LOSING THE LAST BITS OF PAPER:

SHIFTING FORMS AND PROCESSES ONLINE

2021 NYSTAA Conference

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What helped me get through the pandemic was...

ZACHARY WILSON



- SUNY Cortland, Advisement and Transition
- Transfer Mobility Advisor
- zachary.wilson02@cortland.edu

What helped me get through the pandemic was...

MISTY FIELDS



- SUNY Delhi
- Associate Director of Admissions
- fieldsmr@delhi.edu

What helped me get through the pandemic was...

WHO ARE YOU?

Join the conversation! Poll Everywhere

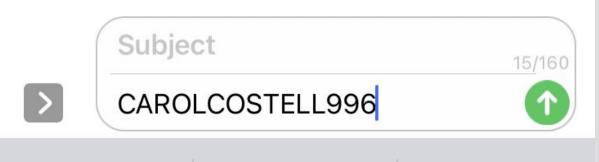
From your computer/tablet: PollEv.com/carolcostell996

From your phone: Text to phone number "22333" Text message "CAROLCOSTELL996"

New Message

Cancel

To: 22333



Which type of college are you from?

Public 4-year campus

Private 4-year campus

2-year campus

Start the presentation to see live content. For screen share software, share the entire screen. Get help at pollev.com/app

Which area best describes your work?

Admissions/Recruitment/Enroll ment

Transfer Credit Evaluation

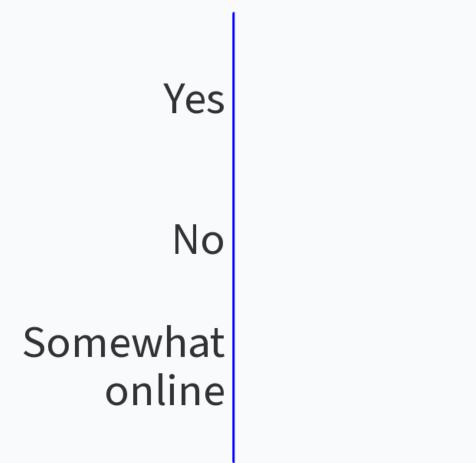
Advising

Transfer Support/Transition P rogramming/Orientation

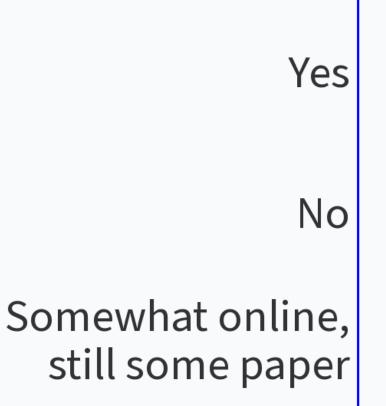
Registrar's Office/Student Records

Other

Does your college have a completely online admissions application review process?



Does your college have a completely online transfer credit evaluation process?



What processes on your campus are still paper-processes?

What helped YOU survive the last year of pandemic?



Permission to Transfer Credit Process

OVERVIEW OF PREVIOUS PROCESS

- Academic review and transfer credit approval process for all current students prior to registering for courses at another college
 - Local process required prior to (and in addition to) SUNY Cross-Registration
- Paper process required academic advisor approval; final approval by Advisement and Transition staff
- Approved paper forms scanned into OnBase; student picked up copy in office
- Student requests transcript; transcript scanned/uploaded to OnBase
- OnBase workflow to match up form/transcript; support staff posts credit to Banner
- 817 requests in 2020
- 926 requests in 2019

SHIFT OF PROCESS TO FORMSTACK

Submission 294 submission			ts				
+ Scheduled Ex	kports					Create Scheduled Export	
All Submissions 🔻	All Submissions - Create Custom filter Import data Sharing						
Filtered by: A	Filtered by: All Submissions						
0 of 294 Selected:	0 of 294 Selected: 🗎 Mark As 🛛 🗄 Export 🕺 📅 Delete						
Date	Submitted	Name	Email		C#	Phone Number	
□ ☆ 2021	-05-11 12:20:21						
2021	-05-11 10:44:24						
2021	-05-10 21:01:06						

FORMSTACK FORM

Example: Bl	OL
Course to	o be taken at other institution: Course Number*
Example: 20)3
Course to	o be taken at other institution: Course Title [*]
Example: Ar	natomy and Physiology I
Credits*	
Equivale	nt Course at Cortland: Course Prefix*
Example: Bl	0
Equivale	nt Course at Cortland: Course Number*
Example: 30	91
	-
Faultypla	nt Course at Cortland: Course Title*

FORMSTACK FORM

Please review the following transfer credit policies:

- 1. Cortland may deny transfer credit that has not been pre-approved
- 2. Only courses with a grade of C- or better will transfer
- 3. Transfer courses do not factor into my Cortland GPA
- 4. The Writing Intensive requirement cannot be fulfilled by coursework transferred to Cortland
- 5. I cannot take a course at another institution while enrolled in student teaching practicum or fieldwork
- 6. I will not receive transfer credit for a course I have already received credit for at Cortland
- 7. Departments may require that specific courses must be completed at Cortland

Please check each box to indicate your understanding of the statement:*

I must earn a grade of C- or better in the course(s) to transfer the credit.

□ 30-45 credits hours of course work (depending on your catalog term) MUST be completed in residence at Cortland, including a tleast half of my major, minor and/or concentration coursework

Approval is granted ONLY for the semester noted above

Courses not listed on charts may require additional department approval and could require extended time for review

A maximum of 64 credits from a two-year institution, and a maximum combination from two and four-year institutions of 75-90 credits (depending on your program and catalog term) may be applied to a Cortland degree.

□ I must request an official graded transcript be sent to Cortland's Student Registration and Record Services office within one semester of completing the course(s).

Check, if applicable

□ I have reached the maximum number of transfer credits and I am willing to have previously transferred credit removed in order to allow the transfer of the above course(s).

EXAMPLES OF SUBMISSIONS

Course to be taken at other institution: Course Prefex:	ENGL
Course to be taken at other institution: Course Number:	1020
Course to be taken at other institution: Course Title:	Writing Composition 2
Credits:	3

Equivalent Course at Cortland: Course Prefix:	CPN
Equivalent Course at Cortland: Course Number:	101
Equivalent Course at Cortland: Course Title:	Writing Studies 2
Credits:	3

EXAMPLES OF SUBMISSIONS

Course to be taken at other institution: Course Prefex:	EMS	Equivalent Course at Cortland: Course Prefix:	MAT
Course to be taken at other institution: Course Number:	110	Equivalent Course at Cortland: Course Number:	101
Course to be taken at other institution: Course Title:	Emergency Medical Technician	Equivalent Course at Cortland: Course Title:	Elementary School Math
Credits:	6	Credits:	3

DEGREE WORKS NOTES

Choose a predefined note from the list below

Received permission to transfer credit for BIO 302 for the Summer 2021 session (Cayuga Community College).

Save Note Clear

BENEFITS OF ONLINE PROCESS

- Ease of student access, convenient
- Efficiency, quicker turn-around time on review/approval
- All students and advisors notified via email on approval status
- Ability to analyze data
 - Export Formstack data to Excel; ability to filter/sort/share with other offices
- Advising note added to Degree Works; helpful to faculty advisors/associate deans for degree planning

CONSIDERATIONS

- Due to many demands on campus technology during COVID, we lacked technical support to develop a routing approval process
 - Academic advisors removed from approval process; outreach only with questions/concerns

- Loss of administrative support staff assistance in process
 - Questions/issues on form cannot be easily resolved at time of submission

• Online access for students with disabilities



- Permission to Transfer Credit information on web
- Permission to Transfer Credit paper form
- Permission to Transfer Credit online form
- Formstack



College Articulation Agreements

OVERVIEW OF PREVIOUS PROCESSES

College Articulation Agreement

- Agreement was developed in paper form
- Two copies sent to SUNY Delhi's Dean/Provost/President via inner office mail
 - Up to a week turnaround
- Agreement was then sent via "mail" to external partners for signatures
 - 2-6 week turnaround

SHIFT OF COLLEGE ARTICULATION AGREEMENT TO DOCUSIGN

DocuSign Electronic Signatures

- Third-party software
- Requires Annual Subscription
 - Individual, Group, Institutional Rates
 - Number of Envelopes based on subscription
- Allows you to manage agreements in one place
- Allows you to email updates or make changes directly from online portal
- Allows you to email reminders to participants

PocuSigned by: Hall Side FAA7A78F168D44A	O Action Required	4 Waiting for Others	D Expiring Soon	8 Completed
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Recent Activity				Go to Manage >
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Please Sign 202122 - Eastern Suffolk BOCES -	Resid 2/4	Please DocuSign: 2021	Ellis Medicine RN to BSN.do	xcx 2/4
RESEND	tivity: 4/20/2021 08:40:05 am	RESEND	Last activity	r: 3/3/2021 03:09:10 pm
Please DocuSign: TC3_SUNY Delhi Partners in	Excell 3/5			
	tivity: 2/27/2021 09:38:17 am			

BENEFITS OF ONLINE PROCESS

College Articulation Agreement

- Agreements and be developed and executed within 24-48 hours rather than days/weeks
- Timestamp and tracking of signatures
- Eliminates room for agreements being lost in the mail
- More efficient turnaround

CONSIDERATIONS

College Articulation Agreement

- IT technical support and implementation
- Subscription cost
- Budget allocation



Readmissions Application

OVERVIEW OF PREVIOUS PROCESSES

Readmissions Application

- Students submitted application via Formstack or pdf.
 paper application
- Application was manually uploaded or scanned in and put on
- Report from Student Financial Services was run to cross-check application fee was paid

SHIFT OF READMISSIONS PROCESS TO QUICKPAY FORM

	Delhi		Why did you leave SUNY Delhi*:	Please Select 🗸 🗸	
	STATE UNIVERSITY & N.W YORK				
Refer to Academic Code 1.385 for Readmission following Academic Dismissal;					
Refer to Academic Code 1.386 for Readmission following a Break in Attendance (Non-		🐣 Commerce Manager Payer 🕞	If you were Academically Dismissed,	Please Select V	
Dalla: Academic Dismissal)				Flease beledit	
Delhi Academic Dismissal)	Payment Information		did you successfully complete the		
PETITION FOR READMISSION			required 6 credit hours*:		
(Revised 11/19/13)	Please enter data and then click the "Continue" button.		required o credit riburs .		
	Required fields are marked with an *				
NAME:	Payment Amount		If yes to the above, please enter		
(last) (first) (middle) (former)					
ADDRESS:			name of Institution(s) you completed		
ADDRESS: (street) (city)	Application Type: Petition for Readmission		6 credits:		
	First Name*:				
PHONE NUMBER: (STUDENT ID # OR SS#:	Protocological Control of Control				
(state) (zip)	Middle Name:		Descention for Lanvier to		
EMAIL ADDRESS:			Reason for Leaving*:		
	Last Name*:				
APPLYING FOR: PROGRAM SEMESTER					
(SPRING or FALL and YEAR)	Former Name (if applicable):				
SEMESTER YOU FIRST ATTENDED DELHI: PROGRAM					
SEMESTER YOU LAST ATTENDED DELHI: PROGRAM	Delhi Student ID or SSN#:				
SEMESTER YOU LAST ATTENDED DELHI: PROGRAM	Deni Stateni Dio Steve.				
PREVIOUS ACADEMIC ADVISOR AT DELHI:	Street Address*:				
			Design of the second second		
HAVE YOU BEEN CONVICTED OF A FELONY?			Reason for Returning*:		
HAVE YOU BEEN DISMISSED AND/OR SUSPENDING FROM A COLLEGE FOR DISCIPLINARY REASONS?					
DID YOU: GRADUATE? WITHDRAW? TAKE A LEAVE OF ABSENCE? ACADEMICALLY_DISMISSED?	City*:				
IF YOU WERE ACADEMICALLY DISMISSED, PLEASE ANSWER THE FOLLOWING QUESTIONS.					
HAVE YOU SUCCESSFULLY COMPLETED THE REQUIRED 6 CREDIT HOURS?	State*:				
NAME OF INSTITUTION WHERE YOU COMPLETED YOUR 6 CREDITS:	Zip Code*:				
REASON FOR LEAVING:	Phone Number*:		Payment Amount*:	40.00	
	Email Address*:				
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	apprying to, (rein an 2021)*:	A			
A \$40 non-refundable fee is required prior to processing this Petition for Readmission form.	Enter the semester/year you FIRST				
Please make check or money order payable to: SUNY Delhi.	attended Delhi and your Major:				
PLEASE FORWARD OFFICIAL COLLEGE TRANSCRIPTS					
FOR ALL CREDIT-BEARING COURSES TAKEN SINCE YOU LAST ATTENDED DELHL	Enter the semesterlyear you LAST				
	attended Delhi and your Major*:			Continue Cancel	
RETURN COMPLETED PETITION TO: Admissions Office	Barden Anders Martin			Continue	
SUNY Delhi	Previous Academic Advisor at Delhi ^a				
454 Delhi Drive			Card transactions for State University of N	ew York - Delhi are processed by Nelnet Campus Cor	AZU anneme
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ADHD Admission Form/jettion for readmission	suspended from a college for				

BENEFITS OF ONLINE PROCESS

Readmissions Application

- Payment is made at the time of application
- Student information is integrated in to Banner
- Turnaround time is up to 24 hours
- Less outreach or follow-up
- More efficient
- No cost

CONSIDERATIONS

Readmissions Application

- IT technical support and implementation
- Processing



- <u>Readmissions</u>
- DocuSign

Questions for presenters?

Start the presentation to see live content. For screen share software, share the entire screen. Get help at **pollev.com/app**

What forms or processes have you converted to online? A Round table Discussion

THANK YOU!