Admissions Finalization

PATH: CAL Components > Admissions > External Education

Finalization is OUA’s verification process to confirm incoming students have met their Conditions of Admission. This document will first outline the steps, then provide an appendix of alternate actions, and finally will provide some alternative examples of different types of students.

Before beginning, we may have Slate and/or UC Review open to see the application or get the Student ID#. We may also want to log into Perceptive Content to view transcripts.

We must log into Campus Solutions and navigate to the External Education page to search for a student’s record.

Finalization process

On the External Education search page, enter the Student ID# and click Search.

The External Education page for this student displays.

This is the main page we’ll be using to complete Finalization.
Links to frequently used pages are at the top.

For example, the Application link goes to information about the applicant.

On the main External Education page, the Org ID drop-list shows all schools the student listed.

Review to ensure it is complete.

Note: Org for Cumulative Stats combines data from all the schools to determine cumulative unweighted & weighted GPAs. On this page, verify degrees/breadth completed.

Scroll down to the Transcript section and check the Transcript Status is Final.

At the bottom, is the Degrees section that will show either: IGETC, Essential Skills, UC Reciprocity or Other. Verify this is complete.

Checklist
Click the Checklist link at the top of the page to go to the Checklist management tabs.

We can doublecheck that all the schools are listed. We can add more by clicking the plus button at the bottom.

Check that the Status shows as Completed.

If we make any changes, make sure to click the Apply button below to save the changes.

When finished, click the OK button to return to the previous page.

Note: To finalize the records, we must have Complete statuses in all Checklist items (this will automatically update Checklist Management 1 tab to Completed).
Optional: On the Checklist Management tab page, use the Comments box to add comments to share with the Colleges.

This is recommended for college liaisons when working with special admit cases.

After adding comments, click the Apply button to save them. Then click OK to return to the External Education page.

Back on the External Education page, we will select an institution to verify work.

From the Org ID drop-down, select a school. Click Courses Taken on the right hand side to verify work from this school against the transcript.

Tip: Do not click the All Courses Taken link at the top - that displays courses from all schools. It is only recommended if the student has only attended 1 school.
The classes are organized by year and semester.

Verify all courses completed, units, grades, course level and term type.

We can add, edit, delete or move class information. See the appendix below for instructions.

Once a transcript is verified as official and final in Perceptive Content, – return to External Education.

In the Transcript section, change Action to Received. Then change Transcript Type to Official and Data Medium to Hard Copy of EDI.

Repeat these steps with each school.

SCORES
To review test scores, click the Scores link at the top of the External Education page.
This will take us to the exams the student listed in the application.

If exams are missing, we can add information for record keeping but in order for the student to have access to the information, we must also add it in the Checklist page.

The Test Results page is divided into 2 parts.

The top section provides the test names, scores and dates taken.

The second half provides a detailed list of the exam types, names, scores and dates taken.
Evaluation
When all scores & transcripts have been reviewed, click the Evaluation link at the top of the External Education page.
Once all courses are verified; the Transcript information is updated, the Checklists are all “Completed”, then click the Evaluator Rating tab.

Change the Eval Status to Complete.

The Comment section in this area is for comments that can be shared with OUA staff.

Note: Comments for colleges can be left on the Checklist Management page.

Note: We can also check what the student sees in CalCentral, on the My Academics page.

We can verify if the transcripts show as “completed” to the incoming student.
Appendix: Actions

There are several actions we can take in the External Education page. Below are examples of each.

Adding an Institution

On the External Ed page, click the Plus button to add a school.

Use the Lookup icon to search for the school.

Use the Description field and change the search to Contains.

Enter all or part of the school name.

Click the Lookup button.

Click the result that matches the correct school.

Click the OK button to add the school.

The school displays.

Note: We may need to add a new Checklist as well. See Adding a New Checklist Item.

Adding a Class
After selecting a school and clicking Courses Taken, review the classes.

If a class is missing, we need to add it.

If the year is not listed, enter the Year and click the Plus sign.

Once the year is added, click the Add link above the appropriate term.

Fill out the appropriate information. Use the lookup buttons to search if needed.

Click the Apply button to save the new information.

When finished, click the OK button to return to the External Ed page.

Moving a Class
After selecting a school and clicking the Courses Taken link, we review the classes.

If a class is listed incorrectly, we can move it.

Select the checkbox next to the class and then click Move.

As appropriate change the school, the year and/or the term.

Then click OK.

Acknowledge the confirmation message by clicking OK.

We can see the class is now in the correct term.

Select All
(mass changes)

After selecting a school and clicking the Courses Taken link, we review the classes.

If we need to make a change that affects all the classes in a term, we can click the Select All link. That will check the box next to all the classes.
We can then click other links, such as Move, change Data Source School, or Term.

Clicking Data Source School will change the Data Source to School for all the classes.

Clicking the Term(Sem/Qtr) link will change the Term Type.

If the Term Type is listed as Semester, it will change to Quarter. If it’s listed as Quarter, it will change to Semester.

Transfer & Freshman Examples

UC Intercampus Transfer example: UC work with UC Reciprocity completed.
   1. Verify schools attended by checking Org ID and the Checklist tab UC Review and/or SLATE.
   2. Verify completion of Breadth w/ UC Reciprocity by checking Degrees/Proficiencies in External Ed tab.
   3. Verify units completed via UC Review.

Log in to External Education page in Campus Solutions and verify schools attended under checklist tab and degrees earned. Update all statuses to Completed once you verify in PC that the transcripts are the final official ones.
Make sure to complete all information under Transcript section for all institutions attended.
Click on **Courses Taken** for each institution and compare all coursework and verify information provided. Pay special attention to **Grading Basis** and **Term Type** - the values should be **Trnsf UC** and **Quarter** correspondingly.

To update, click the **Select All** link, then and click **Term(Sem/Qtr)**, this will update the information to all items selected. **NOTE**: **Grading Basis** will have to be updated individually.

Once all courses are verified, click the **Evaluator Rating** link. Set the **Eval Status** to **Complete**.

**Freshman example**: Regular HS transcript with College work completed and AP exams submitted.
1. Verify schools attended by checking Org ID.
2. Verify degrees completed by selecting HS record.
Select **OrgID/Institution** and click **Courses Taken**.

Note: Since the courses are limited we can use **All Courses Taken** link at the top of the page.

Verity work in Perceptive Concept. (PC) Noticed that EMS 201 was not listed in the transcript therefore, we leave the grade PL and Data Source as Self-Reported. Never delete any information.
Once we verify all course against PC we can check on AP scores by selecting the **Scores** link at the top of the page. This will take us to Exams the student listed in the application. If exams are missing, we can add information for record keeping but in order for the student to have access to the information, we must also add it in the Checklist page.

The first part of the Exams page provides the test names, scores and dates taken.

![Exams page first part](image)

The second part provides a detail list of the exam types, names, scores and dates taken.

![Exams page second part](image)

Once we verify HS date of graduation, final test scores and official final college transcript, we’ll click the **Evaluator Rating** link to complete the file. We will change the **Eval Status** to **Complete**, add the date, and any optional comments.

![Evaluator Rating](image)
Transfer example: Transfer with IGETC and an international high school

1. View Org IDs to check schools. Check “Org for Cumulative Stats” to verify IGETC is complete.
2. Click Courses Taken and compare transcripts in Perceptive Content against self-reported classes.

Review community college transcript against the self-reported data for the school.