

Email sent to Advisor Link

>>> "Mary Schey" <mschey@admissions.wisc.edu> 10/30/02 10:34:07 AM >>>

This time of year as the Registrar's Office prepares to run the course enrollment eligibility list, the Office of Admissions is scrambling to complete transfer credits evals for:

- new freshmen with college level work
- new fall transfers with messy credit evals that require departmental review
- returning study abroad students
- spring UW System transfer admits
- currently enrolled students who studied off campus in the summer

As you may know the Registrar's Office will run the course enrollment eligibility list this Friday. So, we're working feverishly to complete transfer credit evals for those students for whom the additional credits will make a difference in their enrollment appointment time or other special scenarios. Our priorities are:

1) freshman credit evals (we're attempting to complete by Friday)

--despite the very high volume of these evals, they're mostly done. We continue to work on those whose transcripts are trickling in.

2) special deadlines / financial aid / December grads (we're attempting to complete by Friday)

- students who have a deadline for a scholarship application or a special academic program and need the additional credits for their application
- students for whom a financial aid award will increase because their additional transfer credits will move them into a new class level (e.g. from sophomore to junior standing)
- course revisions needed for December grads

NOTE: Please don't inform students of this priority outright (we don't want any invented special needs); however, you can ask questions to determine if a student has a special need such as those listed above. If so, please send them to our office.

3) 10+ additional credits (we're attempting to complete by Friday)

- our understanding is more than 10 additional credits WILL make a significant difference in a student's enrollment appointment time
- if we run out of time and are not able to provide precise course equivalencies, we will at least post general elective credits so that the student will be able to enroll at the appropriate time

4) spring UW System transfer admits

--we're completing credit evals for these students as soon as they confirm their enrollment for spring. If this does not happen by Friday, they will be picked up on the daily list that the REgistrar's Office runs and slotted into the end of their class level.

5) 10 or fewer additional credits (we'll complete as we can throughout the rest of this semester)

--our understanding is that 10 or fewer credits will not make a significant difference in a student's enrollment appointment time

6) course revisions (we'll complete as we can throughout the rest of this semester)

--a change in a course from electives to an exact equivalent will not affect a student's registration time

This is a high pressure time for us as the volume of these credit evals continues to rise each year. The counselors are working very hard to complete evals by Friday. Here are some ways in which you can help us help our students:

1) Let students know that they'll receive a copy of their new credit eval in the mail when we've completed it. They need not continually check their record as this may only serve to increase their level of anxiety.

2) Calm student anxieties re: their enrollment appointment time by letting them know that if they have more than 10 credits, we're planning on getting those 10 credits on their record in time for registration. Conversely, let them know that if they have fewer than 10 credits, the difference in registration time will be only a matter of minutes.

3) Ask questions to determine if the student has a special need (scholarship/academic program deadline, increased financial aid award, December grad). If so, please direct the student to our office to let us know this.

4) For students who took courses off campus in the summer, please use their Course Equivalency Form from us for your advising. Please do not send the student to our office at this time, as this tends to impede our ability to complete the credit evals.

Thanks for your help and understanding. Let me know if you have any questions.

Mary

Mary E. Schey
Assistant Director
Office of Admissions
University of Wisconsin-Madison
Armory & Gymnasium * 716 Langdon St. * Madison WI 53706-1481
608/262-2365 * FAX: 608/262-7706 * mschey@admissions.wisc.edu



MEMORANDUM

February 18, 2003

To: Rob Seltzer, Director of Admissions
Mary Schey, Assistant Director of Admissions

From: Jocelyn Milner

Subject: Trends in Transfer Activity

Thanks for the invitation to join the AAC subcommittee on transfer credit evaluation (charged with examining the undergraduate transfer credit evaluation process and making recommendations for improvement). You asked me if I would provide some information about patterns or trends in transfer activity and transfer credit evaluations in preparation for the committee meetings and so I am responding to that request. The attached analyses attempt to answer three specific questions: how many applications for transfer are received, how many transfer credit evaluation transactions are recorded for enrolled students, and how many degree recipients carry transfer credits or other credits not earned at UW-Madison.

Key points:

- Applications for transfer and for new freshmen admissions are up 27% over 4 years ago.
- The numbers of transfer equivalency transactions for new transfer students exceeded 28,000 in 2001-02.
- The numbers of transfer equivalency transactions for new freshman was nearly 6 times higher in 2001-02 compared with 10 years earlier.
- Among 2001-02 undergraduate degree recipients, more than 4 out of 5 graduated with at least some credits other than those taken for credit at UW-Madison and about 1 of 5 degree recipients started as a transfer student.

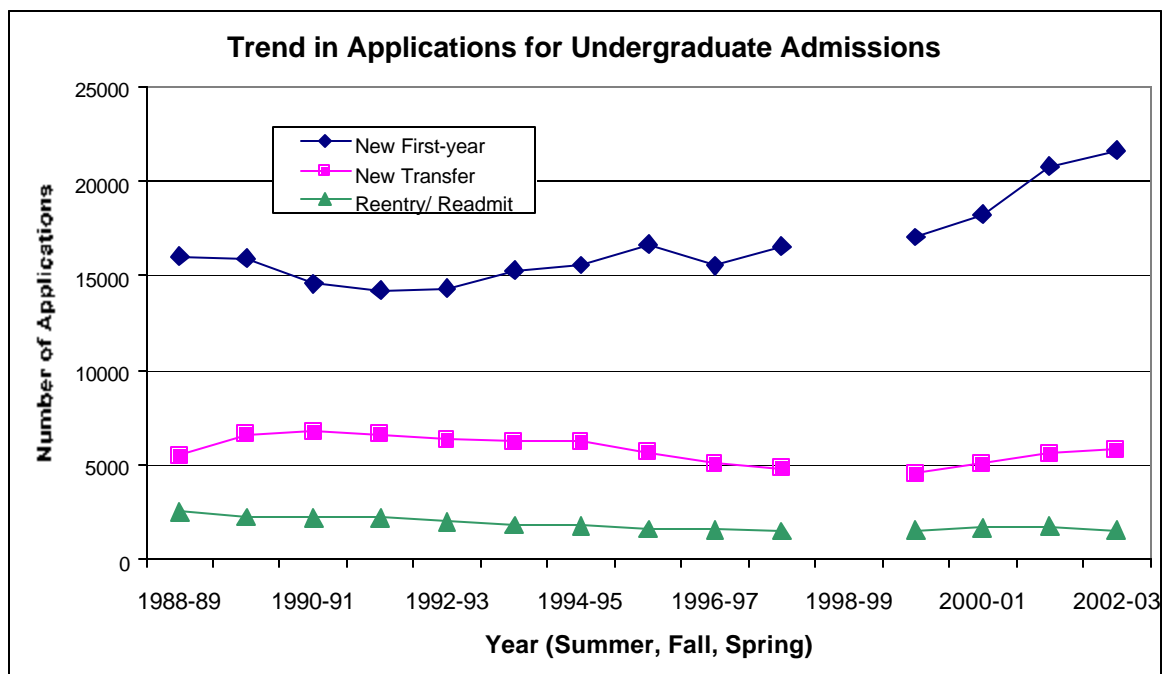
These analyses are consistent with others reports that document increasing numbers of applications for admission and the increasing numbers of UW-Madison students who carry credits from other sources.

I agree with you and our colleagues that timely transfer credit evaluations are an important service to new and continuing students. I'm looking forward to the AAC subcommittee's review of the transfer credit evaluation process.

Copies: Peter Spear, Provost
Paul Barrows, Vice Chancellor
Darrell Bazell, Vice Chancellor
Martha Casey, Assistant Vice Chancellor

UW-Madison Trends in Applications for Undergraduate Admissions

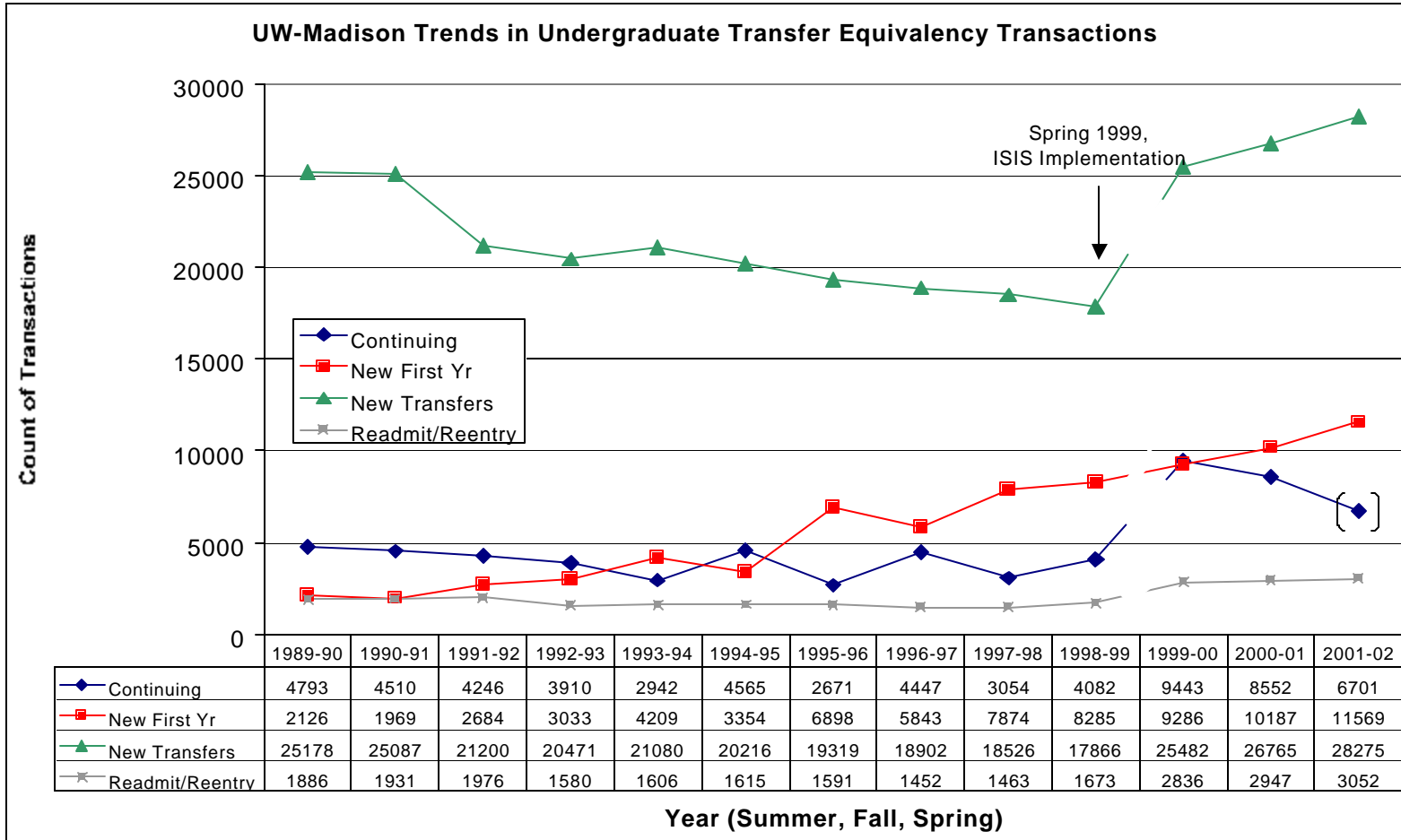
Number of Applications by Admit Type					
Year	New First-year	New Transfer	Reentry/Readmit	Total	% Transfer + Reentry + Readmit
1988-89	16037	5524	2555	24116	34
1989-90	15945	6636	2264	24845	36
1990-91	14614	6774	2242	23630	38
1991-92	14245	6624	2234	23103	38
1992-93	14345	6333	2044	22722	37
1993-94	15278	6251	1845	23374	35
1994-95	15584	6244	1816	23644	34
1995-96	16655	5688	1636	23979	31
1996-97	15544	5102	1612	22258	30
1997-98	16578	4847	1527	22952	28
1998-99					
1999-00	17051	4558	1534	23143	26
2000-01	18258	5063	1685	25006	27
2001-02	20784	5639	1755	28178	26
2002-03	21632	5810	1571	29013	25



Source: Stdnt_Undergraduate_Applicant Dataview for 2000 to present
Legacy Admissions Dataviews for pre-1998 data.

Year - Combines counts from Fall and Spring terms and the preceding Summer term.
Numbers of applications count all applications recorded for the given admit status.

Note: 1999 data was not calculated because the records are split between ISIS and Legacy sources.



Source - Retention_Transfer_Credit_History dataview.

Year - Transactions for Fall, Spring, and preceding Summer terms are combined. Equivalencies are reported by the articulation term, and not the term the transaction was recorded.

Transfer transaction counts include each incidence of transfer course equivalencies, test equivalencies and other equivalencies for each student.

2001-02 transaction counts for Continuing students are still being evaluated

JLM UW-Madison Academic Planning and Analysis 2/12/2003

UW-Madison Undergraduate Degree Recipients with Advanced Standing Credits.

Undergraduate Degree Recipients					
Degree Year	Number of Degrees	# with Advanced Standing Credits	% With Advanced Standing Credits	% of degree recipients who started as Transfer Students	% of degree recipients who were Readmitted / Reentered
1988-89	6222	4051	65	23	19
1989-90	5992	3853	64	25	21
1990-91	5858	3833	65	26	21
1991-92	6352	4230	67	26	19
1992-93	6275	4430	71	29	19
1993-94	5789	4058	70	30	19
1994-95	5586	3866	69	28	19
1995-96	5424	3885	72	28	18
1996-97	5453	4064	75	29	19
1997-98	5469	4206	77	27	18
1998-99	5603	4390	78	26	16
1999-00	5565	4489	81	24	16
2000-01	5954	4864	82	22	16
2001-02	5815	4750	82	20	16

Source: Retention_Awards_Main dataview, Retention_Semester_History dataview.

DegreeYear - Summer, Fall, and Spring terms combined.

Advanced Standing Credits - Includes all credits not earned by course taking at UW-Madison (transfer credits, test credits, and other credits).

% Transfer Students - percent of degree recipients that entered as transfer students (have a term with admit type = TRF).

% Readmitted/Reentry - percent of degree recipients that have at least one term in which they were readmitted or reentered (term with admit type = RAD or RET).

1. Primary functions

- a. Application review
 - 5,800 transfer / year
 - 2,900 international / year
 - 1,600 reentry & study abroad / year
- b. Transfer credit evaluation
 - transfer
 - reentry
 - freshman
 - continuing
 - international
 - study abroad

2. Staffing

- a. Permanent / full-time counselors
 - 3 FTE transfer app review, credit evaluation (transfer, reentry, freshman, continuing)
 - 2 FTE international app review, credit evaluation
 - 1 FTE study abroad app review, credit evaluation
 - 1 FTE transfer on-call
- b. Limited term/part-time counselor support
 - .5 FTE reentry app review
 - 3.5 FTE total for students/PAs

3. Transfer Activity (Jocelyn's report)

- a. FYR / TRF applications
 - 27% increase in last 4 years
- b. Transfer equivalency transactions (2001-02)
 - nearly 6x higher than 10 years ago
 - 28,000+ for new transfers
 - 21,000+ for freshmen, reentry, continuing
- c. % of degree recipients with transfer credit (2001-02)
 - steady increase over past 10 years
 - more than 4 out of 5 grads
 - 1 in 5 grads started as a transfer student

4. Summer session requests

- a. Requests
 - nearly 3x higher than 5 years ago
 - 1995: 250 requests / 2002: 700+ requests
- b. Equivalencies (4 per request)
 - nearly 3x higher than 5 years ago
 - 1995: 1,000 equivs / 2002: 2,900+ equivs
 - in addition to stats in Jocelyn's report
- c. Staffing
 - 4 months full time just for pre-evaluation
 - additional work required throughout the year to create the credit evaluations

5. Additional transfer activities and programs

- a. TIS (UWS Transfer Information System)
- b. Recruitment
- c. UW-Colleges liaison
- d. Annual transfer conference
- e. Connections program
- f. Wisconsin Tech College System articulation
- g. Miami-Dade Community College articulation
- h. College of the Menominee Nation articulation
- i. SEVIS implementation (international transfers)

new

6. ISIS equivalency tables

- a. no comprehensive updating since 1999
- b. no automatic update capability
- c. problematic conversion issues; blocked equivalencies
- d. active/inactive equivalencies and effective date issues
- e. explanatory notes cut off
- f. dynamic nature of course numberings and offerings (both UW -Madison and external courses)
- g. only very knowledgeable can enter updates to equivalency table (must have clear understanding of multiple conversion issues)
- h. involved setup, numerous panels to build and complete for each course, no search capability

constant re-evaluation

inaccuracies

(demonstration)

7. Transfer tools

- a. School/college handbooks & office procedures handbook
 - dynamic nature of handbooks
 - unable to update since 1998
 - no accurate reference; work is slowed
 - difficult to train/guide new staff
- b. ISIS database
 - fixes, patches, upgrades: frequent changes & lost functionality
- c. Credit evaluation system
 - Conversion issues:
 - blocked equivalencies
 - date issues
 - Software issues:
 - NCR: other equivalencies missing
 - multiple schools: jump to other panels
 - incorrect defaults: repetitive data entry
 - Course catalog/Madison record interaction:
 - articulation term vs. term course taken
 - unavailable equivalencies/TIS problems
 - new courses: double our tables w/new date
 - “other” courses (retro/type 5): manual

(demonstration)

8. Other factors

- a. Merging of two offices and two groups of support staff
 - highly specialized support staff to more generalized support staff
 - phone, reception, and clerical staff must have a broader base of understanding; can no longer provide detailed, specialized support
- b. Increased application volume
 - increased demand on support staff; less able to provide support
- c. Complexity of application review, processing, course evaluation
 - competitive/selective admission
 - school/college rules
 - course evaluation
 - ISIS procedures / office procedures
 - 1 year training for minimal level of competence

- d. Change in staff
 - loss of transfer expertise
 - 5 years ago: average 12 years experience
 - today: average 4 years experience
 - down 1.5 FTE in last 5 years
 - additional time spent in training
 - no comprehensive training: temporary staff; limited resources
 - add'l time required to complete evals
 - Assistant Director vacancy
 - cumulative, long-term effect
- e. ISIS in its infancy
 - limited tech support resources must be prioritized: upgrades, patches, etc. require tech support staff to test and repair lost functionality (instead of providing other needed support/ improvements for counseling staff)
 - counseling staff doing more non-counseling work (e.g. compiling statistics, analyzing lost functionality, troubleshooting when systems don't work)
 - counseling staff lack important data analysis
 - with each change in functionality, counseling staff must be retrained and other office staff must be educated on the changes
 - integrated student database requires significant on-going planning/work with other offices

9. Key Points

- a. Increase in application volume
- b. Increase in advanced standing credit
- c. Increased demand for student services
- d. Fewer and less experienced transfer staff
- e. Increased need for & time spent on training
- f. Compromised transfer tools
- g. ISIS developing, still in its infancy
- h. Limited technical support resources

Policies & procedures that affect the processing of transfer credit

AAC subcommittee on transfer credit , Mary Schey, 3/21/03

Appendix 4.

School / College Rules		Population	Recommendation	Action Item
1	No credit in L&S	FYR,TRF,RET/SA,Continuing	Handle via degree audit	Give TRF cr for transferable courses regardless of applicability to L&S (this will eliminate the need to enter transferable Type 5 courses for UWS; explore how to handle non-transferable UWS courses); still need to determine whether to award electives with or without breadth/level
2	No credit Math 101 in Business	FYR,TRF,RET/SA,Continuing	Handle via degree audit	Give TRF cr for Math 101 regardless of school
3	Limit on PE credits (varies college to college)	FYR,TRF,RET/SA,Continuing	Handle via degree audit	Give PE credits regardless of school/college rules
4	Limit on music credits in L&S	FYR,TRF,RET/SA,Continuing	Handle via degree audit	Give all music credits; create MUSIC X01 E C & MUSIC X01 I C and use for music org electives
5	Concurrent enrollment	FYR,TRF,RET/SA,Continuing	Handle via degree audit	Review with faculty
6	Senior residency requirements	TRF, RET/SA, Continuing	Handle via degree audit	No need to address on TRF cr eval
7	Maximum of 10 credits in first-year chemistry	FYR, TRF, RET/SA	Handle via degree audit	Give all chem. credits; create CHEM X01 PE for 1st year chem. electives; code in DARS and test
8	Courses failed in residence cannot be repeated off campus	RET/SA, Continuing	Accept all transferable credits	Review with faculty
9	Course repetition	FYR,TRF,RET/SA,Continuing	Admissions handles for FYR and TRF admits; degree audit handles for RET/SA and continuing students	For new FYR, TRF, eliminate any repeated courses; give all transfer credit for RET/SA, continuing students
10	Course overlap	FYR,TRF,RET, Continuing	Handle via degree audit; if electives, Admissions will handle	Review with faculty
11	Grade point deficiency (if sub-C record overall at an institution, cannot grant degree credit for any credits with sub-C; if student later raises CGPA, then need to reinstate degree credit)	FYR, TRF, RET/SA	Not an issue for continuing students; eliminate as a consideration for all students	Bring in all courses with a grade of 'D' or better as long as the student is admissible or a continuing student; add academic action re: probation if applicable
12	Art credit for art majors	FYR,TRF,RET/SA,Continuing	Will explore with Education	Admissions will meet with Education
13	Military science credit for non-	FYR,TRF,RET, Continuing	Will explore with Military	Admissions will meet with Military

	transferable, non-transcripted credits		Science Dept.	Science Dept.
14	Maximum of 72 degree credits at a 2-year institution	FYR,TRF,RET, Continuing	Handle via Admissions	Admissions will continue to remove degree credits when necessary
15	Professional program requirements (e.g. anatomy, physiology, chemistry Nursing)	TRF, RET, Continuing	School determines if requirements are met	No need to address on TRF cr eval

Changing from one school / college to another		Population	Recommendation	Action Item
1	For switch into L&S, redo evaluation to remove non L&S credit	Continuing (w/TRF cr)	Handle via degree audit	No need to redo credit eval
2	For switch out of Engineering, add HS units and non-engineering TRF credit	Continuing (w/TRF cr)	Refer back to EGR to complete credit evaluation	EGR will add HS math/FL units at point of admission; school/college will screen new transfers for any necessary revisions to transfer credit and refer to admissions if non-engineering TRF credit needs to be added
3	For switch out of PharmD, process application and complete entire credit evaluation (usually expected to do this during summer when counselors are trying to complete credit evals for SOAR)	Continuing (w/TRF cr)	Pharmacy advises PharmD students that they are not admitted to the university; if they aren't admitted to professional program, they will need to apply as an UG, following normal app procedures & deadlines	Need to review with Pharmacy

Completing final degree reqs off campus		Population	Recommendation	Action Item
1	Admissions receives transcript for non-enrolled student; school/college has not notified us that student will graduate or that they have waived the senior residence requirement and/or the failed in residence requirement	Non-enrolled students	School/college sends Admissions written notification of waiving the senior res/failed in residence requirements and that student will graduate	Needs further discussion; advisors could give student a form to complete & submit to Admissions when transcript is sent; form would explain that student has permission to take course off campus to graduate

Second degree transfer applicants		Recommendation	Action Item
1	Business <ul style="list-style-type: none"> School does not allow 2nd degree candidates Admissions sends letter to applicant 	<ul style="list-style-type: none"> Leave as is 	

2	<p>Education</p> <ul style="list-style-type: none"> • Admissions copies app materials & refers to Educ for decision • Upon receipt of action from Educ, Admissions admits and enters general elective credits 		
3	<p>SOHE</p> <ul style="list-style-type: none"> • Admissions copies app materials & refers to SOHE for decision • Upon receipt of action from SOHE, Admissions admits and enters general elective credits 	<ul style="list-style-type: none"> • Students must follow normal UG app procedures and deadlines, even if they've been enrolled as a special student 	
4	<p>CALS</p> <ul style="list-style-type: none"> • Admissions copies app materials & refers to CALS for decision • Upon receipt of action from CALS, Admissions admits • Using CALS degree guide, Admissions determines Which courses satisfy degree requirements and equates these courses • Admissions calculates remaining credits and gives general elective credits • Admissions adds applicable actions 	<ul style="list-style-type: none"> • Admissions sends out a sheet from the schools/colleges explaining considerations and conditions for granting admission as a second degree candidate: <ul style="list-style-type: none"> –must have completed pre-reqs for major –must be a significantly different degree for L&S 	<ul style="list-style-type: none"> • Faculty needs to discuss the admission of second degree candidates in light of limited resources and enrollment management
5	<p>Nursing</p> <ul style="list-style-type: none"> • Admissions copies app materials & refers to Nursing for decision • Upon notification from Nursing, Admissions admits • Using Nursing degree guide, Admissions determines which courses satisfy degree requirements and equates these courses • Admissions calculates remaining credits and gives general elective credits • Admissions adds actions: <ul style="list-style-type: none"> –allowing admission as 2nd degree candidate –anat, phys, chem reqs for Nursing are satisfied –all other applicable actions / notes 	<ul style="list-style-type: none"> • The sheet also explains steps to follow to request permission if student meets the conditions. • Student submits all necessary materials to the appropriate school/college to request permission. • If school/college grants permission, they send an academic action to Admissions. 	<ul style="list-style-type: none"> • Schools/colleges will develop a sheet which Admissions can send out to 2nd degree applicants; sheet will explain considerations for granting admission to 2nd degree candidates • Sheet will give contact info for each school/college and procedures for requesting permission (e.g. student must submit letter of intent and transcript, to school/college); Council on Advising (Jo Meier) may be able to develop the sheet
6	<p>L&S</p> <ul style="list-style-type: none"> • Admissions sends student L&S sheet re: admission as a 2nd degree candidate • Upon receipt of action from L&S, Admissions admits • Admissions equates all courses as for a regular transfer credit evaluation • Admissions adds applicable actions / notes 	<ul style="list-style-type: none"> • Admissions admits student, enters general elective credits. • School/college takes whatever actions are necessary to indicate satisfaction of specific degree/major requirements. 	<ul style="list-style-type: none"> • Needs further discussion with CALS, Nursing, L&S re: the extensive work involved

RECOMMENDATIONS FOR EXPLORING TRANSFER SOFTWARE

Mike Pflieger, Assistant Dean – College of Letters & Science
Martha Pollard, ISIS Central

ASSESSMENT OF CURRENT SYSTEM

Admissions took time to demonstrate the process of entering student data in the Peoplesoft transfer module. The demonstration was suggestive that the PS transfer module is cumbersome and affecting the service Admissions provides campus and students.

Given our knowledge of transfer practices at UW-Madison and other institutions, we have provided a list of desirable system features to guide the explorations of any subsequent committee into transfer credit systems. We also want to inform future committees that UW-Madison currently owns two transfer systems – Peoplesoft and DARS. Our recommendations are predicated on the logic that we ought to first find out if we own a good transfer system before pursuing other options.

DESIRABLE FEATURES OF A TRANSFER SYSTEM

Our experience working with transfer articulation issues and transfer systems leads us to conclude that a good transfer has the following characteristics:

- It should interact well with other campus systems
- Is sophisticated enough to manage complexities of transfer credit rules (e.g., multi-course articulations, grade conversions, assignment of attributes and codes, etc.)
- Includes a simple, effective interface making it easy to use for transfer evaluators
- Technical support of the system should be within our capabilities
- Can be web-enabled for students, prospective applicants, and advisers on and off campus
- Contains functionality to meet the goals set for TIS by the UW-System administration, most importantly integration with the degree audit to provide “degree shopping” information
- Is conducive to extracting data and reporting on transfer equivalencies and trends
- Adaptable to anticipated and emerging technologies that can further enhance service (e.g., EDI transcript transmission, web functionality, etc.)
- Can be easily customized to meet the unique needs of UW-Madison
- A proven reputation, friendly client support, and should be successfully used at another institution.

RECOMMENDATIONS

Form subcommittee to pursue options

We recommend that a working group be formed by AAC and Admissions to pursue the exploration of UW-Madison’s options for transfer software. We recommend appointing non-AAC and Admissions members when appropriate to ensure all stakeholders are present for discussions. Our recommendation is to ensure representation from:

- Functional Offices (Registrar/TACS, Admissions)
- Schools/Colleges
- Advisors
- Technicians (DoIt specialist in Peoplesoft & DARS support)

Explore options

We recommend the following steps in the exploration process:

- General research of currently owned transfer systems (DARS, Peoplesoft). Consultation with end-user, technical experts, and available literature is valuable.
- Connect with vendors and institutions using these transfer systems. Arrange for committee members to participate in forums where transfer module is discussed, demonstrated, and used. This will require nominal expenses to bring vendors to campus for demonstrations, to send committee members to peer institutions using the software and to attend client/user conferences and workshops.

Impact studies

The exploration should result in two impact studies to be submitted to AAC:

- A study that aims to predict the outcomes of retaining and improving the Peoplesoft transfer module
- A parallel study that aims to predict the likely outcomes of converting to the DARS transfer system.

Each study should provide estimates of:

- System capabilities
- Implementation costs
- Annual maintenance costs
- Potential for future enhancement
- Impact for end-user staff
- Impact on service to students
- Impact on technical support and staff
- Integration of that system with other essential UW-Madison systems
- An assessment of business practices related to transfer and how systems will affect them

If the impact studies reveal both DARS and Peoplesoft transfer modules to be inadequate, the committee should then engage in the same process to explore other systems that UW-Madison does not currently own.

CONTACT

Thank you for the opportunity to speak to these issues. Please contact either of us for more information, clarification or service.

Respectfully submitted,

Mike Pflieger
262-2007
pflieger@lssaa.wisc.edu

Martha Pollard
265-8645
martha.pollard@mail.rgstr.wisc.edu

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