CSU Transfer Planner: California Community College Portal

Launch Call Tuesday, April 9th, 2024 9am-10:30am PST





Introductions

The CSU Chancellor's Office

- April Grommo Assistant Vice Chancellor for Strategic Enrollment Management
- Ginger Reyes Director of Admissions & Outreach
- Jazmine Flores Transfer Success Pathway Program Manager

Liaison Presenters

- Alex Arpaia Product Manager
- Taylor Lloyd Client Success Manager
- Allyson Churko Product Manager



Agenda

- Introductions
- Community College Portal
 - Overview
 - How to Review Students
 - How to Operate the portal
- User Management (Access)
- Resources
- Q&A



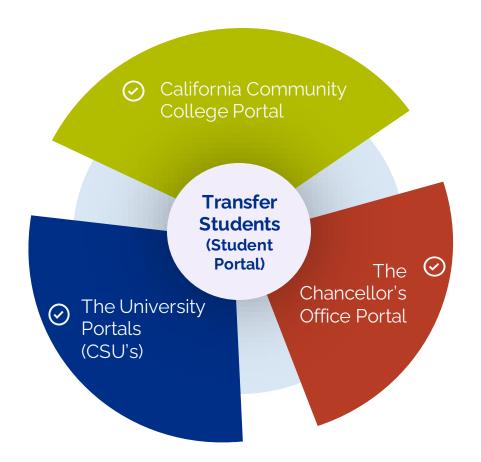


Transfer Planner vs. Transfer Success Pathway

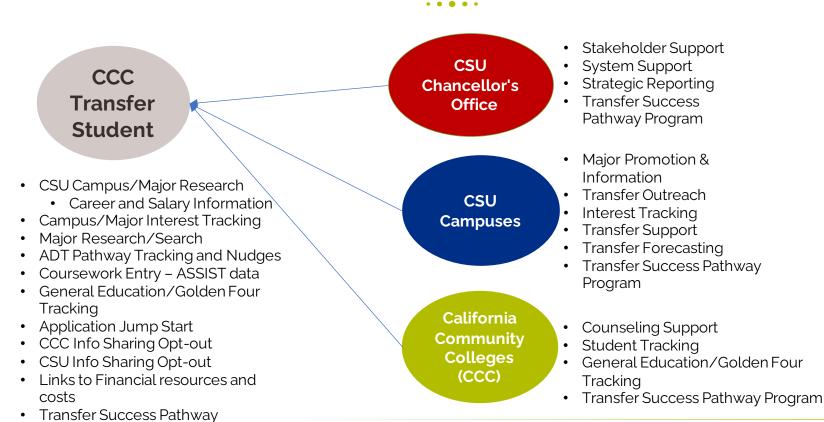
- Transfer Planner (Tool) The CSU Transfer Planner has two portals: a Student Portal and a Community College Portal. The Student Portal allows students to track coursework, view articulation agreements, view program requirements and prerequisites, and enroll in a Transfer Success Pathway (TSP) agreement. The Community College Portal allows you to review a student's entered coursework, TSP agreements with a CSU, and TSP eligibility, and communicate with students.
- Transfer Success Pathway (Program) The Transfer Success Pathway (TSP) is an agreement between a student and a CSU campus that guarantees admission into a degree program. Admission to a CSU is guaranteed so long as the student meets the transfer requirements outlined in the agreement within 3 years of signing the agreement.

CSU Transfer Planner

Create a more seamless transfer pathway from the CCCs to the CSU



CSU Transfer Planner







Program



California Community College Portals



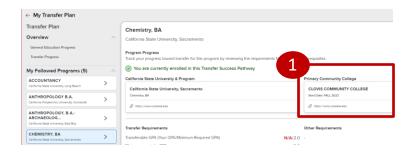
This portal is designed to help you. . .

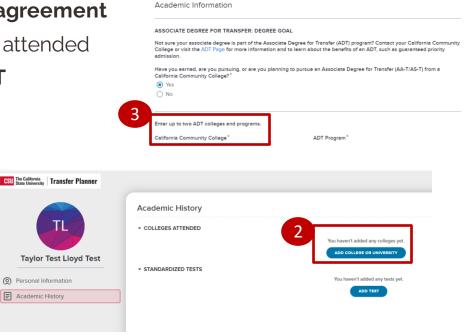
- > Serve transfer students.
- Identify students that may be ready to transfer to a CSU.
- Identify students that are falling behind on their transfer plan.
- Monitor students with a TSP agreement.
- > Monitor students with an ADT agreement.
- > Understand which CSU programs are of interest to your students.
- Communicate with students.

How will students appear in my portal?

You will see students that listed your college

- 1. as the primary college for their **TSP agreement**
- 2. under academic history -> colleges attended
- as the CCC associated with their ADT



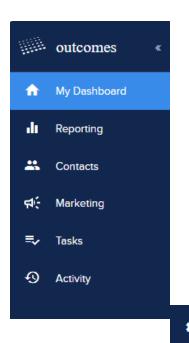


My Additional Details



Functionality Available for Transfer Planner

- **Dashboard**: interactive charts
- Reports: snapshot
- Contacts: synonymous with students
 - Customizable grid view
 - Filterable
 - Exportable
- Marketing: communication
 - Build email templates and campaigns
- Tasks: actions that need to be completed
- Activity: review your recent exports, emails, etc.
- Settings:
 - Manage contact segments (role specific)
 - Export





Settings

Dashboard Overview

All charts on the dashboard are interactive!

- A2/B4 Complete quickly find students that have or have not completed their A2/B4 requirements
- Golden 4 Complete quickly find students that have or have not completed their Golden 4 requirements
- Total Transferable Units in increments of 5
- Transferable GPA in increments of 1
- ADT Students quickly find students that have reported an ADT
- TSP Eligibility- students that are eligible for TSP found here
- TSP California State University these are the CSUs that TSP students will transfer to if they meet the requirements within 3 years.
- Students with CAS ID identifies students that have a CAS ID



Reporting

- There is one preloaded report
 - Enrolled & Reviewed by Program and TSP Transfer Date.
 - This provides a snapshot of TSP students by program and intended transfer term.
- You can create additional reports as needed!

Enrolled & Reviewed by Program and TSP Transfer Date						
Enrolled & Reviewed by Program and TSP Transfer Date						
	Fall 2025	Spring 2026	Spring 2024	Spring 2025	Fall 2026	Fall 2024
Agricultural Business	1	0	0	0	0	0



Students



Student Information

Summary

Overview of student data to include Programs of interest, TSP, ADT, Academic data.

Comments

Unique to your organization.
Only users that have access to your school will see these comments. Students will not.

Information

Contains a link out to the following

- TSP Summary
- Standardized Tests
- General Education
- Transfer Programs

Academics

Filterable on the contact grid view for ease of search on properties like course code, course name, subject and credits.



Student Summary

Profile

Name, address, email, phone, DOB

Transfer Profile

Programs of interest, ADT student, A2/B4 complete, Golden 4 complete

Academics

Transferable GPA & units, units attempted, quality points, primary school, schools attending

Cal State Apply Info

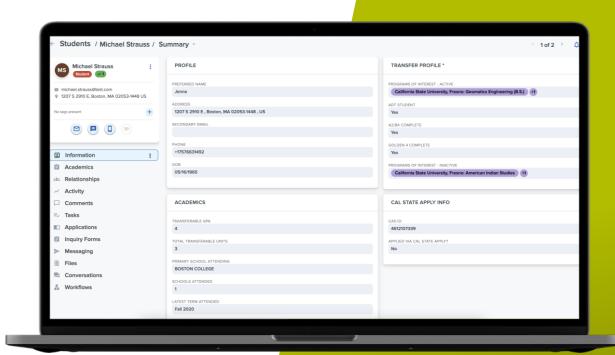
Applied before

ADT 1 and 2

Programs and colleges

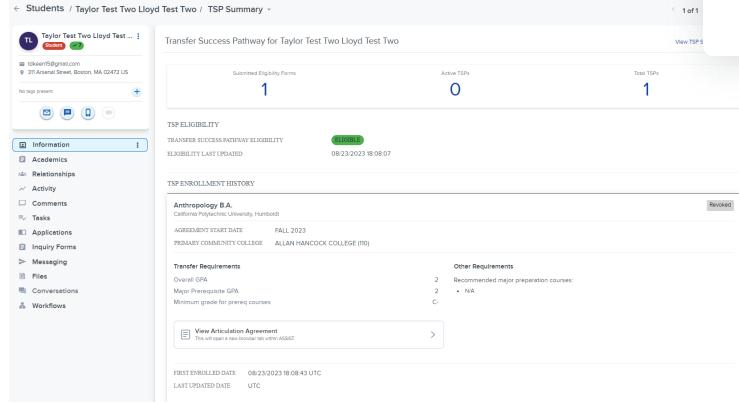
TSP Agreement

Program, campus

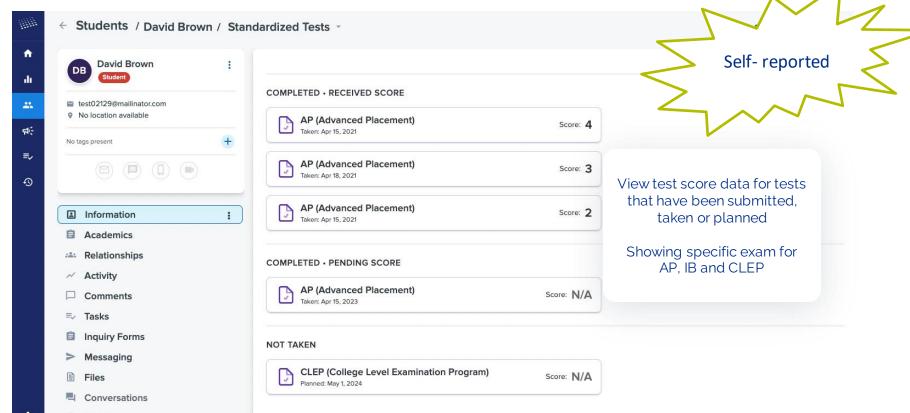


Information Ellipses: TSP Summary

Find eligibility information, relevant program data and more on the Transfer Success Pathway Summary View

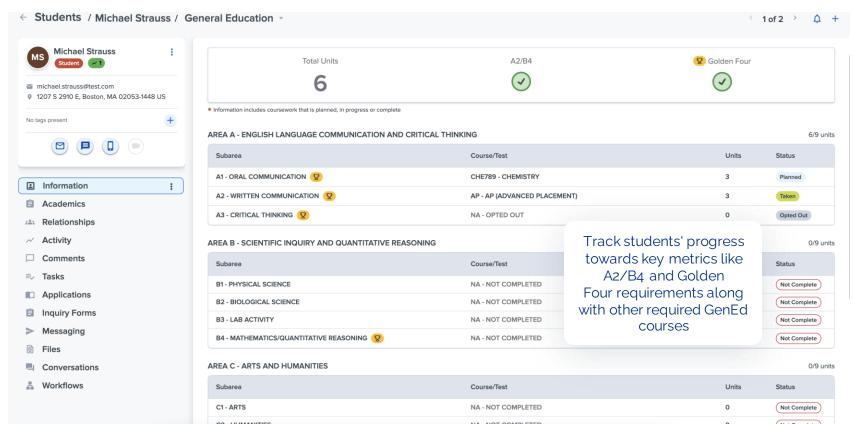


Information Ellipses: Standardized Tests



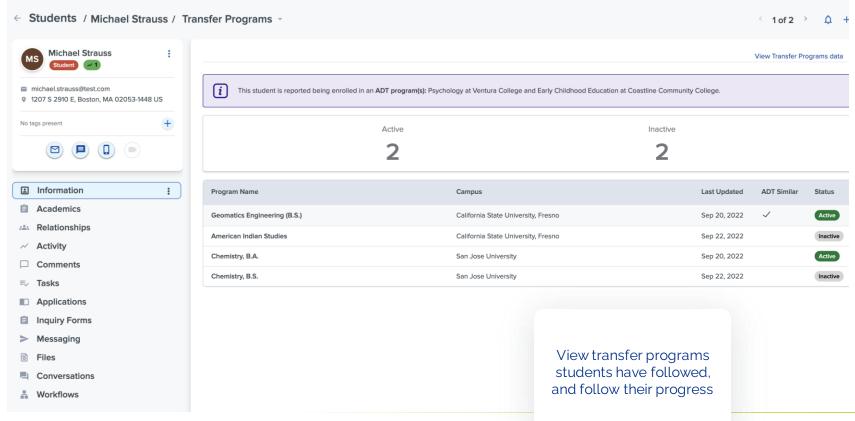
Workflows

Information Ellipses: General Education





Information Ellipses: Transfer Programs



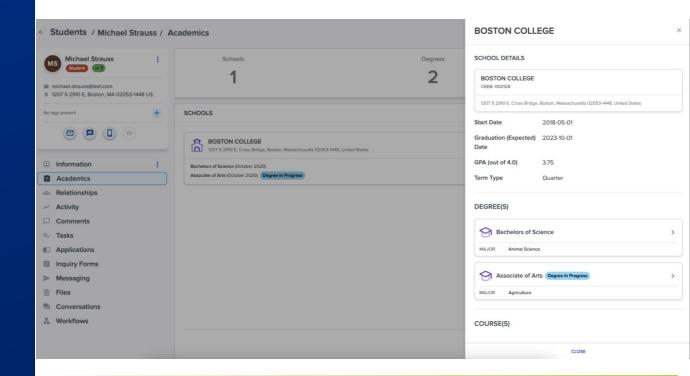
Coursework entered by the student in the Transfer Planner will display in the Community College Portal under the Academics Tab in the student's contact page.

Fach school and its relevant coursework can be drilled into by selecting its row in the grid.

Coursework properties like name, code, and whether the course is transferrable are all filterable options from the main contact grid, allowing users to find and track students based on a number of success criteria.

These filters can be applied and used to create contact segments necessary for outreach and more!

Academics tab





Allyson Churko Student achurko@liaisonedu.com No location available No tags present Information Academics Relationships Activity Comments = Tasks Applications Inquiry Forms Messaging Files

Students / Allyson Churko / Comments

Comments

- Unique to your college.
- Only users within your organization will see comments left on a student's record.
- Students will not have access to view Comments.

LINISON

Viewing Student Information





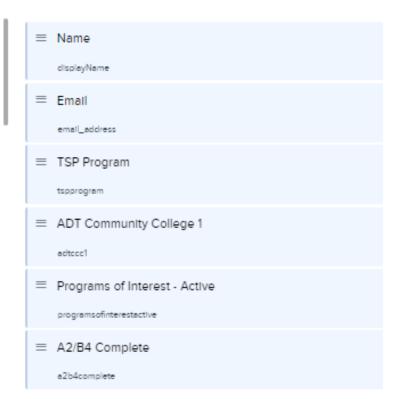
Operating the Portal



Updating Contact Grid View

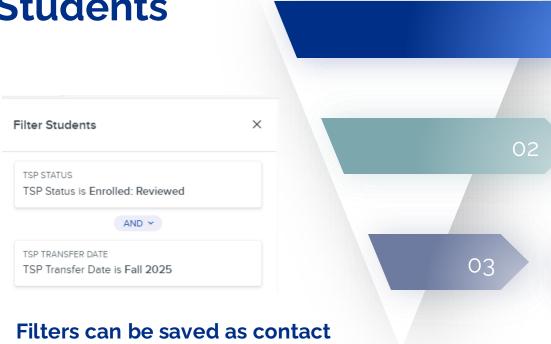
- Recommended Columns
 - o Name
 - o Email
 - o TSP Program
 - o ADT Program 1
 - o Programs of Interest Active
 - o A2/B4 Complete

Shown on Grid





Filtering Students



Filters can be saved as contact segments for faster and more efficient outreach!

All Students

Students using Transfer Planner that listed your cc on their student portal.

TSP Status

01

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Enrolled: Reviewed (only students that were reviewed by the CSU).

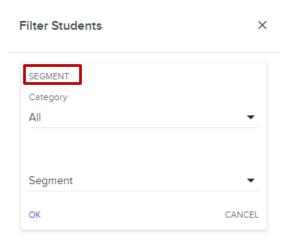
TSP Transfer Date = Fall 2025

This provides a list of TSP students that are enrolled: reviewed and they plan to transfer Fall 2025.



Segmenting Students

- Existing Segments
 - All
 - CAS ID Exists
 - Total Transferable Units < 30
 - Total Transferable Units > 30
 - Transferable GPA under 2.0
 - TSP Enrollment
 - Active
 - Release Requested
 - Reviewed
 - Revoked
 - Submitted, pending campus review





Exporting Students



Via the contact grid

On the contact grid, use the gear icon to manipulate the columns.

Then, use the filters or segments to refine the data.

Select the students and Export!

Export 20 contacts

My Current View (2 Columns)	Tabular
Default Tabular Export	Tabular
Default JSON Export	JSON

Download



Via settings

Settings->Import/Export->Exports

Two exports have been loaded into each portal.

- 1) Students by School of interest
- 2) TSP Student Export

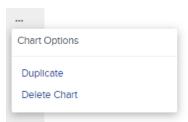
Exports / All (2) v

□ Name -	Format	Туре
☐ Students by School of Interest	Tabular	Contacts
☐ TSP Student Export	Tabular	Contacts



Adjusting your Dashboard

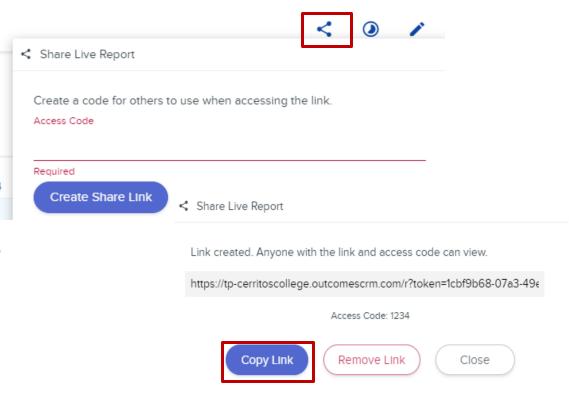
- From Reporting, select default dashboard, select the small pencil icon on the right to edit
- You can edit your dashboard to:
 - Rearrange the charts (Rearrange
 - Add charts + Add Chart
 - Filter charts =
 - Remove charts





Sharing a Report

- Reports
- Share link
- Create an access code
- Select Create Share Link
- Copy the link
- Provide the link and code







User Access



Existing Users



Existing Users

List of users already added to the portal may be found **here!**



URLs

Need your colleges
URL, please visit the
help center.

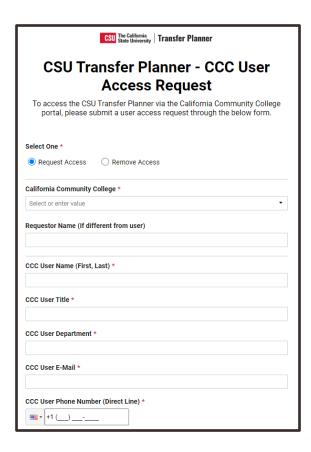


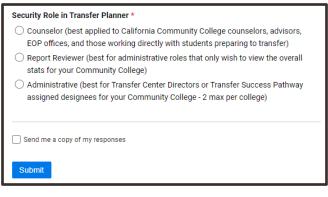
Resend Invite

Your name was on the list, but you didn't get a log in email, please contact support.



New User Process





- Use institution e-mail
- Select appropriate security role
- 2-3 day turn around
- If approved, e-mail invitation will be sent





Please help me!





Contact Support

The CSU Chancellor's Office

- <u>csutransferplanner@calstate.edu</u>
- Process related questions
- User management
- Questions about TSP Eligibility
- Requests for training
- Requests for campus contact information

Liaison Support

- <u>csutransferplanneradm@liaisonedu.com</u>
- Technical questions about the portal
 - How do I...
 - Export data
 - Filter students
 - Manipulate my dashboard
 - Reset my password
 - Add a comment
 - Send a report
 - Remove a tag



Resources

Help Center

CSU Transfer Planner Community College Portal - Liaison (liaisonedu.com)

OneDrive Folder

- Transfer Planner Community College Folder
 - **Operations Manual**
 - **Trainings and Meetings**





Q How can we help you?







A Home » IN CSU Transfer Planner Help Center » IN CSU Transfer Planner Community College Portal

CSU Transfer Planner Community College Portal

Welcome to the CSU Transfer Planner Community College Help Center!

- Just getting started? Set up your account.
- Any questions? Review our Quick Start Guide or contact customer service.
- · Got feedback? Help us improve your experience.

Getting Started with Your CSU Transfer Planner Account



Learn about CSU Transfer Planner and access customer service information

- CSU Transfer Planner Quick Start Guide
- CSU Transfer Planner Customer Service

Creating and Managing Your CSU Transfer Planner Account



Create an account, sign into an existing account, or reset your password.

- Accessing CSU Transfer Planner
- Reseting a CSU Transfer Planner Password
- Managing Your Account
- CSU Transfer Planner Technical Requirements & Accessibility

Managing Transfer Success Pathway Agreements



Review and manage Transfer Success Pathway (TSP) agreements between your program and transfer students.

Mhat is Transfer Success Pathway (TSP)?

Navigating CSU Transfer Planner



Get started using CSU Transfer Planner and managing your program users.

Navigating the Dashboard





THANK YOU

Have a questions?

Contact: csutransferplanner@calstate.edu







Student Portal



Student Portal Functionality

- Onboarding questionnaire
- Dashboard
- Enter College Coursework & Standardized Tests
- Track General Education Progress
- Transfer Progress GPA and Transfer Units
- Follow Programs
- For a refresher on the student portal features, please visit the link below

CSU Transfer Planner Student Portal Demo
CSU Transfer Planner for Community College
Counselors - Zoom



TSP Statuses

TSP Status	Definition
ENROLLED - Reviewed	The CSU reviewed the student's TSP enrollment agreement and confirmed it is all set.
REVOKED - Not Eligible	 The student is not eligible for a TSP enrollment. The student's existing TSP enrollment agreement will be removed (if applicable). The student cannot enroll in any TSP agreement. The TSP questionnaire will be removed. The Enroll buttons on the My Programs page will be removed.
REVOKED - Enrollment Error	 They are still eligible to enter into another enrollment agreement. This status is used for the following reasons: Student indicated a spring entry term for admission and your campus doesn't offer spring admission. Advise the student to change to fall.
REVOKED - Student Mistake	The student is released from TSP. The student made a mistake when selecting their program or university, and they are still eligible to enter in another enrollment agreement. This status is used for the following reasons: • Student selected the wrong university. • Student selected the wrong program.
REVOKED - Requested Release	The student is released from TSP per their request. They're still eligible to enter in another enrollment agreement. This status is used for the following reasons: • Student is not interested in TSP anymore. • Student is choosing a different career path. • Student is pursuing a different transfer path. • Student is no longer planning to transfer.



Glossary of Terms

- Segment: Segments are groups of contacts that meet a specific set of criteria you've established through filters.
- **TSP:** Transfer Success Pathway is an agreement between a student and a CSU campus that guarantees admission into a degree program. Admission to a CSU is guaranteed so long as the student meets the transfer requirements outlined in the agreement within 3 years of signing the agreement.
- Transfer Planner: The CSU Transfer Planner is a tool where students and universities can track a student's progress toward transferring into one of the 23 California State Universities.
- **Contacts**: Students that have added your community college under colleges attended, on their TSP agreement, or as their ADT school will appear as contacts in the community college portal.
- User portal: Refers to the California Community College Transfer Planner Portal.
- **Student portal:** The Student Portal allows students to track coursework, view articulation agreements, view program requirements and prerequisites, and enroll in a Transfer Success Pathway (TSP) agreement.

CSU TSP Contacts

Title

Leader Undergraduate Recruitment Specialist & TSP Coordinator

TSP Coordinator/Admissions Counselor

Student Outreach & Recruitment Counselor

Graduate Admissions Coordinator

Email Address

morgan.thornburg@humboldt.edu

jdmontoya@sfsu.edu verenice.rojas@sjsu.edu

morfinco@sonoma.edu

California State University

San Francisco State University

San Jose State University

Sonoma State University

California Polytechnic University, Humboldt

Name

Morgan Thornburg

Joseph Montoya

Verenice Rojas

Diego Morfin-Contreras

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California Polytechnic University, Pomona	Sarah Sprunger	Outreach Counselor	outreach@cpp.edu
California Polytechnic University, San Luis Obispo			admissions@calpoly.edu
California State University, Bakersfield	Christina Lopez	Admissions & Transfer Success Pathway Specialist	mlopez196@csub.edu
California State University, Channel Islands	Brittany Hong	Transfer Success Counselor	tsp@csuci.edu
California State University, Chico	Jacob Long	Lead Admissions Counselor	jlong@csuchico.edu
California State University, Dominguez Hills	Juana Reyes	Admissions & Recruitment Specialist	<u>TransferSuccess@csudh.edu</u>
California State University, East Bay	Jamee Robbins Gabriela Lomeli	Lead Outreach Counselor Transfer Specialist	tsp@csueastbay.edu
California State University, Fresno			Admissions@mail.fresnostate.edu
California State University, Fullerton	Brenda Hernandez	Senior Associate Director	admissions@fullerton.edu
California State University, Long Beach	Erica Ifill Dobbins	Outreach Coordinator- Transfer Services	Outreach@csulb.edu
California State University, Los Angeles	Vince Lopez Tammie Young	Executive Director of Enrollment Services Director of Admissions	recruit@calstatela.edu
California State University, Maritime Academy	Mayra Escobar	Associate Director, Transfer Enrollment Management	admissions@csum.edu
California State University, Monterey Bay			admissions@csumb.edu
California State University, Northridge	Rene Chino	Assistant Director, Partnerships & Initiatives	outreach.recruitment@csun.edu
California State University, Sacramento	Tommy Ngo	Admissions & Outreach Counselor	tsp@csus.edu
California State University, San Bernardino	Veronica Carpio	Transfer Pathway Coordinator	transfersuccesspathways@csusb.edu
California State University, San Marcos			apply@csusm.edu
California State University, Stanislaus	Joy Vickers	Lead WOW Admissions Counselor	jvickers1@csustan.edu
San Diego State University	Julie Chiwaro	Senior Transfer Admissions Counselor	csutransferpathways@sdsu.edu