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

- CSU Campus/Major Research
  - Career and Salary Information
  - Campus/Major Interest Tracking
  - Major Research/Search
  - ADT Pathway Tracking and Nudges
  - Coursework Entry – ASSIST data
  - General Education/Golden Four Tracking
- Application Jump Start
- CCC Info Sharing Opt-out
- CSU Info Sharing Opt-out
- Links to Financial resources and costs
- Transfer Success Pathway Program

CSU Chancellor’s Office
- Stakeholder Support
- System Support
- Strategic Reporting
- Transfer Success Pathway Program

CSU Campuses
- Major Promotion & Information
- Transfer Outreach
- Interest Tracking
- Transfer Support
- Transfer Forecasting
- Transfer Success Pathway Program

California Community Colleges (CCC)
- Counseling Support
- Student Tracking
- General Education/Golden Four Tracking
- Transfer Success Pathway 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
3. as the CCC associated with their **ADT**
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
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!

<table>
<thead>
<tr>
<th>Enrolled &amp; Reviewed by Program and TSP Transfer Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled &amp; Reviewed by Program and TSP Transfer Date</td>
</tr>
<tr>
<td>Fall 2025</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>Agricultural Business</td>
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Student Information

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

**Information**
Contains a link out to the following
- TSP Summary
- Standardized Tests
- General Education
- Transfer Programs

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

**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

View test score data for tests that have been submitted, taken or planned.

Showing specific exam for AP, IB and CLEP.

Self-reported
Information Ellipses: General Education

Track students’ progress towards key metrics like A2/B4 and Golden Four requirements along with other required GenEd courses.

### AREA A - ENGLISH LANGUAGE COMMUNICATION AND CRITICAL THINKING

<table>
<thead>
<tr>
<th>Subarea</th>
<th>Course/Test</th>
<th>Units</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>A1 - ORAL COMMUNICATION</td>
<td>CHE789 - CHEMISTRY</td>
<td>3</td>
<td>Planned</td>
</tr>
<tr>
<td>A2 - WRITTEN COMMUNICATION</td>
<td>AP - AP (ADVANCED PLACEMENT)</td>
<td>3</td>
<td>Taken</td>
</tr>
<tr>
<td>A3 - CRITICAL THINKING</td>
<td>NA - OPTED OUT</td>
<td>0</td>
<td>Opted Out</td>
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### AREA B - SCIENTIFIC INQUIRY AND QUANTITATIVE REASONING

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<tbody>
<tr>
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<td>NA - NOT COMPLETED</td>
<td>Not Complete</td>
</tr>
<tr>
<td>B2 - BIOLOGICAL SCIENCE</td>
<td>NA - NOT COMPLETED</td>
<td>Not Complete</td>
</tr>
<tr>
<td>B3 - LAB ACTIVITY</td>
<td>NA - NOT COMPLETED</td>
<td>Not Complete</td>
</tr>
<tr>
<td>B4 - MATHEMATICS/QUANTITATIVE REASONING</td>
<td>NA - NOT COMPLETED</td>
<td>Not Complete</td>
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</table>

### AREA C - ARTS AND HUMANITIES

<table>
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<th>Units</th>
<th>Status</th>
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</thead>
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<td>C1 - ARTS</td>
<td>NA - NOT COMPLETED</td>
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<td>Not Complete</td>
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### Information Ellipses: Transfer Programs

#### Active Programs

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Campus</th>
<th>Last Updated</th>
<th>ADT Similar</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Geomatics Engineering (B.S.)</td>
<td>California State University, Fresno</td>
<td>Sep 20, 2022</td>
<td>✔</td>
<td>Active</td>
</tr>
<tr>
<td>American Indian Studies</td>
<td>California State University, Fresno</td>
<td>Sep 22, 2022</td>
<td></td>
<td>Inactive</td>
</tr>
<tr>
<td>Chemistry, B.A.</td>
<td>San Jose University</td>
<td>Sep 20, 2022</td>
<td>✔</td>
<td>Active</td>
</tr>
<tr>
<td>Chemistry, B.S.</td>
<td>San Jose University</td>
<td>Sep 22, 2022</td>
<td></td>
<td>Inactive</td>
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#### Inactive Programs

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<tr>
<th>Program Name</th>
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<th>Last Updated</th>
<th>ADT Similar</th>
<th>Status</th>
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This student is reported being enrolled in an ADT program(s): Psychology at Ventura College and Early Childhood Education at Coastline Community College.

**View Transfer Programs data**

View transfer programs students have followed, and follow their progress.
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.

Each 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!
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.
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
Filtering Students

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

- TSP STATUS
  - TSP Status is Enrolled: Reviewed

- TSP TRANSFER DATE
  - TSP Transfer Date is Fall 2025

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

TSP Status
- 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!

Via settings

Settings->Import/Export->Exports

Two exports have been loaded into each portal.

1) Students by School of interest
2) TSP Student Export
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
  • Add charts
  • 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
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
  - csutransferplanner@calstate.edu
• Process related questions
• User management
• Questions about TSP Eligibility
• Requests for training
• Requests for campus contact information

• Liaison Support
  - csutransferplanneradm@liaisonedu.com
• 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
THANK YOU

Have a question?
Contact: csutransferplanner@calstate.edu
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

<table>
<thead>
<tr>
<th>TSP Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENROLLED - Reviewed</td>
<td>The CSU reviewed the student's TSP enrollment agreement and confirmed it is all set.</td>
</tr>
</tbody>
</table>
| REVOKEDE - 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. |
| REVOKEDE - 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. |
| REVOKEDE - 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. |
| REVOKEDE - 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.
<table>
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<tr>
<th>California State University</th>
<th>Name</th>
<th>Title</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>California Polytechnic University, Humboldt</td>
<td>Morgan Thornburg</td>
<td>Graduate Admissions Coordinator</td>
<td><a href="mailto:morgan.thornburg@humboldt.edu">morgan.thornburg@humboldt.edu</a></td>
</tr>
<tr>
<td></td>
<td>Marissa Holguin</td>
<td>Transfer Coordinator</td>
<td><a href="mailto:marissa.holguin@humboldt.edu">marissa.holguin@humboldt.edu</a></td>
</tr>
<tr>
<td>California Polytechnic University, Pomona</td>
<td>Sarah Sprunger</td>
<td>Outreach Counselor</td>
<td>outreachcpp.edu</td>
</tr>
<tr>
<td>California Polytechnic University, San Luis Obispo</td>
<td></td>
<td></td>
<td><a href="mailto:admissions@calpoly.edu">admissions@calpoly.edu</a></td>
</tr>
<tr>
<td>California State University, Bakersfield</td>
<td>Christina Lopez</td>
<td>Admissions &amp; Transfer Success Pathway Specialist</td>
<td><a href="mailto:mlopez196@csusb.edu">mlopez196@csusb.edu</a></td>
</tr>
<tr>
<td>California State University, Channel Islands</td>
<td>Brittany Hong</td>
<td>Transfer Success Counselor</td>
<td><a href="mailto:tsp@csuci.edu">tsp@csuci.edu</a></td>
</tr>
<tr>
<td>California State University, Chico</td>
<td>Jacob Long</td>
<td>Lead Admissions Counselor</td>
<td><a href="mailto:jlong@csuchico.edu">jlong@csuchico.edu</a></td>
</tr>
<tr>
<td>California State University, Dominguez Hills</td>
<td>Juana Reyes</td>
<td>Admissions &amp; Recruitment Specialist</td>
<td><a href="mailto:TransferSuccess@csudh.edu">TransferSuccess@csudh.edu</a></td>
</tr>
<tr>
<td>California State University, East Bay</td>
<td>Jamee Robbins</td>
<td>Lead Outreach Counselor</td>
<td><a href="mailto:tsp@csueastbay.edu">tsp@csueastbay.edu</a></td>
</tr>
<tr>
<td></td>
<td>Gabriela Lomeli</td>
<td>Transfer Specialist</td>
<td></td>
</tr>
<tr>
<td>California State University, Fresno</td>
<td></td>
<td></td>
<td><a href="mailto:admissions@mail.fresnostate.edu">admissions@mail.fresnostate.edu</a></td>
</tr>
<tr>
<td>California State University, Fullerton</td>
<td>Brenda Hernandez</td>
<td>Senior Associate Director</td>
<td><a href="mailto:admissions@fullerton.edu">admissions@fullerton.edu</a></td>
</tr>
<tr>
<td>California State University, Long Beach</td>
<td>Erica Ilfi Dobbins</td>
<td>Outreach Coordinator- Transfer Services</td>
<td><a href="mailto:Outreach@csulb.edu">Outreach@csulb.edu</a></td>
</tr>
<tr>
<td>California State University, Los Angeles</td>
<td>Vince Lopez</td>
<td>Executive Director of Enrollment Services</td>
<td><a href="mailto:recruit@calstatela.edu">recruit@calstatela.edu</a></td>
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<tr>
<td></td>
<td>Tammie Young</td>
<td>Director of Admissions</td>
<td></td>
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<tr>
<td>California State University, Maritime Academy</td>
<td>Mayra Escobar</td>
<td>Associate Director, Transfer Enrollment Management</td>
<td><a href="mailto:admissions@csumb.edu">admissions@csumb.edu</a></td>
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<tr>
<td>California State University, Monterey Bay</td>
<td></td>
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</tr>
<tr>
<td>California State University, Northridge</td>
<td>Rene Chino</td>
<td>Assistant Director, Partnerships &amp; Initiatives</td>
<td><a href="mailto:outreach.recruitment@csun.edu">outreach.recruitment@csun.edu</a></td>
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<tr>
<td>California State University, Sacramento</td>
<td>Tommy Ngo</td>
<td>Admissions &amp; Outreach Counselor</td>
<td><a href="mailto:tsp@csus.edu">tsp@csus.edu</a></td>
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<tr>
<td>California State University, San Bernardino</td>
<td>Veronica Carpio</td>
<td>Transfer Pathway Coordinator</td>
<td><a href="mailto:transfersuccesspathways@csusb.edu">transfersuccesspathways@csusb.edu</a></td>
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<td>California State University, Stanislaus</td>
<td>Joy Vickers</td>
<td>Lead WOW Admissions Counselor</td>
<td><a href="mailto:jvickers1@csustan.edu">jvickers1@csustan.edu</a></td>
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<tr>
<td>San Diego State University</td>
<td>Julie Chiwara</td>
<td>Senior Transfer Admissions Counselor</td>
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<tr>
<td>San Francisco State University</td>
<td>Joseph Montoya</td>
<td>Leader Undergraduate Recruitment Specialist &amp; TSP Coordinator</td>
<td><a href="mailto:jdmontoya@sfsu.edu">jdmontoya@sfsu.edu</a></td>
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<tr>
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<td>Verenice Rojas</td>
<td>TSP Coordinator/Admissions Counselor</td>
<td><a href="mailto:verenice.rojas@sjsu.edu">verenice.rojas@sjsu.edu</a></td>
</tr>
<tr>
<td>Sonoma State University</td>
<td>Diego Morfin-Contreras</td>
<td>Student Outreach &amp; Recruitment Counselor</td>
<td><a href="mailto:morfinco@sonoma.edu">morfinco@sonoma.edu</a></td>
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