ctcLink/CampusCE Update Overview Project Descope Phase III Items

CONTENTS

Introduction

This document provides ctcLink/CampusCE users with a summary of the changes to be made in the system in the upcoming enhancement implementation.

The items listed below were descoped from the ctcLink Project at the conclusion of ctcLink implementation activities and were reassigned to SBCTC Application Services and Campus Solutions Support (CS Core) for completion.

Project descoped items were deployed in phases and the items below represent the final descoped items - Phase III. There are minimal changes that are noticeable to the end-users. Below is an overview of the changes users can expect to see as part of this enhancement.

CampusCE Project Descope Phase III Items

Process dates for Open Entry & Exit (OEE) classes

(Descoped Item # CSCE002)

Current Issue: OEE classes require a student start date to be entered at time of enrollment. The CampusCE integration uses the date of the transaction (i.e. when the student registers for a class in CampusCE) as the registration date. Enrollment in OEE classes may receive an error (ERR Payment posted; Enrollment failed - OEE Enrollment Start Date is earlier than the Session Start Date). Staff need to use the View Enrollment Request link to correct the date and update the enrollment.

Enhancement Update: Order information is sent from CampusCE to PeopleSoft with the following updated date logic for OEE classes. This date is used as the start date in the Enrollment Request page:

- If the date of the CampusCE registration transaction occurs **on or after** the OEE class start date, transaction is loaded to ctcLink with date of registration.

- If the date of the CampusCE registration transaction occurs **prior to** the OEE class start date, transaction is submitted to ctcLink with OEE class start date (transaction date is < OEE class start date)

Create a Contract Payment type that does not post to student's account

(Descoped Item # CSCE012)

Current Issue

The integration was designed to only send enrollment and payment information to PeopleSoft once full payment was made. However, colleges do not always collect payment at the time of registration. Colleges want to use 3rd party payments, invoices, corporate credit cards and other methods to pay for a student's class. Currently, colleges can use the payment type of PO in CampusCE. This then posts a payment to the student account, which must be reversed. Then staff need to follow their business process for the payment type being used.

Enhancement Update

Contract Payment type is added to CampusCE. When used, a payment does not get posted to the student's account in ctcLink. The CampusCE transaction is sent in a COM (Completed) status with the following message: "Contract payment not posted. Enrollment processed successfully."

Staff will need to follow their own business process for the Contract Payment to collect and post payment in ctcLink.

Note: When the Contract payment type is used, the tuition does NOT auto calculate. The tuition can be manually calculated or picked up in either the weeknight process or All calc process on Sunday.

CampusCE Navigation

Registration > Order Processing

Image 1: CampusCE Order Processing (Order Detail tab)

Image 1: CampusCE Order Processing (Order Detail tab)

Image 2: CampusCE Order Processing (Payment Info tab)

Image 2: CampusCE Order Processing (Payment Info tab)

ctcLink Navigation

Curriculum Management > ctcLink Custom > CampusCE > CampusCE Transaction Mgmt

Image 3: ctcLink Transaction Management Page (ctcLink Response tab)

ctcLink Navigation

Student Financials > View Customer Accounts

Image 4: View Customer Accounts page

Image 5: View Customer Accounts page (Account Details)

Search/Match correctly identifies students

(Descoped Item # CSCE022)

Search/Match is used to search ctcLink for similar person records based on a defined set of rules containing various combinations of search criteria (i.e. Name, Address, Date of Birth). The Search/Match functionality begins searching at the lowest search order number. For CampusCE, if no existing match is found, a new person record is created. If multiple possible matches are found, the transaction is suspended for staff review in ctcLink.

Current Issue

Continuing Ed students do not always use legal names. The current Search/Match parameter has three search rules, and all require Full Name to find a match. This was deemed insufficient and causes missed matches resulting in multiple new records being created for students (duplicate IDs).

Original Search/Match Parameter currently used for CampusCE (PSCS_ADM)

Search Order #	Search Rule Details
10	Last Name, First Name, DoB, Gender, Address Line 1 (first 8 char)
20	Last Name, First Name, DoB, Address Line 1 (first 8 char)
30	Last Name, First Name, DoB

Enhancement Update

A new CampusCE Search/Match parameter has been created to reduce false matches and reduce missed matches as much as possible by accounting for partial names and address changes. Additionally, phone and zip code are introduced as new criteria in search rules. Sex (gender) is removed as a criteria as it is not useful criteria for matches and instead can cause mismatches.

New Search/Match Parameter

Search Order #	Search Rule Details

10	Last Name, First Name, Middle Init, DoB, Address Line 1 (8), Zip (5), Email
20	Last Name, First Name, DoB, Address Line 1 (8), Zip (5), Email
30	Last Name, First Name (3), DoB, Address Line 1 (8), Zip (5), Phone, Email
35	Last Name, First Name, Middle Init, DoB, Email
40	Last Name (5), First Name, DoB, Address Line 1 (8), Zip (5), Email
45	First Name, DoB, Address Line 1 (8), Zip (5), Phone, Email
50	Last Name, First Name, Middle Init, DoB, Address Line 1 (8), Zip (5), Phone
55	Last Name, First Name, DoB, Email
60	Last Name (5), First Name, DoB, Phone, Email
65	Last Name, First Name, DoB, Address Line 1 (8), Zip (5), Phone
70	Last Name, First Name (3), DoB, Phone, Email
75	Last Name, First Name, Middle Init, DoB, Phone
80	Last Name, First Name, DoB, Phone
85	Last Name, First Name, Middle Init, DoBCampusCE Navigation

CampusCE Search/Match Analysis and Design

Below is an embedded PowerPoint presentation with additional details of the CampusCE Search/Match analysis and design. CS Support initially presented to the ctcLink College Collboration Group in October 2022.

CampusCE Search Match ER Overview_

Take to Search/Match when transaction suspended

(Descoped Item #s CSCE069, CSCE057)

Current Issue

Search/Match moves through the defined set of search rules to find the lowest search order that matches with existing ctcLink records. For CampusCE, if that results in a single match, the record is linked with that EMPLID. If it results in multiple matches, the record goes to suspense for staff intervention. If it results in no match, a new EMPLID is created.

When a transaction is suspended due to multiple matches, staff need to enter the student's information in Search/Match, search, and determine which record is the best EMPLID. They then need to return to CampusCE, update the student's record with the EMPLID, and update the record so it will start the process again.

Enhancement Update

Populate the CampusCE Transaction Management page with Search/Match data. Allow staff to choose which EMPLID to use (or to choose that none of the students listed are a match) and have the enrollment and payment process continue.

ctcLink Navigation

Curriculum Management > ctcLink Custom > CampusCE > CampusCE Transaction Mgmt

Image 6: ctcLink Transaction Management Search Page

Image 7: ctcLink Transaction Management Search/Match Results

Update CampusCE Transaction Management page when processes are run in ctcLink

(Descoped Item #s CSCE025, CSCE079, CSCE032)

Current Issue

The CampusCE Transaction Management page in ctcLink does not update when a transaction is in ERR (Error) status that must be corrected in ctcLink. When a manual correction is made in ctcLink, the correction is not recorded on the ctcLink Response Tab (CampusCE Transaction Management page), nor is a COM (Complete) response sent back to CampusCE.

Staff need to return to CampusCE and update the transaction from "Paid not Posted" to "Registered." This triggers data to be sent to PeopleSoft again and if successful a new COM row is added to the ctcLink Response tab.

Enhancement Update

After a manual correction is made in ctcLink, staff can select an option on the CampusCE Transaction Management page in ctcLink to change the transaction from ERR (Error) to COM (Complete). This will send an update of COM back to CampusCE. Note: This does not resend the transaction from CampusCE back to ctcLink; Staff must have manually corrected in ctcLink. This is only to update CampusCE that the staff manually completed the transaction in ctcLink so that both reflect a COM status.

CampusCE Navigation

Registration > Order Processing

Image 8: CampusCE Order Response Page Prior to Sending Update

Response	Message	Created Date
{"CTC_ORDER_ID":"155737","CTC_CSCE_USER_ID":"67676","EMPLID":"203064521","STRM":"2235","CLASS_NBR":18372,"INSTITUTION":"WA140","RESPONSE_CD":"ERR","DESCR200":"Payment posted, Enrollment failed - Hold on record, Add not processed."}	Payment posted, Enrollment failed - Hold on record, Add not processed.	Sep 01 2023 11:13 AM
		Page 1 of 1 (1 items)

Image 9: CampusCE Order Response Page After Sending Update

Response	Message	Created Date
{"CTC_ORDER_ID":"155737","CTC_CSCE_USER_ID":"67676","EMPLID":"203064521","STRM":"2235","CLASS_NBR":18372,"INSTITUTION":"WA140","RESPONSE_CD":"ERR","DESCR200":"Payment posted, Enrollment failed - Hold on record, Add not processed."}	Payment posted, Enrollment failed - Hold on record, Add not processed.	Sep 01 2023 11:13 AM
{"CTC_ORDER_ID":"155737","CTC_CSCE_USER_ID":"67676","EMPLID":"203064521","STRM":"2235","CLASS_NBR":18372,"INSTITUTION":"WA140","RESPONSE_CD":"COM","DESCR200":"An update has been sent to the CampusCE order status."}	An update has been sent to the CampusCE order status.	Sep 07 2023 03:49 PM
		Page 1 of 1 (2 items)

ctcLink Navigation

Curriculum Management > ctcLink Custom > CampusCE > CampusCE Transaction Mgmt

Image 10: ctcLink Transaction Management Page (ctcLink Response tab) Prior to Sending Update

Image 11: ctcLink Transaction Management Page (ctcLink Response tab) After Sending Update

CampusCE Quick Reference Guides (QRGs)

9.2 CS - Continuing Education CampusCE

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