are the specific services provided by the Transfer Center tracked?</td>
<td>They are not maintained in Passport. The only element maintained is the MIS required did the student receive services.</td>
<td>MIS data collections, Matriculation Need answer &amp; PASS TO TRANSFER CENTER DIRECTORS and VPSS</td>
</tr>
<tr>
<td>24. How can the EOPS tasks be added to a To Do List?</td>
<td>Need answer &amp; PASS TO EOPS and VPSS</td>
<td></td>
</tr>
<tr>
<td>25. Can special pops MIS records be rolled forward to the next term such that new data rows do not have to be added each term for continuing students?</td>
<td>To be determined on a group by group basis.</td>
<td>DELETE from FAQs Pass info to VPSS and appropriate group</td>
</tr>
<tr>
<td>26. On the MIS EOPS/Care page Counselor requires the ability to select marital status 'rom drop-down list as in previously-used mainframe screen</td>
<td></td>
<td>DELETE from FAQs Pass info to VPSS and appropriate group</td>
</tr>
<tr>
<td>27. What is the process for a counselor to request the state-required EOPS/CARE reports that were generated from the mainframe? These reports include how many students in the program by term.</td>
<td></td>
<td>DELETE from FAQs Pass info to VPSS and appropriate group</td>
</tr>
<tr>
<td>28. Will Passport identify the Student record as a CALWorks or EOPS student if the student goes to visit a general counselor?</td>
<td>(Can this be viewed somewhere by general counselors?)</td>
<td>Need answer &amp; add to FAQs - Categorical Program</td>
</tr>
<tr>
<td>30. Is there any information that is automatically entered in the CALWorks pages from the application? If so, what is automatically populated?</td>
<td></td>
<td>DELETE from FAQs Pass info to VPSS and appropriate group</td>
</tr>
<tr>
<td>31. Are the CIP codes populated or look-up in the CALWorks pages? There is a look-up button, but it was not accessed in the simulation.</td>
<td></td>
<td>DELETE from FAQs Pass info to VPSS and appropriate group</td>
</tr>
<tr>
<td>32. How are DSPS holds entered in the new system?</td>
<td>Peralta VPs decide who will have security access to place or remove specific holds</td>
<td>DELETE from FAQs Pass info to VPSS and appropriate group</td>
</tr>
</tbody>
</table>
Following is a summary of the May 27th Counseling BRT meeting:

Status of the three transcript queries – (Subject, GPA Type and Campus) (THD)

Discussion and review of the corrections made based on review of problems since last meeting. It was agreed that the “W’s” and the “F’s” should be removed from the Subject Query. It was noted that the “W’s” could be removed but the problem issue with the “F’s” is that they need to be calculated into the other query - GPA Type. It might not be possible to include in one and not the other at this time. Consensus reached that it would be acceptable to have the “F’s” listed on the query reports for now and that on the future customized report this problem could be resolved.

Plan for next steps:

- Since the queries are a primary tool for the degree and certificate evaluations, A&R evaluators need an opportunity to ‘test’ the queries before releasing to the field for use. A&R will be invited to test in July (after peak enrollment for summer) and any corrections/problems they identify will be addressed.

- Once A&R has tested queries and any necessary corrections are completed, communication will be sent to all counselors via respective college counselors group email addresses.

- Sheryl Queen will send the communication to the field referring counselors to the directions in their PASSPORT training manual, a link on the PROMT help page to the training directions and if available any ‘short cuts’ to access the three queries.

Counseling FAQ’s

Plan for next steps:

- As agreed at the April 1st meeting, Joyce will distribute the editing work done to the BRT members for proofing (within the next week).

- Joyce will re-post the revised FAQ’s on the PROMT website with a more user friendly access, easy to find location. (Several suggested possibilities were discussed.)

- Once posted on the website, Kerry Compton will send notification to all counselors via respective college counselors group email addresses advising them of the revised FAQ’s.

It was noted that the academic year for counseling faculty members of the BRT ends this month, they will not be available during June & July, and will be returning various dates in August for high peak enrollment.

Next Counseling BRT meeting is scheduled for September 16, 2009.
Counseling BRT

In an effort to assist in the development of test scripts, described below are various scenarios that document functions related to the work/tasks of counselors that can occur within an appointment or during a drop-in contact. Noted are those current legacy (mainframe) screens used to access information for viewing and/or updating.

Documentation of these current screens can be found in the Matriculation Handbook http://www.peralta.eduwindex/research/mathandbk.pdf and in legacy/mainframe under /docs. In addition to educational records and assessment test scores, some of the multiple measure criteria related to the discussion regarding appropriate course placement recommendation and prerequisite clearance can be found on page 5 & 6 of the Assessment Handbook http://www.peralta.eduwindex/research/assesshb.pdf

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Business Practice</th>
<th>Legacy Screen</th>
<th>Parking Lot Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can this course be repeated?</td>
<td>Several places can be checked: /RFM, catalog (hard copy or online)</td>
<td>/RFM</td>
<td></td>
</tr>
<tr>
<td>What is the grading req. for this course, can it be taken CR/NC or Letter Grade? Can it be taken Credit by Exam?</td>
<td>Several places can be checked: /RFM, catalog (hard copy or online)</td>
<td>/RFM</td>
<td></td>
</tr>
<tr>
<td>Can I have approval for excess units this semester?</td>
<td>Check the educ history, consider appropriateness of the academic rigor &amp; # of units of the class load (prior &amp; requested), combination of classes desired in respect to the passed academic performance, consideration of their GPA (cum &amp; assoc. level), if they are full-time, part-time, attempted excess units in the past, if alternative offering - intersession, etc</td>
<td>/THI /THD</td>
<td>/SCD /SCI</td>
</tr>
<tr>
<td>Is this course transferable, can it by used on IGETC or CSU GE/Breadth?</td>
<td>Several places can be checked: /RFM, catalog (hard copy or online). If a CA Community College course can check <a href="http://www.assist.org">www.assist.org</a>. In some cases may need to check the catalog of out of district college (hard copy or online) or look at narrative info provided on out of district transcripts (e.g.: #ing system). If out of district course request copy of out of district transcript if on file (from A &amp; R) &amp; student does not have copy - may need to require course descriptions for decision on course placement (or view online catalog) &amp; unsure or student ‘protests’ may need to forward to Dist A&amp;R for initial eval decision. Assist the student fill out the GE advising worksheet, if last semester before transfer fill out the Certification Petition</td>
<td>/RFM /RFI /THD</td>
<td></td>
</tr>
<tr>
<td>Is this course degree</td>
<td>Several places can be</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
<td>Code</td>
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<tr>
<td>applicable, can it by used for the associate GE?</td>
<td>checked: /RFM, catalog (hard copy or online), GE advising worksheets, etc. If out of district course to be used for major requirement student may need to file a Petition for Substitution with necessary approvals. If out of district course request copy of out of district transcript (from A &amp; R) if on file &amp; student does not have copy - may need to require course descriptions for decision on course placement (or view online catalog) &amp; unsure or student 'protests' may need to forward to Dist A&amp;R for initial eval decision.</td>
<td>/RFM /THD</td>
<td></td>
</tr>
<tr>
<td>Here are my assessment scores, what English and math course should I take, when I leave here can I enroll online? I'm not taking math this semester, will the prereq clearance for math still be in place for next semester?</td>
<td>Review cutoff score course recommendation grid with the student and have a discussion related to the multiple measures questions to make appropriate course recommendation. Clear appropriate prereqs base on recommendation. If also have out of district transcripts, in some cases may need to check the catalog of out of district college (hard copy or online) or look at narrative info provided on out of district transcripts (e.g.: #ing system). If out of district course request copy of out of district transcript if on file (from A &amp; R) &amp; student does not have copy - may need to require course descriptions for decision on course placement (or view online catalog) &amp; unsure or student 'protests' may need to forward to Dist A&amp;R for initial eval decision.</td>
<td>/ATR /SRW /RAP</td>
<td></td>
</tr>
<tr>
<td>What is the prereq for this course?</td>
<td>Can be looked up in the catalog (hard copy or online) and al on the /r/fp screen.</td>
<td>/RFP</td>
<td></td>
</tr>
<tr>
<td>Can you clear the prereq for this course, based on this course taken out of district? Can I enroll online when I leave your office (new student)?</td>
<td>If cannot decide based on the course title, request a course description from the student or look up on internet from other college online catalog; can also consult with other counselors and/or the artic officer; if approved prereq can be cleared on the /srw screen and enrollment aprt established on the /rap screen if all other matric steps are completed (eg: application if new or returning student, any appropriate assessment completed if necessary), etc</td>
<td>/SRW /RAP</td>
<td></td>
</tr>
<tr>
<td>How do I get in touch with my instructor(s)?</td>
<td>Phone # listed in hard copy phone directory, in legacy directory under 'phone' and in the PCCCD email global</td>
<td>'phone'</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
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<tr>
<td>How do I get my grade changed?</td>
<td>Discuss the situation with student to establish if grade change is the appropriate action based on their situation. If so advise student to submit 'Record Correction' (goes to instructor and then division dean).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When is the earliest I can enroll for the next term?</td>
<td>Enrollment appts are established the last 7 weeks of the term; once posted can see enrollment appt for the student on the /scd screen.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are my instructors' office hours?</td>
<td>Not posted in legacy screen; need to refer the student to the appropriate division dean in the Office of Instruction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What should I take next semester, I need 12 units?</td>
<td>What is done depends on the situation with student, e.g.: are they new or continuing with courses completed, do they have out of district transcripts, do they have a SEP completed or need one developed; do they have a decided major/educ goal or are they undecided, etc. Important to establish what is a priority, e.g.: completing the sequence needed for English and Math requirements, prereqs for future courses, etc. Checking the student's record for courses completed (/thi) or in progress (/scd) is a first step, along with what classes are available in the term (class schedule or /sci), etc. Requirements for goal can be checked: the <a href="http://www.assist.org">www.assist.org</a>, catalog, GE advising sheets, major worksheets, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I need help to build a Student Education Plan (SEP) for dual goal of transfer and associate and I have 2 transcripts from out of the district. (I need a SEP for my financial aid petition.)</td>
<td>Have student complete 'Authorized Repeat Petition' if course repeated &amp; GPA needs recalculation. If appropriate based on past record, have student submit Academic Renewal of Alleviation of Substandard Performance. Discuss appropriate assoc major to complement transfer goal and appropriate transfer GE. Review/discuss GE &amp; major requirements, check/print out catalog pages or major worksheets, GE advising forms and ASSIST for list of all requirements. Evaluate/fill in what is already completed, what is in progress</td>
<td></td>
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<td>Question</td>
<td>Answer</td>
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<td></td>
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<tr>
<td>I want to change my major, what do I do?</td>
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<tr>
<td>Major is in legacy but not usually accurate, can be updated on the /smd screen (and viewed on /sbd for original at time of application or /smd for most current major in system). Explain to student that they do not have to 'officially' declare until petition for certificate and/or associate and/or when the file for transfer GE certification (GE:IC or CSU GE/Breadth). Review with student the requirements for the major they want to pursue — if PCCD associate or certificate in the catalog or major worksheets and if transfer on <a href="http://www.assist.org">www.assist.org</a>, Advising Sheets or catalogs. Assist the student in developing a SEP and may also refer to 4-year colleges.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is the major prep for this major at this CSU and this UC?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Assist website for existing articulation and/or advise student how to check. If no articulation can compare course descriptions and also check for comparison of articulation that does exist with other community colleges — especially local colleges with familiar curriculum.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I don't know what career to go into, what should I major in?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discuss &amp; review: COUN 207 &amp; 57 ‘Explore Majors’ in <a href="http://www.assist.org">www.assist.org</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>various internet websites for career type inventories and info Eureka website</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correlation of major, career interest and talents/interests, etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Why can't I enroll, A&amp;R says I am on hold? (progress, academic, dismissal)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check the Student Hold Maintenance screen to determine why the hold is there. If the hold is in fact dismissal or probation, follow steps below. If the hold is due to unpaid fees, duplicate SSN, library, or equipment hold, for example, refer student to appropriate department (i.e. bursar's office, A &amp; R, library, DSPS)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I'm here because I'm on Student to attend Student</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| /HCR | /HCR | An electronic SEP will not be
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>W-Drive</th>
</tr>
</thead>
<tbody>
<tr>
<td>dismissal/probation, they say I need to file this petition for the VP to review. Do I have any other type of hold on my records?</td>
<td>Success Workshop (if offered). Student completes petition. Counselor reviews student's academic history &amp; prior SEP by reviewing transcripts and other factors which led to dismissal (i.e. hours worked, load &amp; courses taken, assessment, etc.). Have student complete 'Authorized Repeat Petition' if course repeated &amp; GPA needs recalculation. If appropriate based on past record, have student submit Academic Renewal of Alleviation of Substandard Performance. Counselor completes petition for reinstatement with appropriate recommendations, (i.e. COUN courses, fewer units, etc). If probation the counselor clears student for enrollment, if dismissal goes to VP for decision &amp; then A&amp;R clears if VP approves for readmission.</td>
<td>These questions relate to A&amp;R evaluators and counselors. Are the forms that we use as Counselors (i.e. Request for Certification, Petition for AA/AS degree, etc.) going to be available electronically through Passport? (Forms – hard copies could be kept on file as done now &amp; in past.)</td>
</tr>
<tr>
<td>Am I ready to file petition for my associate?</td>
<td>Review the student’s transcript, checking for GE and major course completion/units/GPA. Check for degree applicable units. Make sure transcripts from other schools are on file and sub/waivers/credit by exam forms have been approved (if applicable). Review calendar to check petition deadline.</td>
<td>W-Drive</td>
</tr>
<tr>
<td>Am I ready to file the certification for IGETC?</td>
<td>Review the student's transcript to check for completion of IGETC. Check to make sure official high school transcript is on file if LOTE requirement was satisfied with high school coursework. Check ASSIST for CA Community College approved courses for out of district, request copy of out of district transcript if on file (from A&amp;R) &amp; student does not have copy - may need to require course descriptions for decision on course placement or if out of state/independent &amp; unsure forward to Dist A&amp;R for initial eval decision.</td>
<td>W-Drive</td>
</tr>
<tr>
<td>W-Drive information – e.g.: copies of A&amp;R forms, status of various eval petitions (initial, credit by exam, AP, etc), alpha list of student w/ official transcripts on file, etc</td>
<td>W-Drive is a more recent improvement.</td>
<td>W-Drive</td>
</tr>
<tr>
<td>Results of &quot;positive&quot; Eval/AP/Credit by Exam &amp; other info is available for view on W-drive although also in some cases is or could be posted on the transcript, but w/o access to W-Drive type of info can’t see the denials.</td>
<td></td>
<td></td>
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<tr>
<td>---</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If new kind of A&amp;R evaluator does input eval results of out of district transcripts in the Passport system – how will it be viewed? Is there some sort of summary of degree-applicable courses &amp; transferable courses? Still would be good to actually be able to view the transcript in order to address any questions of the student about the eval.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>W/O view of alpha list of out of district transcripts cannot advise student the official transcript is rec’d &amp; on file.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PASSPORT Quick Reference Sheet for Counseling Services

These instructions are meant to be a quick reference for the common tasks performed by Counseling Services Staff. More detailed information can be found at www.peralta.edu/passport under Faculty and Staff Training Documents.

For VPN Access, go to http://access.peralta.edu

Navigating the Student Services Center

Step 1: From the Main Menu, click the Campus Community link.
Step 2: Click the Student Services Ctr (Student) link.
Step 3: Enter the required information to search for a student record and click Search.
   Ex: ID or Last Name and First Name
Step 4: Choose the student from the search results, if applicable.
Step 5: View information available on the Student Center tab, including the student’s academic, financial and personal information.
Step 6: Click the General Info tab to view the student’s service indicators, student groups and personal information.
Step 7: Click the Admissions tab to view the student’s admissions, external education, and assessment test results information.
Step 8: Click the Transfer Credit tab to view the student’s transfer course and test credit equivalencies.
Step 9: Click the Academics tab to view the student’s load status, plan (major), course load, cumulative units and GPA information by term.
Step 10: Click the Finances tab to view the student’s fees and waivers, and overall account summary information by term.
Step 11: You have successfully navigated through a student’s record on the Student Services Center.

Removing Service Indicators

Step 1: From the Main Menu, click the Records and Enrollment link.
Step 2: Click the Student Background Information link.
Step 3: Click the Service Indicators link.
Step 4: Enter the required information to search for a student record and click Search.
   Ex: ID or Last Name, First Name
Step 5: Click Search.
   NOTE: Make sure to navigate to the service indicator that needs to be removed.
Step 6: Click to remove the service indicator.
Step 7: A dialogue box will appear confirming the removal of the service indicator. Click OK.
Step 8: The service indicator has been removed.
Step 9: Click Save.

Searching for Classes from the Student Center

Step 1: From the Main Menu, click the Campus Community link.
Step 2: Click the Student Services Ctr (Student) link.
Step 3: Enter the required information to search for a student record and click Search.
   Ex: ID or Last Name and First Name
Step 4: Choose the student from the search results, if applicable.
Step 5: Click the SEARCH FOR CLASSES button
Step 6: Complete the following fields, as required: Institution and Term
   NOTE: Institution should default to Peralta Community College Dist.
Step 7: Select the Search for Classes radio button
Step 8: Click the Go button.
Step 9: At least two of the following three fields must be completed to perform a search:
   Course Subject, Course Number, Course Career
   Note: You may also select the Show Open Classes Only or the Show Open Entry/Exit Classes
   Only check box to narrow your search.
Step 10: Click the Additional Search Criteria link to display supplementary fields to narrow your
   search.
Step 11: Complete the following fields, as required: Meeting Time, Day of the Week, Instructor Last
   Name, Class Nbr, Course Title Keyword, Course Component, Session, Mode of
   Instruction, and Campus
Step 12: Click the SEARCH button to view results.

Viewing Course Catalog Information

Step 1: From the Main Menu, click the Curriculum Management link.
Step 2: Click the Course Catalog link.
Step 3: As required, complete/review the following fields:
   Ex: Academic Institution = PCCD1
       Subject Area = ENGL, etc.
       Catalog Nbr = 1A
       Campus = 5 (Laney College)
Step 4: Click Search.
Step 5: As required, review the following fields:
   Ex: Effective Date, Status, Description, Long Course Title, Long Description.
Step 6: As required, review the following fields:
   Ex: Minimum Units, Maximum Units, Academic Progress Units, Financial Aid Progress Units,
   Enrollment Units Load Cal Type, Course Count, Grading Basis, Grade Roster Print, Repeat for
   Credit, Total Units Allowed.
Step 7: Scroll down to view additional fields on the page.
Step 8: As required, review the Additional Course Information in the following fields:
   - Instructor Edit
   - Consent
Step 9: Review the Course Attribute fields.
Step 10: Click the Offerings tab.
Step 11: As required, review the following Course Offering fields:
   Ex: Course Offering Nbr, Catalog Nbr, Academic Institution, Academic Group, Course
   Approved, Subject Area, Campus, Academic Organization, Academic Career, and Dynamic
   Class Date Rule.
Step 12: Ensure the following check boxes are selected:
   - Allow Course to be Scheduled
   - Catalog Print
   - Print Instructor in Schedule
   - Schedule Print
   - Schedule Term Roll
Step 13: As required, review the following Enrollment Requirement Group and Taxonomy fields:
   - Requirement Group
   - CIP Code
Step 14: As required, review the following Course Component fields:
   Ex: Course Component, Default Section Size, Workload Hours, Final Exam, and Exam Seat
   Spacing.
Step 15: Ensure the following check boxes are selected:
- Auto Create
- Graded Component
- Generate Class Mtg Attendance

Step 16: Scroll down the page to view additional fields.

Step 17: As required, review the following Course Attendance fields:
- Instruction Mode
- Attendance Type

Step 18: Ensure the following check boxes are selected:
- Use Present
- Use Contact Minutes
- Use Reasons
- Use To and From Time
- Use Tardy
- Use Left Early

Viewing Transcript Requests

Note: It is necessary to know the entire student ID number before starting this query.

Step 1: From the Main Menu, click the Records and Enrollment link.
Step 2: Click the Transcript Request link.
Step 3: Click the Add a New Value tab.
Step 4: On the Request Header tab, enter the required information denoted by the * next to the field name.
  Note: Institution = PCCD1
  Transcript Type = OFF or UNOFF
  Output Destination = PRINTER or PAGE

Step 5: On the Request Detail tab, enter the student's ID number.
  Note: It is necessary to know the entire student ID number before requesting a transcript.

Step 6: To send the transcript to another institution, click SEND. To view an unofficial transcript, go to Step 11.

Step 7: Enter the required information. Use the look-up key (Q) to search for the school code by school name.

Step 8: Click Edit Address and complete the address information for the to which the transcript is to be sent.
Step 9: Click OK.
Step 10: Click Return.
Step 11: Click Process Request.
Step 12: The transcript will display on the Report Results tab.

Step 13: Use the Print icon on the browser toolbar to print an unofficial transcript. Use the Print button on the Report Results page only to print Official transcripts.

Querying Transcript Data by Subject

*Note: It is necessary to know the entire student ID number before starting this query.

Step 1: From the Main Menu, click the Reporting Tools link.
Step 2: Click the Query link.
Step 3: Click the Query Viewer link.
Step 4: Type in the name of the query.
  Ex: PCC_SA_TRANSCPT_SUBJ
Step 5: Click Search
Step 6: Click the HTML link.
Step 7: Enter the Student ID Number.
Step 8: Click View Results.

**Querying Degree Applicable Units by Campus**
*Note: It is necessary to know the entire student ID number before starting this query.*

Step 1: From the Main Menu, click the Reporting Tools link.
Step 2: Click the Query link.
Step 3: Click the Query Viewer link.
Step 4: Type in the name of the query.
   Ex: PCC_SA_TRANSCPT_CAMPUS
Step 5: Click Search
Step 6: Click the HTML link.
Step 7: Enter the Student ID Number.
Step 8: Enter the Campus Code in the Acad Org field.
Step 9: Click View Results.
Step 10: Repeat steps 7-9 for each campus that the student completed coursework.

**Querying Transcript Data by GPA Type**
*Note: It is necessary to know the entire student ID number before starting this query.*

Step 1: From the Main Menu, click the Reporting Tools link.
Step 2: Click the Query link.
Step 3: Click the Query Viewer link.
Step 4: Type in the name of the query.
   Ex: PCC_SA_TRANSCPT_UNTS
Step 5: Click Search
Step 6: Click the HTML link.
Step 7: Enter the Student ID Number.
Step 8: Click View Results.

**Adding a Milestone**

Step 1: From the Main Menu, click the Record and Enrollment link.
Step 2: Click the Enroll Students link.
Step 3: Click the Student Milestones link.
Step 4: Enter the required information to search for a student record.
   Ex: ID or Last Name and First Name
Step 5: Click the Add a New Milestone tab.
Step 6: As required, complete/review the following fields:
   - ID
   - Academic Institution
   - Academic Career
   - Academic Program
Step 7: Click Add.
Step 8: Click the Look-up key to search for the milestone code by description.
Step 9: Choose the appropriate milestone code.
Step 10: Click the Milestone Attempts tab to enter attempt information.
Step 11: As required, complete/review the following fields:
Collecting MIS Matriculation Data

Step 1: From the Main Menu, click the SC Community College Data link.
Step 2: Click the MIS Data Collection link.
Step 3: Click the CalWORKS link.
Step 4: Enter the required information to search for a student record and click Search.
   Ex: ID or Last Name and First Name
Step 5: Choose one of the following actions:
   1. If the CalWORKS record for a student displays, go to Step 8.
   2. If the search displays the message “No matching records found”, go to Step 6.
Step 6: Click the Add a New Milestone tab and enter the following information.
   - EmplID (Student ID)
   - Academic Career
   - Campus
Step 7: Click Add.
Step 8: Perform one of the following actions:
   1. If there is no CalWORKS data or you need to update data for the current term, then go to Step 9.
   2. If there is existing CalWORKS data for a prior term, click the + key to add a new row, then go to Step 9.
Step 9: As required, complete/review the following fields:
   - Term
   - CalWORKS Student Information box
   - Direct Student Support Services Provided box
Step 10: Click the CalWORKS Family Data tab.
Step 11: As required, complete/review the following fields:
   - Campus
   - Transfer Center Status
   - Services
Step 12: Click Save.

Collecting MIS CalWORKS Data

Step 1: From the Main Menu, click the SC Community College Data link.
Step 2: Click the MIS Data Collection link.
Step 3: Click the Matriculation link.
Step 4: Enter the required information to search for a student record and click Search.
   Ex: ID or Last Name and First Name
Step 5: Click the Add a New Milestone tab.
Step 6: Click Search.
Step 7: Choose one of the following actions:
   3. If the current record displays data for a prior term, go to Step 8.
   4. If no data exists or you need to update data for the current term, go to Step 9.
Step 8: Click the + key to add a new row.
Step 9: As required, complete/review the following fields:
   - Academic Institution (always PCCD1)
   - Academic Career
- Term
- Educational Goals
- Special Service Needs
- Exemptions

**Step 10:** Click the CalWORKs Family Data tab.

**Step 11:** As required, complete/review the following fields:
- Total Hrs Of Campus Child Care
- Total Hrs Of Campus Child Care
- Total Nbr of Children Receiving Child Care
- Total Nbr of Dependant Children
- Student Family Status

**Step 12:** Click CalWORKs Employment Data tab.

**Step 13:** As required, complete/review the following fields:
- Type of Employment Services Provided
- Work Activity

**Step 14** Click Save.

**Collecting MIS DSPS Data**

**Step 1:** From the Main Menu, click the SC Community College Data link.

**Step 2:** Click the MIS Data Collection link.

**Step 3:** Click the DSPS link.

**Step 4:** Enter the required information to search for a student record and click Search.
   - Ex: ID or Last Name and First Name

**Step 5:** Choose one of the following actions:
   5. If the current record displays data for a prior term, go to Step 6.
   6. If no data exists or you need to update data for the current term, go to Step 7.

**Step 6:** Click the + key to add a new row.

**Step 7:** As required, complete/review the following fields:
- Academic Institution
- Term
- Academic Career
- Campus
- Primary Disability
- Number of Contacts
- Secondary Disability
- Number of Contacts
- Client of Dept. of Rehabilitation check box

**Step 8:** Click Save.

**Collecting MIS EOPS/Care Data**

**Step 1:** From the Main Menu, click the SC Community College Data link.

**Step 2:** Click the MIS Data Collection link.

**Step 3:** Click the EOPS/Care link.

**Step 4:** Enter the required information to search for a student record and click Search.
   - Ex: ID or Last Name and First Name

**Step 5:** Choose one of the following actions:
   7. If the current record displays data for a prior term, go to Step 6.
   8. If no data exists or you need to update data for the current term, go to Step 7.

**Step 6:** Click the + key to add a new row.
Step 7: As required, complete/review the following fields:
- Academic Institution
- Term
- Academic Career
- Campus
- Admit Term
- Term Category
- Eligibility Factor
- End of Term Status
- Units Planned
- EOPS CARE Withdraw Status
- Term

Step 8 Click the Care tab.
Step 9: As required, complete/review the following fields:
- Admit Term
- Term Category
- EOPS CARE Status
- Marital Status
- Academic Career
- Number of Dependents
- AFDC Duration

Step 10: Click Save.

Collecting MIS VATEA Data

Step 1: From the Main Menu, click the SC Community College Data link.
Step 2: Click the MIS Data Collection link.
Step 3: Click the VATEA link.
Step 4: Enter the required information to search for a student record and click Search.
  Ex: ID or Last Name and First Name
Step 5: If data exists fro a prior term, click the + key to add a new row.
Step 6: As required, complete/review the following fields:
- Term
- Academic Career
- Campus
- Received Funded Services
- Status
- Source
- A Single Parent check box
- A Criminal Offender check box
- A Displaced Homemaker check box
- Participate in Tech Prep Program check box
- Coop Work Experience

Step 7: Click Save.

Approving Excess Units

Step 1: From the Main Menu, click the Campus Community link.
Step 2: Click the Student Services Ctr (Student) link.
Step 3: Enter the required information to search for a student record.
  Ex: ID or Last Name and First Name
Step 4: Click **Search**.
Step 5: Click the **Academics** tab.
Step 6: Under **Term Summary**, click the term for which you want to override the unit limit (for example: 1083 – Summer 2008).
Step 7: Click the **Edit term data** button.
Step 8: Click the **Enrollment Limit** tab.
Step 9: As required, complete/review the following fields:
   - Override Units Limits check box
   - Max Total Units
Step 10: Click **OK**.

**Requesting a Transcript**

Step 1: From the Main Menu, click the **Records and Enrollment** link.
Step 2: Click the **Transcript Request**.
Step 3: Click the **Add a New Value** tab.
Step 4: On the **Request Header** tab, enter the required information denoted by the * next to the field name.
   - **Note:** Institution = PCCD1
     - Transcript Type = OFF or UNOFF
     - Output Destination = PRINTER or PAGE
Step 5: On the **Request Detail** tab, enter the student’s ID number.
   - **Note:** It is necessary to know the entire student ID number before requesting a transcript.
Step 6: To send the transcript to another institution, click **SEND**. To view an unofficial transcript, go to Step 11.
Step 7: Enter the required information. Use the look-up key (Q) to search for the school code by school name.
Step 8: Click **Edit Address** and complete the address information for the to which the transcript is to be sent.
Step 9: Click **OK**.
Step 10: Click **Return**.
Step 11: Click **Process Request**.
Step 12: The transcript will display on the **Report Results** tab.
Step 13: Use the Print icon on the browser toolbar to print an unofficial transcript. Use the Print button on the Report Results page only to print Official transcripts.
Business Teams

- **A&R and Counseling**
  - Josué Hoyos, College Lead
  - Charlotte Smith, A&R
  - Counselor (2-4)
  - Joyce Brown-Willis, SME
  - A&R Specialist (2-4)
  - International Students
  - Kim Kearney (Ciber)

- **Scheduling**
  - Jannett Jackson, College Lead
  - Sheryl Queen, Co-Lead/SME
  - College Schedulers
  - Anita Black, Faculty

- **Student Finance**
  - Mary Beth Benvenuti, College Lead
  - Dettie Del Rosario, Finance Lead
  - College Bursars
  - Rep from intnl Students

- **Faculty**
  - Anita Black, Faculty Lead
  - College BRT Leaders
  - Dean of Instruction
  - Charlotte Smith, A&R

- **Students**
  - Anthony Powell, College Lead
  - Joyce Brown-Willis, SME
  - Student Ambassador, Associated Students reps

- **Financial Aid**
  - George Herring, College Lead
  - Judy Cohen, Financial Aid SME
  - College FA Supervisors
  - Counselor

- **Procurement**
  - TBD

- **Human Resources**
  - TBD

- **Financials**
  - TBD

- **Business Intelligence**
  - TBD

- **College Lead**
  - Sponsor and facilitate regular meetings
  - Work with functional lead to develop agenda
  - Hold colleges accountable for participating

- **Functional Lead / SME**
  - Develop agenda
  - Follow up on commitments
  - Provide functional expertise
  - Interface with IT as necessary

- **IT Representation in each team**

- **OCM Representation in each team**

- Define and validate process changes
- Develop specifications
- Redefine job roles and responsibilities
- Test solutions
- Communicate and train
- Implement
- Work with department leadership to facilitate transitions
- Meets weekly or as needed

7/1/08
## Peralta BRT Structure

<table>
<thead>
<tr>
<th>Admissions &amp; Records</th>
<th>Campus Community</th>
<th>Self Service</th>
<th>Schedule &amp; Course Catalog</th>
<th>Financial Aid</th>
<th>Student Finance</th>
<th>Faculty Senate</th>
<th>Student Government</th>
<th>Classified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berkeley City College</td>
<td>Loretta Newsom</td>
<td>Paula Coil</td>
<td>Fabian Banga</td>
<td>Johnny Dong</td>
<td>Robert Vergas</td>
<td>John Pang</td>
<td>Joseph Bielanski</td>
<td>TBD</td>
</tr>
<tr>
<td>College of Alameda</td>
<td>Marcean Bryant</td>
<td>Trulie Thompson</td>
<td>Mary Shaughnessy</td>
<td>Min Wu</td>
<td>Angelita Finlayson</td>
<td>Muriel Montague</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>Laney College</td>
<td>Rene Rivas</td>
<td>Ron Moore</td>
<td>David Reed</td>
<td>Eleanor Liu</td>
<td>Judy Cohen</td>
<td>Kinh Tran</td>
<td>TBD</td>
<td>Yvonne Thompson</td>
</tr>
<tr>
<td>Merritt College</td>
<td>Suzanna De La Torres</td>
<td>Anika Toussaint-Jackson</td>
<td>Alexis Alexander &amp; Rona Young</td>
<td>Jane Fong</td>
<td>Alice Freeman</td>
<td>Jaqueline Bell</td>
<td>Tom Branca</td>
<td>TBD</td>
</tr>
<tr>
<td>Others As Needed</td>
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8/12/2009