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…

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What helped me get through the pandemic was…

MISTY FIELDS

- SUNY Delhi

- Associate Director of Admissions

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What helped me get through the pandemic was…

WHO ARE YOU?

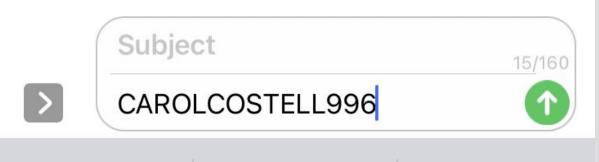Join the conversation!
Poll Everywhere

From your computer/tablet:

PollEv.com/carolcostell996

From your phone:

Text to phone number "22333"

Text message "CAROLCOSTELL996"

New Message Cancel

To: 22333

Subject   15/160

CAROLCOSTELL996

Which type of college are you from?

Public 4-year campus

Private 4-year campus

2-year campus

Which area best describes your work?

Admissions/Recruitment/Enroll
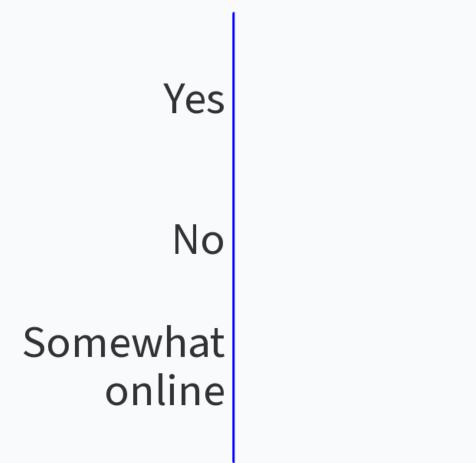ment

Transfer Credit Evaluation

Advising

Transfer Support/Transition P
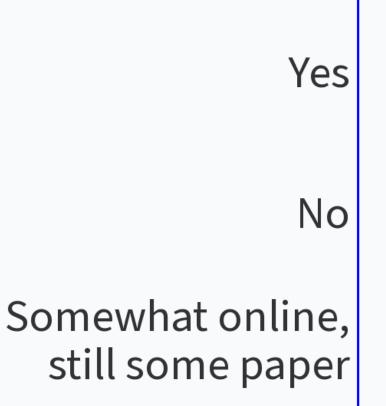rogramming/Orientation

Registrar's Office/Student Records

Other

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

Yes

No

Somewhat online

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

Yes

No

Somewhat online, still some paper

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

FORMSTACK FORM

Course to be taken at other institution: Course Prefex＊

Example: BIOL

Course to be taken at other institution: Course Number＊

Example: 203

Course to be taken at other institution: Course Title＊

Example: Anatomy and Physiology I

Credits＊

Equivalent Course at Cortland: Course Prefix＊

Example: BIO

Equivalent Course at Cortland: Course Number＊

Example: 301

Equivalent Course at Cortland: Course Title＊

Example: Human Anatomy & Physiology I

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
Course to be taken at other institution: Course Number:	110
Course to be taken at other institution: Course Title:	Emergency Medical Technician
Credits:	6

Equivalent Course at Cortland: Course Prefix:	MAT
Equivalent Course at Cortland: Course Number:	101
Equivalent Course at Cortland: Course Title:	Elementary School Math
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

RESOURCES

- [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

Adobe Sign – is another alternative

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

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

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

RESOURCES

- [Readmissions](#)

- [DocuSign](#)

Questions for presenters?

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

THANK YOU!