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**HCM 9.2 Business Process Guide**

**Admissions Inquiry Pages**

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**Confidentiality Statement**

This document has been checked and screen shots do not contain any confidential information (staff names, addresses, social security numbers).

*Please add a new line, verifying that screen shots have been checked each time this document is published.*

*2/10/12 Arlene Reed*

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# Introduction

The Admissions Inquiry Pages Business Process Guide will discuss the updates delivered by CMS Baseline to the PeopleSoft System to display pertinent Admissions information in one set of pages. This guide is intended to discuss only the Inquiry pages and is not intended to replace the Business Process Guide for application maintenance in your system. For in-depth information regarding the data displayed in the Inquiry pages, please refer to the Application Maintenance, 3Cs Maintenance and Test Score business process guides.

The Admissions Inquiry Pages Business Process Guide will discuss features available for functional users. A great feature of CMS is that we have the “one stop shop” page available that provides a quick snapshot of a student’s admission file. Outside of the CSU, people must visit several pages in order to retrieve admissions information. We are fortunate to have it available to us on one screen. The CSU Admissions Inquiry Page will display the most recent row of academic data and academic summary for an individual who has applied to CSUSB as an undergraduate or graduate student.

Definitions

The following (optional) icons are used to draw attention to information in this guide:

New in 9.0 icon

New New in 9.2: this icon will appear where a significant change has occurred from 9.0 to 9.2

Note icon

Note Note: this icon will appear where a significant change has occurred from 9.0 to 9.2

1.0 Admissions Inquiry Pages

Admissions Inquiry pages include search functionality, display of admissions information, as well as appropriate links to pages with detailed information. New in 9.0 icon

Navigation to pages crosses the top of the screen.

*Navigation: Main Menu> CSU SA Baseline> CSU Admissions> Inquire> Admissions Inquiry*

Image of navigation to admissions inquiry

Navigation
Main Menu CSU SA Baseline CSU Admissions Inquire Admissions Inquiry

Begin by navigating through PeopleSoft to get to the Admissions Inquiry Page.

## Search Page

IEnter the appropriate data to use as search criteria for the applicant. ote icon

Note Use either individual or a combination of search fields, i.e., **Career**, **Program**, and **Admit Term**, may be used, along with the **ID** (which may be used if a student has multiple applications in the system), to further refine the search. Date of Birth and name searches are commonly used search fields as well.

CSU Admissions Inquiry Page Enter any Information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Field 
Search Criteria Application Nbr ID Academic Insitiuation Academic Career Academic Program Admit Term Application Center Date of Birth Campus ID Natioanl ID Last Name First Name Case sensitive Search box button Clear box button Basic Search Link Save Search Criteria LinkThe four tabs associated with Admissions Inquiry include:

* Admissions Summary
* Test Summary
* Checklist Summary
* Comment Summary

Admissions Inquiry page
Admission Summary Test Summary Checklist Summary

Image of navigation to admissions inquiry

## Admissions Summary

**Admissions Summary**: reflects General Application Information. A summary of the student’s file is available. The data displayed includes the applicant’s biographic and demographic information as well as application information.

Bio/Demo Data 
Adress Adress 1Citzenship Sex Adress 2 Visa Type
Adress 3 Phone Adress 4 Email City State Zip Country
Application Data Appl Nbr Appl Dt Action Date Prog Nbr Status Adm Status Override Prog Action Prog Rsn Comments? 
Admit Term Plan/Subplan Acad Career Acad Prog
Appl Cener Admit Type Acad Level Complete Complete Date
Instn Origin App Fee EOP Interest Adm Basis Residency Stu Standing
Recruit Cat Sport

**Bio/Demo Data**: includes Address, Phone Number, Campus Assigned Email, Country of Citizenship, Sex

**Application Data**: Includes the basic information about an applicant.

***Application Date****:*reflects the date the information was loaded into Oracle/PeopleSoft, not the date the student submitted their application on CalState Apply or a paper application to the campus.

***Action Date****:* reflects the date a major action occurred on the application such as an Admission Decision

***Program Action and Program Reason****:* reflect the Admissions Decision.

*Common values in the* ***Program Action*** *field will include APPL (applicant), COND (conditional admit), DENY (denied), DDEF (deferred decision), MATR (matriculated; eligible to register). Values in the* ***Program Reason*** *field will depend on the Program Action. The Program Reason provides more details about the Program Action. For example, if the students’ Program Action: COND, Program Reason: AUTO to reflect the decision was based on self-reported information.*

***Program Action****:* reflects the admission status of the application.

*COND= the student has been conditionally admitted and must be submit final documents in order to be fully admitted. Conditional admission will be rescinded if we discover the student is no longer eligible for admission.*

*MATR= the student has been moved into a status where they are eligible to register. Because many of the students in MATR status are still conditionally admitted, MATR status can be reversed at any time.*

*CNCL= the offer of admission has been cancelled*

*DENY= the student is not eligible for admission*

***Program Reason****:* reflects the reason for the status of the application.

***Admit Term****:* reflects the term to which the student has applied.

***Academic Career****:* Undergraduate or Post-baccalaureate

***Academic Program****:* Undergraduate, Graduate, CCRE, Transitory (non-degree seeking)

***Plan/Subplan****:* Major

Residency Stu Standing Recruit Cat Sport 
ERS Data 
College Prepatory Semesters 
Eng Math Soc Sci Elect Biol Phys Lab Sci Fgn Lang Vis/Per Arts 
GE Breadth Status Critical Thinking
English/Writting Mathematics Oral Communication 
Additional Data 
EPT Status ELM Status Residence Code CSU Cred Status
Education
Org ID Description From Date To Date Transcript Statu Transcript Type Recieved Date Summary Type GPA Type Ext GPA
Education link Return to Search button Notify button 
Admssion Summary Link Test Summary link Checklist Summary link Comment Summary link ***Complete and Complete Date****:* indicate the final admission decision has been made based on final official transcripts and admission will not be cancelled by Admissions unless requested by the student and the date the final admission decision was made. Complete value must be Y in order for financial aid to disburse and the PAWS Audit to be provided.

***Residency****:* considered for tuition fee purposes.

***Recruitment Category****:* reflects whether a student is in any particular group tracked for admissions purposes.

Residency Stu Standing Recruit Cat Sport 
ERS Data 
College Prepatory Semesters 
Eng Math Soc Sci Elect Biol Phys Lab Sci Fgn Lang Vis/Per Arts 
GE Breadth Status Critical Thinking
English/Writting Mathematics Oral Communication 
Additional Data 
EPT Status ELM Status Residence Code CSU Cred Status
Education
Org ID Description From Date To Date Transcript Statu Transcript Type Recieved Date Summary Type GPA Type Ext GPA
Education link Return to Search button Notify button 
Admssion Summary Link Test Summary link Checklist Summary link Comment Summary linkImage of ERS data and education information on page

**ERS Data**: includes the number of **College** **Preparatory Semesters** completed by first time freshman applicants, **GE Breadth Status** for transfer applicants, and **EPT/ELM** information.

**EPT/ELM** information: the information in the EPT and ELM status box is updated when students submit documentation that allows for the determination of Math and English readiness and/or the need for developmental coursework.

**Education**: reflects the institutions the applicant has attended as well as the GPA information from those institutions. The functional user may also use this display to determine which official transcripts have been received by Admissions and which are still required. The most recent effective dated row will be displayed. More detailed information may be obtained using the **Education** hyperlink and will be covered in section 1.5 of this document.

Note icon

Note Additional access to the **Education** data page is required to view contents.

## Test Summary

**Test Summary**: includes all test results in the student record. Common test results for applicants include, but are not limited to: SAT, ACT, AP, GRE, GMAT and TOEFL.

Access to the Test Summary page is not granted to all functional users with Admissions Inquiry access. View will depend on the access individual users have to the page.

Image of test summary tab

Academic Test Summary 
Test summary by ID/Component
Test ID Test Component 
Sort By 
Date Score Test Search button
Personlaize Find View All 
Test ID Description Personlize Find Zoom transaction Icon Expand Icon First Pervious arrow icon pages Next Arrow Icon Last
Test ID Decriptin Score %Title Letter Score Test Dt Stnd Admin Acad Leve Data SRCE Dt Loaded
Return to Search button  Notify button
Admission Summay link Test Summary link Checklist Summary link Comment Summary link

Users with access may go to the Test Summary tab and click the image of search button Search Icon button to display all test data for the applicant.

The **Test Summary by ID/Component** may be used to further refine or limit the search criteria. If the applicant has multiple Test IDs, such as ACT, SAT, etc., entering ACT, in the **Test ID** field, then clicking the image of search button Search Icon button button will limit the display to only ACT scores.

Populating the **Test Component** field, in addition to the **Test ID**, will provide an even more detailed search. By selecting the **Test ID**: ACT and the **Test Component**: Composite, only ACT Composite scores will display after clicking on the image of search button Search Icon  button button.

Clicking on the **Date**, **Score**, or **Test** radio buttons allows users to sort their results.

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## Checklist Summary

**Checklist Summary**: used to communicate real time document status to the student through the portal. Admissions information on the applicant/student’s Checklist is displayed to the student through the To Do and Application Status links on the applicant/student’s MyCoyote account.

Note icon

NoteAccess to the Checklist Summary page is not granted to all functional users with Admissions Inquiry access. View will depend on the access individual users have to the page.

Image of checklist summary tab Selection Criteria 
Function Search Seach Box Magnifying glass Icon Variable Data
Checklist Type Checklist Responsible ID Status 
Search Selection Bon Search box magnifying glass icon Search box magnifying glass icon Search Selection Box Search button
Search Results 
Status Tab Institution and Function tab Expand across button
Checlist Item Description Due Date Item Status
Edit View
Return to Search Button Notify Button
Admission Summary link Test Summary Link Checklist Summary link Comment Summay link

The **Checklist Summary** page allows users to click the mage of search button Search button button to view all checklist items for the applicant. Selection criteria fields may be used to refine the search results.

Leave the **Responsible ID** box blank to get a full display of Checklist Items. Entering an ID in the **Responsible ID** box will limit the display to only those Checklist Items assigned by the individual with that ID.

This page displays the status of items the applicant needs to complete their application. In this example, the applicant was required to submit the $55 application fee and their final college transcript. Both items have been supplied by the applicant and the checklist item has been completed. When the applicant/student views the To Do list in the portal, they will see they have no To Do items for Admissions and the Application Status will reflect Completed.

## Comment Summary

**Comment Summary**: displays the comments made on a student record through the Campus Community navigation to comments. In an effort to maintain confidentiality during the application process, Admissions does not make any comments about applicants through the Campus Community navigation.

Note icon

NoteAccess to the **Comment Summary** page is not granted to all functional users with Admissions Inquiry access. View will depend on the access individual users have to the page.

Image of comment summary tab

Selection Criteria
Function 
Search Box Magnifying Glass icon Variable Data link 
Category Comment ID Expand Across button
Search Box Magnifying Glass icon Search Box Magnifying Glass icon
Search result  Fetch Button
Comment Cateogry Tab Comment ID Tab
Category Description Function Date Time Sequence
Edit View
Return to Search Button Notify Button
Admission Summary link Test Summary Link Checklist Summary link Comment Summay link

On the Comment Summary page, click the mage of search button Search Icon  button to retrieve all comment data for the student.

Note icon

NoteThe **Comment Summary** page allows users to view staff-entered comments related to a student’s record. The **Comment Summary** page does not display entries made on the Admissions Comments page.

When the **Edit** or **View** hyperlink for a comment is clicked, the **Person Comment Detail** page will open in a new window. This page provides details about the comment.

## Education Data

The **Education** data hyperlink will lead the functional user to extensive information regarding the institution(s) the student has attended. Additional access to the **Education** data page is required to view contents.

Image of Education hyperlink

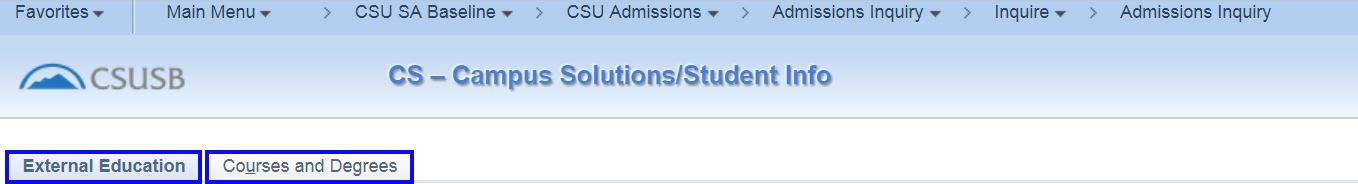
Education
Org ID Description From Date To Date Transcript Status Transcript Type
Recieved Date Summary Type GPA Type Ext GPA
Education hyperlink
Return to Search Button Notify Button
Admission Summary link Test Summary Link Checklist Summary link Comment Summay link

New in 9.0 icon

The two tabs associated with the Education data link include:

* External Education
* Courses and Degrees

Image of external education tab



## External Education

External Education: displays all of the information about the schools an applicant/student has attended.

Image of External Education tab with row information

External Education Tabe Courses and Degrees tab
School Information Find View All First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
External Org ID Check box Checlist Item Update
School Details
Career Data Find View All First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Data Number  Career
Term Type External Term 
Term Year Academic Level
From Date To Date Comments
Transcript Status
Action Transcript Date Date Recieved Transcript Type Transcropt Status
Data Source Data Medium 
Transcript Summary Personalize Find View All First previous arrow icon 1 of 1 Next Arrow Icon Last
Term tab GPA tab Units/Credits tab Rank tab Expand Across button
Summary type External Term External Year Academic Level Institution
External Subjects Expand Across button Personalize Find View All First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
GPA tab Subject Totals tab Units/Credits tab
External Subject Area Short Desc Course level Institution GPA Type External GPA Converted GPA
Transfer to Prospect Data Go Button
Return to Search Button Notify Button
OK button Cancel button Apply button
External Education link Courses and Degrees link

Note icon

NoteTake notice if there are multiple **External Orgs** (schools) or multiple entries for any particular data row. If it says 1 of 1, that means the functional user is looking at the only external organization information reported for the student. However, if it indicates the student attended more than one External Org, you must click on the arrow to get the additional information for each school OR you can click on “View All” to see all schools on one continuous page.

Image of external education tab carrer data External Education tab Courses and Degrees tab
School Information Find View all First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
External Org ID Checked Check Box button Checklist Item Update
School Career Data Find View All  First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Datae Number Career
Term Type External Term  Check Box Dissmissed from School
Term Year Academic Level 
From date To date Comments link



**School Information**: displays the External Org ID. The name of the school is listed beside the External Org ID. The **Career Data** box displays how many rows of data are available for that particular school, type of term at the school, and the dates the student attended.

Image of external education school details

School Information Find View all First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
External Org ID Checked Check Box Checklist Item Update
School Details 
Location Country Address
School Characteristics 
School Type Checked Check Box Accredited 
School District Check Box Transcript Translation Req
School Code
ATP Code FICE Code NCES
ACT Code IPEDS Code

Clicking on **School Details** displays the address and system codes for each institution the applicant/student has attended. Admissions Inquiry access does not allow access to School Details to most functional users. Additional security access is required.

Image of transcript status

Career Data Find View all First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Data Number  Career 
Term Type External Term Check Box Dismissed from School
Term Year Academic Level
From Date To Date
Trascript Status
Action Transcript Date Date Recieved Transcript Type Transcript Status 
Data Course Data Medim

**Transcript Status**: displays what was External Data in PeopleSoft v8.9. The **Action** field displays whether a transcript is Desired, Not Desired, or Received. The **Transcript Date** displays the date of the **Action**.

Image of transcript status

Transcript Status 
*Action Transcript Date Date Recieved Transcript Type Transcript Status Data Source Data Medium

The data row for the school is usually completed when the Official transcript has been updated to the Action of Received.

In PeopleSoft, the information displayed on the External Academic Summary tab is displayed in PeopleSoft under **Transcript Summary**.

**Transcript Summary**: may be expanded out across the page by clicking on the image of column expander icon Expand across button button or viewed as it is in the screen shot. Here, it appears the Transcript Summary row displays the type of school the External Org is, GPA/Unit information, and student Rank as separate tabs when they are, in fact all one row. Image of transcript summary

Transcript Summay Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Term tab GPA tab Units/Credits tab Ranks Tab Expand Across buton
Summary Type External Term External Year Academic Level Institution
 Transcript Summary  Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Term tab GPA tab Units/Credit tab Rank tab Expand Across button
Summary Type GPA Type Short Desc External GPA Converted GPA

The Admissions Office does not update Rank information of applicants as the student’s rank at any institution is not part of the application process. Likewise, the External Subjects row is not updated by Admissions.

Transcript Summay Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Term tab GPA tab Units/Credits tab Ranks Tab Expand Across buton
Summary Type External Term External Year Academic Level Institution
External Subjects Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
GPA Tab Subject Total Tab Units/Credits tab Expand across button
External Subject Area Short Desc Course level Instiution GPA Type External GPA Converted GPACourses and Degrees

Tracking degree information is an important part of the applicant/student record. Depending on the type of degree earned, there may be a delicate balance where a student can only be held to a specific pattern of courses to meet graduation requirements.

mage of courses and degrees tab External tab Courses and Degrees tab
External Organization Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
External Org ID 
External Course Defaults 
Data Number External Career
Data Source Term Type
Acad level Begin Date
Institution End Date
Course Type Course level 
Unit Typt Unit Taken
Grading scheme Grading Basis
External Courses Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Course tab Grade tab Timefram tab Details 1 tab Details 2 tab Details 3 tab Transfer/Credit comments Expand across button 
Course Seq School Subject Description Course number Course Name
External Degrees Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Degree 1 Degree 2 Field of Study Transcript Expand Across button
Degree Description Degree Date

**Courses and Degrees**: displays information about specific courses taken at the particular External Org. At this time, Admissions does not record specific course information within PeopleSoft.

Image of degree tab in the external degrees section

External Degrees Personalize Find First Previous Arrow Icon 1 of 1 Next Arrow Icon Last
Degree 1 tab Degree 2 tab Field of Study Transcript tab Expand Across tab
Degree Description Degree Date

**External Degrees**: reflects any degree an applicant/student has earned from a previous institution. The type of degree, the date it was awarded, and the field of study the degree was awarded for will be indicated as well.  
Service Indicators

Student records are often managed with **Service Indicators**. Service Indicators may be merely notes on a student’s record or they may have an impact on the services a student may receive from the campus. Whether positive or negative,

A **Star** red star symbol Star symbol symbol: there is a **Positive Service Indicator** on the student record. Click on the icon to find out what the positive service indicator means. Details about the Service Indicator and the terms affected will be displayed.

The student has no access to view Positive Service Indicators through their MyCoyote account and often has no idea the indicator exists on their record.

Manage Service Indicator 
Display Effect Scroll Box Postive Institution CSU San Bernardino Refresh Refresh button
Add button Add Service Indicator
Service Indicator Summary Personalize Find First Previous Arrow Icon 1-2 of 2 Next Arrow Icon Last
Code Code Description Reason Description Institution Start Term End Term End Term Description Start Date End Date
Add Button Add Service Indicator

A **No** crossed out circle icon Red Circle with diagonal line through it symbol: there is a **Negative Service Indicator** on the student record. Click on the icon to find out what the negative service indicator means. As with the Positive Service Indicator, details about the Service Indicator and the terms affected will be displayed.

The student will be able to view their negative service indicators as **Holds** in their MyCoyote account by clicking on the Details in **Holds** in Student Center and then clicking on the link in the **Hold Item** box.

Image of service indicator summary

Manage Service Indicator 
Display Effect Scroll Box Negative Institution CSU San Bernardino Refresh Refresh button
Add button Add Service Indicator
Service Indicator Summary Personalize Find First Previous Arrow Icon 1-2 of 2 Next Arrow Icon Last
Code Code Description Reason Description Institution Start Term End Term End Term Description Start Date End Date
Add Button Add Service Indicator