

Session 3b - Student: Admission Application through Orientation, Assessment, Transcript Evaluation



Date: Monday, April 11, 2022

Time: 3:15pm – 4:45pm

Anthology

Evaluator's Name: _____

	Functionality	Comments
Application		
1.	Demonstrate how a customized online (web-based) application can be configured	
2.	Assuming that most applications will come in via CCCApply, show how special applications can be used to collect data for special populations such as international students, non-credit students, dual enrollment students	
3.	Describe integration between CCCApply and the ERP	
4.	Show how application data can be viewed in the ERP	
5.	Demonstrate the creation and use of College-defined fields for admissions data	
6.	Demonstrate in detail how a matching algorithm can be configured to ensure data quality – e.g., matched record, new record, needs review, matched record in CRM component of ERP, etc.	
7.	Demonstrate the ability to create an algorithm capable of calculating a student's residency status with information derived from data on the admission application.	
8.	Demonstrate the ability to track the completeness of applications by the College staff and how staff can view and interact with submitted applications.	
9.	Demonstrate the ability to provide the student with college information (Student ID number, email and registration date) immediately after submitting an application.	

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10.	Demonstrate how staff can have real-time analytics dashboards that keep accurate count of students at various in the process – e.g., applied, ed plan complete, registered, applied for financial aid, etc. Demonstrate how these can be segmented for various student types and programs.	
11.	Show how the system checks for duplicate records when loading data from CCCApply.	
12.	Show the student self-service both on desktop and mobile interface	
13.	Demonstrate notification to student once external transcripts have arrived and have been entered into the system.	
14.	Show how students can upload/submit external transcripts and evaluation forms -- and then view evaluation of transcripts through system.	
15.	Demonstrate the ability for a student to book a counseling or financial aid appointment online identify the reason for the appointment.	
16.	Demonstrate the ability to generate a variety of communications, e.g., email messages, text messages, to new students. Demonstrate the ability to automate these reminders.	
17.	Demonstrate how communications history is recorded and maintained and how staff can interact with this data	
18.	Demonstrate how comments and other information can be recorded by staff and viewed by other staff based on permissions.	
Provisioning		
19.	Ability to trigger provisioning based on student status – e.g., application complete – and integrate with Identity Management System (e.g., Active Directory, LDAP, etc.) for e-mail creation, network access, etc.	

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Checklist		
20.	Demonstrate the ability to identify student type based on self-declared information and existing information in the SIS to correctly identify the student type.	
21.	Demonstrate the ability to configure the system to display "next steps" to incoming students based on student type – e.g., first-time students click to start orientation, international students apply for I-20, etc.	
22.	Auto-assess self-reported data and – if assessment requirements met – display "Here are your recommended courses based on your great work in high school!"	
23.	Demonstrate the ability for student to securely upload documents to meet checklist items	
24.	Demonstrate the ability to auto-generate and schedule reminders to students who have incomplete items on their checklists	
25.	Demonstrate the ability to auto-notify students about existing account holds before proceeding to next steps	
26.	Demonstrate the ability to record completion of various activities – e.g., orientation, assessment, creation of ed plan, application for financial aid, etc.	
Communications management		
27.	<p>Demonstrate the ability to auto-generate personalized messages based on configured scenarios – e.g., "Thanks for completing your application, click here for the next step," or incoming student has completed orientation and then receives, "Great job with orientation! Click here to see your recommended classes."</p> <p>Provide examples of specific events that can trigger communications and what granularity is available to allow departmental control over communication trigger rules.</p>	

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28.	Demonstrate the ability to target messages based on student information – e.g., graduated from specific local high school in specific year, application complete but orientation not started, resides in certain zip code, etc.	
29.	Demonstrate the ability to send auto-generated messages based on registration schedule. (e.g., "Your application has been submitted. Registration is currently in progress, please review schedule of classes and proceed to register on X date/time. The X term begins in N weeks.")	
30.	Demonstrate the ability to create communication plans – i.e., a timed sequence based on student characteristics – from new student entry through graduation	
Transfer Evaluation		
31.	Demonstrate the ability to load incoming transcripts electronically to tables in the ERP	
32.	Demonstrate the ability to set up articulated/equivalent courses. Demonstrate how these courses are set up.	
33.	Demonstrate the ability to create academic year-based records for public and private colleges and universities with different grading scales	
34.	Demonstrate the ability to auto-articulate/equate courses that have been loaded or entered into the ERP	
35.	Demonstrate the ability to incorporate articulated/equated courses into a student's degree audit	
36.	Demonstrate the ability to route incoming transcript, syllabus, course description to academic department for evaluation and then return to the evaluator for completion	
37.	Demonstrate the repeat logic functionality.	

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38.	Demonstrate manual entering of applications.	
39.	Demonstrate how the system separates non-credit student enrollment from credit student enrollment.	
40.	Demonstrate how high dual enrollment registration is handled when it comes to limitations on enrollment.	
41.	Demonstrate how the system establishes limitations on enrollment beyond prerequisites (such as age or vaccination status)	
42.	Demonstrate how the system provides an athletic eligibility module	
43.	Demonstrate how the system provides an international students module	

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Evaluation Form

Perceived Strengths of Vendor Solution:

Perceived Weaknesses of Vendor Solution:

Additional Comments:

Acceptability of Vendor Solution: Yes No