CEDARCRESTONE

ORACLE CERTIFIED ADVANTAGE PARTNER

MADISON COLLEGE

NON-PROGRAM INTAKE MANAGEMENT BUSINESS PROCESS GUIDE

OCTOBER 2010

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Process Overview

Process Owner Information

Functional Area	Functional Unit	Process Owner	Date
Enrollment Services	Enrollment Center	Associate Director Enrollment Services	06/07/2010

Version Control

Version #	Version Date	Revised By	Description of Change
Draft	6/8/10	Tricia Campbell	Original draft, process steps, mockup screenshots
Draft 2	6/17/10	Tricia Campbell	Inserted Jennifer and Stephanie's comments
Draft 3	6/22/10	Tricia Campbell	Updated to reflect technical changes from Jack, Peri and Jayme
Final Draft	10/18/10	Tricia Campbell	Updated to reflect actual development completed for roll out

Non-Program Intake Management Process Overview

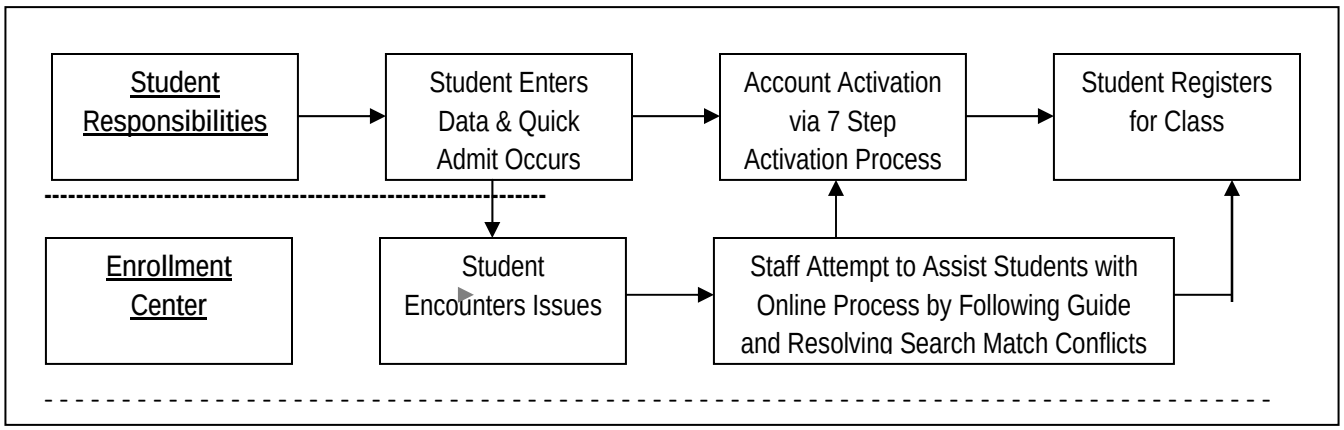
The primary purpose of the Non-Program Intake Management process is to allow potential students, who do not need to complete a formal admission process, the ability to activate an account, register, and pay for their classes in a self-service, online manner. The management of quick admits at Madison College has been a highly decentralized process. Students may be quick admitted by telephone, in person contact, or by paper form. Although in person and phone communications allow a staff person to ask pertinent questions, problems still exist with information gathering and concern for identity confirmation.

The use of a common paper form or process has not been uniform, in many cases, and has also lead to an accumulation of applications to be entered due to the high volume of quick admits each year. Over the years, this has lead to a number of inconsistencies in data integrity attributable, in part, to illegible or incomplete information on the form. Because of these data collection and integrity issues, this has also lead to incomplete client reporting. As a result of these and other determining factors, the development of a process to allow this service was defined in the scope of

the Quick Wins project. The scope objectives are addressed in this business process guide.

The development of this process will include a few phases. The first phase will consist of allowing undeclared degree and non-degree students the ability to create an account, quick admit, and register. Subsequent phases (to be determined) will deliver more enhanced functionality such as: developing a series of menus that enable various questions/additional required information to be displayed based on student's answers, additional prompts to offer assistance to students, options for student's preferred language while completing the intake, roll out to contract services, webinars, and enrichment classes and the ability to require payment in advance for targeted courses.

The diagram below displays how the Non-Program Intake Management fits within the overall enrollment process.



BUSINESS PROCESS REQUIREMENTS

To accomplish the goals of the Non-Program Intake Management Project, it was important to define the critical foundation pieces of the process as well as develop a mechanism to evaluate and monitor the success of the project. In addition, rolling out further, enhanced functionality as part of a phase 2 of this project was noted. The following business process requirements were identified:

- Create and activate an account
    - Collect Student ID, Social Security Number, First Name, Middle Initial, Last name, Name Suffix and Date of Birth to perform a search match.
    - If it is determined that the student is already in the system, supply the user ID and redirect to the 'Account Activation / Password Reset page in S-Portal. If it cannot be determined who the student is (a potential match) the student will receive a message indicating to contact the Enrollment Services Office due to a potential match. Otherwise, collect other pertinent personal profile data required for client reporting.
        - This section would capture other required information Madison College needs to collect for client reporting. These fields would be questions (highly defined to gather more information to promote accuracy) that are captured in various steps or pages that make the data collection process complete prior to allowing the student to finish creating their account and register. All fields in this process include:
            - Student ID, SSN, Last Name, First Name, MI, Name Suffix, Date of Birth, Email Address, Phone Number, Gender, Disability, Question asking if Hispanic or Latino (Yes or No), Question to ask Race information (include an option to capture those who do not wish to provide), Mailing Address, City, State, Zip, Legal State of Residence Information (Capture if state is WI, MN or Other), and if WI is answered then indicate County, Municipality, and High School District), Work Status (Employed Full-Time, Part-Time, Underemployed, Unemployed-Seeking, Not in Labor Market, Dislocated Worker, Refuse to Provide), Displaced Homemaker, Single Parent, Economically Disadvantaged, Limited English Proficiency, Either parent completed a 4yr degree (Y/N), Highest Grade Completed, Signature with date indicating that they have certified the information

provided is valid and they are responsible for all charges incurred.

- Ability for student to go through the process to obtain their User ID and/or password, if needed.
- Quick admit and term activate process occurs behind the scenes (quick admit for current term and term activate for current and next term for both degree and non-degree).
- Links to the necessary information should be provided after the activation (as well as links to tutorials).
- The ability to register will depend on the registration timeline at the given time. Generally, students will be allowed to register during open enrollment.
- Students would be able to use other self service functionality that currently exists for students (i.e. password reset, update bio-demographic information).
- Queries be developed that can help with data collection, analyzing trends, and client reporting would be created.
- Rollout functionality to contract services, enrichment, and webinars as part of phase 2.
- Continue to build on the process and develop more robust menus, prompts, guides, and communications as part of phase 2.
- Provide alternate method of staff-assisted, Red Flags Rule compliant, account creation via paper form.

Where the Data for This Process Comes From

The majority of the information contained in this Business Progress Guide is pulled from the information the student enters when creating the account and Self-service areas of the PeopleSoft Campus Solutions product.

Where the Data from This Process Goes

Students have the primary responsibility for performing the account creation, account activation and self-registration steps. Once complete, the quick admit, term activation and registration processes will have been performed for both careers (degree and non-

degree). Staff may be required to assist students who are not technology-enabled or who have difficulties for a variety of reasons in account activation or registration completion. Staff should review the entire procedure in order to familiarize themselves with the process students will complete so they are able to assist students with any problem areas.

Related Information

Prerequisites and Assumptions

Students are expected to activate their own account and self-register for the appropriate classes. Certain criteria are assumed and other items should be completed as part of the prerequisites to enrolling in a class.

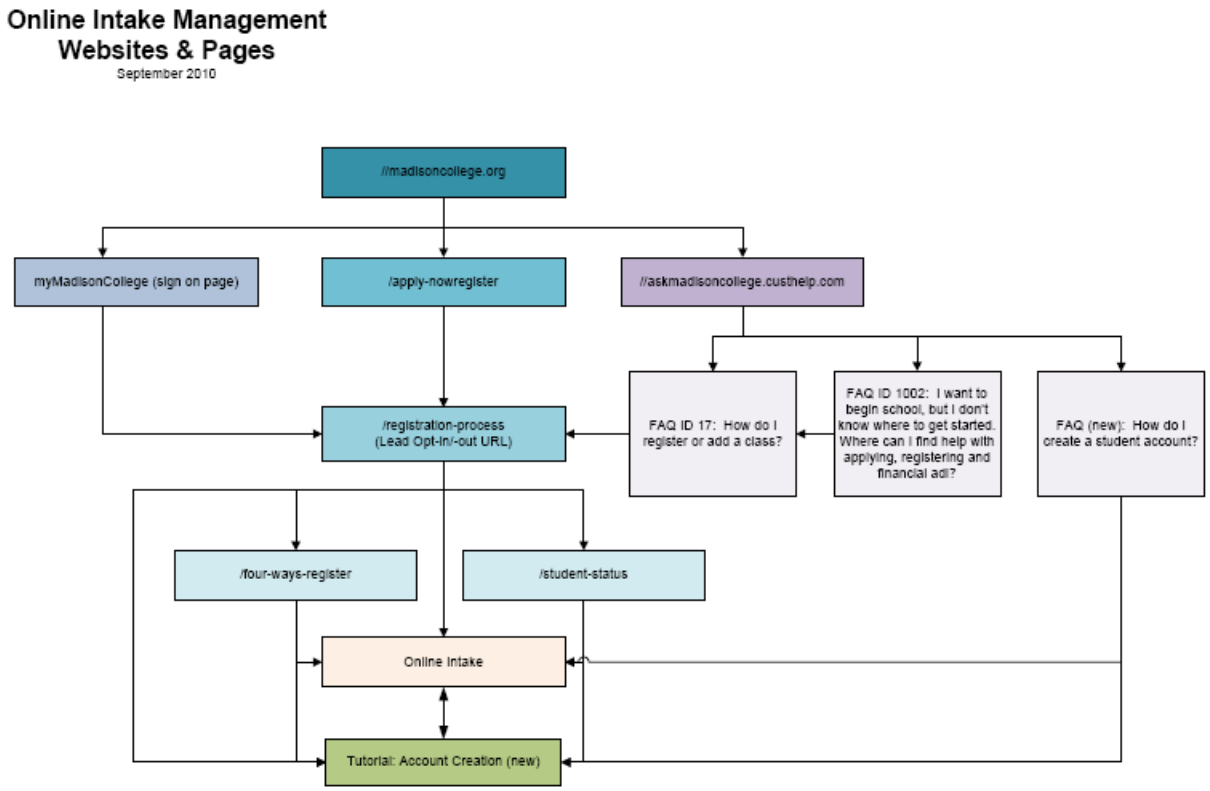
Prerequisites and Assumptions	
Prerequisite/Assumption	Detail
Course and Class Setup for Term	Classes have been rolled from previous terms and/or setup as classes for the selected term.

Related Documents

The following website resources provide additional information concerning Non-Program Intake.

Related Documents	
Document Name	Location or Link to Document
General process information/details	http://matcmadison.edu/registration-process
Student Portal	https://mymadisoncollege.swcportal.org/
Tutorials	http://breeze.fvtc.edu/accountcreation
FAQs	askMadisonCollege FAQ 17, 1002 & 1085
Account Creation Form	http://intranet.matcmadison.edu/forms-db/forms/New-Student-Account-Creation-Form.pdf
STEPS Program/Matters	http://matcmadison.edu/steps-phase-ii

ONLINE INTAKE MANAGEMENT WEBSITES & PAGES



HELPFUL HINTS

This section provides useful tips, guides, or background information about this business process. These hints are related to the Non-Program Intake process.

- √ The Non-Program Intake Management process is a phased-in process allowing undeclared degree and non-degree students the ability to quick admit, activate an account, and register. The first phase contains the basic foundation pieces while phase 2 will allow for more robust functionality and rollout to contract services, enrichment, and webinars.
- √ If the student has problems with quick admit or account activation, a "contact us" note will be available providing them with a phone number to call.
- √ The less than one year auto load process will continue to run as normal.

- √ The account activation and registration processes are unchanged. Students will activate their account and register for classes as current students do at Madison College.
- √ Students will make payments as they normally would. Further discussion about payments "on the spot" for specific classes will be discussed in phase 2.

KEY DEFINITIONS

KEY DEFINITIONS	
TERM/ACRONYM	DEFINITION
Quick Admit	This is the first step for a new student to gain online access to the system 24/7 to create and activate an account, and register for courses. The Quick Admit process enables a student's personal data to be created in the database as follows: • Assigns the new student an ID number and creates a row for the student in the person tables. • Activates the new student in the academic programs for undeclared and non-degree for the careers degree and non-degree. • Activates the student in the appropriate terms based on the time of year, which creates a row in the student term table. (This would occur as part of the new process)
Term Activation	Term activation is the process by which you inform the system that admitted and matriculated students are eligible for enrollment, transfer credit posting to their records, and tuition calculation. Each term, activating students is a prerequisite for these functions. This is part of the quick-admit process but is listed here for clarity.
Account Activation	This is the second step new students take to log into their online Student Center through myMadisonCollege, Madison College's student portal. When new students activate their accounts, they are given access to class registration, financial aid information, grades, calendars, and more. The Account Activation function currently exists today and will not be modified. After the student quick admits, he/she will be redirected to the Account Activation page where they will follow the 7 steps to activate their account.

PROCESS SUMMARY

Creating this process to allow students to create and activate their account online, 24/7 and register for classes will increase customer satisfaction. This will allow staff more meaningful opportunities to assist the students with support, when needed. The processes below are broken down into the phases recommended to the STEPs team as part of the new policy document.

Phase 1: Create the critical foundation pieces of the process as well as develop a mechanism to evaluate and monitor the success of the project.

1. Allow the online collection of pertinent bio-demographic data so that undeclared degree and non-degree students can create and activate an account, and register for classes. Vital data required for client reporting would be collected before the account is created.

2. Students will be able to use other self service functionality that currently exists for students (i.e. password reset, update bio-demographic information, make a payment).

3. Effective with online account creation implementation on Oct, 25 2010, account creation will not be completed over the telephone in compliance with Red Flags Rule. New students not using the online process must submit a new student account creation form in-person with qualified photo ID to any enrollment service office to confirm identity and create account. It will be important to promote and instruct students on the options in Self Service as the primary resource for handling their transactions, when possible.

4. Madison College website language/links and other communication devices would need to be modified to guide the student to the appropriate area for their educational pursuits.

5. Communicate with and provide training for staff regarding changes to internal procedures as well as student procedures. Staff will need to know trouble-shooting procedures in order to assist students with process questions as well as be able to determine search match conflicts.

6. Queries that can help with data collection, analyzing trends, and reporting will be created.

Phase 2: On a timeframe determined by Madison College, deliver more enhanced functionality. Such as:

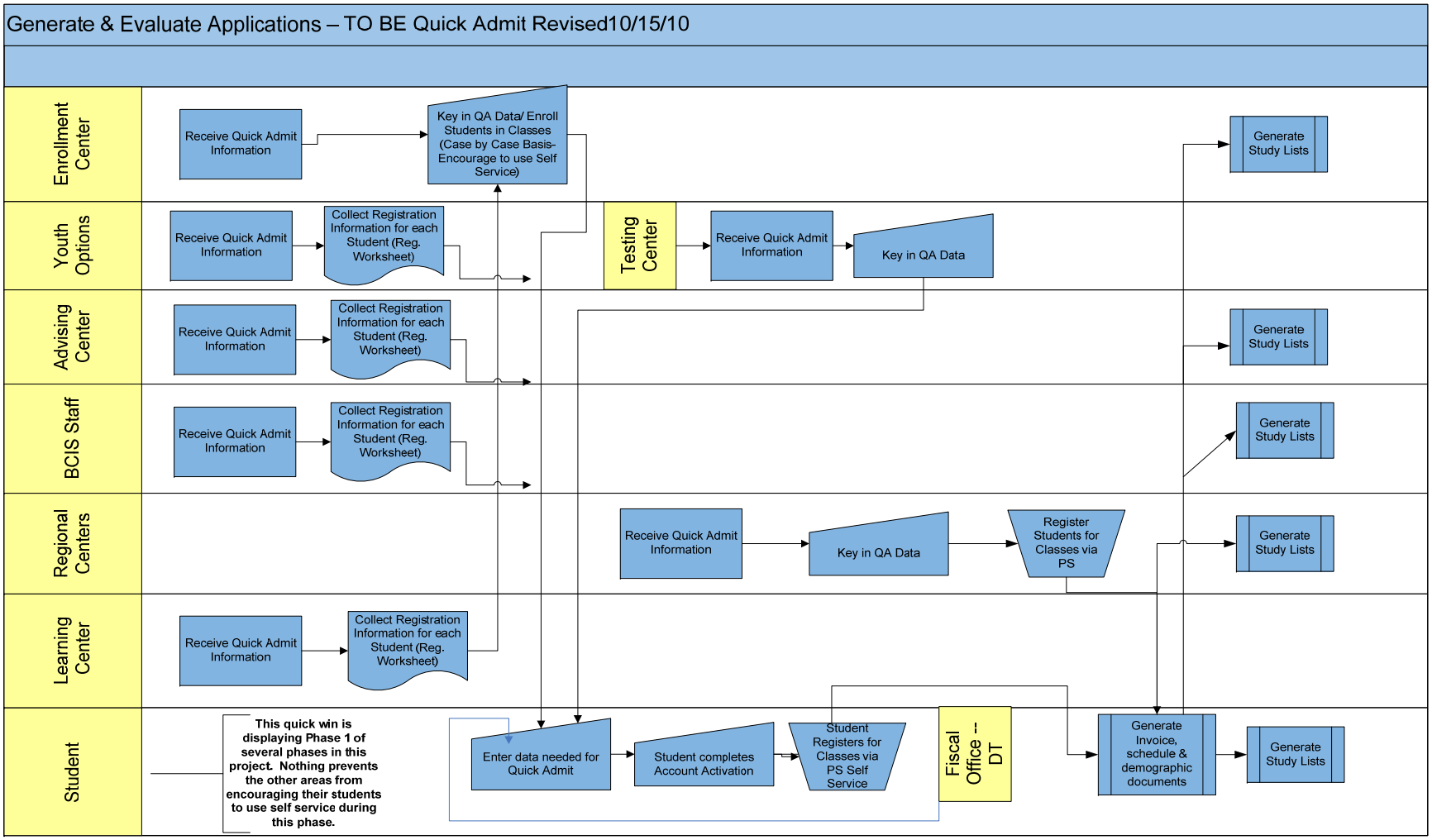
1. Rollout functionality to use this method for contract services, event/webinar registration, and enrichment classes.

2. Develop a series of menus that enable various questions/additional required information to be displayed based on students' answers.

3. Create additional prompts to offer assistance to students.

4. Offer the student the option of preferred language while creating the account and enrolling (could be out further than phase 2).

FLOW DIAGRAM OF NON-PROGRAM INTAKE MANAGEMENT PROCESSES



BUSINESS PROCESS STEPS

The business process involves various steps performed primarily by the student. Some steps may change if more data is required to be collected in the future or when the additional phases are implemented. Most of the steps are repeated for each term or enrollment period.

I. Student wants to take a class
- Navigate to the Madison College Public Website.
- Choose the appropriate path and leads them to an account creation page.
- Click on appropriate option to register.

II. Account Creation
- Student will enter Student ID OR SSN, DOB, First Name, Middle Initial, Last Name and Name Suffix.
    - System will conduct a search match.
        - If potential match found and a search match conflict exists, student will be directed to an Enrollment Services contact number for assistance.
        - If the search finds a direct match, the student ID will be displayed and the student will be directed to the Student Center Account Activation and/or Username and Password Retrieval process.
        - If no match found, student will proceed to next step.
- Student will provide personal profile information, residency data, client reporting , additional questions and electronic signature.
- Student will review and click on “Move to Next Step” button.
- Student will be assigned a Student ID, and a page will display to show it.
- Student will be term activated for the current and next term for both careers.
- Staff provides trouble-shooting assistance as appropriate.

III. Account Activation
- After the quick-admit and term activation process is complete, the student will click on the Activate Student Account button and be directed to the current Account Activation 7-step process.
    - The important difference is that on step 2, the Student ID, SSN, and Birth Date fields will already be populated; user just clicks thru to next step.
    - When complete, student may sign into myMadisonCollege and register.

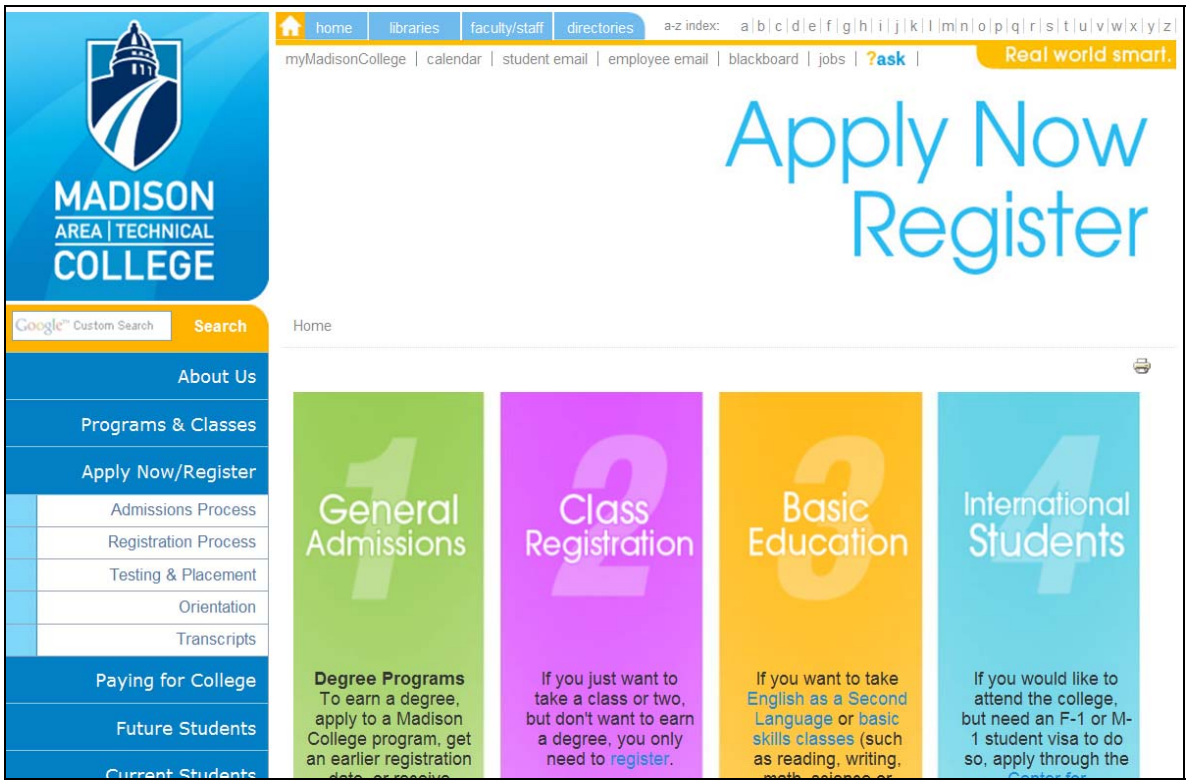
IV. Register for Classes
- Student registers via self-service.
- Staff provides assistance for registration as appropriate.

Details for each of the steps are provided in this document except where the process or steps are not impacted by the process.

PROCESS DETAIL

NON-PROGRAM INTAKE MANAGEMENT

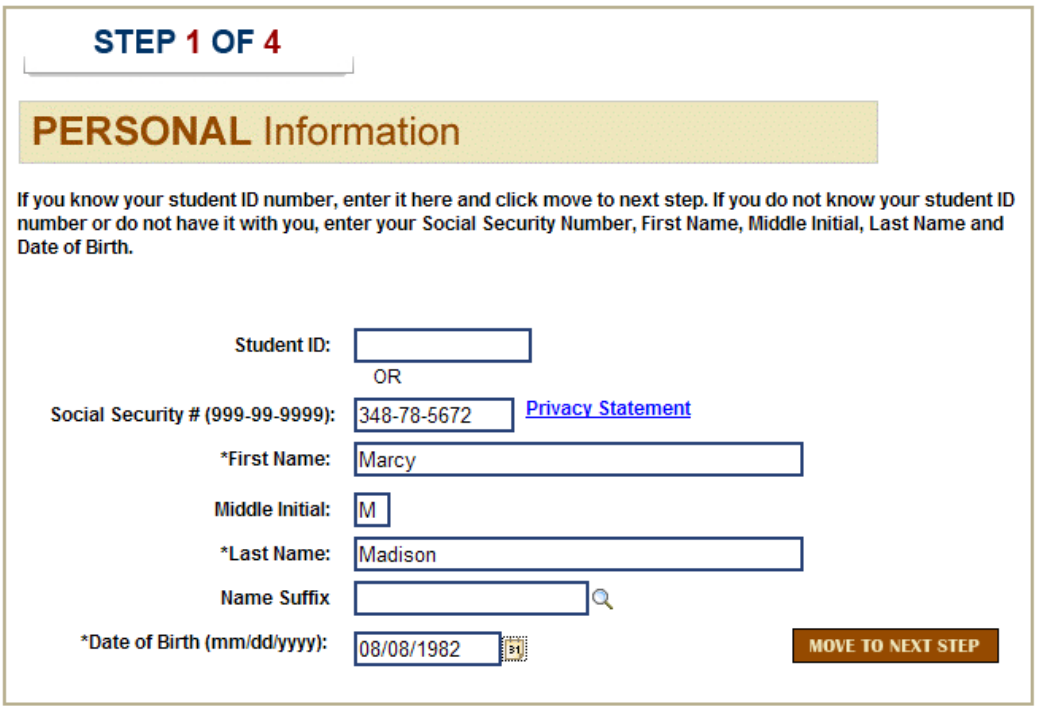
Navigation: Madison College Website > Apply Now/Register > Class Registration



Step 1 The Apply Now Register page choice will appear.

The student will review his/her options and will select Class Registration option number 2.

They will click on Step 2 to verify status as first time student, and be directed to the following page to create an account (additional information and access to create an account is available from Admissions Process, Four Ways to Register, myMadisonCollege and askMadisonCollege FAQs).



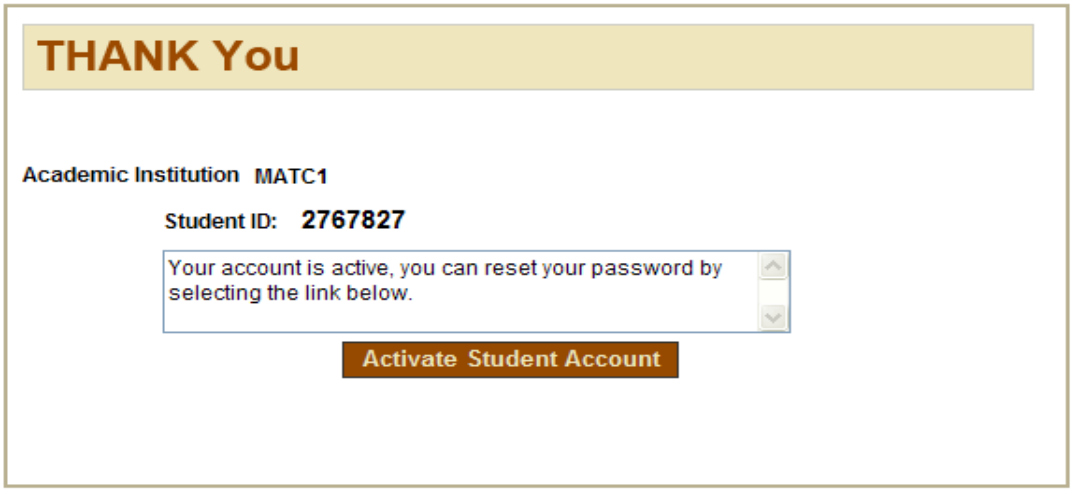
Step 2 The Personal Information page appears. (Step 1 of 4)

The student will need to enter Student ID (if known) OR, SSN, First Name, Middle Initial (optional), Last Name, Name Suffix (optional) and Date of Birth.

Asterisks indicate required fields

They will click on MOVE TO NEXT STEP.

A search match will occur and will attempt to verify the information the student submitted against what currently exists in the database. If a direct match is found, the following screen will appear.

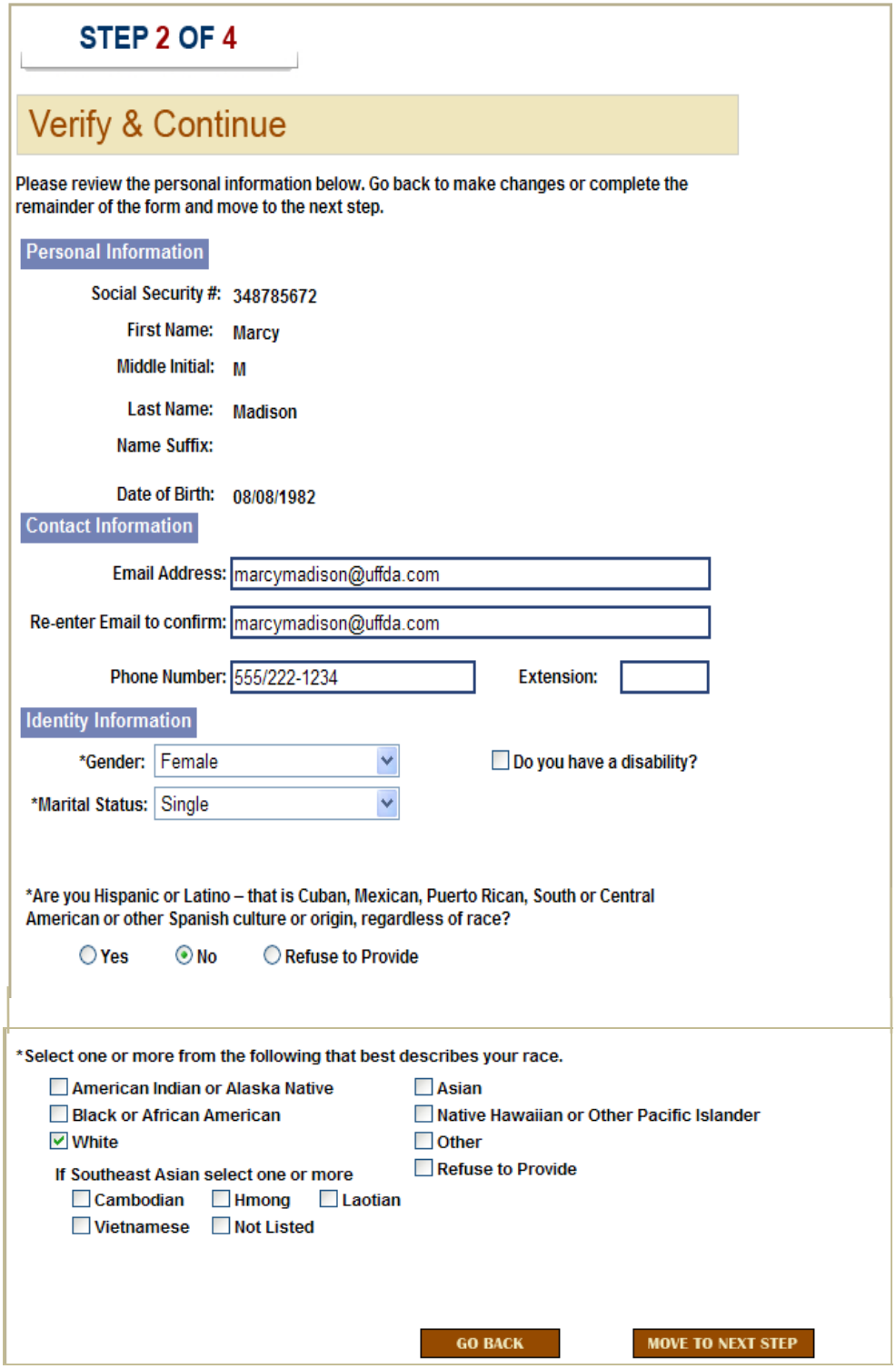


If the student does not remember their password, they can click on the Activate Student Account link and follow the steps to reset their password.

If the search match process does not encounter match results, the student will proceed onto the next step.

If the system cannot determine if the student is an exact match against a record in the database, the student will receive a message like below:

> We have identified a possible conflict in attempting to process your data. Please contact the Enrollment Center (608-246-6240) , option 1, to assist you.



STEP 2 OF 4

Verify & Continue

Please review the personal information below. Go back to make changes or complete the remainder of the form and move to the next step.

Personal Information

Social Security #: 348785672
First Name: Marcy
Middle Initial: M
Last Name: Madison
Name Suffix:
Date of Birth: 08/08/1982

Contact Information

Email Address: marcymadison@uffda.com
Re-enter Email to confirm: marcymadison@uffda.com
Phone Number: 555/222-1234 Extension:

Identity Information

*Gender: Female
Do you have a disability?
*Marital Status: Single

*Are you Hispanic or Latino – that is Cuban, Mexican, Puerto Rican, South or Central American or other Spanish culture or origin, regardless of race?

Yes No Refuse to Provide

*Select one or more from the following that best describes your race.

American Indian or Alaska Native
Black or African American
White
Asian
Native Hawaiian or Other Pacific Islander
Other
Refuse to Provide

If Southeast Asian select one or more

Cambodian Hmong Laotian
Vietnamese Not Listed

GO BACK MOVE TO NEXT STEP

Step 3 The Verify & Continue page appears. (Step 2 of 4)

The student will need to verify the personal information is correct. If not, the student may choose to click on the GO BACK button and correct the information.

The student can choose to enter the Contact Information (optional). Enter Email Address, Re-enter Email to Confirm, and Phone Number.

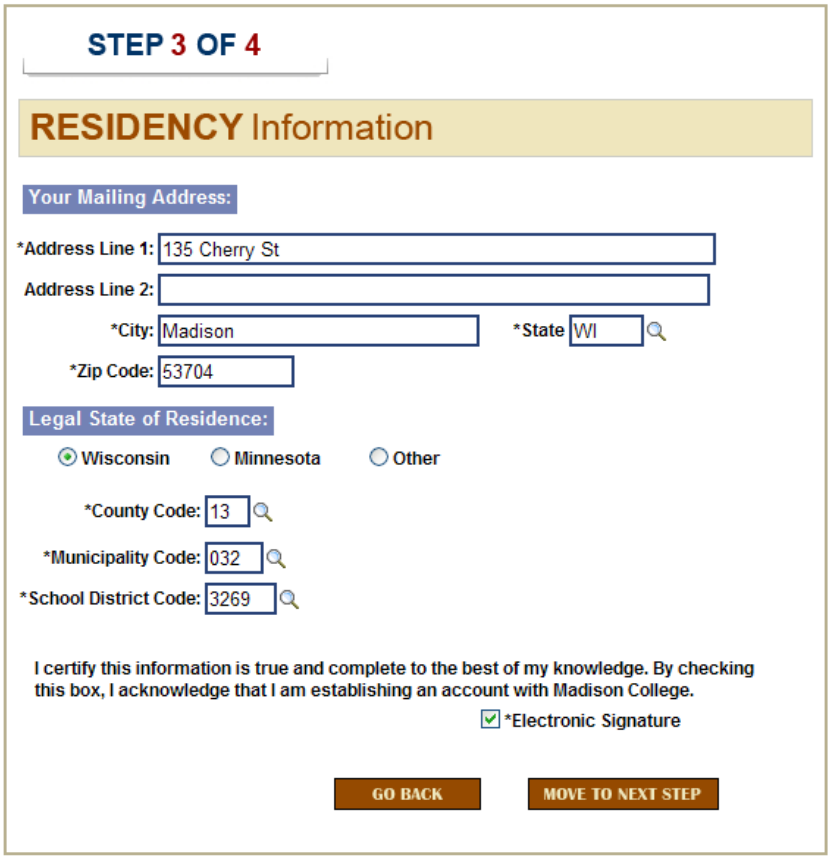
Asterisks indicate required fields

Enter **Identity Information**. Choose the appropriate **Gender** and **Marital Status** from the drop down. Check the **Disability** box, if appropriate.

Answer the "**Are you Hispanic or Latino**" question by checking the appropriate radio button.

Then, the student should select one or more of the boxes that best describes their **Race**.

When finished, click on MOVE TO NEXT STEP.



Step 4 The **Residency Information** page appears.

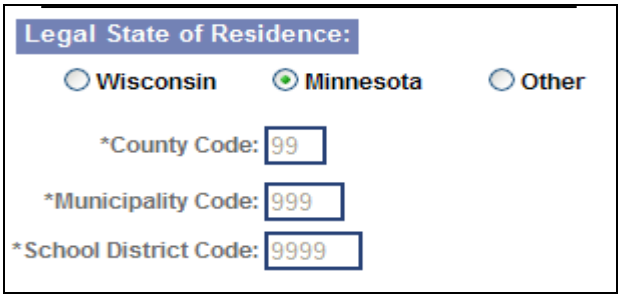
The student will need to enter their mailing address information.

Enter **Address Line 1**, **Address Line 2** (if appropriate), **City**, **State**, and **Zip Code**.

The student's actual address may not be the same as their residency, so additional fields/questions are required.

The **Legal State of Residence** is required. The student will either choose **Wisconsin**, **Minnesota**, or **Other**. If **Wisconsin** is chosen, the **County Code**, **Municipality Code**, and **School District Code** will become available to enter data (which is required).

If **Minnesota** or **Other** are selected, the **County Code**, **Municipality Code**, and **School District Code** will be auto populated with **9's**.

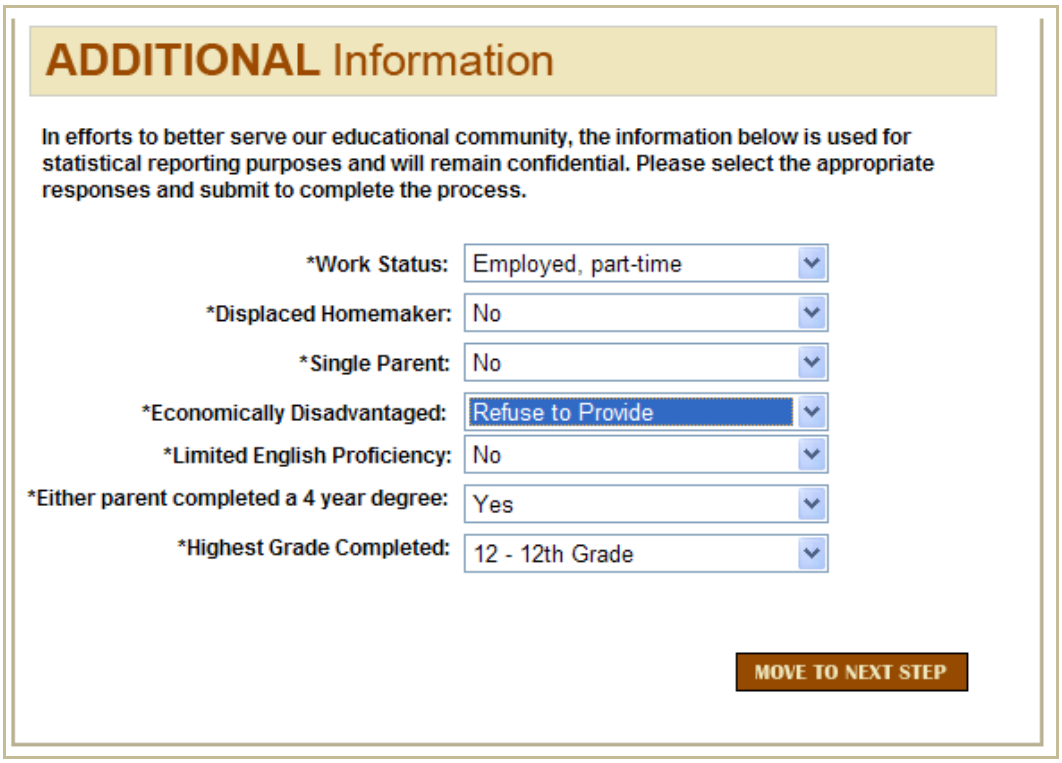


The student must check the box by *Electronic Signature before proceeding.

The student may choose to click on the GO BACK button and correct the information on the previous page.

When fields are entered, click on MOVE TO NEXT STEP.

At this time, the student will be term activated for the current and the following terms.



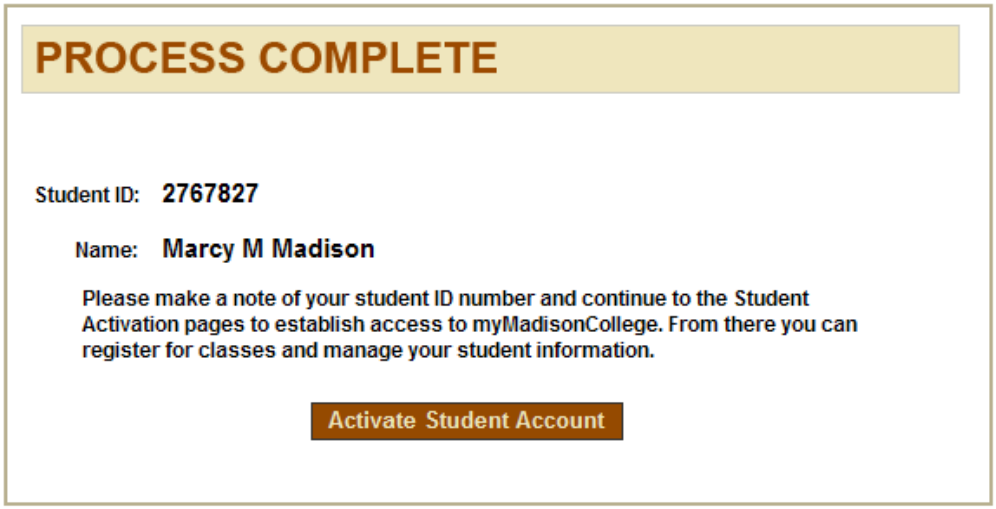
Step 5 The Additional Information page appears.

The student will answer the questions by choosing the appropriate drop down answer.

Asterisks indicate required fields

When fields are entered, click on MOVE TO NEXT STEP.

When the process is complete the following screen will appear.



Step 6 The Process Complete page appears. The student is encouraged to make a note of their student ID number.

The student can then click on the Activate Student Account link and be directed to the Reactive Account / Password Reset steps.

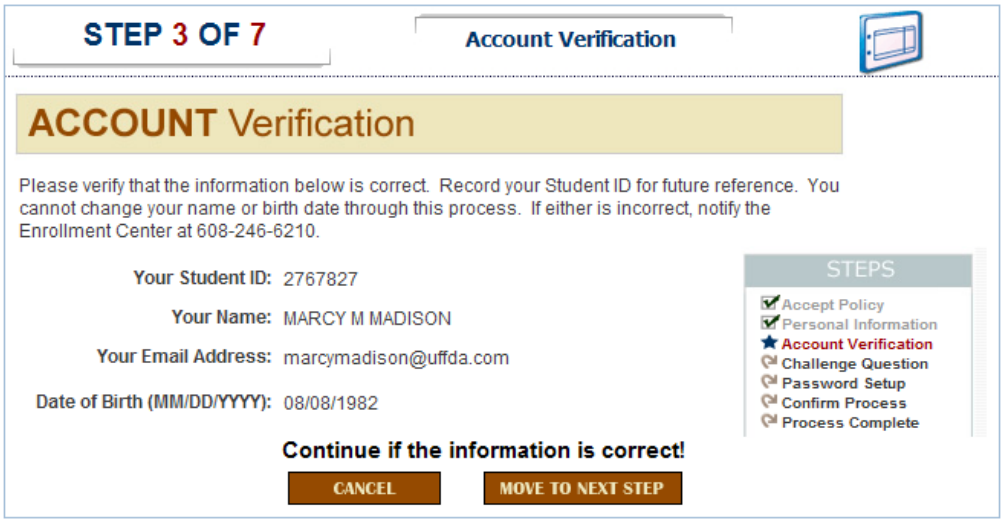
REACTIVATE ACCOUNT / PASSWORD RESET

Step 7 The student will click **I AGREE** at the bottom of this page. (Step 1 of 7)

Step 8 The **Personal Information** page appears. (Step 2 of 7)

The new Student ID or SSN, and Date of Birth will be defaulted from previous data collection.

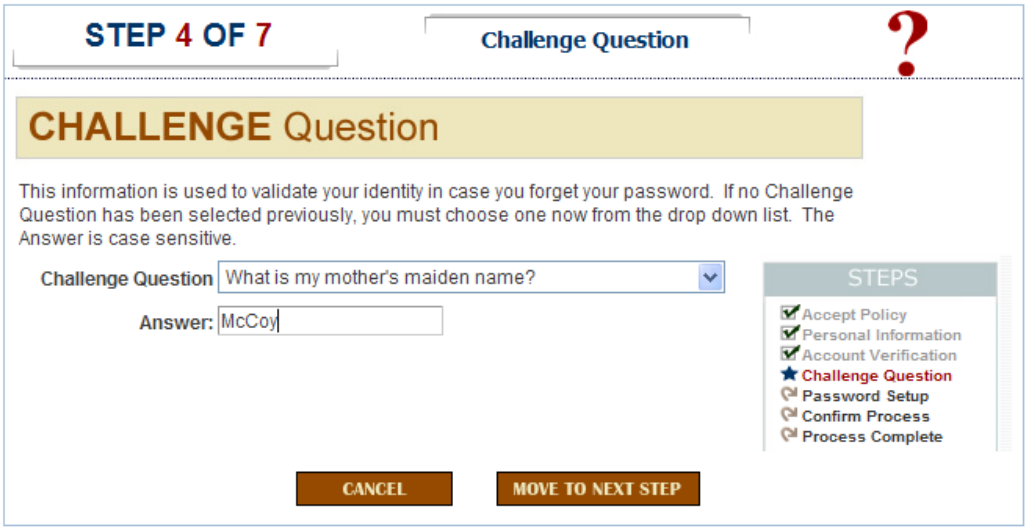
When fields are entered, click on **MOVE TO NEXT STEP**.



Step 9 The Account Verification page appears. (Step 3 of 7)

The student will need to review the information. If the information is incorrect, they are asked to contact the Enrollment Center at the phone number listed.

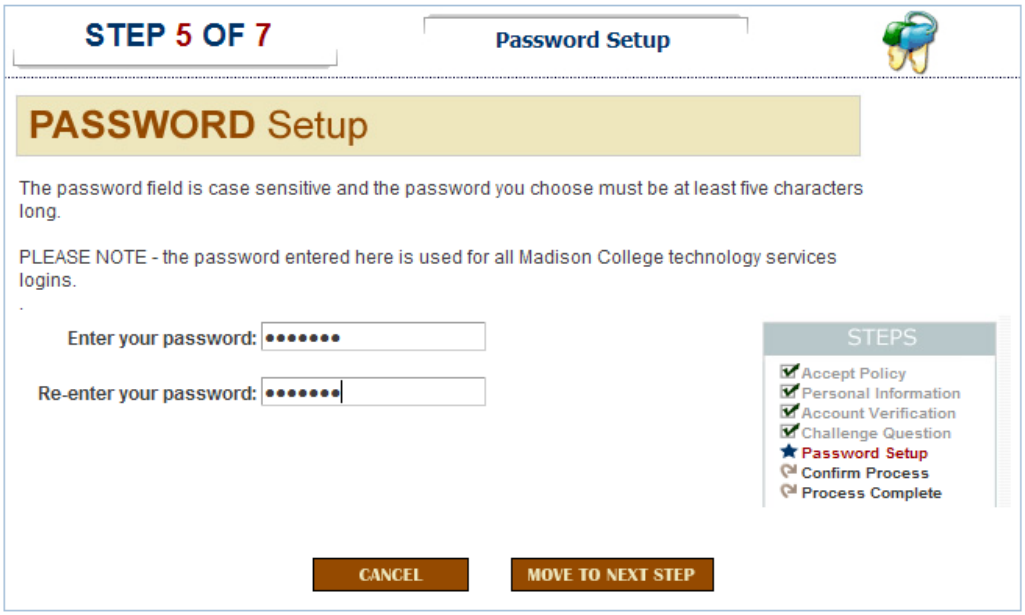
If the information is correct, click on MOVE TO NEXT STEP.



Step 10 The Challenge Question page appears. (Step 4 of 7)

The student will be prompted to choose a challenge question and provide an answer.

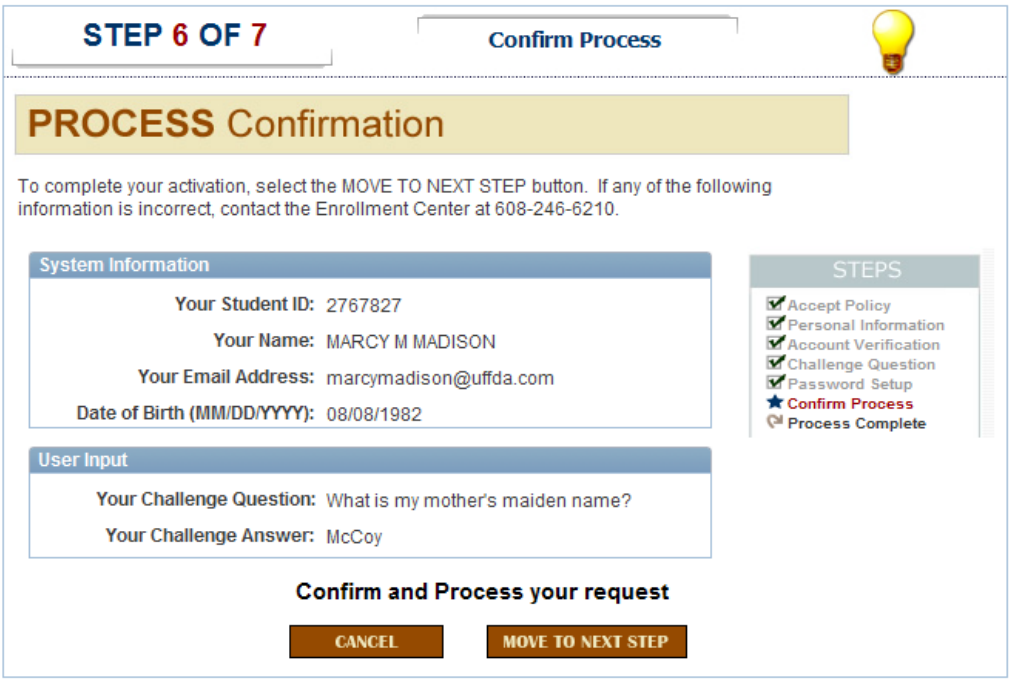
When information is entered, click on MOVE TO NEXT STEP.



Step 11 The **Password Setup** page appears. (Step 5 of 7)

The student will be prompted to create a password and to re-enter that password.

When information is entered, click on MOVE TO NEXT STEP.

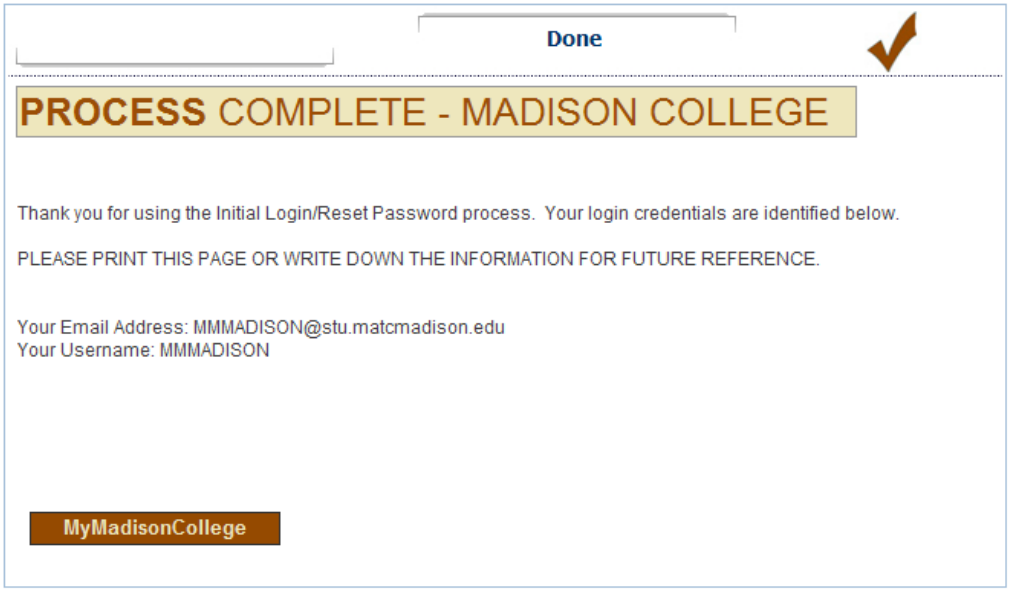


Step 12 The **Process Confirmation** page appears. (Step 6 of 7)

The student is prompted to review the information listed. If it is incorrect, the student is instructed to contact the Enrollment Center at the phone number provided.

If the information is correct, the student is instructed to **Confirm and Process** their

request by clicking on MOVE TO NEXT STEP.



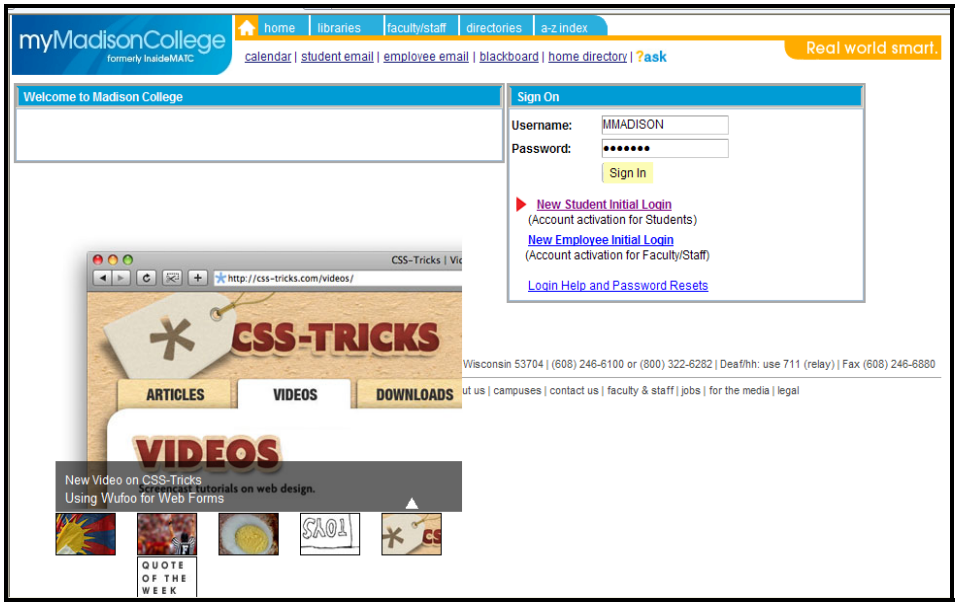
Step 13 The **Process Complete-Madison College** page appears. (Step 7 of 7)

The student is encouraged to print or write down the information for future reference.

Their Madison College email is provided as well as their Madison College Username.

These will be needed to log into **myMadisonCollege**.

The student may click on the link MyMadisonCollege and will be directed to the website.



Step 14 The **Madison College** website appears. The student would enter their **Username** and **Password** (from the previous steps), click Sign In and would see a page like below.

Step 15 The student would be able to register for classes by completing the normal procedures.

EXPECTED OUTCOMES

Using this Business Process Guide, staff should be able to understand the new online process and steps a student needs to perform to create and activate an account in order to self-register.

- √ Staff personnel understand where and how the student needs to go to complete the process.
- √ Staff personnel are able to understand data required to create the account.
- √ Staff personnel are able to answer questions about the process and assist when a student gets stuck in a search match suspense transaction.
- √ Staff personnel are able to assist students with issues during self-registration activities.
- √ Staff personnel are able to begin evaluation for effectiveness of process.