Using CA State Reporting: MIS Reports

Reissued Manual as of April 4, 2005

Enclosed is a new edition of the manual *Using CA State Reporting: MIS Reports* for Release 17.0**.** This edition replaces your existing manual.

The Primary Changes Made

- New documentation is included for processing the Student Basics (SB) and Student Enrollment (SX) reports. This documentation reflects the changes issued on the software updates:
  - C14016-22_CAST_17014_U
  - C14016-22_CAST_17014_W
  - C14017-19_CORE_17014_U
  - C14017-19_CORE_17014_W
  - C14017-19_ST_17014_U
  - C14017-19_ST_17014_W
- All figures of forms have been updated to reflect the Colleague system at this time.

Updating Your Manual

Replace ***all copies*** of your existing manual with this new edition as it will be the basis for all future updates.

Colleague®

Using CA State Reporting: MIS Reports

Release 17.0

April 4, 2005

For last-minute updates and additional information about this manual,
see AnswerNet page 2321.63.

Using CA State Reporting: MIS Reports

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Publication History

The contents list on the next page identifies the publication date of each section of your copy of this manual. See “How to Verify That Your Manual Is Current” below for instructions on how to make sure that you have the current version of the manual.

How to Verify That Your Manual Is Current

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- To make sure that your copy of the manual has been updated with all previous revisions, check that the date at the bottom of each page matches the corresponding date for that section in the contents list on the next page.

If you determine that one or more sections is outdated, we recommend that you download the entire manual from the Datatel Web site (www.datatel.com/documentation).

Tracking the History of Revisions

The contents list shows only the date of the latest revision of each section; it does not show a history of previous revisions or the reasons for revisions. Each update to this manual includes a memo describing the reasons for the update. If you want to track the history of revisions and the reasons for revisions, keep the update memos with your copy of this manual.

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Using CA State Reporting: MIS Reports

1. Introduction to MIS Reports

About This Manual

Who Should Read This Manual

Anyone at your institution responsible for entering information for the MIS reports and anyone generating the Colleague MIS Reports.

In addition, if you are newly implementing Colleague, anyone in your institution's implementation team should read the information about setting up the various codes needed by the Colleague MIS Reports. How you define your various codes and tables, as well as where you choose to store certain types of data will have a direct impact on reporting. Understanding how the data is collected prior to implementing Colleague can eliminate having to make changes to your system later on.

What This Manual Covers

This manual provides instructions for using Colleague to generate the MIS reports required by the Chancellor’s Office in California.

It does not provide information on selecting appropriate information for your institution or on the current codes required by the Chancellor’s Office. For more information, see the manuals provided by the Chancellor’s Office at your institution.

How This Manual is Organized

This manual is organized into the following parts:

- "Introduction" contains this chapter about this manual.
- "Getting Started with MIS Reports" contains the instructions for defining the codes and setting up the processing options for the Colleague MIS Reports.
- "Generating the Course Report" contains instructions for generating the Course (CB) Report.
- "Generating the XB/XF/XE Reports" contains instructions for generating the XB, XE, and XF reports.
- "Generating Other Student Reports" contains instructions for generating the Student reports, including the SB and SF reports.
- "Generating the College Calendar Report" contains instructions for generating the Colleague Calendar (CC) Report.
- "Generating 320 Report" contains instructions for generating the 320 Report.
- "Generating the Employee Reports" contains instructions for generating the Employee Demographics (EB) and Employee Assignment (EJ) Reports.
- "Appendices" contains information about calculating a student's academic standing and Board of Governor's Fee Waivers.

Where to Find More Information

In addition to the information provided in this manual, you can find more information in these sources:

- Colleague online help for each form and field.
- Technical documentation available on the Datatel web site.
- The manual provided by the Chancellor's Office.

2. Getting Started with MIS Reports

Defining Codes & Tables for MIS Reporting

In This Chapter

This chapter contains a list of code files, validation code tables, and translation tables that must be set up in Colleague to accommodate California MIS Reporting needs. When you implement your system, you should keep in mind that the codes and tables listed below will be used to generate the various reports you submit to the state. If you define your codes and tables correctly at implementation time, and subsequently use those codes consistently, your reports should reflect true and accurate data. Table 2-1 lists the topics covered in this chapter.

Table 2-1: Topics in this Chapter

Before You Begin

Before you begin, you should have a basic understanding of the various codes used by the Colleague. Refer to *Getting Started with Colleague Student* for a thorough explanation of how Colleague uses codes in the Student System.

Additional set up maybe required to generate the 320 Report. For additional information about the codes required for the 320 report, see “Defining Codes for 320 Reporting” on page 2-13.

Code Files & Tables Used by California State Reporting

When you define the codes and tables listed below, keep in mind the information you will need to see on your state reports and define your codes accordingly. You can define the codes used by your institution to reflect the codes required by the state. Or, if your institution prefers to use customized codes, they will be converted to the required state codes through the use of translation tables.

For information about how Colleague uses the codes to derive each data element, refer to the chapters in this manual for each individual report. In addition, you can view information about each translation table listed by using the File Translation Table (FLTT) form and detailing on the Comments field.

Code Files

Code File	Form	California MIS Export	Data Element
ACTIVITY	HIER	Student Matriculation Export (SM)	SM04. SM05, SM06, SM07, SM08, SM09, SM12, SM13
ADMIT.STATUSES	ADST	Student Basics Export (SB)	SB15
CONTACT	CON	Student Matriculation Export (SM)	SM04. SM05, SM06, SM07, SM08, SM09, SM12, SM13
CORP.TYPES	ORTY	Section Export (XB)	XB04
COUNTIES	CNTY	Student Basics Export (SB)	SB12
CRED.TYPES	CTYP	Course Export (CB)	CB04
DISABILITY	DISD	Student Disability Export (SD) Employee Demographics (EB)	SD01 EB06
EEO.CATEGORY	ECAT	Employee Demographics (EB)	EB07
ENROLL.STATUSES	ENRS	Student Basics Export (SB)	SB15
ETHNICS	ETH	Student Basics Export (SB) Employee Demographics (EB)	SB05 EB04
GRADES	GRDC	Student Enrollment Export (SX)	SX04
INSTR.METHODS	ISTM	Session Export (XF)	XF01

Table 2-2: Code Files Required for California State Reporting

Code File	Form	California MIS Export	Data Element
LOCAL.GOVT.CODES	LGCD	Course Export (CB) Student Program Export (SP)	CB03 SP01
NON. COURSES	NONC	Student Assessment Export (SA)	SA01
NOTE.CODES	NOTC	320 Reporting	[a]
OTHER.CCDS	OCCD	Student Program Export (SP)	SP02
OTHER.DEGREES	ODEG	Student Program Export (SP)	SP02
REG.RETAKE.POLICIES	RPOL	Course Export (CB)	CB12
RESIDENCY.STATUSES	RSST	Student Basics Export (SB) 320 Reporting	SB09 a
SESSIONS	SESS	All Course, Student, and Employee Reports except for the Student Identifier Export (SI)	GI03
SUBJECTS	SUBJ	Course Export (CB)	CB19
TERMS	RYAT	All Course & Student Exports	GI03
WITHDRAW.REASONS	WTHR	Student EOPS Export (SE)	SE10

Table 2-2: Code Files Required for California State Reporting (cont'd)

a. See "Defining Codes for 320 Reporting" for information on how this code is used for 320 Reporting.

Validation Code Tables

Validation Code Table	California MIS Export	Data Element	Application	User Modifiable?
ACAD.PROGRAM.TYPES	Student VATEA Export (SV)	SV01, SV08	ST	Yes
ACAD.STANDINGS	Student Basics Export (SB)	SB22	ST	Yes
ACTIVITY.TYPES	Student Basics Export (SB) Student Matriculation Export (SM)	SB24 SM04. SM05, SM06, SM07, SM08, SM12, SM13	Core	Yes
APPOINTMENT.REASONS	Employee Demographics (EB)	EB09	HR	Yes
BLDG.OWNERSHIP.STATUSES	320 Reporting	[a]	Core	Yes
BUILDING.TYPES	Student VATEA Export (SV)	SV07	Core	Yes
CA.EB.CLASSIFICATIONS	Employee Demographics (EB)	EB08	HR	Yes
CA.EB.STATUSES	Employee Demographics (EB)	EB09	HR	Yes
CA.EJ.ASSIGN.TYPES	Employee Assignments (EJ)	EJ01	HR	Yes
CA.EJ.LEAVE.STATUSES	Employee Assignments (EJ)	EJ02	HR	Yes
CA.RETIREMENT.PLANS	Employee Assignments (EJ)	EJ02	HR	Yes
CA.RETIREMENT.REC.TYPES	Employee Assignments (EJ)	EJ01	HR	No
CALENDAR.DAY.TYPES	College Calendar Export (CC)	CC05, CC07, CC08	Core	Yes
COURSE.DISABILITY.STATUSES	Course Export (CB) Section Export (XB)	CB13 XB08	ST	Yes
COURSE.LEVELS	Course Export (CB) Student Basics Export (SB)	CB09, CB21 SB23	ST	Yes
COURSE.PURPOSES	Course Export (CB)	CB11	ST	Yes

Table 2-3: Validation Codes Required for California State Reporting

Validation Code Table	California MIS Export	Data Element	Application	User Modifiable?
COURSE.TYPES	Course Export (CB) Student Basics Export (SB) Student Matriculation Export (SM) Student VATEA Export (SV)	CB08, CB10 SB23 SM07 SV06	ST	Yes
DEGREE.TYPES	Student Basics Export (SB)	SB11	Core	Yes
EDUCATION.GOALS	Student Basics Export (SB) Student Matriculation Export (SM)	SB14 SM01	ST	Yes
EOPS.CARE.STATUSES	Student EOPS Export (SE)	SE05	ST	Yes
EOPS.ELIGIBILITY.FACTORS	Student EOPS Export (SE)	SE01	ST	Yes
EOPS.TERM.END.STATUSES	Student EOPS Export (SE)	SE03	ST	Yes
FA.DECISIONS	Student Financial Aid Export (SF)	SF01	ST	Yes
FA.MARITAL.STATUSES	Student Financial Aid Export (SF)	SF07	ST	No
FUNDING.ACCTG.METHODS	Section Export (XB) 320 Reporting	XB01 [a]	ST	Yes
FUNDING.SOURCES	Section Export (XB)	XB07	ST	Yes
GAIN.STATUSES	Student Basics Export (SB)	SB25	ST	Yes
IMMIGRATION.STATUSES	Student Basics Export (SB) Employee Demographics (EB)	SB06 EB05	Core	Yes
LANGUAGES	Student Basics Export (SB)	SB07	Core	Yes
LEAVE.TYPES	Employee Assignments (EJ)	EJ02	HR	Yes

Table 2-3: Validation Codes Required for California State Reporting (cont'd)

Validation Code Table	California MIS Export	Data Element	Application	User Modifiable?
MARITAL.STATUSES	Student EOPS Export (SE) Student VATEA Export (SV)	SE07 SV04	Core	Yes
NON.COURSE.CATEGORIES	Student Assessment Export (SA) Student Matriculation Export (SM)	SA04 SM09	ST	Yes
NON.COURSE.FACTORS	Student Assessment Export (SA)	SA03	ST	Yes
SAP.STATUSES	Student Financial Aid Export (SF)	SF01	ST	Yes
SPECIAL.SERVICES.NEED.CODES	Student Matriculation Export (SM)	SM03	ST	Yes
STAFF.REMINDER.TYPES	Student Basics Export (SB) Student Disability Export (SD) Student Matriculation Export (SM) Student VATEA Export (SV)	SB24 SD02 SM04. SM05, SM06, SM07, SM08, SM12, SM13 SV02	Core	Yes
STUDENT.ACAD.CRED.STATUSES	Student Enrollment Export (SX)	SX04	ST	Yes
STUDENT.SPECIAL.SERVICES	Student Matriculation Export (SM)	SM03	ST	Yes
TEACHING.ARRANGEMENTS	Faculty Assignment Export (XE)	XE01	ST	Yes
TRANSFER.STATUSES	Course Export (CB)	CB05	ST	Yes
VATEA.ECONOMIC.STATUS.SOURCES	Student VATEA Export (SV)	SV03	ST	Yes
VATEA.ECONOMIC.STATUSES	Student VATEA Export (SV)	SV03	ST	Yes

Table 2-3: Validation Codes Required for California State Reporting (cont'd)

a. See "Defining Codes for 320 Reporting" for information on how this code is used for 320 Reporting.

Translation Tables

Translation Table	Description	California MIS Export	Data Element	Application
CAHR.EB.POSITION.ET	Specify postiton earn types	Employee Demographics (EB)	EB12, EB13	HR
CAHR.EB.STIPEND.ET	Employee Earning Types	Employee Demographics (EB)	EB12, EB13	HR
CAHR.EB04	Ethnicity	Employee Demographics (EB)	EB04	HR
CAHR.EB05	Citizenship	Employee Demographics (EB)	EB05	HR
CAHR.EB07	Employee Occupational Activity	Employee Demographics (EB)	EB07	HR
CAHR.EB08	Employment Classification	Employee Demographics (EB)	EB08	HR
CAHR.EB08.TENURE.TYPE	Tensure Types	Employee Demographics (EB)	EB08	HR
CAHR.EB09	Employment Status	Employee Demographics (EB)	EB09	HR
CAHR.EJ.CONTACT.MEASURES	Specify contact measures	Employee Assignment (EJ)	EJ04	ST
CAHR.EJ.EARNTYPES	Specify positon earn types	Employee Assignment (EJ)	EJ01	HR
CAHR.EJ.ROLES	Specify assignment types	Employee Assignment (EJ)	EJ01, EJ02	ST
CAHR.EJ01.CONTRACT.TYPE	Contract Types	Employee Assignment (EJ)	EJ01	HR
CAHR.EJ01.POS.CLASS	Positions Classifications	Employee Assignments (EJ)	EJ01	HR
CAHR.EJ01.TEACH.ARRGT	Teaching Arrangements	Employee Assignments (EJ)	EJ01	ST
CAHR.EJ03	Translate ASA/TOPS Codes	Employee Assignments (EJ)	EJ03	HR
CAHR.GI01	District Identifier	Employee Assignment (EJ)	GI01	HR
CAST.CB03	Local Government Codes	Course Export (CB)	CB03	ST
CAST.CB04	Course Credit Status	Course Export (CB)	CB04	ST
CAST.CB05	Course Transfer Status	Course Export (CB)	CB05	ST
CAST.CB08	Course Basic Skill Status	Course Export (CB)	CB08	ST

Table 2-4: Translation Tables Required for California State Reporting

Translation Table	Description	California MIS Export	Data Element	Application
CAST.CB09	Course SAM Priority Code	Course Export (CB)	CB09	ST
CAST.CB10	Course Co-op Work Experience Education Status	Course Export (CB)	CB10	ST
CAST.CB11	Course Classification Code	Course Export (CB)	CB11	ST
CAST.CB12	Course Repeatability	Course Export (CB)	CB12	ST
CAST.CB13	Course Special Class Status	Course Export (CB)	CB13	ST
CAST.CB14	Course C.A.N. Code	Course Export (CB)	CB14	ST
CAST.CB15	Course C.A.N. Sequence Code	Course Export (CB)	CB15	ST
CAST.CB19	Course Crosswalk Course Department Name	Course Export (CB)	CB19	ST
CAST.CB21	Course Prior to College Level	Course Export (CB)	CB21	ST
CAST.CB22	Course Noncredit Category	Course Export (CB)	CB22	ST
CAST.CC02	Principal/Overlapping Term	College Calendar Export (CC)	CC02, CC03	ST
CAST.CC05	Calendar Day Special Days	College Calendar Export (CC)	CC05	ST
CAST.GI03	Term Session Code	Course Export (CB) & Student Exports	GI03	ST
CAST.LOC.INSTS	Local Institutions	Student Basics (SB), Student Disability (SD) & Student Martriculation (SM) Exports	SB23, SB24 SD02 GI01	ST
CAST.SA01	Student Assessment Instrument	Student Assessment Export (SA)	SA01	ST
CAST.SA01.A	Test Form Name	Student Assessment Export (SA)	SA01	ST
CAST.SA03	Student Assessment Accommodations	Student Assessment Export (SA)	SA03	ST

Table 2-4: Translation Tables Required for California State Reporting (cont'd)

Translation Table	Description	California MIS Export	Data Element	Application
CAST.SA04	Student Assessment Purpose	Student Assessment Export (SA)	SA04	ST
CAST.SB.INST.FLAGS	Student Apprenticeship Status	Student Casics Export (SB)	SB23, SB24	ST
CAST.SB05	Ethnicity	Student Basics Export (SB)	SB05	ST
CAST.SB06	Citizenship	Student Basics Export (SB)	SB06	ST
CAST.SB07	Language	Student Basics Export (SB)	SB07	ST
CAST.SB09	Residence Code	Student Basics Export (SB)	SB09	ST
CAST.SB11[a]	Education Status	Student Basics Export (SB) Student Matriculation Export (SM)	SB11 SM04, SM05, SM06	ST
CAST.SB11.B	Education Status	Student Basics Export (SB)	SB11	ST
CAST.SB12	Last High School County	Student Basics Export (SB)	SB12	ST
CAST.SB15	Enrollment Status	Student Basics Export (SB)	SB15	ST
CAST.SB15.B	Admit Status	Student Basics Export (SB)	SB15	ST
CAST.SB22	Academic Standing	Student Basics Export (SB)	SB22	ST
CAST.SB23	Apprenticeship Status	Student Basics Export (SB)	SB23	ST
CAST.SB23.A	Apprenticeship Status Course Level	Student Basics Export (SB)	SB23	ST
CAST.SB25	GAIN Status	Student Basics Export (SB)	SB25	ST
CAST.SD01	Student Disabilities	Student Disability Export (SD)	SD01, SD03	ST
CAST.SD02	Contact Types	Student Disability Export (SD)	SD02, SD04	ST
CAST.SE07	CARE Marital Status	Student EOPS Export (SE)	SE07	ST
CAST.SE10	CARE Withdrawal Reason	Student EOPS Export (SE)	SE10	ST
CAST.SF.GI03	Term Identifier for Award	Student Financial Aid Export (SF)	GI03	ST

Table 2-4: Translation Tables Required for California State Reporting (cont'd)

Translation Table	Description	California MIS Export	Data Element	Application
CAST.SF.TRAILING.AWARDS	Determine trailing award codes	Student Financial Aid Export (SF)	SF21	ST
CAST.SF.TRAILING.WAIVERS	Determine tailing fee waivers	Student Financial Aid Export (SF)	SF21	ST
CAST.SF01	Student Aid Applicant Status	Student Financial Aid Export (SF)	SF01	ST
CAST.SF01.B	Student Aid Applicant Status	Student Financial Aid Export (SF)	SF01	ST
CAST.SF03	Budget Category	Student Financial Aid Export (SF)	SF03	ST
CAST.SF07	Student Aid Family Marital Status	Student Financial Aid Export (SF)	SF07	ST
CAST.SF21	Student Aid Award Type	Student Financial Aid Export (SF)	SF21	ST
CAST.SF21.A	Translate Ar to State Codes	Student Financial Aid Export (SF)	SF21	ST
CAST.SP02	Academic Degrees	Student Program Export (SP)	SP02	ST
CAST.SP02.A	Academic CCDs	Student Program Export (SP)	SP02	ST
CAST.SV01	Vocational Program Plan	Student VATEA Export (SV)	SV01	ST
CAST.SV02	VATEA Funded Status	Student VATEA Export (SV)	SV02	ST
CAST.SV03.A	VATEA Economic Status	Student VATEA Export (SV)	SV03	ST
CAST.SV03.B	VATEA Economic Status Source	Student VATEA Export (SV)	SV03	ST
CAST.SV04	VATEA Single Parent Status	Student VATEA Export (SV)	SV04	ST
CAST.SV06	Co-op Work Experience	Student VATEA Export (SV)	SV06	ST
CAST.SV07	VATEA Criminal Status	Student VATEA Export (SV)	SV07	ST
CAST.SV08	VATEA Tech Prep Status	Student VATEA Export (SV)	SV08	ST
CAST.SX04	Enrollment Grade	Student Enrollment Export (SX)	SX04	ST
CAST.SX04.A	Enrollment Grade Status	Student Enrollment Export (SX)	SX04	ST

Table 2-4: Translation Tables Required for California State Reporting (cont'd)

Translation Table	Description	California MIS Export	Data Element	Application
CAST.XB01	Section Accounting Method	Section Export (XB)	XB01	ST
CAST.XB04	Contract Education Code	Section Export (XB)	XB04	ST
CAST.XB07	Section VATEA Funded Status	Section Export (XB)	XB07	ST
CAST.XB08	Section Disability Status	Section Export (XB)	XB08	ST
CAST.XE01	Teaching Arrangement	Faculty Assignment Export (XE)	XE01	ST
CAST.XF01	Session Instructional Method	Session Export (XF)	XF01	ST
SB.EDUC.GOAL.TIMES	Matriculation Time Goals	Student Matriculation Export (SM)	SM01	ST
SB.EDUC.GOALS	Student Basics Educational Goals	Student Basics Export (SB) Student Matriculation Export (SM)	SB14 SM01	ST
SB.EDUC.STATUS	Student Basics Educational Status	Student Basics Export (SB)	SB11	ST
SM.ACTIVITY	Matriculation Activity Types	Student Basics Export (SB) Student Matriculation Export (SM)	SB24 SM04, SM05, SM06, SM07, SM08, SM12, SM13	ST
SM.CONTACT	Matriculation Contact Types	Student Basics Export (SB) Student Matriculation Export (SM)	SB24 SM04, SM05, SM06, SM07, SM08, SM12, SM13	ST
SM.COURSE.TYPES	Matriculation Orientation Services Contact	Student Matriculation Export (SM)	SM07	ST
SM.SPECIAL.SERV.NEEDS.POS	Matriculation Special Services Needs Position	Student Matriculation Export (SM)	SM03	ST
SM.SPECIAL.SERVICE.NEEDS	Matriculation Special Services Needs	Student Matriculation Export (SM)	SM03	ST

Table 2-4: Translation Tables Required for California State Reporting (cont'd)

Translation Table	Description	California MIS Export	Data Element	Application
SM.TEST	Matriculation Test Categories	Student Matriculation Export (SM)	SM07, SM09	ST
VTEA.MARITAL.STATUS	VTEA Marital Status	Student VATEA Export (SV)	SV04	ST

Table 2-4: Translation Tables Required for California State Reporting (cont'd)

a. For additional information about how to set up the translation tables used by the SB11 data element, see "California MIS Data Elements" on page 5-26.

Defining Codes for 320 Reporting

In This Chapter

This chapter contains a list of code files and validation code tables that must be set up in Colleague's Student System to accommodate the 320 Report Table 2-5 lists the topics that are covered in this chapter.

Table 2-5: Topics in this Chapter

Understanding Colleague Codes Used in 320 Reports

Colleague uses codes that are specifically designed for 320 reports, as well as codes used by Colleague for other functions. Both types of codes are discussed in this chapter.

Many of the codes specifically designed for 320 reports should not be modified by your institution, however, it is helpful to understand how they are defined and what impact they have on your 320 reports. Refer to “Codes Predefined for 320 Reports” on page 2-19 for detailed information on this subject.

The other codes used by 320 reports are common codes used throughout Colleague. You should give special consideration to how you define these codes as they relate to 320 reporting. Refer to “Codes to Define for 320 Reporting” on page 2-15 for more information on defining Colleague codes.

Forms Used

Table 2-6 shows an alphabetical list of the forms used in this chapter and a description of each.

Form	Purpose
Note Codes (NOTC)	Define standardized note text that can be assigned to a student.
Residency Statuses (RSST)	Define codes indicating a student residency status.
Validation Codes (VAL)	Define validation code tables.

Table 2-6: Forms Used

Codes to Define for 320 Reporting

Table 2-7 lists the codes that you must define as part of the setup for the 320 reporting process and where to refer for more information about each.

Code	Reference
Academic Program Types	page 2-15
Building Ownership Statuses	page 2-15
Course Types	page 2-16
Funding Accounting Methods	page 2-16
Note Codes	page 2-13
Residency Statuses	page 2-18

Table 2-7: List of Codes To Define For 320 Reports

Academic Program Types

The academic programs of your institution can be divided into various types, such as Honors or Vocational. These academic program types are distinct from Classification of Instructional Program (CIP) codes. For the purpose of the 320 reports, you must define at least one academic program type to mean "Apprenticeship."

The codes defined to indicate that an academic program is an apprenticeship must also be defined on the 320 Reporting Parameters (CA3P) form. See "Apprentice Academic Program Types" on page 1-27 for more information about defining this parameter.

Academic program types are maintained on the Validation Codes (VAL) form. These codes are stored in the ACAD.PROGRAM.TYPES record of the ST.VALCODES file.

Building Ownership Statuses

Building ownership statuses are used to indicate various ways the ownership of your institution's buildings may be classified, such as Owned, Leased or Shared. For the purpose of the 320 reports, you must define at least one building ownership status to mean "Leased/Rented."

The code defined to indicate that a building is being leased must also be defined on the 320 Reporting Parameters (CA3P) form. See "Leased Ownership Status" on page 1-27 for more information about defining this parameter.

Building ownership statuses are maintained on the Validation Codes (VAL) form. These codes are stored in the BLDG.OWNERSHIP.STATUSES record of the CORE.VALCODES file.

Course Types

Your courses can be categorized into various types, such as honors or remedial. For the purpose of the 320 reports, you must define a unique course type for each of the following:

- apprentice
- basic skills
- in-service training
- immigrant education

The codes defined to indicate these special course types must also be defined on the 320 Reporting Parameters (CA3P) form. See "Course Types" on page 1-28 for more information about defining this parameter.

Course types are maintained on the Validation Codes (VAL) form. These codes are stored in the COURSE.TYPES record of the ST.VALCODES file.

Funding Accounting Methods

The funding accounting method codes are used to define the accounting methods that your institution uses. These methods are used to determine course section enrollment for the purposes of funding. These codes are used by Colleague in the 320 reports for state funding, but can be used by other institutions to describe the accounting methods used in their funding. You can create as many methods as desired. Each method is translated into an census type using the CAST.320.CENSUS.TYPES translation table. For more information about census type codes, see "Census Types" on page 2-19.

Each course section will be associated with a funding accounting method code. This accounting code will then be translated into a census type to determine which calculations to use for 320 reporting. The following table shows some suggested accounting methods and the associated census type:

Funding Accounting Methods	Description	Census Type
CD	Census Daily	D
CWIS	Census Weekly, Independent Study	IW
CW	Census Weekly	W
CWWE	Census Weekly, Work Experience	IW
DENW	Distance Education, Non-Credit, Weekly	NC
NA	Not State Supported	X
PACI	Positive Attendance, Credit, In-Service	PAC
PANI	Positive Attendance, Non Credit, In-Service	PANC

Table 2-8: Funding Accounting Methods

Note: When you set up the CA320.CENSUS.TYPE translation table, use the Census Types exactly as listed in table 2-8.

Positive attendance course sections are usually those sections which do not meet on a regular basis, such as labs, learning center, or skills workshops, but for which you still want to track the hours students attended. The funding accounting methods you plan to associate with positive attendance must have a special processing code of “1.” You can record this positive attendance in Colleague using the Non-Scheduled Meeting Attendance (NSMA) form. See “Positive Attendance” beginning on page 10-25 for more information.

Note: Course sections identified as apprentice type courses must have a funding accounting method of “PACI” or PANI” in order for FTES to be calculated correctly.

Funding accounting method codes are maintained on the Validation Codes (VAL) form. These codes are stored in the FUNDING.ACCTG.METHODS record of the ST.VALCODES file.

Note Codes

Note codes are used to define certain conditions associated with a student. Specifically, they are used by the 320 reports to exclude a student's contact hours from FTES calculations. You must define a code for each of the following conditions:

- The student is cross-enrolled in a course at another community college and number of contact hours generated by the student at your institution are not included in FTES.
- The student is enrolled in a non-funded repeated course (has repeated the course too many times to be funded again) and the number of contact hours generated by the student for that course are not included in FTES.

These note codes also need to be defined on the 320 Parameters (CA3P) form. See "Exclude Notes" on page 1-28 for more information about defining this parameter.

Note codes are defined on the Note Codes (NOTC) form. These codes are stored in the NOTE.CODES file.

Residency Statuses

Residency status codes identify the residency of a student, such as whether he is a state resident or from out of state. With regards to the 320 reports, at least one status must be defined to mean that a student resides within the state.

The code defined to indicate an in-state residency must also be defined on the 320 Reporting Parameters (CA3P) form. See "Residency Statuses" on page 1-27 for more information about defining this parameter.

Residency status codes are defined on the Residency Status (RSST) form. These codes are stored in the RESIDENCY.STATUSES file

Codes Predefined for 320 Reports

Datatel has specifically designed many codes for 320 reports. These codes should not be modified by your institution, but you may find it helpful to understand how they are defined. Table 2-9 lists these codes and where to refer for more information about each.

Code	Reference
Census Types	page 2-19
Day Types	page 2-20
Reporting Periods	page 2-20

Table 2-9: List of Codes Used in CA 320 Reports

This section provides information for each of these codes.

Census Types

There are eight Census Types that are used to calculate the number of contact hours and FTES for your 320 reports. The census types are derived from the Funding Accounting Methods Codes associated with each course section using the ELF Translation Table CAST.320.CENSUS.TYPES. The Census types are used to determine how contact hours are calculated for each student course section as well as to determine how to group contact hours on the 320 reports.

The possible values for the census type codes are.

Census Type Codes	Description
W	Weekly
D	Daily
PAC	Positive Attendance, Credit
PANC	Positive Attendance, Non-Credit
IW	Independent Study and Work Experience, Weekly Census
ID	Independent Study and Work Experience, Daily Census
NC	Non-Credit, Independent Study, Distance Education, Weekly
X	Not Supported or Reported

Table 2-10: Census Type Codes

Census type codes are stored in the CA320.CENSUS.TYPES record of the ST.VALCODES file and can be viewed on the Validation Codes (VAL) form. You should only modify these codes with the assistance of a Datatel representative.

Day Types

Day type codes are used to indicate when a course section is scheduled to meet. The valid codes are listed in the following table:

Code	Day Type	Description
D	Day	Indicates a course section has at least one meeting that begins before 4:30 PM on a weekday.
E	Extended Day	Indicates a course section has no meetings scheduled before 4:30 PM on a weekday.
O	Positive Attendance	Indicates a course a positive attendance section that is not associated with either a D or E code.

Table 2-11: Day Type Codes

Day type codes are stored in the CA320.DAY.TYPES record of the ST.VALCODES file and can be viewed on the Validation Codes (VAL) form. You should only modify these codes with the assistance of a Datatel representative.

Reporting Periods

Reporting periods are California specified time periods which indicate which term a specific report refers to. The valid reporting period codes are listed in the following table:.

Code	Reporting Periods	Due To State	Dates To Include
1	Last Summer		Determined by your institution’s summer term(s).
2	This Summer		Determined by your institution’s summer term(s).
3	First	January 15th	7/1 - 12/31 This report may include the contact hours for Summer Intersession offered last year whose census dates fall within the 7/1 - 12/31 time frame.

Table 2-12: Reporting Periods

Code	Reporting Periods	Due To State	Dates To Include
4	Second	April 30th	1/1 - 4/15
5	Third	July 15th	4/16 - 6/30 Revisions to the Annual Report are due by October 1st.

Table 2-12: Reporting Periods (cont'd)

Reporting period codes are stored in the CA320.REPORTING.PERIODS record of the ST.VALCODES file and can be viewed on the Validation Codes (VAL) form. You should only modify these codes with the assistance of a Datatel representative.

Procedure for Defining a Validation Code

Complete the following steps to define any validation code you need when implementing the 320 reports:

Step 1. Understand the different 320 codes and how they are defined.

Read “Codes to Define for 320 Reporting” on page 2-15.

Step 2. Determine if the code you want to define or modify is stored in the Student System or in Core.

Core codes are stored in the CORE.VALCODES file.

Student System codes are stored in the ST.VALCODES file.

Step 3. Enter code:

a. If it is a Core code, enter CORE *from the DBMS prompt*.

b. If it is a Student System code, enter ST *from the DBMS prompt*.

Step 4. Enter `VAL` at any menu prompt.

The Validation Codes form is displayed.

If you enter VAL from the Student System main menu, or any menu in the Student System, you will access *only* the Student System validation codes (ST.VALCODES).

Step 5. Enter the ID of the code you want to define.

The ID of the code is displayed in the header of the VAL form.

Step 6. Enter an individual code for this validation code table.

For example, if you are creating a code for course types, enter a code for each type you want to define, such as **`BAS`** for Basic Skills or **`APP`** for Apprentice.

Step 7. Enter the description of the associated code.

The code description is displayed and the cursor moves to the Min element.

Step 8. Enter the minimum characters required to identify the associated code.

The number of minimum characters required to identify the associated code is established, and the cursor moves to the Special Processing element.

For example, if you named a code BAS (for Basic Skills), you could use this field to indicate a minimum number of acceptable characters that can be entered for this code, by entering **B** in this field. You will only have to enter **B** in a code field to identify this code.

Step 9. Do you want to define special processing for this code table?

If yes, enter the special processing information.

Move the cursor to the next Code group element. Continue with Step 10.

Space is provided for two special processing codes.

If no, move the cursor to the next Code group element and continue with Step 10.

Step 10. Do you want to change the maximum code size for this code table?

If yes, move to the Maximum Code Size field and enter the value you want. Continue with Step 11.

If no, continue with Step 11.

Step 11. Repeat Step 6 through Step 10 until all the codes you want are defined for this validation code.

When you are finished completing the VAL form, save the information. The menu from which you accessed VAL is displayed.

Procedure for Defining 320 Codes

Complete the following steps to define your 320 codes.

Step 1. Understand the different 320 codes and how they are defined.

Read "Codes to Define for 320 Reporting" on page 2-15.

Step 2. If the code you want to define is a valcode, see "Procedure for Defining a Validation Code" on page 2-22.

Valcodes are stored in either the CORE.VALCODES file or the ST.VALCODES file.

Step 3. Define each code.

a. Use the Residency Status (RSST) form to define your residency statuses.

b. Use the Note Codes (NOTC) form to define your note codes.

c. Use the Validation Code (VAL) form to define the remaining 320 codes. (See "Procedure for Defining a Validation Code" on page 2-22.)

Setting Up Parameters

In This Chapter

This chapter describes how to define the parameters used by the reports for California State Reporting. Table 2-13 lists the topics covered in this chapter.

Table 2-13: Topics In This Chapter

Before You Begin

Before you can define your parameters, you must have already set up your code files and tables to facilitate California State Reporting needs. Refer to "Defining Codes & Tables for MIS Reporting" on page 2-1 to determine which code files and tables are affected by CALMIS reporting.

Understanding Parameters

The work files created for California State Reports are governed by a set of rules and parameters that you define for your institution. These rules and parameters identify the criteria used by Colleague to select records to be included in the work file or define how certain data elements will be set. For example, on the Matriculation Parameters (MATP) form, you can define rules to determine which students are exempt from taking exemption tests and therefore have the SM05 data element on the Student Matriculation (SM) Report set to “other.”

Forms Used

Table 2-14 shows an alphabetical list of the forms used in this chapter and a description of each.

Form	Purpose
320 Reporting Parameters (CA3P)	Defines the parameters needed to create the 320 Report.
California MIS Report Dates (CAMD)	Defines the GI03 Identifier codes used by the CALMIS reports.
California MIS SF Parameters (CSFP)	Defines the parameters needed to create the Student Financial Aid (SF) Report.
Matriculation Parameters (MATP)	Defines the parameters needed to create the Student Matriculation (SM) Report.

Table 2-14: Forms Used to Define Parameters

Defining Matriculation Parameters

Use the Matriculation Parameters (MATP) form to enter your parameters and rules used to identify which students are exempt from matriculation services.

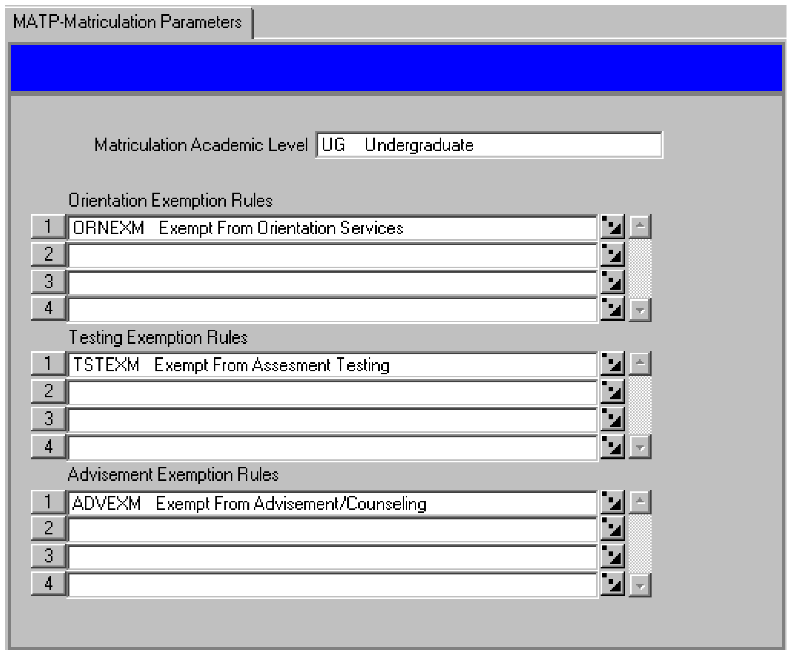


Figure 2-1: The Matriculation Parameters (MATP) Form

Matriculation parameters allow you to define the types of students that are eligible for certain matriculation services. Matriculation services consist of such activities as orientation, assessment testing, and counseling/advisement services.

Because matriculation services are usually available for the undergraduate population, you can define a default academic level to which these services are targeted.

You can also create rules that identify which students at that defined academic level are exempt from matriculation services. Define your rules to assign “O” for the SM04, SM05, or SM06 data elements if a student is exempt from orientation, testing, or counseling based on other district criteria. If a student fails the rules, Colleague calculates their status. For more information about the SM04 data element, see “California MIS Data Elements” beginning on page 8-62.

Noteworthy Fields on the MATP Form

The fields on the MATP form are explained below. For additional information about the fields on the MATP form, see the online help.

Matriculation Academic Level

Use the Matriculation Academic Level field to identify a specific level of students eligible for matriculation services, such as undergraduate students. By entering the code for the targeted academic level, students in all other academic levels (graduate, continuing education, non-credit programs, etc.) are ineligible.

The Exemption Rules Fields

Define one or more rules to identify students who are exempt from the following:

- Orientation services
- Assessment testing
- Advisement services

When creating the rules, use the Rules Definition (RLDE) form, which you can access from the fields on the Matriculation Parameters (MATP) form. The rule(s) you create are used in determining a status of “other” for three of the data elements on the Student Matriculation (SM) Report.

Note: You can use the Rules Test and Debug (RLTD) form to verify that the rules work correctly. Refer to *Getting Started with Colleague Student* for more information on working with rules.

Table 2-15 provides information about each of the different fields on the Matriculation Parameters (MATP) form where you can enter rules.

Field Name	Purpose	File	Data Element
Orientation Exemption Rules	Identifies student who are exempt from orientation services.	PERSON.ST	SM04
Testing Exemption Rules	Identifies student who are exempt from taking assessment tests.	PERSON.ST	SM05
Advisement Exemption Rules	Identifies students who are exempt from matriculation counseling.	PERSON.ST	SM06

Table 2-15: Exemption Rules

Procedure for Defining Matriculation Parameters

Complete the following steps to define your matriculation parameters.

Step 1. Access the Matriculation Parameters (MATP) form.

Step 2. Enter the Academic Level to which the matriculation services apply.

Step 3. Depending on the type of exemption rule you want to create or maintain, go to one of the following fields and detail to the Rules Definition (RLDE) form:

- Orientation Exemption Rules
- Testing Exemption Rules
- Advisement Exemption Rules

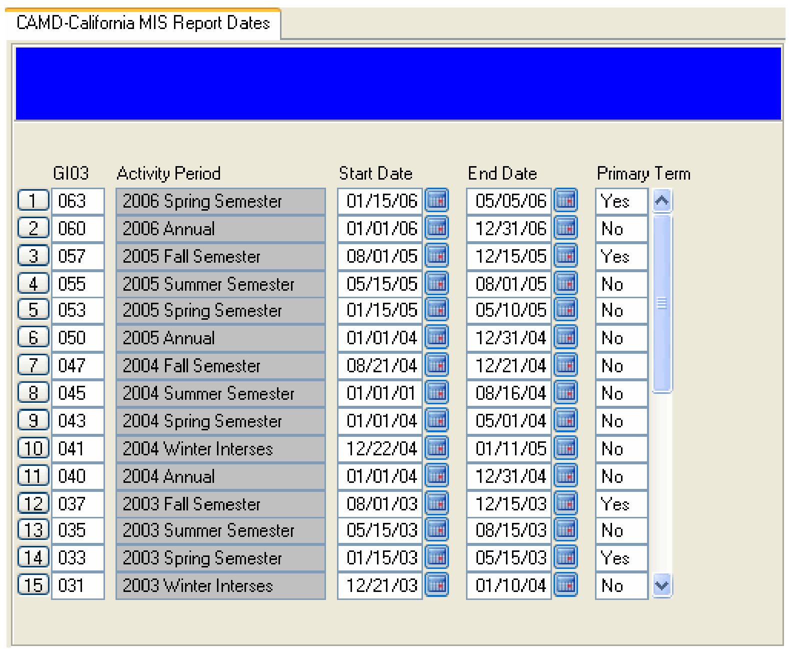
Note: You can use the Rules Test and Debug (RLTD) form to verify that the rules work correctly. Refer to *Getting Started with the Student System* for more information on working with rules.

Step 4. Finish from the MATP form.

Defining California MIS Report Dates

Use the California MIS Report Dates (CAMD) form to define reporting time frames for specific GI03 codes. When you generate your MIS reports, the information on the CAMD form determines the GI03 data element and is used as selection criteria.

Note: Currently the reports that use the functionality of the CAMD form are the XB, XF, XE, SB, SX, and SF reports. The remaining MIS reports will be updated at a later date to use the CAMD form.


CAMD-California MIS Report Dates

	GI03	Activity Period	Start Date	End Date	Primary Term
1	063	2006 Spring Semester	01/15/06	05/05/06	Yes
2	060	2006 Annual	01/01/06	12/31/06	No
3	057	2005 Fall Semester	08/01/05	12/15/05	Yes
4	055	2005 Summer Semester	05/15/05	08/01/05	No
5	053	2005 Spring Semester	01/15/05	05/10/05	No
6	050	2005 Annual	01/01/04	12/31/04	No
7	047	2004 Fall Semester	08/21/04	12/21/04	No
8	045	2004 Summer Semester	01/01/01	08/16/04	No
9	043	2004 Spring Semester	01/01/04	05/01/04	No
10	041	2004 Winter Interses	12/22/04	01/11/05	No
11	040	2004 Annual	01/01/04	12/31/04	No
12	037	2003 Fall Semester	08/01/03	12/15/03	Yes
13	035	2003 Summer Semester	05/15/03	08/15/03	No
14	033	2003 Spring Semester	01/15/03	05/15/03	Yes
15	031	2003 Winter Interses	12/21/03	01/10/04	No

Figure 2-2: The California MIS Report Date (CAMD) Form

The use of reporting time frames creates reports based on the activity occurring at your institution during a specific time period. The use of activity based reporting allows for a more accurate representation of what is offered during the reporting time frame. For example, a course section that spans multiple terms would be reported multiple times and not just on the report for the term with which the course section is associated.

Noteworthy Fields on the CAMD Form

The fields on the CAMD form are explained below. For additional information about the CAMD form, see the online help.

GI03

Use the GI03 field to enter a GI03 code, which Colleague uses when creating the MIS reports to determine what information should be included on the report.

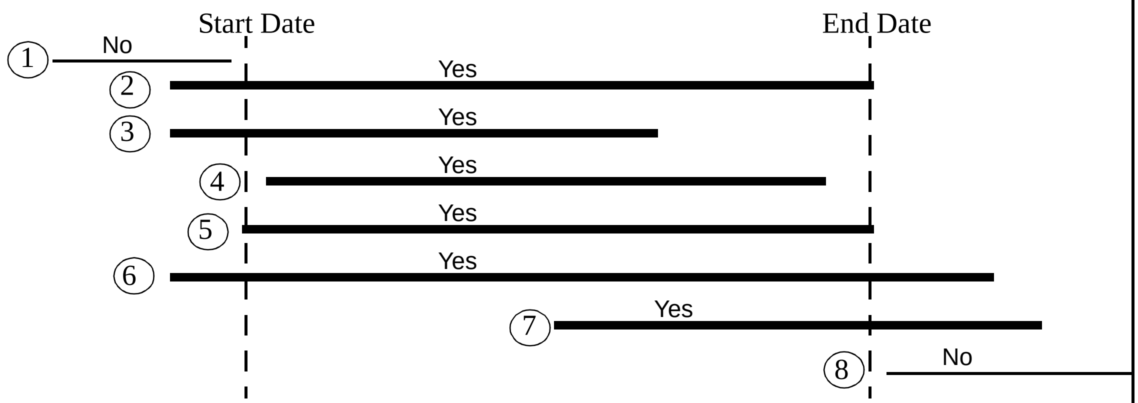
The format of the GI03 code is YYT. The “YY” represents the last two digits of the calendar year. For example, if the year is 2004, the first two characters of the GI03 code would be “04”. The “T” represents the single-digit term-type identifier defined by the Chancellor's Office. The term-type identifier allows the Chancellor's Office to know the what reporting period the data is associated with. The valid codes for the last character are described below:

- 5 = Summer Term
- 7 = Fall Semester
- 1 = Winter Intersession
- 3 = Spring Semester
- 6 = Summer Quarter
- 8 = Fall Quarter
- 2 = Winter Quarter
- 4 = Spring Quarter
- 0 = Annual
- 9 = Other (use for employee fall first census reporting period)

After you enter your GI03 code, Colleague populates the Activity Period field based on the last digit of the GI03 code. For additional information about the term-type codes, see the documentation provided by the Chancellor's Office.

The Start and End Date Fields

Use the Start and End Date fields to define the beginning and ending of your reporting time frame. Any activity that occurred during the reporting time frame is selected to be included on a report. For example, on the Section (XB) Report, Colleague selects course sections that end on or after the start date of the reporting time frame and start on or before the end date of the reporting time frame. For more information about which course sections are selected, see Figure 2-3 on page 2-32.



1 – begins and ends prior to the start date of the reporting period and would not be reported.
2 – begins prior to the start date and ends on the end date of the reporting period and would be reported.
3 – begins prior to the start date and ends prior to the end date of the reporting period and would be reported.
4 – begins after the start date and ends before the end date and would be reported.
5 – begins and ends on the dates of the reporting period and would be reported.
6 – begins prior to the start date and ends after the end date of the reporting period and would be reported.
7 – begins after the start date and ends after the end date of the reporting period and would be reported.
8 – begins and ends after the reporting time frame and would not be reported.

Figure 2-3: Records Selected Based on a Reporting Time Frame

Primary Term

Use the Primary Term field to indicate if the time period assoicated to the GI03 Identifier is considered a primary term or session. If the GI03 Identifier is a primary term, enter **`Y.`** Otherwise, leave the field set to “No.”

Colleague uses the primary terms to derive enrollment status on the Student Basics (SB) Report.

Procedure for Defining California MIS Date Parameters

Follow the steps below to define the reporting time frames used on the MIS reports.

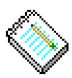
Step 1. Access the California MIS Report Dates (CAMD) form.

Step 2. Enter a GI03 code.

If you are creating a new record the following prompt is displayed:

```
Record not found - Do you want to create a new
record (Y/N)?
```

Enter **`Y`** to add the new record to the file.



Note: You have the option of viewing all the GI03 codes, GI03 codes for a specific year, or just one GI03 code. If you want to view all the GI03 codes, enter three ellipses at the LookUp prompt. If you want to view all the GI03 codes for a particular year, enter the last two digits of the year plus three ellipses at the LookUp prompt. If you want to view one GI03 code, enter the GI03 code at the LookUp prompt.

Step 3. Enter the information to create a reporting time frame.

If you are creating a new reporting time frame you must have a GI03 code, start date, and end date.

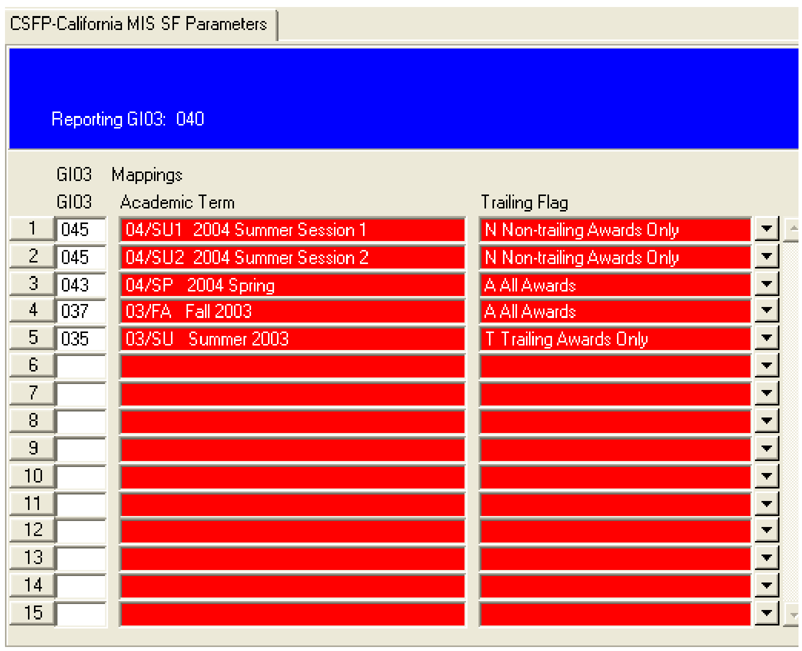
Step 4. Repeat Step 3 for each reporting time frame you want to create.

Step 5. Save the information by finishing from the form.

Defining MIS Financial Aid Parameters

Use the California MIS SF Parameters (CSFP) form to define the parameters used for the Student Financial Aid (SF) Report.

Note: In order to produce accurate reports, you must define your GI03 codes on both the California MIS Report Dates (CAMD) form and the CSFP form.


CSFP-California MIS SF Parameters

Reporting GI03: 040

GI03 Mappings

	GI03	Academic Term	Trailing Flag
1	045	04/SU1 2004 Summer Session 1	N Non-trailing Awards Only
2	045	04/SU2 2004 Summer Session 2	N Non-trailing Awards Only
3	043	04/SP 2004 Spring	A All Awards
4	037	03/FA Fall 2003	A All Awards
5	035	03/SU Summer 2003	T Trailing Awards Only
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Figure 2-4: The California MIS SF Parameters (CSFP) Form

When you access the CSFP form, you must enter the GI03 code that represents the reporting year. For example, if you are generating the SF report for 2003, you would enter 030 at the LookUp prompt. Each of the GI03 codes for that reporting year entered in the GI03 Mapping window are then associated to the GI03 Reporting Year code and are used on the Stu Financial Aid (SF) Export (CASF) form as part of the selection process. For more information about the CASF process, see “Generating the Student Financial Aid Export” on page 8-41.

Noteworthy Fields on the CSFP Form

The fields on the CSFP form are explained below.

GI03 Mapping

To determine a relationship between GI03 codes and your academic terms, you must enter each of your academic terms and associate it to the appropriate GI03 code. You can have multiple terms mapped to the same GI03 code. For example, if you have multiple sessions during the summer term, you can enter the Summer 1 and Summer 2 sessions for the 2004 year and map them both to the 045 GI03 code.

For each entry in the GI03 Mapping window, you must enter the following:

- **GI03.** Enter the GI03 code you want to associate to an academic term. Before you can enter a GI03 code, the code must already be defined on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.
- **Academic Term.** Enter the academic term that represents the GI03 code.
- **Trailing Flag.** If your institution awards financial aid at the end of the financial aid year, enter `T` in this field to report only the awards that are defined on the CAST.SF.TRAILING.AWARDS and CAST.SF.TRAILING.WAIVERS translation tables, or enter `N` to report all awards given during the term that are not on the translation tables. If your institution is not set up to grant trailing awards, set this field to `A` to report all awards given during the term.

Note: Any awards or fee waivers that you include on the CAST.SF.TRAILING.AWARDS and CAST.SF.TRAILING.WAIVERS translation tables must also be defined on the CAST.SF21 or CAST.SF21.A translation tables.

If your institution grants trailing awards or fee waivers, you should set the summer term from the previous year as a trailing award period, meaning that the Trailing field is set to “T.” If you also include the summer term from the current year, as a part of the reporting year, you should set the Trailing field to “N” to report only the awards that are not included on the CAST.SF.TRAILING.AWARDS and CAST.SF.TRAILING.WAIVERS translation tables. If you set the Trailing Flag field to “A” for a trailing term, Colleague reports the awards or fee waivers granted in that term in the current year even if the awards or fee waivers are set up on the translation tables. Table 2-16 displays how different awards would be reported based on how the Trailing Flag field is defined.

Term	Trailing	Award Type	Report?
Previous Summer	T	Trailing Award	Yes
		Non-Trailing Award	No
Previous Summer	A	Trailing Award	Yes
		Non-Trailing Award	Yes
Previous Summer	N	Trailing Award	No
		Non-Trailing Award	Yes
Fall or Spring	T	Trailing Award	Yes
		Non-Trailing Award	No
Fall or Spring	A	Trailing Award	Yes
		Non-Trailing Award	Yes
Fall or Spring	N	Trailing Award	No
		Non-Trailing Award	Yes
Current Summer	T	Trailing Award	Yes
		Non-Trailing Award	No
Current Summer	A	Trailing Award	Yes
		Non-Trailing Award	Yes
Current Summer	N	Trailing Award	No
		Non-Trailing Award	Yes

Table 2-16: Awards Included on the SF Report for Trailing Institutions

Procedure for Defining the MIS Financial Aid Parameters

Follow the steps below to define the parameters used by the SF Report.

Step 1. Access the California MIS SF Parameters (CSFP) form.

Step 2. Enter the GI03 code that represents the reporting year in the GI03 Identifier LookUp Prompt.

Note: The GI03 code you enter must already be defined on the California MIS Report Dates (CAMD) form.

Step 3. Enter the GI03 codes that fall within the time frame of the reporting year.

Step 4. For each GI03 code, enter the associated academic term.

If you have multiple academic terms that map to one GI03 code, enter the GI03 code multiple times and associate it with each of the academic terms.

Step 5. If your institution is a trailing institution, enter **`T`** in the Trailing Flag field for the academic terms where only trailing awards should reported.

Note: If this is the first time that you are using the CASF form to generate the SF report, you must enter **`A`** in the Trailing Flag field for the summer academic term in the previous year. For subsequent years, enter **`T`** in this field.

For an academic term where you do not want to report any trailing awards, enter **`N`**. To report all the awards given during the academic term, leave the field set to the default value of “A.”

If your institution does not grant trailing awards, leave the field set to the default value of “A” to report all the awards given during the academic term.

Step 6. Finish from the CSFP form to save the information.

Defining 320 Reporting Parameters

Establishing parameters allows you to define various characteristics that remain fairly constant for all 320 reports. Colleague references these parameters when selecting students, courses, and other information used to generate the 320 work file.

Use the 320 Reporting Parameters (CA3P) form to enter and maintain the parameters used to generate the 320 Report.

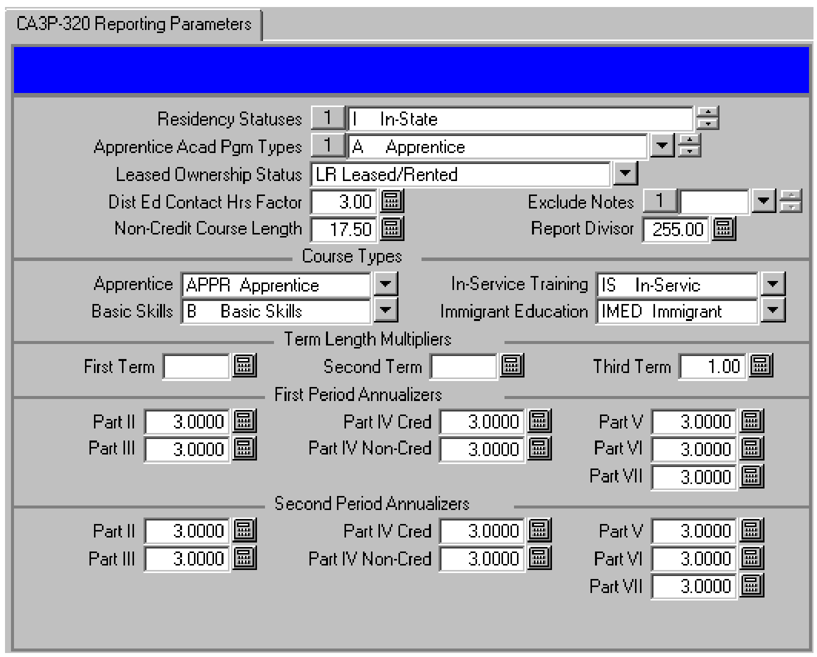


Figure 2-5: The 320 Reporting Parameters (CA3P) Form

Noteworthy Fields on the CA3P Form

Most of the fields on the CA3P form are explained below. For information about the other fields on the CA3P form, see the online help.

Residency Statuses

Each student is associated with a residency status. Use this parameter to identify one or more residency statuses used by your institution to indicate that the student is a resident of the state. If the student’s record contains any of the residency statuses listed here for the reporting period, the student is reported as a state resident. If not, the student is reported as a non-resident. Refer to “Residency Statuses” on page 2-18 for information on setting up residency statuses.

At least one residency status is required.

Apprentice Academic Program Types

Each student is associated with an academic program type. Enter one or more academic program types used by your institution to indicate that the program is an apprenticeship. If the student’s active academic program contains any of the program types listed here for the reporting period, the program is reported as an apprenticeship. Refer to “Academic Program Types” on page 2-15 for information on setting up academic program types.

If you do not enter an apprenticeship academic program type, no apprenticeship programs are reported for the college.

Leased Ownership Status

Each building is associated with an ownership status. Enter the status code used by your institution to indicate that a building is leased or rented. The students in any course taught in a building with an ownership status that matches the one entered here are reported as Full Time Equivalent Students (FTES) Generated in Leased (or Rented) Space. Refer to “Building Ownership Statuses” on page 2-15 for more information on setting up building ownership statuses.

If you do not enter a leased ownership status, no FTES are reported as being Generated in Leased (or Rented) Space.

Distance Education Contact Hours Factor

Distance Education courses need to be converted to student contact hours for 320 reporting. Enter the factor used by your institution to determine the number of contact hours for Distance Education courses.

An entry in this field is required.

Non-Credit Course Length

Non-credit courses meeting on a weekly basis need a standard course length assigned to them for the purposes of 320 reporting. Use this parameter to enter the course length used by your institution for non-credit courses.

An entry in this field is required.

Exclude Notes

Exclude note codes identify certain conditions used to exclude the contact hours for a student’s academic credit record from FTES calculations. For the purposes of 320 reporting, exclude note codes are used to identify a course for which a student is cross-enrolled at a community college, or is enrolled in a non-funded repeated course. Enter the note codes used by your institution to identify these situations.

Report Divisor

Contact hours need to be converted to Full Time Equivalent Students (FTES). Use this parameter to enter the report divisor used by your institution to convert contact hours to FTES.

An entry in this field is required.

Apprentice

Enter the course type code used by your institution to indicate that a course section is an apprenticeship course.

If you do not enter an Apprentice course type, no apprenticeship courses are reported for the college.

Basic Skills

Enter the course type code used by your institution to indicate that a course section is a basic skills course.

If you do not enter a Basic Skills course type, no basic skills courses are reported for the college.

In-Service Training

Enter the course type code used by your institution to indicate that a course section is an in-service training course.

If you do not enter an In-Service Training course type, no in-service training courses are reported for the college.

Immigrant Education

Enter the course type code used by your institution to indicate that a course section is an immigrant education course.

If you do not enter an Immigrant Education course type, no immigrant education courses are reported for the college.

First Period Annualizers

First Period Annualizers are used to convert the number of contact hours into Full Time Equivalent Students (FTES). In order to convert contact hours into FTES when reporting by term, you must enter a term length multiplier. The following fields should contain a value only if you generate the 320 report for the term specified:

- First Term
- Second Term
- Third Term

In order to convert contact hours into FTES when reporting for specified time periods, you must enter the period annualizer. The following fields should contain a value only if you generate the 320 report for the time period specified.

- Part II - Weekly Census
- Part III - Daily Census
- Part IV Credit - Positive Attendance, Credit
- Part IV Non-Credit - Positive Attendance, Non-Credit
- Part V - Independent Study and Work Experience, Weekly
- Part VI - Independent Study and Work Experience, Daily
- Part VII - Non-Credit, Independent Study, Distance Education

Second Period Annualizers

Second Period Annualizers are used in converting the number of contact hours into Full Time Equivalent Students (FTES). In order to convert contact hours into FTES when reporting for specified time periods you must enter the period annualizer. The following fields should contain a value on if you generate the 320 report for the time period specified.

- Part II
- Part III
- Part IV Credit
- Part IV Non-Credit
- Part V
- Part VI
- Part VII

Procedure for Defining 320 Reporting Parameters

Complete the following steps to define 320 reporting parameters:

Step 1. Access the 320 Reporting Parameters (CA3P) form.

Step 2. Enter the required and optional parameters for 320 reporting.

Refer to “Defining Codes for 320 Reporting” beginning on page 2-13 for information on setting up your code files and tables prior to defining your parameters.

Step 3. Finish from the CA3P form.

Setting Up EB and EJ Defaults

In This Chapter

This chapter describes how to define the defaults used by Colleague to extract data to be included in the EB and EJ work files. The work files are used for the employee exports. Unlike the other California exports which originate in the Student System, the employee exports are generated from Colleague's Human Resources System. Many of the forms mentioned in this and other chapters related to employee exports are found in the California MIS module in the HR application of Colleague. This chapter also provides some information about where to enter data into Colleague to help you produce more accurate employee reports.Table 2-17 lists the topics covered in this chapter.

Table 2-17: Topics in this Chapter

Before You Begin

Before you can define your defaults, you must have a thorough understanding of employee set up, positions, and General Ledger account numbers. See "Employee Demographics Export (EB)" on page 11-49 and "Employee Assignment Export (EJ)" on page 11-63 for detailed information about the data Colleague uses for the employee reports.

Understanding EJ Defaults

Defaults are used by Colleague to identify where to look for certain types of information. Once this information is identified, it can then be used to select data to be extracted from Colleague. For example, you must tell Colleague a starting position in which to extract an ASA/TOPS Code from a General Ledger (GL) account code, which is used for labor distribution purposes, and can be entered on the Pay Funding Information (PPFI) form.

Form Used

Table 2-18 shows the form used in this section and a description of the form.

Form	Purpose
California MIS EB/EJ Defaults (CADE)	Defines the defaults needed to generate the work files used by the EB and EJ reports.

Table 2-18: Form Used to Define the Employee Report Parameters

Defining EJ Defaults

Use the California MIS EB/EJ Defaults (CADE) form to define the defaults used to identify how to extract employee data from Colleague.

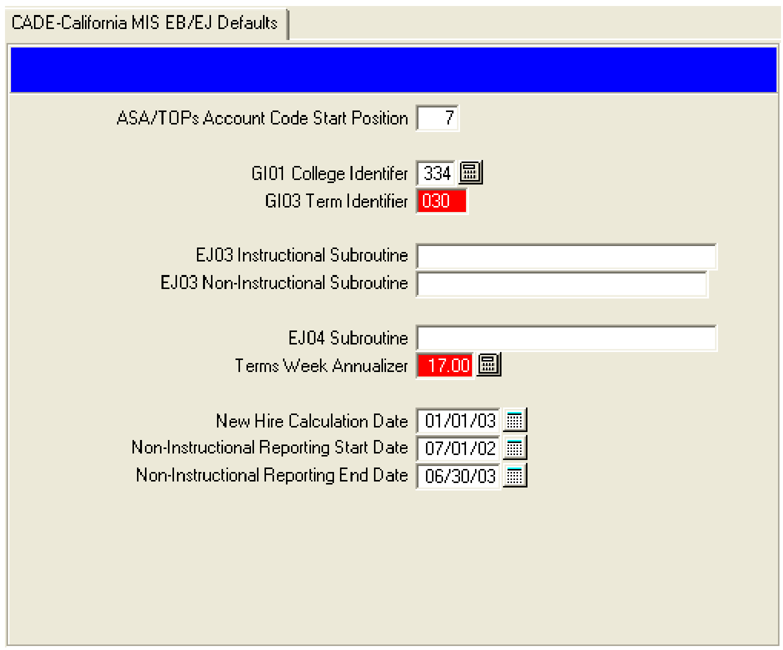


Figure 2-6: The California MIS EB/EJ Defaults (CADE) Form

The fields on the CADE form are explained below. For more information about the CADE form, see the online help.

Identifying ASA/TOPs Code Start Position

Use the ASA/TOPs Account Code Start Position field to define where the ASA/TOPs account code should be extracted from within a GL number. When you build the EJ work file, Colleague uses the ASA/TOPs account code start position to extract the code for each person's non-instructional position funding, which Colleague then uses to determine how to set the first position of the Employee Assignment Type (EJ01) data element.

GI01 District College Identifier

If your institution is a single district college, enter the 3 digit code that has been assigned to your institution by the Chancellor's Office.

If your institution has multiple districts, leave this field blank. If you enter a code in this field Colleague uses this code as your district identifier for all districts even if you have multiple codes. When you leave this field blank Colleague extracts the code based on the course section location for the course section extract and the position location for the release time and non-instructional extracts.

GI03 Term Identifier

Enter the GI03 code to be used on the EB and EJ reports. The GI03 Term Identifier is a three character code in the form of YYT. YY is the last two digits of the year for which you are reporting, and the T is the report identifier, which can be a value of “0” through “9,” and is determined by MIS.

Note: The GI03 Term Identifier field must be updated before creating the work file for each different reporting period.

Defining a Custom Subroutine for EJ03

Enter a custom subroutine that sets the employee assignment account code [EJ03] when the GL account codes do not conform to the values as defined by the Chancellor’s Office. The EJ03 Instructional Subroutine and the EJ03 Non-Instructional Subroutine fields can both contain a subroutine name, but it is not required that you enter a subroutine name in both fields. The instructional subroutine extracts a course section assignment account code and the non-instructional subroutine extracts an assignment account code for other positions held by an employee.

The instructional subroutine must be globally cataloged and have the following 3 arguments in the following sequence:

1. Output - value for EJ03
2. Input - the system calculated value for EJ03
3. Input - GL number

The non-instructional subroutine must be globally cataloged and must have the following 3 arguments in the following sequence:

1. Output - argument that contains the calculated/customized value for EJ03
2. Input - argument that contains the Colleague PERSON ID for the PERSON that owns this assignment
3. Input - argument that contains the GL number used for creating an EJ record from a non-instructional assignment. This will only have a value when an EJ record is being created from a non-instructional assignment

Defining a Custom Subroutine for EJ04

Enter a custom subroutine that sets employee assignment weekly hours [EJ04] when you need to adjust faculty weekly contact hours for short term classes over the reporting period. The subroutine must be globally cataloged and have 7 arguments in the following sequence:

1. Output - argument that will contain the calculated value for EJ04.
2. Input - argument that contains the Colleague Term Week Annualizer.
3. input argument that contains the Colleague value for either the section clock hours (SEC.CLOCK.HOURS) or the section contract hours (SEC.CONTRACT.HOURS) that is associated with a specific instructional method.
4. Input - argument that contains the Colleague value for the section instructional methods (SEC.INSTR.METHODS is a list).
5. Input - argument that contains the Colleague value for the section contact measures (SEC.CONTACT.MEASURES is a list)
6. Input - argument that contains the Colleague value for the section number of weeks (from SEC.NO.WEEKS).
7. Input - argument that contains the Colleague percent of the instructional method the faculty member is to teach.

Term Week Annualizer

Enter the number of weeks in a term of normal duration as the institution's Term Weeks Annualizer for processing.

This is the same number of weeks that is reported on the Chancellor's office Calendar file for California State Reporting as the primary term number of weeks.

The value entered in this field is used when calculating the number of weekly hours for an assignment, which is reported in the EJ04 data element.

New Hire Calculation Date

The new hire calculation date is used by the Build EB Work Records (BEWF) process to calculate the Employee Employment Status [EB09] data element which indicates if an employee is considered a new hire or a continuing employee. Any employee with a hire date on or after the date entered is considered to be a new employee. Any employee with a hire date before the date entered is considered to be a continuing employee.

The new hire calculation date is also used when you are adding a new EB record on the Employee Demographics (CAEM) form to default position information.

Note: The New Hire Calculation Date field must be updated before creating the work file for each different reporting period.

Non-instructional Report Period Start and End Dates

The Non-instructional Report Period Start and End Date is used Build EB Work Records (BEWF) process to calculate whether a person's position and its associated wage records should be included to determine the employee's annual salary. If a position is open, meaning that the position wage records have a start date that is on or before the reporting end date, and the end date is on or after the reporting start date or does not have an end date, the wage is reported for the person.

The non-instructional report period start and end dates are also used when you are adding a new EB record on the Employee Demographics (CAEM) form to default position information.

Note: The Non-instructional Report Period Start and End Date fields must be updated before creating the work file for each different reporting period.

Procedure for Defining EJ Defaults

Complete the following steps to define the EB and EJ parameters and defaults.

Step 1. Access the California MIS EB/EJ Defaults (CADE) form.

Step 2. Enter the start position of your ASA/TOPs account codes.

Step 3. If your institution is a single district institution, enter your GI01 District College Identifier.

If your institution is a multiple district institution, leave the GI01 District College Identifier blank.

Step 4. Enter the GI03 Term Identifier.

The GI03 is a three character code in the form of YYT

Step 5. Enter the new hire calculation date that corresponds to the GI03 Term Identifier.

Step 6. Enter the start and end dates to define the non-instructional report period time frame.

Step 7. Optionally, enter any of your custom subroutines used to:

- set the employee assignment account code [EJ03]
- set the employee assignment weekly hours [EJ04]

  If you enter a custom subroutine to determine EJ04, you must enter a term weeks annualizer.

Step 8. Finish from the CADE form.

Additional Considerations

To prepare for CALMIS HR staff reporting there are several forms that require certain data be entered in order to extract the information. Table 2-19 is an overview of some of the forms that should be used to produce accurate staff reports.

Form	Description
Add Faculty Employee (FACL)	All faculty and non-faculty members must be entered through the FACL form. If you use the Add Non-Faculty Employee (NFAC) form, the proper information is not reported on the staff reports.
Person’s Position (PPOS)	Use to enter data about an employee assignment and total FTE. **Note:** Each position has its own set of account information.
Person’s Pay Distribution (PPYD)	Use to enter employee assignment labor distribution information. The ASA/TOPS codes used for reporting purposes are entered on this form, along with the distribution percent.
Person’s Wage/Salary (PWAG)	Use to enter employee assignment hourly rates and salary information. The EJ05 data element is calculated based on the salary or hourly information entered on this form.
Position Definition (POSD)	Use to define a position and the work location. The classification code determines if the position is to be included or excluded from the non-instructional extract.
Leave Plan Definition (LEAD)	Use to set up leave plans.
Person’s Leave Plan Summary (LEVS)	Use to view an employee’s leave plans.
Section Offering Info (SOFF)	Use this form in the ST application to enter cumulative load, contact hours by instructional method, and contact measure for a course section.
Faculty Section Assignment (FASC)	Use this form in the ST application to enter details about each instructor assigned to a course section. Required information on this form includes faculty member, instructional method, percent, load, teaching arrangement, contract type, position, contract, and load period.
Person’s Work Schedule (PWSC)	Use to enter the number of hours an employee works each day. The EJ04 data element is calculated based on the information entered on this form.
Faculty Organization Asgmt (FAOA) or Faculty Membership Detail (FCMD)	Use the forms in the ST application to assign release time/ leaves for instructional faculty. Use the roles codes to determine the type of leave which could include sabbatical, pre-retirement, or leave from teaching.

Table 2-19: Additional Information for Setting Up Staff Reporting

Using CA State Reporting: MIS Reports

3. Generating the Course Report

Course Export (CB)

In This Chapter

This chapter describes how to produce the Course Export (CB) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

Table 3-1 lists the topics covered in this chapter.

Table 3-1: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting.

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
CRED.TYPES		CAST.CB04
	TRANSFER.STATUSES	CAST.CB05
	COURSE.TYPES (with COURSE-BASIC-SKILLS-STATUS, COURSE-COOP-WORK-EXP-ED-STATUS, and COURSE-NONCREDIT-CATEGORY codes)	CAST.CB08
	COURSE.LEVELS (with COURSE-SAM-PRIORITY-CODE codes and COURSE-PRIOR-TO-COLLEGE-LEVEL codes)	CAST.CB09
	COURSE.TYPES (with COURSE-BASIC-SKILLS-STATUS, COURSE-COOP-WORK-EXP-ED-STATUS, and COURSE-NONCREDIT-CATEGORY codes)	CAST.CB10
	COURSE.PURPOSES	CAST.CB11
	COURSE.DISABILITY.STATUSES	CAST.CB13
SUBJECTS		CAST.CB19
	COURSE.LEVELS (with COURSE-SAM-PRIORITY-CODE codes and COURSE-PRIOR-TO-COLLEGE-LEVEL codes)	CAST.CB21
	COURSE.TYPES (with COURSE-BASIC-SKILLS-STATUS, COURSE-COOP-WORK-EXP-ED-STATUS, and COURSE-NONCREDIT-CATEGORY codes)	CAST.CB22

Table 3-2: Course Export Code Files and Tables

Understanding Course Export

The Course Export is generated at the end of each term or quarter, and provides a snapshot of all active courses on file as of the end of the reporting term.

Selection Criteria

This export selects courses with the following criteria:

- "TOP" status with a special processing code of 1 (Active) in the COURSE.STATUSES validation code table
- start date on or before the end date of the term entered on the CACB form
- matches a course optionally entered on the CACB form (only used if one or more courses are entered on CACB)
- one of the following:
  - no course end date

or

  - course end date on or after the end date of the term entered on the CACB form

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Formform Mnemonic: CACB

The Record Code, set to **`CB`** on extract mapping, identifies the record as a course export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INSTITUTIONS file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, the export process determines the associated departments of the course, and uses the DEPTS.INSTITUTIONS.ID from the first or most current department. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CACB
Translation Table: CAST.GI03

The Term Identifier is derived from the term entered on the CACB form. The format of this field is YYT, where:

- YY = the last two digits of the reporting year in which the term occurs as taken from the reporting year field of the TERMS record.
- T = the single-digit term-type identifier as derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

COURSE-PERMANENT-DISTRICT-IDENTIFIER [CB00]

Filled with spaces.

COURSE-DEPARTMENT-NUMBER [CB01]

Colleague Data Element: CRS.NAME
Form Mnemonic: CRSE

The Course Department Number is the course name (CRS.NAME), a combination of the subject and course number separated by a pre-defined delimiter (for example, MATH*101).

COURSE-TITLE [CB02]

Colleague Data Element: CRS.TITLE or CRS.SHORT.TITLE
Form Mnemonic: CRSE

The Course Title is the title of the course as used in the catalogue (for example, Freshman English). Colleague uses the full title (CRS.TITLE) first. If there is none, it uses the short title (CRS.SHORT.TITLE). If neither title exists, an error message is printed.

COURSE-TOP-CODE [CB03]

Colleague Data Element: CRS.LOCAL.GOVT.CODES
Form Mnemonic: CRSE

The Course TOP Code uses the first value in the state TOP code (CRS.LOCAL.GOVT.CODES) field. This code is separate from the national code and is used for reporting purposes.

When this code is reported Colleague exports the first five digits of the code and removes any decimals. Datatel recommends that do not place decimals in the Local Govt Code when they are created.

COURSE-CREDIT-STATUS [CB04]

Colleague Data Element: CRS.CRED.TYPE
Form Mnemonic: CRSE
Translation Table: CAST.CB04

The Course Credit Status is the credit type (CRS.CRED.TYPE) taken from the CRED.TYPES file. This is used to determine grading and billing for a course. It is derived by translating the credit type from the COURSES record using the CAST.CB04 translation table. This table converts the credit type into the required state code.

COURSE-TRANSFER-STATUS [CB05]

Colleague Data Element: CRS.TRANSFER.STATUS
Form Mnemonic: ACOI
Translation Table: CAST.CB05

The Course Transfer Status is the transfer status of the course (CRS.TRANSFER.STATUS). It indicates if a course can be transferred to other institutions. It is derived by translating the transfer status from the COURSES record using the CAST.CB05 translation table. This table converts the transfer status into the required state code. If CRS.TRANSFER.STATUS is blank, a C is reported.

COURSE-UNITS-OF-CREDIT-MAXIMUM [CB06]

Colleague Data Element: CRS.MAX.CRED
Form Mnemonic: CRSE

The Course Units of Credit Maximum is the maximum number of credits received for a course as follows:

- If it is a variable credit course, CRS.MAX.CRED is reported.
- If it is a fixed credit course, CRS.MIN.CRED is reported.
- If it is a zero credit course, 0 (zero) is reported.

COURSE-UNITS-OF-CREDIT-MINIMUM [CB07]

Colleague Data Element: CRS.MIN.CRED
Form Mnemonic: CRSE

The Course Units of Credit Minimum is the minimum number of credits or Continuing Education Units (CEUs) received for a course as follows:

- If it is a credit course, CRS.MIN.CRED is reported.
- If it is a Continuing Education course, CRS.CEUS is reported.

COURSE-BASIC-SKILLS-STATUS [CB08]

Colleague Data Element: CRS.COURSE.TYPES
Form Mnemonic: CRSE
Translation Table: CAST.CB08

The Course Basic Skills Status is the course type (CRS.COURSE.TYPES) used for basic skills courses as well as for precollegiate basic skills (PBS) courses. The Course Coop Work Exp Ed Status [CB10] and Course Non Credit Category [CB22] fields also use course types.

Since all three values [CB08, CB10, and CB22] are stored in the same multi-valued field, unique codes must be defined for each use of the course type. Examples of course type codes for CB08 are listed in Table 3-3 on page 3-8. The course type used for basic skills status is derived by translating the course type from the COURSES record using the CAST.CB08 translation table. This table converts the course type into the required state code. If the course type cannot be translated, an N is reported.

Separate translation tables are used for CB08, CB10, and CB22 to determine their values.

Colleague Code	Definition	California MIS Code
P	Precollegiate Basic Skills	P
B	Basic Skills	B
NBS	Not Basic Skills	N

Table 3-3: Examples of Course Types for CB08

COURSE.SAM-PRIORITY-CODE [CB09]

Colleague Data Element: CRS.LEVELS
Form Mnemonic: CRSE
Translation Table: CAST.CB09

The Course SAM Priority Code identifies the course level (CRS.LEVELS) used for occupational courses as well as identifies the course sequence in occupational programs. The Course Prior To College Level [CB21] field also uses course level codes.

Since both values [CB09 & CB21] are stored in the same multi-valued field, unique codes must be defined for each use of the course level. Examples of course level codes are listed in table 3-4 below. The course level used for SAM priority code is derived by translating the course level from the COURSES record using the CAST.CB09 translation table. This table converts the course level into the required state code. Separate translation tables are used for CB09 and CB21 to determine their values.

Colleague Code	Definition	California MIS Code
A	Apprenticeship	A
B	Advanced Occupational	B
C	Clearly Occupational	C
D	Possibly Occupational	D
E	Not Occupational	E

Table 3-4: Examples of Course Levels for CB09

COURSE-COOP-ED-STATUS [CB10]

Colleague Data Element: CRS.COURSE.TYPES
Form Mnemonic: CRSE
Translation Table: CAST.CB10

The Course Coop Ed Status is the course type (CRS.COURSE.TYPES) used for cooperative education courses. The Course Basic Skills Status [CB08] and Course Non Credit Category [CB22] fields also use course types.

Since all three values [CB08, CB10, and CB22] are stored in the same multi-valued field, unique codes must be defined for each use of the course type. Examples of course type codes are listed in table 3-5 below. The course type used for Coop Work Exp Ed Status is derived by translating the course type from the COURSES record using the CAST.CB10 translation table. This table converts the course type into the required state code. If the course type code cannot be translated, an N is reported.

Separate translation tables are used for CB08, CB10, and CB22 to determine their values.

Colleague Code	Definition	California MIS Code
NCOOP	Not COOP Education Course	N
COOP	COOP Education Course	C

Table 3-5: Examples of Course Types for CB10

COURSE-CLASSIFICATION-CODE [CB11]

Colleague Data Element: CRS.PURPOSE
Form Mnemonic: ACOI
Translation Table: CAST.CB11

The Course Classification Code is the course purpose (CRS.PURPOSE), and is used to classify the primary objective of a course.

If this field contains a translated value of I, meaning “Occupational,” the course must also have a Course SAM Priority Code [CB09] that identifies it as an occupational course. The Course SAM Priority code must translate to A, B, C, or D using the CAST.CB09 translation table.

COURSE-REPEATABILITY [CB12]

Filled with spaces.

COURSE-SPECIAL-CLASS-STATUS [CB13]

Colleague Data Element: CRS.DISABILITY.STATUS
Form Mnemonic: CFIN
Translation Table: CAST.CB13

The Course Special Class Status is the disability status used to indicate if a course is an "approved special class" according to the provisions of Title 5, Section 56028. If it is, the course is considered repeatable for apportionment purposes under the provisions of Title 5, Section 56029. The course's special class status is derived by translating the disability status from the COURSES record using the CAST.CB13 translation table. This table converts the disability status into the required state code. If the disability status cannot be translated, an N is reported.

COURSE-CAN-CODE [CB14]

Colleague Data Element: CRS.STANDARD.ARTICULATION.NO
Form Mnemonic: ACOI

The Course CAN (California Articulation Number) Code is the articulation number for which this course qualifies. Colleague processes the articulation number as follows:

- If a course standard articulation number (CRS.STANDARD.ARTICULATION.NO) exists, the letters CAN and any embedded spaces are removed, and the remaining number is reported. Refer to the California MIS Data Dictionary for examples.
- If there is neither an articulation number (CRS.STANDARD.ARTICULATION.NO) nor an articulation sequence number (CRS.ARTICULATION.SEQUENCE.NO), YYYYYYYY is reported.
- If there is no articulation number (CRS.STANDARD.ARTICULATION.NO), but there is an articulation sequence number (CRS.ARTICULATION.SEQUENCE.NO), XXXXXXXX is reported, and a warning message is printed.

COURSE-CAN-SEQ-CODE [CB15]

Colleague Data Element: CRS.ARTICULATION.SEQUENCE.NO
Form Mnemonic: ACOI

The Course CAN Sequence Code is the California Articulation Number (CAN) code for which this course has been qualified as a component of a sequence of courses. Colleague processes the articulation sequence number as follows:

- If a course articulation sequence number (CRS.ARTICULATION.SEQUENCE.NO) exists and:
  - a course standard articulation number (CRS.STANDARD.ARTICULATION.NO) exists, the letters CAN and any embedded spaces are removed, and the remaining number is reported. Refer to the California MIS Data Dictionary for examples.
  - a course standard articulation number (CRS.STANDARD.ARTICULATION.NO) does not exist, XXXXXXXX is reported and a warning message is printed.
- If a course articulation sequence number (CRS.ARTICULATION.SEQUENCE.NO) does not exist and:
  - a course standard articulation number (CRS.STANDARD.ARTICULATION.NO) exists, XXXXXXXX is reported and a warning message is printed.
    - a course standard articulation number (CRS.STANDARD.ARTICULATION.NO) does not exist, YYYYYYYY is reported.

COURSE-SAME-AS-DEPARTMENT-NUMBER1 [CB16]

Filled with spaces.

COURSE-SAME-AS-DEPARTMENT-NUMBER2 [CB17]

Filled with spaces.

COURSE-SAME-AS-DEPARTMENT-NUMBER3 [CB18]

Filled with spaces.

COURSE-CROSSWALK-CRS-DEPT-NAME [CB19]

Colleague Data Element: CRS.SUBJECT
Form Mnemonic: CRSE
Translation Table: CAST.CB19

The Course Crosswalk Course Department Name is the course subject (CRS.SUBJECT) used as the first half of the user course name. The course crosswalk course department name is derived by translating the course subject from the COURSES record using the CAST.CB19 translation table. This table converts the course subject into the required state code. If your institution currently uses the state codes for your course subjects, you do not need to create the CAST.CB19 translation table. If a course cannot be transferred (CRS.TRANSFER.STATUS is not equal to A or B), YYYYYYYY is reported.

COURSE-CROSSWALK-CRS-NUMBER [CB20]

Colleague Data Element: CRS.NO
Form Mnemonic: CRSE

The Course Crosswalk Course Department Number is the course number (CRS.NO) used as the second half of the user course name. If a course cannot be transferred (CRS.TRANSFER.STATUS is not equal to A or B), YYYYYYYY is reported.

COURSE-PRIOR-TO-COLLEGE-LEVEL [CB21]

Colleague Data Element: CRS.LEVELS
Form Mnemonic: CRSE
Translation Table: CAST.CB21

The Course Prior to College Level code is the course level (CRS.LEVELS) code used for courses which were taken prior to the student attending your institution. The Course SAM Priority Code [CB09] field also uses course level codes.

Since both values [CB09 & CB21] are stored in the same multi-valued field, unique codes must be defined for each use of the course level. Examples of course level codes are listed in table 3-6 below. The course level used for Course Prior to College Level code is derived by translating the course level from the COURSES record using the CAST.CB21 translation table. This table converts the course level into the required state code. If a course level cannot be translated, a Y is reported. Separate translation tables are used for CB09 and CB21 to determine their values.

Colleague Code	Definition	California MIS Code
1	One Level Below Transfer	A
2	Two Levels Below Transfer	B
3	Three Levels Below Transfer	C
3+	More Than Three Levels Below	Y

Table 3-6: Examples of Course Levels for CB21

COURSE-NONCREDIT-CATEGORY [CB22]

Colleague Data Element: CRS.TYPE
Form Mnemonic: CRSE
Translation Table: CAST.CB22

The Course Non Credit Category is the course type (CRS.COURSE.TYPES) used for noncredit courses. The Course Basic Skills Status [CB08] and Course Coop Work Exp Ed Status [CB10] fields also use course types.

Since all three values [CB08, CB10, and CB22] are stored in the same multi-valued field, unique codes must be defined for each use of the course type. Examples of course type codes for CB22 are listed in table 3-7 below. The course type used for course noncredit category is derived by translating the course type from the COURSES record using the CAST.CB22 translation table. This table converts the course type into the required state code. If the course type cannot be translated, an N is reported. If Course Credit Status [CB04] is reported as C or D for the course, a Y is reported.

Separate translation tables are used for CB08, CB10, and CB22 to determine their values.

Colleague Code	Definition	California MIS Code
01	Parenting	P
04	Citizenship for Immigrants	B
08	Home Economics	G

Table 3-7: Examples of Course Types for CB22

Generating the Course Export

Use the Course (CB) Export (CACB) form to generate the Course Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

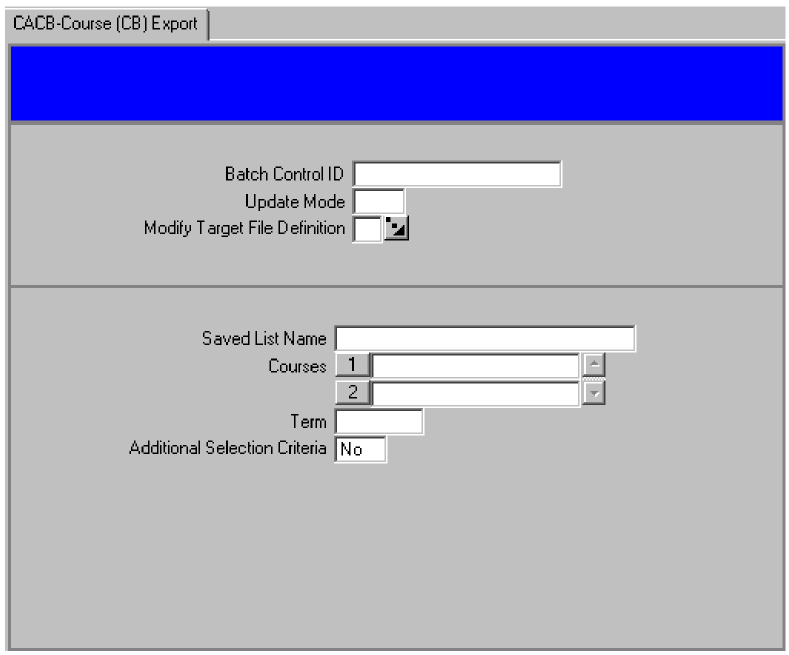


Figure 3-1: The Course (CB) Export (CACB) Form

The fields on the CACB form are described below. For additional information about the CACB form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.CB) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the COURSES file to limit the courses included in the extract. Or you can specify individual courses in the Courses field on this form.

Courses

You can identify specific courses to be included in the extract.Use either this field or a saved list of courses if you do not want to include all active courses in the extract.

Term

The term further identifies which courses are included in the extract. Any courses active as of the end date of the term entered, and that meet any other selection criteria entered, are included in the extract.

Procedure for Generating the Course Export

Complete the following steps to generate the Course (CB) Export:

Step 1. Access the Course (CB) Export (CACB) form.

Step 2. Enter the export parameters.

Use Update Mode **N** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Note: Run the export by finishing from the form

Step 4. Review any error reports printed.

Step 5. Make the necessary corrections to the Colleague database.

Step 6. Rerun the export.

Step 7. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 8. When all errors have been corrected, change the Update Mode to **Y**.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 9. Export the data to the target file by finishing from the CACB form.

Using CA State Reporting: MIS Reports

4. Generating the XB/XF/XE Reports

Understanding the XB/XE/XF Reports

In This Part

This part of the manual provides the information you need to prepare the section, session, and assignment reports required by the Chancellor's Office, and which can be generated by Colleague. The chapter that you are reading now, gives you the background knowledge you need to perform the procedures detailed in subsequent chapters.

Before You Begin

Before you can complete the procedures in this part, you must define the parameters on the California MIS Dates (CAMD) form. For more information, see "Defining California MIS Report Dates" beginning on page 2-30.

Reports That Can Be Generated

Colleague's Student System can generate the following reports that are required by the Chancellors's Office:

- Section (XB) Report
- Session (XF) Report
- Faculty Assignment (XE) Report

The the section, session, and assignment reports are due during each of the end of term collection periods.

Generating the XE report also assists you in creating employee demographic records needed during the end of term submissions. For more information, see "Term End Submissions" on page 4-42. The steps to complete the end of term submission are intergrated with the steps to complete the XB, XF, and XE reports, and is outlined in Table 4-3 on page 4-6.

Section (XB) Report

This report provides the Chancellor's Office with information about each of the course sections offered at your institution. Colleague produces a file of the information, which can be submitted to the Chancellor's Office. For information on how to generate this report, see "Generating the Section (XB) Report" beginning on page 4-9.

Session (XF) Report

This report provides the Chancellor's Office with information about each session within a course section. Sessions are differentiated by the different times on different days they are scheduled, by different faculty members assigned to teach the course section, or by the different instructional methods used. Colleague produces a file of the information, which can be submitted to the Chancellor's Office. For information on how to generate this report, see "Generating the Session (XF) Report" beginning on page 4-27.

Faculty Assignment (XE) Report

This report provides the Chancellor's Office with information about each of the faculty members assigned to teach a session. Colleague produces a file of the information, which can be submitted to the Chancellor's Office. For information on how to generate this report, see "Generating the Faculty Assignment (XE) Report" beginning on page 4-41.

Understanding Colleague's Capabilities

Using Colleague, you can enter the data necessary to generate the section, session, and faculty assignment records. For information about where Colleague extracts the data from, refer to the following chapters in this part:

- "Section Export (XB)" beginning on page 4-57.
- "Session Export (XF)" beginning on page 4-63.
- "Faculty Assignment Export (XE)" beginning on page 4-69.

Forms Used

Table 4-1 shows an alphabetical list of the forms used in this part and a description of each.

Form	Purpose
Assignment (XE) Maintenance (CXEM)	View and maintain records contained in the CAST.XE.WORK file. You can also add and delete records from the work file using the CXEM form.
Build Assignment (XE) Data (CAXE)	Builds the CAST.XE.WORK file for a particular reporting period.
Build Section (XB) Data (CAXB)	Builds the CAST.XB.WORK file for a particular reporting period.
Build Session (XF) Data (CAXF)	Builds the CAST.XF.WORK file for a particular reporting period.
California Work File Purge (CAFP)	Purges the data in the work files.
EJ Section Build EB Work Records (BEWF)	Creates EB work file records that are needed for the end of term submission.
Employee Demographic Export (CAEB)	Creates the export file with the employee demographic records that can be submitted to the Chancellor's Office.
Employee Demographics (CAEM)	View and maintain information in the EB work file that contains the records for the end of term submission.
Section (XB) Maintenance (CXBM)	View and maintain records contained in the CAST.XB.WORK file. You can also add and delete records from the work file using the CXBM form.

Table 4-1: Forms Used

Form	Purpose
Session (XF) Maintenance (CXFM)	Use to maintain records contained in the CAST.XF.WORK file. You can also add and delete records from the work file using the CXFM form.
XB/XE/XF Concatenation (CACT)	Use to conjoin the data in each of the workfiles into a single export file.

Table 4-1: Forms Used (cont'd)

Files Used

Table 4-2 lists the primary files used in this part.

File	Description
CAST.XB.WORK	Contains a record for each course section that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.
CAST.XE.WORK	Contains a record for each faculty assignment that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.
CAST.XF.WORK	Contains a record for each session of a course section that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.
COURSE.SEC.FACULTY	Contains information about each faculty assignment, including the load and percent.
COURSE.SEC.MEETING	Contains information about when the session meets, including the time and dates for the session.
COURSE.SECTION	Contains information about the course section name, number of credits, and sponsorship, which are all reported on the Section (XB) Report.

Table 4-2: Files Used

Steps at a Glance

Table 4-3 provides a summary of the steps used to generate the XB/XE/XF reports. For detailed information about each of the steps, see the pages referenced below.

Step	Task	Form	For More Information, See...
1.	Set-up the parameters for the XB/XE/XF reports.	California MIS Report Dates (CAMD)	page 2-30
2.	Set-up the parameters for the EB report.	California MIS EB/EJ Defaults (CADE)	page 2-43
3.	Purge any existing records from the work files.	Purge Employee Reporting Recs (PERR)	page 11-75
4.	Create records in the XB work file for the course sections.	Build Section (XB) Data (CAXB)	page 4-9
5.	Create records in the XF work file for each session in a course section.	Build Session (XF) Data (CAXF)	page 4-27
6.	Create records in the XE work file for faculty assignments.	Build Assignment (XE) Data (CAXE)	page 4-41
7.	Concatenate the XB, XF, and XE work files.	XB/XE/XF Concatenation (CACT)	page 4-75
8.	Summarize EJ records and build employee demographic records.	Build EB Work Records (BEWF)	page 11-31
9.	Export the EB work file records to the CAST.EB file.	Employee Demographic Export (CAEB)	page 11-58
10.	Submit Data	Data Submission (COMIS)[a]	http://www.cccco.edu/divisions/tris/mis.htm
11.	Review error reports generated by the Chancellor's Office.	Syntactical and Referential Reports (COMIS)[b]	http://www.cccco.edu/divisions/tris/mis.htm
12.	Add, modify, or delete XB work file records.	Section (XB) Maintenance (CXBM)	page 4-17
13.	Add, modify, or delete XF work file records.	Session (XF) Maintenance (CXFM)	page 4-33
14.	Add, modify, or delete XE work file records.	Assignment (XE) Maintenance (CXEM)	page 4-49
15.	Add, modify, or delete EB records.	Employee Demographics (CAEM)	page 11-46

Table 4-3: Steps at a Glance for Generating the XB/XE/XF Reports

a. The submission of data is completed using the Chancellor's Office Web site and not through Colleague.
b. The Syntactical and Referential Reports are not generated by Colleague, and must be retrieved directly from the Chancellor's Office.

If the data you submit to the Chancellor's Office contains errors, you can modify the data using the appropriate maintenance form. After you have made all the necessary corrections, you must create a new export file using the XB/XE/XF Concatenation (CACT) process.

Generating the Section (XB) Report

In This Chapter

This chapter explains how to generate the work file used to create the Section (XB) Report. Table 4-4 lists the topics covered in this chapter.

Table 4-4: Topics in this Chapter

Before You Begin

Before you can build the XB work file used for the Section Report, you must have already set up your Colleague database with the necessary codes and tables. Refer to "Defining Codes & Tables for MIS Reporting" beginning on page 2-1 for a complete list of the codes and tables required to produce all of the California State Reports. Table 4-5 lists the codes and tables used specifically by the Section (XB) Report.

Code Files	Validation Code Tables	Translation Tables
	FUNDING.ACCTG.METHODS	CAST.XB01
CORP.TYPES		CAST.XB04
	COURSE.DISABILITY.STATUSES	CAST.XB08
		CAST.XB10
		CAST.XF01

Table 4-5: Section Code Files and Tables

Understanding Work Files

Work files are temporary files created by extracting information from the Colleague database, and then converting that data to specific formats used by the California course reports. While some data can be extracted directly from Colleague at the time the work files are created, other types of data are derived from multiple fields in Colleague and then combined into a single work file field. A work file field may also require additional translation in order to export the data in the format required by the Chancellor’s Office.

The XB work file (CAST.XB.WORK) contains course section data. The work file selects information for the XB records from the following sources:

- Course sections eligible for reporting (for example, Math*100*01).
- Section financial information eligible for reporting (for example, accounting method).

You can override the information that Colleague creates and stores in the work file for individual course sections. For information about maintaining the data in the XB work file, see “Maintaining the XB Work File” on page 4-17.

Form Used

Table 4-6 lists the form used in the chapter and a brief description of the form.

Form	Description
Build Section (XB) Data (CAXB)	Use to build the CAST.XB.WORK file for a particular reporting period.

Table 4-6: Form for Building the XB Work File

Files Used

Table 4-7 lists the primary files used in this chapter and a brief description of the files.

File	Description
CAST.XB.WORK	Contains a record for each course section that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.
COURSE.SECTION	Contains information about the course section name, number of credits, and sponsorship, which are all reported on the Section (XB) Report.

Table 4-7: Files Used with Building the XB Work File

Building the XB Work File

Colleague does the following to determine which course sections to include in the work file:

- If a saved list name is entered in the Input Saved List Name field on the CAXB form, Colleague creates records in the work file for all the course sections in the saved list regardless of the other selection criteria on the CAXB form or if the course section data contains errors.
- If a saved list is not entered, Colleague creates records for all course sections that are within the reporting time frame that also meets the other selection criteria. For more information, see “Selecting Records Based on a Reporting Time Frame” below.
- If you entered information in the Courses field, Colleague creates records only for the course sections that are within the reporting time frame and are also in the Courses field.
- If you entered information in the Sections field, Colleague creates records for only the course sections that are within the reporting time frame and are also in the Sections field.

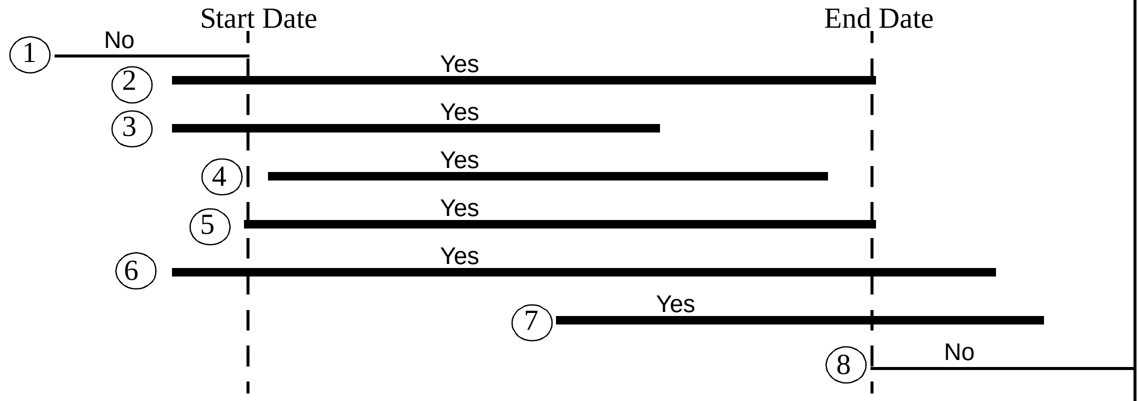
Each course section that meets the selection criteria is then processed and data is populated for each data element. For more information about how a data element is derived, see “California MIS Data Elements” beginning on page 4-58.

Note: When you run the CAXB process multiple times for the same reporting period, Colleague first clears the work file for that specific reporting period and then creates new records based on the selection criteria entered on the CAXB form.

Selecting Records Based on a Reporting Time Frame

If you do not enter an Input Saved List, Colleague selects all course sections that were active during the reporting time frame that also meets the other selection criteria entered on the Build Section (XB) Data (CAXB) form. The reporting time frame is defined on the California MIS Report Dates (CAMD) form with an associated GI03 code. When you enter a GI03 code on the CAXB form, Colleague uses the dates from the CAMD form to select records. Figure 4-1 on page 4-13 illustrates which course sections are selected by the CAXB process.

Note: The date range for CAXB is represented by the dash line and the course sections are represented by the horizontal lines.



1 – begins and ends prior to the start date of the reporting period and would not be reported.
2 – begins prior to the start date and ends on the end date of the reporting period and would be reported.
3 – begins prior to the start date and ends prior to the end date of the reporting period and would be reported.
4 – begins after the start date and ends before the end date and would be reported.
5 – begins and ends on the dates of the reporting period and would be reported.
6 – begins prior to the start date and ends after the end date of the reporting period and would be reported.
7 – begins after the start date and ends after the end date of the reporting period and would be reported.
8 – begins and ends after the reporting time frame and would not be reported.

Figure 4-1: Records Selected Based on a Reporting Time Frame

Creating the Section Work File Data

Use the Build Section (XB) Data (CAXB) form to build the CAST.XB.WORK file used to create the Section (XB) Report. You can define parameters, as well as enter selection criteria that determines the records included in the work file.

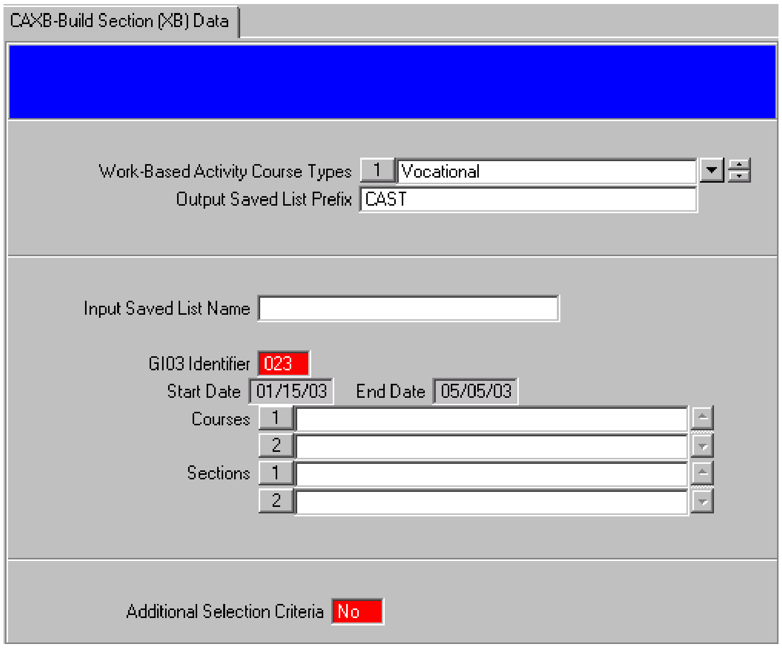


Figure 4-2: The Build Section (XB) Data (CAXB) Form

Noteworthy Fields on the CAXB Form

The fields on the CAXB form are described below. For additional information about the CAXB form, see the online help.

Work-Based Activity Course Types

Enter course types that indicate work-based activity courses. Colleague uses the course types entered in this field to compare with the course types entered for a course section. If the course types match then the work file is populated with a "W." If the course types do not match, then an "N" is reported. If you do not enter course types in this field, or if course types are not listed on the Sections (SECT) form then an "X" is reported.

Output Saved List Prefix

Use the Output Saved List Prefix field to enter the prefix for the saved lists that will be created when running the Build Section (XB) Data (CAXB) process. For example, if you enter CAST043 in the Output Saved List Prefix field, Colleague will create a saved list called CAST043.COURSES that contains a list of all the courses processed by CAXB. You can then use the saved list when generating the CB report. Table 4-8 lists the different saved lists that the CAXB process creates when a value is entered in the Output Saved List Prefix field, as well as the reports the can utilize the saved list.

File	Saved List Name	Report
COURSE.SECTIONS	*prefix.*COURSE.SECTIONS	[a]
COURSES	*prefix.*COURSES	CB
COURSE.SEC.MEETING	*prefix.*CRS.SEC.MEETING	XF
COURSE.SEC.FACULTY	*prefix.*CRS.SEC.FACULTY	XE
STUDENTS	*prefix.*STUDENTS	SB
FACULTY	*prefix.*FACULTY	EB, EJ

Table 4-8: Saved Lists Created by the CAXB Process

a. The course section savedlist cannot be used by any of the other MIS reports. You can use the savedlist for other processes within Colleague that utilize a savedlist containing course IDs.

Input Saved List Name

You can enter a saved list of IDs from the COURSE.SECTIONS file to limit the course sections included in the work file. Each course section in the saved list is included in the CAST.XB.WORK file, regardless of other selection criteria entered on the Build Section (XB) Data (CAXB) form or if there are errors in the course section data.

GI03 Identifier

Use the GI03 Identifier field to populate the start and end dates for the reporting period, which are then used as part of the selection criteria to determine which course sections should be included on the report (unless you entered an input saved list). Before you can enter a GI03 code in this field you must have set up the GI03 code on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.

The GI03 code entered in this field is also the code that is reported in the GI03 data element on the report.

The Courses and Sections Fields

Use these fields to include specific courses and sections that were active during the reporting time frame in the work file. The Courses and Sections fields are mutually exclusive, meaning that you cannot enter IDs in both fields. If you have entered an input saved list, Colleague does not use the IDs entered in either of these fields as additional selection criteria.

Procedure for Building the XB Work File

Follow the steps below to build the XB work file for a specific reporting period.

Step 1. Access the Build Section (XB) Data (CAXB) form.

Step 2. Enter a value in the GI03 Identifier field.

The GI03 value that you enter in this field must be defined on the California MIS Report Dates (CAMD) form.

Step 3. To process only specific course sections use one of the two following methods:

- Enter a saved list containing course section IDs in the Input Saved List Name field

or

- Enter information in the Course and/or Sections fields

Step 4. Enter information in any of the following fields as necessary:

- Work-Based Activity Course Types
- Output Saved List Prefix

Step 5. Run the CAXB process by finishing from the form.

Maintaining the XB Work File

In This Chapter

This chapter explains how to maintain the information stored in the XB work file (CAST.XB.WORK). Table 4-9 lists the topics covered in this chapter.

Table 4-9: Topics in this Chapter

Before You Begin

Before you can maintain the work file data, you must have built the XB work file. For information about building the XB work file, see "Generating the Section (XB) Report" beginning on page 4-9.

In addition, you must have a thorough understanding of how Colleague extracts the information contained in the Sections Report. For detailed information on how this data is extracted and/or calculated by Colleague, see "Section Export (XB)" beginning on page 4-57.

Understanding XB Work File Maintenance

After you have built the XB work file, you have the ability to alter the information in the records in the work file. There are three general approaches to correcting data errors. You can:

- update the data in the Colleague database and rebuild the affected work file
- correct individual records in Colleague and in the affected work file
- correct the individual records in the affected work file

Note: Datatel recommends that you correct the data in the Colleague database and rebuild the work file to avoid repeating the same error the next time the report is generated.

When you are maintaining the work file data you are editing the exact data that will be submitted on the XB report, which also means that you must enter values in the fields in the formats defined by the Chancellor's Office. For example, if you want to edit a field that contains a date, the numbers displayed are in the YYMMDD format and if you change the date you must enter the new date in that format.

Form Used

Table 4-10 lists the form used in the chapter and a description of the form.

Form	Description
Section (XB) Maintenance (CXBM)	Use to maintain records contained in the CAST.XB.WORK file. You can also add and delete records from the work file using the CXBM form.

Table 4-10: Form for Maintaining the XB Work File

File Used

Table 4-11 lists the primary file used in this chapter and a brief description of the file.

File	Description
CAST.XB.WORK	Contains a record for each course section that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.

Table 4-11: File Used with Maintaining the XB Work File

Correcting the Colleague Database

You can make corrections directly in the Colleague database if necessary. The easiest type of data to change in the Colleague database is one-to-one extractions from Colleague, such as CEUs. Since this type of field is not derived from additional calculations or subroutines, it is easy to make the correction on the database itself. When this happens, it is necessary to rebuild the work file to extract the updated information from the Colleague database for it to be included in the work file. If the data is not a one-for-one extraction, it may be necessary to correct it in the work file instead.

Procedure for Correcting Data in Colleague

Follow the general steps below to make corrections to information in the Colleague database.

Step 1. Build the work file for Section (XB) report.

For more information, see “Generating the Section (XB) Report” beginning on page 4-9.

Step 2. Review any error listings.

Step 3. Determine the data that must be entered in Colleague to correct the errors.

Refer to “California MIS Data Elements” on page 4-58 for more information about the data elements for the XB report.

Step 4. Correct the data on the Colleague database.

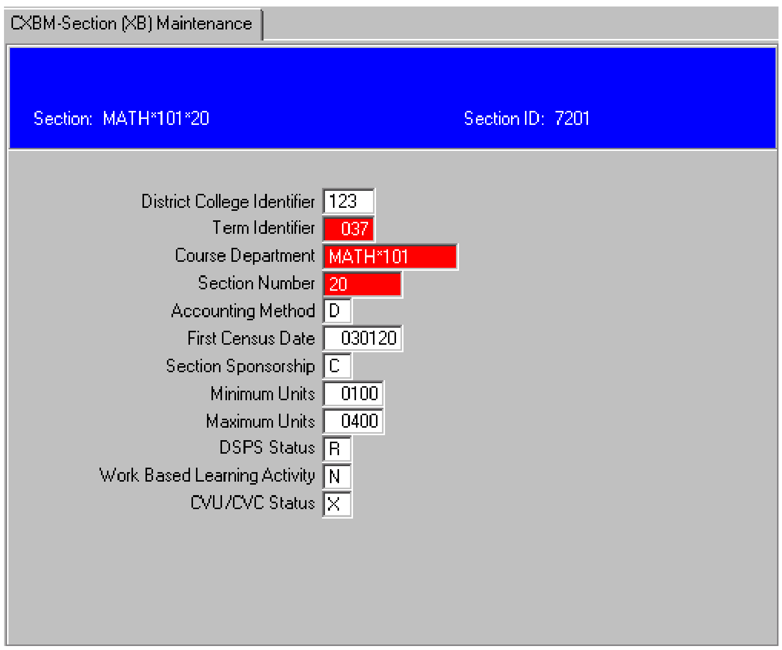
Step 5. Rebuild the work file data.

Step 6. Repeat Step 1 through Step 5 until all the errors are corrected.

Correcting the Work File Data

Use the Section (XB) Maintenance (CXBM) form to maintain individual work file records. The CXBM form also provides the ability to add records to the work file and delete records from the work file.

Note: The values displayed on the CXBM form is exactly what will be submitted on the XB report. When you enter information in any of the fields you must enter the data in the formats defined by the Chancellor's Office.



CXBM-Section (XB) Maintenance

Section: MATH*101*20   Section ID: 7201

District College Identifier	123
Term Identifier	037
Course Department	MATH*101
Section Number	20
Accounting Method	D
First Census Date	030120
Section Sponsorship	C
Minimum Units	0100
Maximum Units	0400
DSPS Status	R
Work Based Learning Activity	N
CVU/CVC Status	X

Figure 4-3: The Section (XB) Maintenance (CXBM) Form

Noteworthy Fields on the CXBM Form

The fields on the CXBM form are explained below. For additional information about the CXBM form, see the online help.

Note: Leaving fields blank on the CXBM form will cause the record to be rejected by the Chancellor's Office because all the data is required on the report.

District ID

The code displayed in this field is assigned by the Chancellor's Office and represents the college code for your institution's district. The format of the district ID is a three digit code, and you must always entered it as such.

Colleague uses the first department listed for the course section on the Sections (SECT) form to determine which District ID to use. You can change the District ID if necessary.

Term Identifier

The Term Identifier field displays the GI03 code associated with the course section. You can change the value in this field if necessary, but you can only change the GI03 code to a code that has been defined on the California MIS Report Dates (CAMD) form. A GI03 code is a three digit code with a format of YYT, where YY is the last two digits of the year and the T is the term identifier. The GI03 code must always be entered as a three digit code.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Term Identifier LookUp. You can only add a new record for a GI03 code that has been defined on the CAMD form.

Course Department

The Course Department field displays the subject and course number of the course section. For example, if you access the work file record for Math 100, the subject is Math and the course number is 100. If necessary you can change the information in this field. The course department code can be up to 12 characters in length and is padded with spaces when the work file is exported if the field contains less then 12 characters.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Course Section LookUp.

Section Number

The Section Number field displays the section identifier for the course specified in the Course Department field. The value for this field is taken from the Section field on the Sections (SECT) form. You can change the information in this field if necessary. The section number can be up to 6 characters in length and is padded with spaces when the work file is export if the field contains less then 6 characters.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Course Section LookUp.

Accounting Method

The Accounting Method field displays the translated code associated with the accounting method for the course section. The accounting method for a course is derived from the Section Financial Info (SFIN) form. The value from SFIN is translated by the CAST.XB01 translation table and is displayed in this field. You can change the accounting method if necessary. The accounting method code is a 1 character code and can only be entered as such.

First Census Date

The First Census Date fields displays the first census date for the course section. If the course section is not a positive attendance or weekly census course section, the census date is derived by checking the following forms:

- Section Reg Date Ranges (SRGD)
- Term Location Dates (TLOC)
- Reporting Years and Terms (RYAT) / Academic Term (ACTM)

If the course section is a weekly census section, the census date is taken from the Section Reg Date Ranges (SRGD) form.

The format of the first census date is YYMMDD. You must enter the two digit year, month and day in the correct order without entering delimiters to separate the values.

You can change the first census date if necessary by either changing the date or by removing the date from the field.

Section Sponsorship

The Section Sponsorship field is used to determine the Section Contract Education Code (XB04) data element. If the section is not a sponsored course section, then a “Y” is displayed. If the section is sponsored by an individual, an “O” is displayed. If the section is sponsored by an organization, then the value that was translated by the CAST.XB04 translation table is displayed. The section sponsorship code is a one character code and can only be entered as such.

Minimum Units

The Minimum Units field contains either the minimum number of credits or continuing education units (CEUs) for the course section. The units for the course section is taken from the Sections (SECT) form. You can change the number of minimum units if necessary. The minimum units field is a four digit code with an implied decimal point after the second digit. When entering the number of units you must enter all four digits using zeros to fill spaces without a value. For example, if the course section has a minimum of four credit units, you would enter **`0400`** in the field.

Maximum Units

The Maximum Units field contains either the maximum number of credits or continuing education units (CEUs) for the course section. The units for the course section is taken from the Sections (SECT) form. You can change the number of maximum units if necessary. The maximum units field is a four digit code with an implied decimal point after the second digit. When entering the number of units you must enter all four digits using zeros to fill spaces without a value. For example, if the course section has a maximum of ten credit units, you would enter **`1000`** in the field.

DSPS Status

The DSPS Status field displays the value that is reported in the Section DSPS Special Status (XB08) data element. Colleague determines the code for the XB08 data element by translating the disability status from the course section using the CAST.XB08 translation table. The translated value is displayed in the DSPS Status field.

Disability status information is entered on the Section Financial Info (SFIN) form. You can change the code if necessary. The DSPS status code is a one character code and can only be entered as such.

Work Based Learning Activity

The Work Based Learning Activity field indicates whether there are work based learning activities for the course section. If the course section does include work based learning activities, a “W” is displayed in the field. If the course does not include work based learning activities, an “N” is displayed in the field. If Colleague cannot determine if there are work based activities for the course section, a “X” is displayed in the field.

Work based learning activities could include any of the following:

- pre-apprenticeships
- job shadowing
- mentorship
- internship
- clinical experience
- work-study programs
- field experience
- community service learning

You can change the code in the Work Based Learning Activity field if necessary. The work based learning activity code is a one character code and can only be entered as such.

CVU/CVC Status

The CVU/CVC Status field indicates if there are distance education sessions that have been created by an instructor who has taken professional course through the California Virtual University (CVU)/California Virtual Campus (CVC). The following are possible values that can be displayed in this field:

- **0** – Distance education session(s) was not developed by a CVU trained instructor.
- **1** – Distance education session(s) was developed by a CVU/CVC instructor or one trained by the CVU/CVC program.
- **X** – Unknown whether distance education session(s) was developed by a CVU trained instructor.
- **Y** – Not applicable (there are no distance education sessions).

You can change the value in the CVU/CVC Status field if necessary. The CVU/CVC code is a one character code and can only be entered as such.

Procedure for Maintaining the XB Work File

Follow the steps below to maintain the information in the XB work file.

Step 1. Access the Section (XB) Maintenance (CXBM) form.

Step 2. Access the course section that you want to maintain.

If you are adding a new record to the work file the following prompt is displayed:

```
CAST.XB.Work Record not found - Add a new record (Y/N)?
```

Enter **Y** to add the record to the work file. Colleague displays the GI03 Identifier resolution form so you can specify which reporting period the course section record should be associated with. After you have selected a GI03 code, you can then add information for the record.

Note: If output saved lists were created by the Build Section (XB) Data (CAXB) process and you add records to the XB work file, Colleague does not updated the saved lists.

Step 3. Add or change the desired information about the course section.

Step 4. Save your changes by finishing from the form.

Step 5. Repeat Step 2 through Step 4 for each XB record that requires maintenance.

Generating the Session (XF) Report

In This Chapter

This chapter explains how to generate the work file (CAST.XF.WORK) used to create the Session (XF) Report.Table 4-12 lists the topics covered in this chapter.

Table 4-12: Topics in this Chapter

Before You Begin

Before you can build the XF work file used for the Session Report, you must have already set up your Colleague database with the necessary codes and tables. Refer to "Defining Codes & Tables for MIS Reporting" beginning on page 2-1 for a complete list of the codes and tables required to produce all of the California State Reports. Table 4-13 lists the codes and tables used specifically by the Session (XF) Report.

Code Files	Validation Code Tables	Translation Tables
INSTR.METHODS		CAST.XF01

Table 4-13: Session Code Files and Tables

Understanding Work Files

Work files are temporary files created by extracting information from the Colleague database, and then converting that data to specific formats used by the California course reports. While some data can be extracted directly from Colleague at the time the work files are created, other types of data are derived from multiple fields in Colleague and then combined into a single work file field. A work file field may also require additional translation in order to export the data in the format required by the state.

The XF work file (CAST.XF.WORK) contains data about each session for a course section. The work file selects information for the XF records from the following sources:

- Course sections that are eligible for reporting (i.e. data from the COURSE.SECTION file).
- Sessions meeting information eligible for reporting (i.e. data from the COURSE.SEC.MEETING file).

You can override the information that Colleague creates and stores in the work file for individual sessions. For information about maintaining the data in the XF work file, see “Maintaining the XF Work File” beginning on page 4-33.

Form Used

Table 4-14 lists the form used in the chapter and a brief description of the form.

Form	Description
Build Session (XF) Data (CAXF)	Use to build the CAST.XF.WORK file for a particular reporting period.

Table 4-14: Form for Building the XF Work File

Files Used

Table 4-15 lists the primary files used in this chapter and a brief description of the files.

File	Description
CAST.XF.WORK	Contains a record for each session of a course section that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.
COURSE.SEC.MEETING	Contains information about when the session meets, including the time and dates for the session.

Table 4-15: Files Used with Building the XF Work File

Building the XF Work File

Colleague does the following to determine which sessions to include in the work file:

- If a saved list name is entered in the Saved List Name field on CAXF, Colleague creates records in the work file for the sessions of the IDs in the saved list regardless of the other selection criteria or if the session data contains errors.
- If a saved list is not entered, Colleague creates records for only the sessions from the course sections that are in the CAST.XB.WORK file for the GI03 code entered in the GI03 Identifier field.

ALERT! If you have not built the CAST.XB.WORK file for the GI03 code and you do not enter a saved list, Colleague will not create any records in the CAST.XF.WORK file for the GI03 code you entered in the GI03 Identifier field.

Each session that meets the selection criteria is then processed and data is populated for each data element. For more information about how a data element is derived, see “California MIS Data Elements” beginning on page 4-64.

Note: When you run the CAXB process multiple times for the same reporting period, Colleague first clears the work file and then creates new records based on the selection criteria entered on the CAXB form.

Creating the Session Work File

Use the Build Session (XF) Data (CAXF) form to build the CAST.XF.WORK file used to create the Session (XF) Report. You can define parameters, as well as enter selection criteria that determines the records included in the work file.

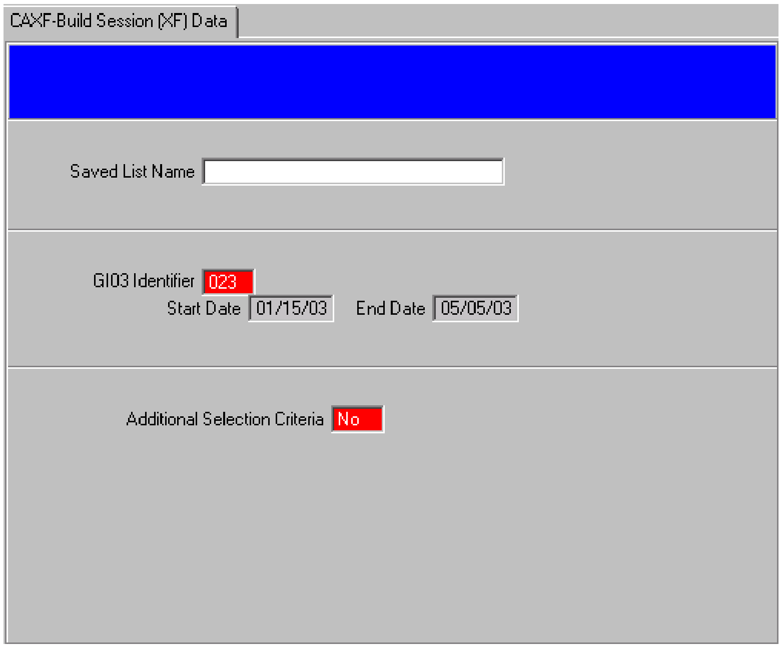


Figure 4-4: The Build Session (XF) Data (CAXF) Form

Noteworthy Fields on the CAXF Form

The fields on the CAXF form are described below. For additional information about the CAXF form, see the online help.

Saved List Name

Enter a saved list of IDs from the COURSE.SEC.MEETING file to limit the sessions included in the work file. The course section included in the saved list will have a record for each session created on the CAST.XF.WORK file, regardless of the selection criteria entered on the Build Session (XF) Data (CAXF) form or if there are errors in the data for the session.

Note: If during the Build Section (XB) Data (CAXB) process output saved lists were created, you can use the course section meeting saved list that was produced.

GI03 Identifier

Use the GI03 Identifier field to populate the start and end dates for the reporting period, which are then used as part of the selection criteria to determine which sessions should be included on the report (unless you entered an input saved list). Before you can enter a GI03 code in this field you must have set up the GI03 code on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see "Defining California MIS Report Dates" on page 2-30.

The GI03 code entered in this field is also the code that is reported in the GI03 data element on the report.

Procedure for Building the XF Work File

Follow the steps below to build the XF work file for a specific reporting period.

Step 1. Access the Build Session (XF) Data (CAXF) form.

Step 2. Enter the GI03 Identifier.

The GI03 value that you enter in this field must be defined on the California MIS Report Dates (CAMD) form.

Step 3. To process sessions for specific course sections enter a saved list containing course section IDs in the Saved List Name field.

If you do not enter a saved list, Colleague selects the sessions for course sections with records in the XB work file for the GI03 code you enter in the GI03 Identifier field.

Step 4. Run the CAXF process by finishing from the form.

Maintaining the XF Work File

In This Chapter

This chapter explains how to maintain the information stored in the XF work file (CAST.XF.WORK). Table 4-16 lists the topics covered in this chapter.

Table 4-16: Topics in this Chapter

Before You Begin

Before you can maintain the work file data, you must have built the XF work file. For information about building the XF work file, see “Generating the Session (XF) Report” beginning on page 4-27.

In addition, you must have a thorough understanding of how Colleague extracts the information contained in the Session Report. For detailed information on how this data is extracted and/or calculated by Colleague, see “California MIS Data Elements” beginning on page 4-64.

Understanding XF Work File Maintenance

After you have built the XF work file, you have the ability to alter the records in the work file. There are three general approaches to correcting data errors. You can:

- update the data in the Colleague database and rebuild the affected work file
- correct individual records in Colleague and in the affected work file
- correct the individual records in the affected work file

Note: Datatel recommends that you correct the data in the Colleague database and rebuild the work file to avoid repeating the same error the next time the report is generated.

When you are maintaining the work file data you are editing the exact data that will be submitted on the XF report, which also means that you must enter values in the fields in the formats defined by the Chancellor's Office. For example, if you want to edit a field that contains a date, the numbers displayed are in the YYMMDD format and if you change the date you must enter the new date in that format.

Form Used

Table 4-17 lists the form used in the chapter and a description of the form.

Form	Description
Session (XF) Maintenance (CXFM)	Use to maintain records contained in the CAST.XF.WORK file. You can also add and delete records from the work file using the CXFM form.

Table 4-17: Form for Maintaining the XF Work File

File Used

Table 4-18 lists the primary file used in this chapter and a brief description of the file.

File	Description
CAST.XF.WORK	Contains a record for each session of a course section that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.

Table 4-18: File Used with Maintaining the XF Work File

Correcting the Colleague Database

You can make corrections directly in the Colleague database if necessary. The easiest type of data to change in the Colleague database is one-to-one extractions from Colleague, such as instructional method. Since this type of field is not derived from additional calculations or subroutines, it is easy to make the correction on the database itself. When this happens, it is necessary to rebuild the work file to extract the updated information from the Colleague database for it to be included in the work file. If the data is not a one-for-one extraction, it may be necessary to correct it in the work file instead.

Procedure for Correcting Data in Colleague

Follow the general steps below to make corrections to information in the Colleague database.

Step 1. Build the work file for Session (XF) report.

For more information, see “Generating the Session (XF) Report” beginning on page 4-27.

Step 2. Review any error listings.

Step 3. Determine the data that must be entered in Colleague to correct the errors.

Refer to “California MIS Data Elements” on page 4-64 for more information about the data elements for the XF report.

Step 4. Correct the data on the Colleague database.

Step 5. Rebuild the work file data.

Step 6. Repeat Step 1 through Step 5 until all the errors are corrected.

Correcting the Work File

Use the Session (XF) Maintenance (CXFM) form to maintain individual work file records. The CXFM form also provides the ability to add records to the work file and delete records from the work file.

Note: The values displayed on the CXFM form is exactly what will be submitted on the XF report. When you enter information in any of the fields you must enter the data in the formats defined by the Chancellor's Office.

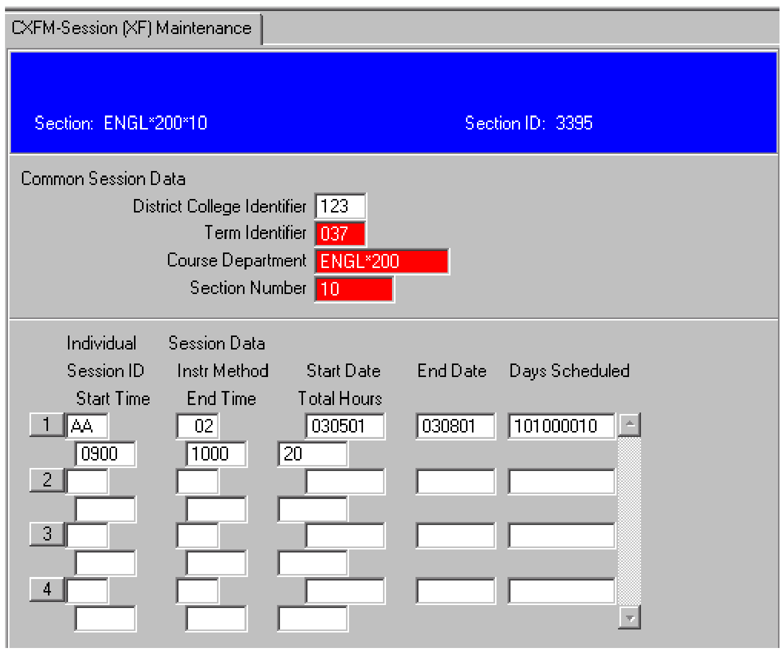


Figure 4-5: The Session (XF) Maintenance (CXFM) Form

Noteworthy Fields on the CXFM Form

The fields on the CXFM form are explained below. For additional information about the CXFM form, see the online help.

Note: Leaving fields blank on the CXFM form will cause the record to be rejected by the Chancellor's Office because all the data is required on the report.

District College Identifier

The code in this field is assigned by the Chancellor's Office and represents the college code for your institution's district. The district ID is a three digit code and must be entered as such.

Colleague uses the first department listed for the course section associated with the session on the Sections (SECT) form to determine which District ID to use. You can change the District ID if necessary.

Term Identifier

The Term Identifier field displays the GI03 code associated with the session. You can change the value in this field if necessary, but you can only change the GI03 code to a code that has been defined on the California MIS Report Dates (CAMD) form.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Term Identifier LookUp. You can only add a new record for a GI03 code that has been defined on the CAMD form. A GI03 code is a three digit code with a format of YYT, where YY is the last two digits of the year and the T is the term identifier. The GI03 code must always be entered as a three digit code.

Course Department

The Course Department field displays the subject and course number of the session. For example, if you access the work file record for Math 100, the subject is Math and the course number is 100. If necessary you can change the information in this field. The course department code can be up to 12 characters in length and is padded with spaces when the work file is exported if the field contains less then 12 characters.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Course Section LookUp.

Section Number

The Section Number field displays the section identifier for the course displayed in the Course Department field. The value for this field is taken from the Sections (SECT) form. You can change the information in this field if necessary. The section number can be up to 6 characters in length and is padded with spaces when the work file is export if the field contains less then 6 characters.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Course Section LookUp.

Individual Session Data Group

The following information is displayed for each session associated with the course section:

- **Session ID.** The session ID is a two digit code, with the first character that represents the type of session, and the second digit represents the sequencing of the sessions.
- **Instr Method.** The instructional method indicates the method of instruction for the session. The value displayed in this field has been translated by the CAST.XF01 translation table. The format of this field is two digits, and can only be entered as such.
- **Start Date/End Date.** The start and end date indicates when the session first meets and when the last meeting date is. The format of the first census date is YYMMDD. You must enter the two digit year, month and day in the correct order without entering delimiters to separate the values.
- **Days Scheduled.** The days scheduled indicates which days during the week the session will meet, if it is a irregularly scheduled section, or if the section is not scheduled (TBA). The format of this field is nine digits long and consists of a series of zeros and ones based on when the section is offered. The first seven digits represents the days of the week, starting with Monday. The last two digits are for the irregularly scheduled sections and TBA sections respectively. For each day of the week the section is offered or if it is a irregularly scheduled section or TBA, enter a “1,” otherwise enter a “0.” For example if a section meets on Mondays and Wednesdays at an irregular interval, you would enter “101000010.”
- **Start Time/End Time.** The start and end time indicates during what time of the day the session meets. If you enter a time in this field then you must enter the time in the format of HHMM, where “HH” represents the hour, and “MM” equals the minutes. When you enter time in a 24 hour clock time format 00 equals midnight and 13 equals 1 p.m.
- **Total Hours.** The total number of hours is the sum of hours for which the session is scheduled to meet during the reporting period. The format of this field is four digits with an implied decimal after the third digit. For example, if the section met for a total of 50 hours, you would enter 0500.

Procedure for Maintaining the XF Work File

Follow the steps below to maintain the information in the XF work file.

Step 1. Access the Section (XF) Maintenance (CXFM) form.

Step 2. Access the course section that you want to maintain.

If you are adding a new record to the work file the following prompt is displayed:

```
CAST.XF.Work Record not found - Add a new record (Y/N)?
```

Enter **Y** to add the record to the work file and then the GI03 Identifier resolution form is displayed so you can specify which reporting period the record is a part of. After you have selected a GI03 code you can then add information for the record.

Step 3. Add or change the desired information about the common session data.

Step 4. Add or change the desired information about the individual session data.

Step 5. Save your changes by finishing from the form.

Step 6. Repeat Step 2 through Step 5 for each XF record that requires maintenance.

Generating the Faculty Assignment (XE) Report

In This Chapter

This chapter explains how to generate the XE work file (CAST.XE.WORK) used to create the Faculty Assignment (XE) Report. Table 4-19 lists the topics covered in this chapter.

Table 4-19: Topics in this Chapter

Before You Begin

Before you can build the XE work file used for the Faculty Assignment Report, you must have already set up your Colleague database with the necessary codes and tables. Refer to “Defining Codes & Tables for MIS Reporting” beginning on page 2-1 for a complete list of the codes and tables required to produce all of the California State Reports. Table 4-20 lists the codes and tables used specifically by the Faculty Assignment (XE) Report.

Code Files	Validation Code Tables	Translation Tables
	TEACHING.ARRANGEMENTS	CAST.XE01

Table 4-20: Faculty Assignment Code Files and Tables

Understanding Work Files

Work files are temporary files created by extracting information from the Colleague database, and then converting that data to specific formats used by the California course reports. While some data can be extracted directly from Colleague at the time the work files are created, other types of data are derived from multiple fields in Colleague and then combined into a single work file field. A work file field may also require additional translation in order to export the data in the format required by the state.

The XE work file (CAST.XE.WORK) contains data about each faculty assignment. The work file collects information for the XE records from the following sources:

- Assignment information for course sections that are eligible for reporting (i.e. data from the COURSE.SEC.FACULTY file)
- Session meeting information eligible for reporting (i.e. data from the COURSE.SEC.MEETING file)

You can override the information that Colleague creates and stores in the work file for individual faculty assignment. For information about maintaining the data in the XE work file, see “Maintaining the XE Work File” beginning on page 4-49.

Term End Submissions

As a part of the term end submissions it is required that you report employee demographic data for each faculty member who is included on the Faculty Assignment (XE) report. In order to extract the faculty data necessary for the term end submissions, Datatel recommends that you complete the following steps.

ALERT! Before you complete the steps below, you must purge the EJ and EB work files. For more information, see “Purging EB and EJ Work File Data” on page 11-75.

Step 1. Verify that the GI03 code on the California MIS EB/EJ Defaults (CADE) form is the same as the GI03 code you are going to use to create the XE work file.

Step 2. Run the Build Assignment (XE) Data (CAXE) process.

The CAXE process creates the necessary EJ work file records that are required by the Build EB Work Records (BEWF) process.

For more information about the CAXE process, see “Building the XE Work File” on page 4-45.

Step 3. Run the Build EB Work Records (BEWF) process.

For more information about the BEWF process, see “Building the EB Work File” beginning on page 11-37.

Step 4. Run the Employee Demographic Export (CAEB) process to create your export file.

For more information about CAEB process, see “Generating the Employee Demographic Export” on page 11-58.

Form Used

Table 4-21 lists the form used in the chapter and a brief description of the form.

Form	Description
Build Assignment (XE) Data (CAXE)	Use to build the CAST.XE.WORK file for a particular reporting period.

Table 4-21: Form for Building the XE Work File

Files Used

Table 4-22 lists the primary files used in this chapter and a brief description of the files.

File	Description
CAST.XE.WORK	Contains a record for each faculty assignment that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.
COURSE.SEC.FACULTY	Contains information about each faculty assignment, including the load and percent.

Table 4-22: Files Used with Building the XE Work File

Building the XE Work File

Colleague does the following to determine which faculty assignments to include in the work file:

- If a saved list name is entered in the Saved List Name field on CAXE, Colleague creates records in the work file for each faculty assignment for the IDs included in the saved list regardless of the other selection criteria or if the faculty data contains errors.
- If a saved list is not entered, Colleague creates records for all the faculty assignments from the course sections that are in the CAST.XB.WORK file for the GI03 code entered in the GI03 Identifier field.

ALERT! If you have not built the CAST.XB.WORK file for the GI03 code and you do not enter a saved list, Colleague will not create any records in the CAST.XE.WORK file for the GI03 code you entered in the GI03 Identifier field.

Each faculty assignment that meets the selection criteria is then processed and data is populated for each data element. For more information about how a data element is derived, see "Faculty Assignment Export (XE)" beginning on page 4-69.

Note: When you run the CAXB process multiple times for the same reporting period, Colleague first clears the work file and then creates new records based on the selection criteria entered on the CAXB form.

Creating the Faculty Assignment Work File

Use the Build Assignment (XE) Data (CAXE) form to build the CAST.XE.WORK file used to create the Faculty Assignment (XE) Report. You can define parameters, as well as enter selection criteria that determines the records included in the work file.

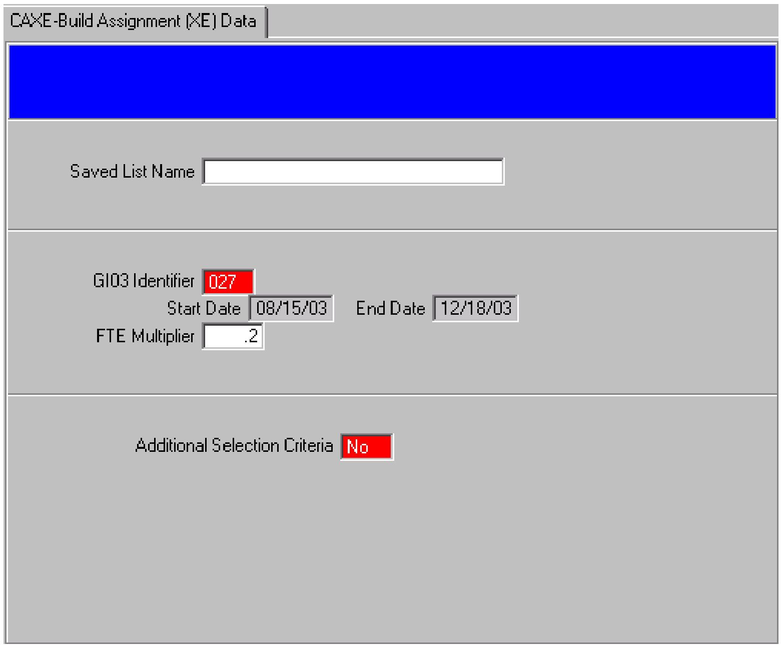


Figure 4-6: The Build Assignment (XE) Data (CAXE) Form

Noteworthy Fields on the CAXE Form

The fields on the CAXE form are described below. For additional information about the CAXE form, see the online help.

Input Saved List Name

You can enter a saved list of IDs from the COURSE.SEC.FACULTY file to limit the faculty assignments included in the work file. The faculty included in the saved list will have a record for each faculty assignment created on the CAST.XE.WORK file, regardless of the selection criteria entered on the Build Assignment (XE) Data (CAXE) form or if there are errors in the data for the session.

Note: If during the Build Section (XB) Data (CAXB) process output saved lists were created, you can use the faculty saved list that was produced.

GI03 Identifier

Use the GI03 Identifier field to populate the start and end dates for the reporting period, which are then used as part of the selection criteria to determine which faculty assignments should be included on the report (unless you entered an input saved list). Before you can enter a GI03 code in this field you must have set up the GI03 code on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.

The GI03 code entered in this field is also the code that is reported in the GI03 data element on the report.

FTE Multiplier

To determine the Full Time Equivalent (FTE) load factor, enter the percent or number of units that represent a full-time load. For example, if your institution expresses a full-time load as a percent you would enter 100.00 for a regular full-time load. If your institution expresses a full-time load in terms of units, you would enter the number of hours that is considered full time.

Procedure for Building the XE Work File

Follow the steps below to build the XE work file for a specific reporting period.

Step 1. Access the Build Assignment (XE) Data (CAXE) form.

Step 2. Enter the GI03 Identifier.

The GI03 value that you enter in this field must be defined on the California MIS Report Dates (CAMD) form.

Step 3. To process specific faculty assignments enter a saved list containing course section faculty IDs in the Saved List Name field.

If you do not enter a saved list, Colleague selects the faculty assignments for course sections with records in the XB work file for the GI03 code you enter in the GI03 Identifier field.

Step 4. Enter a value in the FTE Multiplier field to annualize your faculty load amount if it is not stored in Colleague as a yearly value.

Step 5. Run the CAXF process by finishing from the form.

Maintaining the XE Work File

In This Chapter

This chapter explains how to maintain the information stored in the XE work file (CAST.XE.WORK). Table 4-23 lists the topics covered in this chapter.

Topic	Page
"Understanding XE Work File Maintenance"	4-50
"Correcting the Colleague Database"	4-51
"Correcting the XE Work File Data"	4-52

Table 4-23: Topics in this Chapter

Before You Begin

Before you can maintain the work file data, you must have built the XE work file. For information about building the XE work file, see "Generating the Faculty Assignment (XE) Report" beginning on page 4-41.

In addition, you must have a thorough understanding of how Colleague extracts the information contained in the Session Report. For detailed information on how this data is extracted and/or calculated by Colleague, see "Faculty Assignment Export (XE)" beginning on page 4-69.

Understanding XE Work File Maintenance

After you have built the XE work file, you have the ability to alter the records in the work file. There are three general approaches to correcting data errors. You can:

- update the data in the Colleague database and rebuild the affected work file
- correct individual records in Colleague and in the affected work file
- correct the individual records in the affected work file

Note: Datatel recommends that you correct the data in the Colleague database and rebuild the work file to avoid repeating the same error the next time the report is generated.

When you are maintaining the work file data you are editing the exact data that will be submitted on the XB report, which also means that you must enter values in the fields in the formats defined by the Chancellor's Office. For example, if you want to edit a field that contains a date, the numbers displayed are in the YYMMDD format and if you change the date you must enter the new date in that format.

Form Used

Table 4-24 lists the form used in the chapter and a description of the form.

Form	Description
Assignment (XE) Maintenance (CXEM)	Use to maintain records contained in the CAST.XE.WORK file. You can also add and delete records from the work file using the CXEM form.

Table 4-24: Form for Maintaining the XE Work File

File Used

Table 4-25 lists the primary file used in this chapter and a brief description of the file.

File	Description
CAST.XE.WORK	Contains a record for each faculty assignment that meets the selection criteria. The work file can contain records for multiple reporting periods at one time.

Table 4-25: File Used with Maintaining the XE Work File

Correcting the Colleague Database

You can make corrections directly in the Colleague database if necessary. The easiest type of data to change in the Colleague database is one-to-one extractions from Colleague, such as instructional method. Since this type of field is not derived from additional calculations or subroutines, it is easy to make the correction on the database itself. When this happens, it is necessary to rebuild the work file to extract the updated information from the Colleague database for it to be included in the work file. If the data is not a one-for-one extraction, it may be necessary to correct it in the work file instead.

Procedure for Correcting Data in Colleague

Follow the general steps below to make corrections to information in the Colleague database.

Step 1. Build the work file for Faculty Assignment (XE) report.

For more information see, “Generating the Faculty Assignment (XE) Report” beginning on page 4-41.

Step 2. Review any error listings.

Step 3. Determine the data that must be entered in Colleague to correct the errors.

Refer to “California MIS Data Elements” on page 4-70 for more information about the data elements for the XE report.

Step 4. Correct the data on the Colleague database.

Step 5. Rebuild the work file data.

Step 6. Repeat Step 1 through Step 5 until all the errors are corrected.

Correcting the XE Work File Data

Use the Assignment (XE) Maintenance (CXEM) form to maintain individual work file records. The CXEM form also provides the ability to add records to the work file and delete records from the work file. When you access records through the CXEM form you can either look at all the faculty assignments for a course section or for a faculty member depending on which LookUp you use. When you access the CXEM form the Course Section LookUp is displayed. If you want to view all the faculty assignments for a course section, enter the ID of the course section in the LookUp. If you want to view all the assignments for a faculty member, enter through the Course Section LookUp to the Person LookUp and enter the faculty member's ID.

Note: The values displayed on the CXEM form is exactly what will be submitted on the XE report. When you enter information in any of the fields you must enter the data in the formats defined by the CB. The only field that does not display the actual data that will be reported is the Faculty Member field. The SSN for the faculty member is not displayed for privacy purposes.

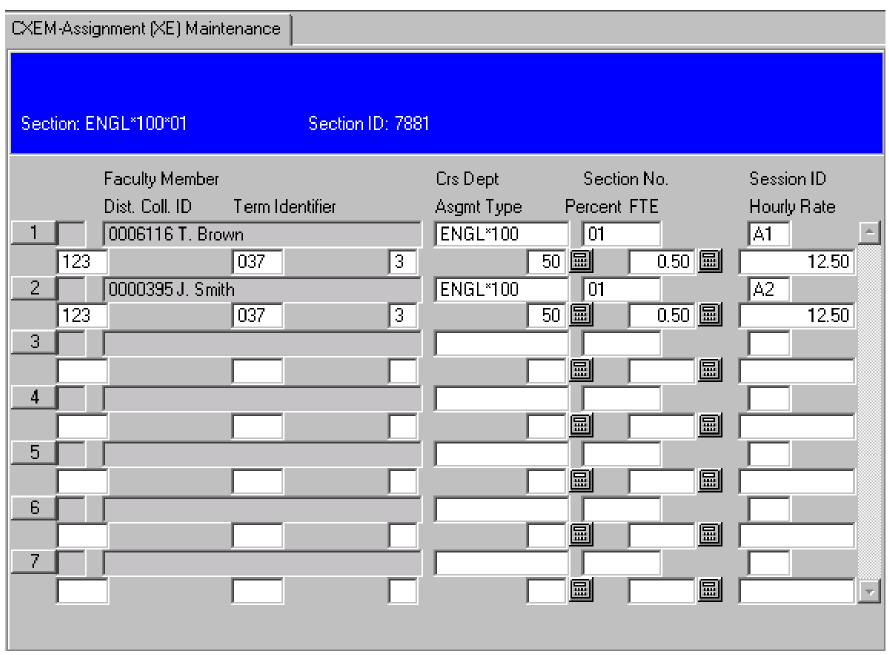


Figure 4-7: The Assignment (XE) Maintenance (CXEM) Form

When adding new records to the XE work file, you must use the Course Section LookUp. In order to create complete XE records a course section and faculty ID must be associated with the record and in order to do that you must use both the Course Section and Faulty LookUps. Colleague cannot create a new XE records when you access the CXEM form using the Person LookUp because it cannot associate a course section to the XE record.

If you want to reassign a XE record from one faculty member to another you must also access the CXEM form using the Course Section LookUp.

Noteworthy Fields on the CXEM Form

The fields on the CXEM form are explained below. For additional information about the CXEM form, see the online help.

Note: Leaving the fields on the CXEM form blank will cause the record to be rejected by the Chancellor’s Office because the information is required to be reported.

Faculty Member

The Faculty Member field displays the employee assigned to teach the course section. If you need to change the faculty member, you can access the Faculty LookUp from the first field in the window.

Course Department

The Course Department field displays the subject and course number associated with the course section. For example, if you access the work file record for Math 100, the subject is Math and the course number is 100. If necessary you can change the information in this field. The course department code can be up to 12 characters in length and is padded with spaces when the work file is exported if the field contains less then 12 characters.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Course Section LookUp.

Section Number

The Section Number field displays the section identifier for the course displayed in the Course Department field. You can change the information in this field if necessary. The section number can be up to 6 characters in length and is padded with spaces when the work file is export if the field contains less then 6 characters.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Course Section LookUp.

Term Identifier

The Term Identifier field displays the GI03 code associated with the course section. You can change the value in this field if necessary, but you can only change the GI03 code to a code that has been defined on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Term Identifier LookUp. You only have the option of adding a new record for a GI03 code that has been defined on the CAMD form. A GI03 code is a three digit code with a format of YYT, where YY is the last two digits of the year and the T is the term identifier. The GI03 code must always be entered as a three digit code.

Session ID

The Session ID field displays a two digit code, where the first character represents the kind of session, and the second digit represents the sequencing of the sessions. You must enter both digits in the session ID code.

District ID

The code in this field is assigned by the Chancellor's Office and represents the college code for your institution's district. The district ID code is a three digit code and must be enter as such.

Colleague uses the first department listed for this course section on the Sections (SECT) form to determine which District ID to use. You can change the District ID if necessary.

Assignment Type

The Asgmnt Type field displays the value that is reported for the Faculty Assignment Type (XE01) data element. The assignment type is derived by translating the teaching arrangement from the Faculty Section Assignment (FASC) form using the CAST.XE01 translation table. The code that is displayed is the value that will be reported on the Faculty Assignment (XE) Report. You can change the value if necessary. The assignment type code is a one digit code and can only be entered as such.

Percent

The Percent field displays the percentage for which the faculty member is responsible for teaching the course section. The value for this field is derived using the Percent field from the Faculty Section Assignment (FASC) form. The value in is field is reported in the Faculty Assignment Percentage (XE02) data element. You can change the value in this field if necessary. The faculty assignment percent is a three digit code and can only be a whole number. For example, if the faculty percent was 33.3% you would enter 034 in the Percent field.

FTE

The FTE field displays the value that will be reported in the Faculty Assignment FTE (XE03) data element. The FTE is derived from the Load field on the Faculty Section Assignment (FASC) form and can be changed if necessary. The faculty assignment FTE is a 5 digit field with an implied decimal after the third digit. When you are entering the FTE you must enter all five digits, including zeros if the value is not 5 digits long. For example, if the FTE is 3.33 units, you would enter 00333 in the FTE field.

Hourly Rate

The Hourly Rate field displays the value that will be reported in the Faculty Assignment Hourly Rate (XE04) data element. The hourly rate is derived from the wage record that is associated with the assignment contract for the faculty member. If a wage record cannot be located, this field will be blank, or if the assignment type equals a “3” or a “4” then “88888” is displayed in this field. You can change the hourly rate if necessary. Hourly rate is a 5 digit code with an implied decimal after the third digit. When you enter an hourly rate you must enter all five digits, including zeros if the value is not 5 digits long. For example, if the hourly rate is $15.50, you would enter 01550 in the Hourly Rate field.

Procedure for Maintaining the XE Work File

Follow the steps below to maintain the information in the XE work file.

Step 1. Access the Assignment (XE) Maintenance (CXEM) form.

Step 2. Access the work file record that you want to maintain.

You have the option of viewing work file records either by course section or by faculty member depending on which LookUp you use.

If you are adding a new record to the work file the following prompt is displayed:

```
CAST.XE.Work Record not found - Add a new record (Y/N)?
```

Enter **`Y`** to add the record to the work file and then the GI03 Identifier resolution form is displayed so you can specify which reporting period the record is a part of. After you have selected a GI03 code you can then add information for the record.

Step 3. Add or change the desired information about the faculty assignment data.

Step 4. Save your changes by finishing from the form.

Step 5. Repeat Step 2 through Step 4 for each XE record that requires maintenance.

Section Export (XB)

In This Chapter

This chapter lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data element(s)
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

Detailed instructions for exporting the file are outlined in “Concatenating the XB/XE/XF Exports” beginning on page 4-75.

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CAXB

The Record Code, set to **`XB`** on extract mapping, identifies the record as a section export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, the export process determines the associated departments of the course, and uses the DEPTS.INSTITUTIONS.ID from the first or most current department. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

IDENTIFIER [GI02]

Filled with spaces.

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CAXB

The Term Identifier is from the GI03 Identifier entered on the CAXB form. The format of this field is YYT, where:

- YY = is the last two digits of the reporting year.
- T= is the single-digit term-type identifier.

The Term Identifier must be defined on the California MIS Report Dates (CAMD) form before you can create a report for the specific reporting time frame.

COURSE-DEPARTMENT-NUMBER [CB01]

Colleague Data Element: CRS.NAME
Form Mnemonic: CRSE

The Course Department Number is the course name used to identify the course. The course name is the combination of course subject and course number (for example, MATH*101).

SECTION-IDENTIFIER [XB00]

Colleague Data Element: SEC.NO
Form Mnemonic: SECT

The Section Identifier is the section number used to identify the course section. This is a unique number for each course section.

SECTION-ACCOUNTING-METHOD [XB01]

Colleague Data Element: SEC.FUNDING.ACCTG.METHOD
Form Mnemonic: SFIN
Translation Table: CAST.XB01

The Section Accounting Method identifies the method used to determine course section attendance for funding purposes. The attendance values can be calculated using the attendance number on either the first census date, both census dates, or the actual reported attendance for each course section meeting, depending on the funding accounting method used.

SECTION-DATE-CENSUS-FIRST [XB02]

Colleague Data Element: Value 1 of either the SEC.CENSUS.DATES or the SEC.OVR.CENSUS.DATES field.
Form Mnemonic: SRGD

The Section Date Census First identifies the first date used to determine course section attendance for funding purposes. The census date used depends on the course section's census type, which is determined by the course section's funding accounting method. The first census date is determined as follows:

- For a Weekly Census course section, the first section census date is reported. If the first section census date does not exist, an error message is printed.
- For a Daily Census course section, the first section override census date is reported. If the first section override census date does not exist, an error message is printed.
- For a Positive Attendance course section, 888888 is reported.

SECTION-DATE-CENSUS-SECOND [XB03]

Filled with spaces.

SECTION-CONTRACT-EDUCATION-CODE [XB04]

Colleague Data Element: COR.CORP.TYPE
Form Mnemonic: AORG
Translation Table: CAST.XB04

The Section Contract Education Code is the type of corporate sponsor funding for this course section as follows:

- If no occurrence of SPONSORED.SEC exists, the course is not sponsored, and XB04 is reported as **Y**.
- If a course section is sponsored by an individual, XB04 is reported as **O**.
- If a course section is sponsored by an organization, the type of organization is determined from COR.CORP.TYPE.

The section contract education code is derived by translating the corporation type code from the COURSE.SECTIONS record using the CAST.XB04 translation table. This table converts the corporation type code into the required state code.

SECTION-UNITS-MAXIMUM [XB05]

Colleague Data Element: SEC.MAX.CRED/SEC.CEUS
Form Mnemonic: SECT

The Section Units Maximum is the section's maximum number of credits or continuing education units (CEUs). If the COURSE.SECTIONS record has both section max credits and section CEUs, the larger number of the two is reported. If the COURSE.SECTIONS record has neither section max credits nor section CEUs, the section minimum credits is reported.

SECTION-UNITS-MINIMUM [XB06]

Colleague Data Element: SEC.MIN.CRED/SEC.CEUS
Form Mnemonic: SECT

The Section Units Minimum is the section's minimum number of credits or continuing education units (CEUs). If the COURSE.SECTIONS record has both section minimum credits and section CEUs, the smaller number of the two is reported.

SECTION-VATEA-FUNDED-STATUS [XB07]

Filled with spaces.

SECTION-DSPS-SPECIAL-STATUS [XB08]

Colleague Field: SEC.DISABILITY.STATUS
Form Mnemonic: SFIN
Translation Table: CAST.XB08

The Section Disability Special Status is the disability status used to indicate if a course section is an "approved special class" according to the provisions of Title 5, Section 56028. If it is, the course section is considered repeatable for apportionment purposes under the provisions of Title 5, Section 56029. The section disability special status can be used as a designator for funding based on the population the course is intended to serve. The section disability special status is derived by translating the disability status from the COURSE.SECTIONS record using the CAST.XB08 translation table. This table converts the disability status into the required state code.

SECTION-WORK BASED-LEARNING-ACTIVITIES [XB09]

Colleague Field: SEC.COURSE.TYPES
Form Mnemonic: SECT

A section-work based-learning-activities indicates if a course section is section-work based. Colleague uses course types to determine if the course section is section-work based. If a COURSE.SECTION has a course type equal to a credit type distinguished as a section-work based-learning-activities, a W (Section includes Work-Based Learning Activities) is reported. If a COURSE.SECTION does not have any course types which are section-work based-learning-activities, an N (Section does not include Work-Based Learning Activities) is reported. If a COURSE.SECTION does not have any course types, an X (Unknown) is reported.

SECTION-CVU/CVC-STATUS [XB10]

Colleague Field: SEC.INSTR.METHODS
Form Mnemonic: SOFF
Translation Table: CAST.XF01, CAST.XB10

The section-cvu/cvc-status element indicates whether the distance education sesssion(s) of the section was developed by an instructor who has taken professional development courses/workshops through the California Virtual University (CVU)/California Virtual Campus (CVC).

To determine XB10, first each entry in SEC.INSTR.METHODS is translated from the COURSE.SECTIONS record against the CAST.XF01 translation table. If any entry in SEC.INSTR.METHODS translates to a value whose 2 digit code begins with a 5, 6, or 7 (between 50 and 79 inclusive), then this section is considered to be distance education. If no SEC.INSTR.METHODS translated to be between 50 and 79, then XB10 is set to Y (not applicable). For a distance education section, translate the entries that were between 50 and 79 against the CAST.XB10 translation table. If the instructional method of the distance education section was not found in the translate table, set XB10 to X (Unknown).

Session Export (XF)

In This Chapter

This chapter describes lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CAXF

The Record Code, set to **`XF`** on extract mapping, identifies the record as a session export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, the export process determines the associated departments of the course, and uses the DEPTS.INSTITUTIONS.ID from the first or most current department. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CAXB

The Term Identifier is from the GI03 Identifier entered on the CAXB form. The format of this field is YYT, where:

- YY = is the last two digits of the reporting year
- T= is the single-digit term-type identifier

The Term Identifier must be defined on the California MIS Report Dates (CAMD) form before you can create a report for the specific reporting time frame.

COURSE-DEPARTMENT-NUMBER [CB01]

Colleague Data Element: CRS.NAME
Form Mnemonic: CRSE

The Course Department Number is the course name used to identify the course. The course name is the combination of course subject and course number (for example, MATH*101).

SECTION-IDENTIFIER [XB00]

Colleague Data Element: SEC.NO
Form Mnemonic: SECT

The Section Identifier is the section number used to identify the course section. This is a unique number for each course section.

SESSION-IDENTIFIER [XF00]

Colleague Data Element: derived
Form Mnemonic: SOFF

The Session Identifer is the session ID for each unique course section meeting. Sessions are differentiated by time, location, and instructional method. The session identifer is reported as follows:

- The first position of this field is an **`A`**.
- The second position of this field is the line number of the “Schedule Print Times” window from the Section Offering Information (SOFF) form (if more than 9 lines, upper-case letters A - Z are used).

For example, the first meeting of a course section is reported as **`A1`**.

SESSION-INSTRUCTION-METHOD [XF01]

Colleague Data Element: CSM.INSTR.METHOD
Form Mnemonic: SOFF
Translation Table: CAST.XF01

The Session Instruction Method is the instructional method (such as lecture, lab, etc.) assigned to a course section meeting. It is derived by translating the instructional method from the COURSE.SEC.MEETING record using the CAST.XF01 translation table. This table converts the instructional method into the required state code.

SESSION-DATE-BEGINNING [XF02]

Colleague Data Element: CSM.START.DATE
Form Mnemonic: SOFF

The Session Date Beginning is the start date of the course section meeting. If this is an irregularly scheduled or to-be-arranged session, `999999` is reported.

SESSION-DATE-ENDING [XF03]

Colleague Data Element: CSM.END.DATE
Form Mnemonic: SOFF

The Session Date Ending is the day of the last course section meeting as follows:

- For all sessions beginning with an `A` in the Session Identifier [XF00] field, this is the date of the last meeting or final exam date (if any).
- For irregularly scheduled or to-be-arranged sessions, `999999` is reported.

SESSION-DAYS-SCHEDULES [XF04]

Colleague Data Element: CSM.DAYS
Form Mnemonic: SOFF

The Session Days Schedule identifies the days of the week on which the course section meets. Each of the nine positions in this field indicate a specific meeting day as follows:

- If a value is present for a specific day of the week, a **1** is placed in the corresponding position of the reporting field (the 1st position being Monday and 7th position being Sunday).
- If the course section meets irregularly, a **1** reported in the 8th position.
- If there are no days listed for a course section (meaning "to be arranged"), a 1 is reported in the 9th position. If a 1 is reported in the 9th position, and 9999 is reported for either XF05 or XF06, an error message is printed.

SESSION-MEETING-TIME-BEGINNING [XF05]

Colleague Data Element: CSM.START.TIME
Form Mnemonic: SOFF

The Session Meeting Time Beginning is the time the course section meeting is scheduled to begin. If this is an irregularly scheduled or to-be-arranged session, and the start time is unknown, **9999** is reported.

SESSION-MEETING-TIME-ENDNG [XF06]

Colleague Data Element: CSM.END.TIME
Form Mnemonic: SOFF

The Session Meeting Time Ending is the time of the course section meeting is scheduled to end. If this is an irregularly scheduled or to-be-arranged session, and the end time is unknown, **9999** is reported.

SESSION-TOTAL-HOURS [XF07]

Colleague Data Element: derived
Form Mnemonic: SOFF

The Session Total Hours indicates the total number of hours for which the session is scheduled during the term. For regularly scheduled sessions, this is the number of times the session meets during the term multiplied by the duration of each such meeting. The hours associated with the final examination are included in the total for the first regularly scheduled session (sessions beginning with an **A** in the Session Identifier [XF00] field).

This element defines the real time number of hours the session meets, while the 320 reports list the number of section contact hours. In theory, the sum of all of the real time number of hours should equal the number of contact hours, but that is not always true in practice.

This field is calculated as follows:

- If the course section has actual meeting times:
  - The number of minutes for the session is calculated.
  - If the number of minutes is between 50 and 59, it is changed to 60 (50 minute meetings are considered to be 1 hour).
  - The number of minutes is converted to the number of hours.
  - The total number of hours that the session meets (actually meet, ignore holidays, etc.) are summed.
  - The number is rounded to the nearest tenth.
- If the course section has no actual meeting times:
  - And the contact hours are specified with a term contact measure, and this is the only session for the associated instructional method, the contact hours specified for the section (SEC.CONTACT.HOURS) are reported.
  - Otherwise, session hours are reported as zero.

Faculty Assignment Export (XE)

In This Chapter

This chapter lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic
- translation table (if any)
- additional information (if any)

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CAXE

The Record Code, set to **`XE`** on extract mapping, identifies the record as a faculty assignment export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, the export process determines the associated departments of the course, and uses the DEPTS.INSTITUTIONS.ID from the first or most current department. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CAXB

The Term Identifier is from the GI03 Identifier entered on the CAXB form. The format of this field is YYT, where:

- YY = is the last two digits of the reporting year
- T= is the single-digit term-type identifier

The Term Identifier must be defined on the California MIS Report Dates (CAMD) form before you can create a report for the specific reporting time frame.

COURSE-DEPARTMENT-NUMBER [CB01]

Colleague Data Element: CRS.NAME
Form Mnemonic: CRSE

The Course Department Number is the course name used to identify the course. The course name is the combination of course subject and course number (for example, MATH*101).

SECTION-IDENTIFIER [XB00]

Colleague Data Element: SEC.NO
Form Mnemonic: SECT

The Section Identifier is the section number used to identify the course section. This is a unique number for each course section.

EMPLOYEE-IDENTIFIER [EB00]

Colleague Data Element: SSN (in Person) or PERSON.ID
Form Mnemonic: NAE

The Employee Identifier is the employee's Social Security Number (SSN). If the SSN does not exist, the employee's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A 'D' (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the employee's identifier.

SESSION-IDENTIFIER [XF00]

Colleague Data Element: derived
Form Mnemonic: SOFF

The Session Identifier is the session ID for each unique course section meeting. Sessions are differentiated by time, location, and instructional method. The session identifier is reported as follows:

- The first position of this field is an **`A`**.
- The second position of this field is the line number of the “Schedule Print Times” window from the Section Offering Information form (if more than 9 lines, upper-case letters A - Z are used).

For example, the first meeting of a course section is reported as **`A1`**.

FACULTY-ASSIGNMENT-TYPE [XE01]

Colleague Data Element: CSF.TEACHING.ARRANGEMENT
Form Mnemonic: FASC
Translation Table: CAST.XE01

The Faculty Assignment Type is the type of teaching arrangement the faculty member has with your institution. The faculty assignment type is derived by translating the teaching arrangement from the COURSE.SEC.FACULTY record using the CAST.XE01 translation table. This table converts the teaching arrangement into the required state code.

FACULTY-ASSIGNMENT-PERCENT [XE02]

Colleague Data Element: CSF.FACULTY.PCT
Form Mnemonic: FASC

The Faculty Assignment Percent indicates the percentage of the total session instructional hours credited to the faculty member.

Multiple instructors may be assigned to the same session and each be given 100% responsibility. Colleague issues a warning that the total responsibility is in excess of 100%, but allows the transaction to be completed.

If multiple faculty members are assigned to different sessions within a section, each faculty member must be explicitly assigned to their respective session times using the Faculty Section Assign Detail (FSAD) form.

FACULTY-ASSIGNMENT-FTE [XE03]

Colleague Data Element: CSF.FACULTY.LOAD
Form Mnemonic: FASC

The Faculty Assignment FTE is the faculty load which indicates the full time equivalent load factor associated with this assignment.

The load for an assignment should be entered as a percentage of an FTE for one semester at your institution. For example, if an assignment is one-fifth of a full-time equivalent load for one of two semesters and a full-time annual load is 100.00, the assignment would be one-tenth of a full time annual equivalency and would thus have a value of 10.00

FACULTY-ASSIGNMENT-HOURLY-RATE [XE04]

Colleague Data Element: CSF.PAC.LP.ASGMT
Form Mnemonic: FASC

The faculty assignment hourly rate is the hourly rate for an assignment that a faculty member has. The hourly rate is reported as follows:

If XE01 equals a 1 or 2 each COURSE.SEC.FACULTY record is selected for the faculty member and is checked for an assignment associated with it. If an assignment is not found, Colleague issues an error.

If the record has an assignment associated with it, Colleague uses the PAC.LP.ASGMTS file in HR to get the PERPOS and PERPOSWG records for the position. Colleague selects the wage record for the postion that is the most recent active record during the term entered on the Faculty Assign (XE) Export (CAXE) form. If the PERPOSWG record is an hourly pay rate, the wage rate is reported. If the PERPOSWG record is not an hourly pay rate or a pay rate cannot be found, Colleague issues a warning, and the record is created with blank spaces for the value.

If XE01 is not equal to a 1 or 2, 88888 is reported.

Concatenating the XB/XE/XF Exports

In This Chapter

This chapter describes how to produce a concatenated export of the Section (XB), Faculty Assignment (XE), and Session (XF) exports. Table 4-26 lists the topics covered in this chapter.

Table 4-26: Topics in this Chapter

Before You Begin

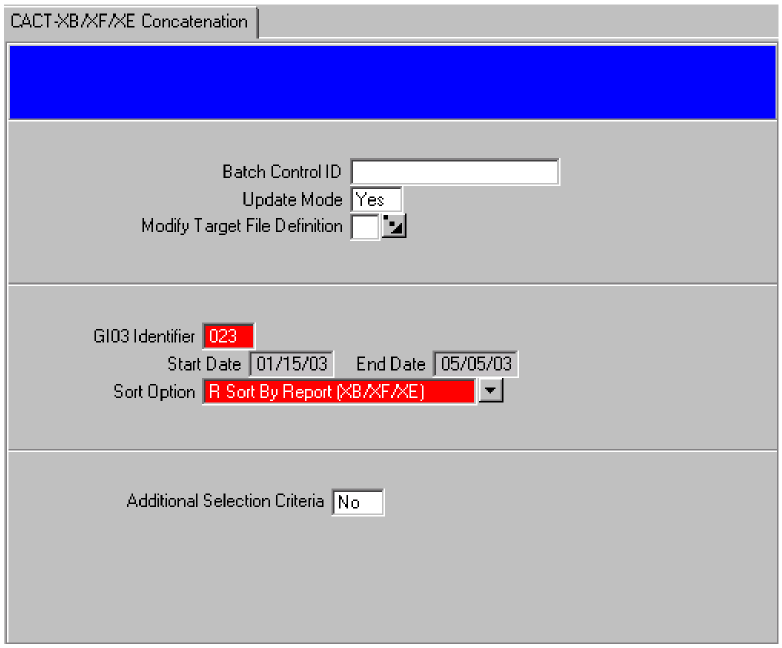
Before you begin, you must have already successfully created the work files to be included in the concatenated export. Table 4-27 below lists the reports included in this process and where to refer for information on creating those work files.

For Information About...	See...
Section (XB) Report	"Generating the Section (XB) Report" beginning on page 4-9
Session (XF) Report	"Generating the Session (XF) Report" beginning on page 4-27
Faculty Assignment (XE) Report	"Generating the Faculty Assignment (XE) Report" beginning on page 4-41

Table 4-27: Finding Additional Information About Course Reports

Generating the XB/XE/XF Concatenation Export

Use the XB/XE/XF Concatenation (CACT) form to take the Section (XB), Faculty Assignment (XE), and Session (XF) work files and conjoin the data into a single output file. You have the option of sorting the single output file by either course section or by report.


CACT-XB/XF/XE Concatenation

Batch Control ID
Update Mode Yes
Modify Target File Definition

GI03 Identifier 023
Start Date 01/15/03 End Date 05/05/03
Sort Option R Sort By Report (XB/XF/XE)

Additional Selection Criteria No

Figure 4-8: The XB/XE/XF Concatenation (CACT) Form

The CACT form allows you to specify which reporting time frame you want to create the export for and how you want to sort the export file. When you enter a GI03 Identifier Colleague selects all the records from the following work files to create a single export file:

- XB (CAST.XB.WORK)
- XF (CAST.XF.WORK)
- XE (CAST.XE.WORK)

After the records have been selected, Colleague will sort the export file either by report or by course section, depending how which sort option you select.

When using the CACT form you also have the option of modifying the directory the file will be created in and the name of the file. Figure 4-9 on page 4-77 displays the default directory and file name for the CACT process.

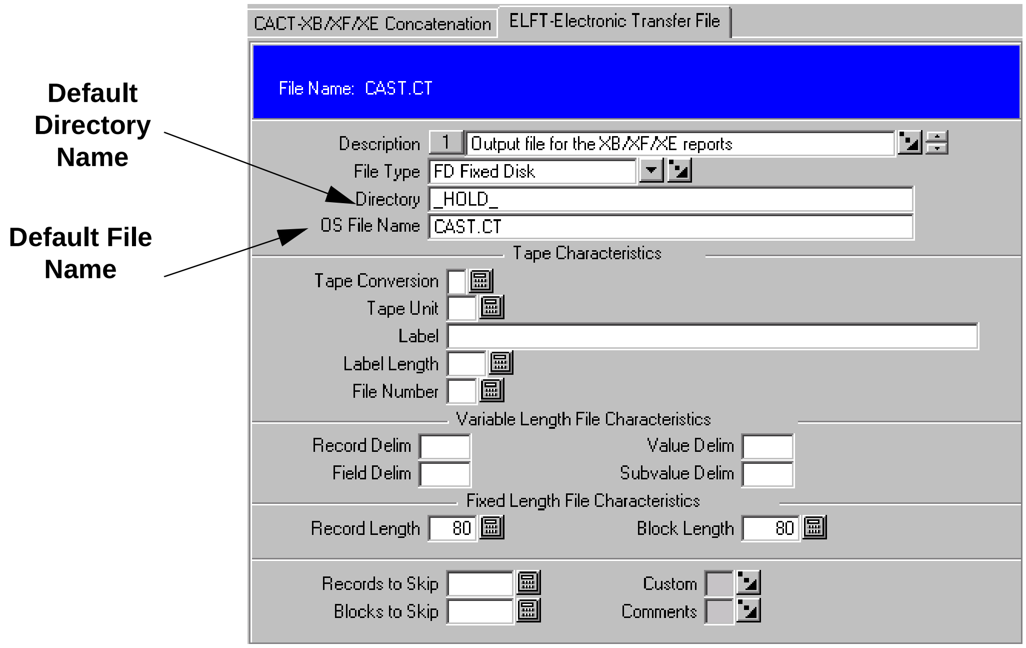


Figure 4-9: The Electronic Transfer File (ELFT) Form

If you change information on the ELFT, those changes are valid only for one running of the CACT process. The next time you run the process, the default values will be in effect. If you do not modify the target definition and/or try to use the same file name each time you run the XB/XE/XF Concatenation (CACT) process, Colleague will issue an error. You must either change the name of the file in the OS File Name field or delete the old file from the HOLD directory before you run CACT.

For more information about ELFT form, see the online help.

Procedure for Generating the XB/XE/XF Concatenation Export

Complete the following steps to generate the Concatenation Export.

Step 1. You must have already created the following work files:

a. Section Export (XB)

b. Faculty Assignment (XE)

c. Session Export (XF)

Step 2. Access the XB/XE/XF Concatenation (CACT) form.

Step 3. Complete the following fields as necessary:

- Batch Control ID – use to modify the batch process name.
- Update Mode – enter “No” to produce an error report and not the export file or enter “Yes” to produce both the error report and the export file.
- Modify Target File Definition – use to change the name of the export file from the default name of CAST.CT in the hold file.

Step 4. Enter the GI03 Identifier to specify the reporting time frame of the export file.

Step 5. Enter the sort option for the export file.

If you want to sort the export file by report, enter **`R.`** If you want to sort the export file by course section, enter **`C.`**

Step 6. Finish from the CACT form to generate the concatenated file.

Using CA State Reporting: MIS Reports

5. Generating the Student Basics Report

Understanding the Student Basics (SB) Report

In This Part

This part of the manual provides the information you need to prepare the Student Basics (SB) Report required by the Chancellor's Office, which can be generated by Colleague. The chapter that you are reading now gives you the background knowledge you need to perform the procedures detailed in subsequent chapters.

Before You Begin

Before you can complete the procedures in this part, you must define the parameters on the California MIS Dates (CAMD) form. For more information, see "Defining California MIS Report Dates" beginning on page 2-30.

Reports That Can Be Generated

Colleague's Student System can generate the Student Basics (SB) Report that is required by the Chancellors's Office.

The SB report is due during each of the end of term collection periods.

The selection process of the SB report uses information generated for the Section (XB) Report. Before you can generate the SB report you must create the CAST.XB.WORK file. The steps to complete the XB report are outlined in Table 4-3 on page 4-6.

Student Basics (SB) Report

This report provides the Chancellor's Office with information about each of the students who are registered at your institution. Colleague produces a file of the information, which can be submitted to the Chancellor's Office. For information on how to generate this report, see "Generating the Student Basics (SB) Report" beginning on page 5-5.

Understanding Colleague's Capabilities

Using Colleague, you can enter the data necessary to generate the student basics records. For information about where Colleague extracts the data from, refer to "Student Basics Export (SB)" beginning on page 5-25 in this part.

Forms Used

Table 5-1 shows an alphabetical list of the forms used in this part and a description of each.

Form	Purpose
Build Stu Basics (SB) Data (CASB)	Generate the work file that contains the data necessary for the Student Basics (SB) Report.
Stu Basics (SB) Maintenance (CSBM)	Maintain records in the CAST.SB.WORK file. You can also add and delete records from the work file using the CSBM form.
Student Basics (SB) Export (CSBE)	Create a file that can be submitted to the state that contains all the data for the Student Basics (SB) Report.

Table 5-1: Forms Used to Generate the Student Basics Report

Files Used

Table 5-2 lists the primary files used in this part and a description of each.

File	Description
CAST.SB.WORK	Contains a record for each student who meets the selection criteria. The work file can contain records for multiple reporting periods.
STUDENT.EOPS	Contains information about student participation in the extended opportunities programs and services provided by your institution.
ACAD.PROGRAMS	Contains the data necessary to determine if a student is enrolled in a vocational program.

Table 5-2: Files Used to Generate the Student Basics Report

Steps at a Glance

Table 5-3 provides a summary of the steps used to generate the SB report. For detailed information about each of the steps, see the pages referenced below.

Step	Task	Form	For More Information, See...
1.	Set-up the parameters for the SB report.	California MIS Report Dates (CAMD)	page 2-30
2.	Create records in the XB work file.	Build Section (XB) Data (CAXB)	page 4-9
3.	Create records in the SB work file for each student.	Build Stu Basics (SB) File (CASB)	page 5-1
4.	Create the SB export file to submit to the Chancellor’s Office.	Student Basics (SB) Export (CSBE)	page 5-39
5.	Submit data.	Data Submission (COMIS)[a]	http://www.cccco.edu/divisions/tris/mis.htm
6.	Review error reports generated by the Chancellor’s Office.	Syntactical and Referential Reports (COMIS)[b]	http://www.cccco.edu/divisions/tris/mis.htm
7.	Add, modify, or delete SB work file records.	Stu Basics (SB) Maintenance (CSBM)	page 5-15

Table 5-3: Steps at a Glance for Generating the SB Report

a. The submission of data is completed using the Chancellor’s Office Web site and not through Colleague.
b. The Syntactical and Referential Reports are not generated by Colleague, and must be retrieved directly from the Chancellor’s Office.

If the data you submit to the Chancellor’s Office contains errors, you can modify the data using the Stu Basics (SB) Maintenance (CSBM) form. After you have made all the necessary corrections, you must create a new export file using the Student Basics (SB) Export (CSBE) process.

Generating the Student Basics (SB) Report

In This Chapter

This chapter explains how to generate the work file used to create the Student Basics (SB) Report. Table 5-4 lists the topics covered in this chapter.

Table 5-4: Topics in this Chapter

Before You Begin

Before you can build the SB work file used for the Student Basics Report, you must have already set up your Colleague database with the necessary codes and tables. Refer to "Defining Codes & Tables for MIS Reporting" beginning on page 2-1 for a complete list of the codes and tables required to produce all of the California State Reports. Table 5-5 lists the codes and tables used specifically by the Student Basics (SB) Report.

Code Files	Validation Code Tables	Translation Tables
SESSIONS		
ETHNICS		CAST.SB05
	IMMIGRATION.STATUSES	CAST.SB06
	LANGUAGES	CAST.SB07
RESIDENCY.STATUSES		CAST.SB09
	DEGREE.TYPES	CAST.SB11
STUDENT.TYPES		CAST.SB11.B
	GRADUATION.TYPES	SB.EDUC.STATUS

Table 5-5: Student Basics Code Files and Tables

Code Files	Validation Code Tables	Translation Tables
COUNTIES		CAST.SB12
	EDUCATION.GOALS	SB.EDUC.GOALS
ENROLL.STATUSES		CAST.SB15
ADMIT.STATUSES		CAST.SB15.B
	ACAD.STANDINGS	CAST.SB22
		CAST.LOC.INSTS CAST.SB.INST.FLAGS
	ACTIVITY.TYPES	SM.ACTIVITY
	STAFF.REMINDER.TYPES	SM.CONTACT
	GAIN.STATUSES	CAST.SB25
		CAST.SB27

Table 5-5: Student Basics Code Files and Tables (cont'd)

Before you can generate the Student Basics (SB) Report you must generate the work file for the Section (XB) Report. Colleague selects the students from course sections included in the CAST.XB.WORK file to determine who to include on the Student Basics (SB) Report. For information about how to build the CAST.XB.WORK file, see "Generating the Section (XB) Report" beginning on page 4-9.

Understanding Work Files

Work files are temporary files created by extracting information from the Colleague database, and then converting that data to specific formats used by the Student Basics (SB) Report. While some data can be extracted directly from Colleague at the time the work files are created, other types of data are derived from multiple fields in Colleague and then combined into a single work file field. A work file field may also require additional translation in order to export the data in the format required by the Chancellor's Office.

The SB work file (CAST.SB.WORK) contains student data. The work file selects information for the SB records from the following sources:

- Students registered in course sections included on the Section (XB) Report.
- Students with activity in the STUDENTS.EOPS file.

You can override the information that Colleague creates and stores in the work file for individual students. For information about maintaining the data in the SB work file, see "Maintaining the SB Work File" on page 5-15.

Form Used

Table 5-6 lists the form used in the chapter and a brief description of the form.

Form	Description
Build Stu Basics (SB) Data (CASB)	Generate the work file that contains the data necessary for the Student Basics (SB) Report.

Table 5-6: Form for Building the SB Work File

Files Used

Table 5-7 lists the primary files used in this chapter and a brief description of the files.

File	Description
CAST.SB.WORK	Contains a record for each student who meets the selection criteria. The work file can contain records for multiple reporting periods.

Table 5-7: Files Used with Building the SB Work File

File	Description
STUDENT.EOPS	Contains information about student participation in the extended opportunities programs and services provided by your institution.
ACAD.PROGRAMS	Contains the data necessary to determine if a student is enrolled in a vocational program.

Table 5-7: Files Used with Building the SB Work File (cont'd)

Building the SB Work File

Colleague does the following to determine which students to include in the work file:

- If a saved list is entered in the Saved List Name field on the Build Stu Basics (SB) Data (CASB) form, Colleague creates records in the work file for all the students in the saved list regardless of the other selection criteria on the CASB form or if their data contains errors.
- If a saved list is not entered, Colleague selects students as follows:
  - All students registered in a course section included in the CAST.XB.WORK file with the same GI03 code as entered on the CASB form.
  - All students with a record in the STUDENT.EOPS file with whose term start date is within the reporting period entered on the CASB form.
- After all the students are selected, Colleague creates an unduplicated list of student IDs per reporting institution.

Note: If you enter institution IDs in the Reporting Institutions field, Colleague only creates records for students at the institutions that you specified. If you enter multiple institution IDs, Colleague creates multiple SB records for the student.

- Each student ID is then processed and an SB record is created.

For each SB record that is created, Colleague populates each of the data elements within the record. For more information about how a data element is derived, see “Generating the Student Basic Export” beginning on page 5-39.

Creating the Student Basics Work File Data

Use the Build Stu Basics (SB) Data (CASB) form to build the CAST.SB.WORK file that creates the Student Basics (SB) Report. You can define parameters, as well as enter selection criteria that determines which records are created in the work file.

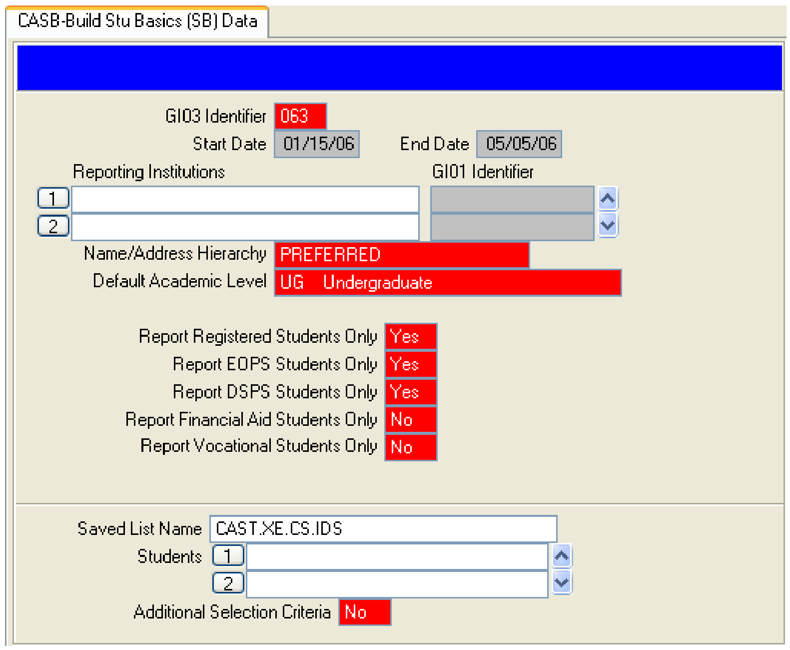


Figure 5-1: The Build Stu Basics (SB) Data (CASB) Form

When you run the CASB process multiple times for the same reporting period, Colleague does not clear the work file for that specific reporting period. Colleague updates any records currently stored in the work file, and also creates new records based on the selection criteria entered on the CASB form. If you want to clear the work file prior to creating records, you can use the California Work File Purge (CAFP) process. For more information about the CAFP process, see "Purging the MIS Work Files" beginning on page 7-1.

Noteworthy Fields on the CASB Form

The fields on the CASB form are described below. For additional information about the CASB form, see the online help.

GI03 Identifier

Enter a GI03 code in the GI03 Identifier field to determine the start and end dates for the reporting period, which are then used as part of the selection criteria to determine which students should be included on the report (unless you entered a saved list). Before you can enter a GI03 code in this field, you must have set up the GI03 code on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.

The GI03 code entered in this field is also the code that is reported in the GI03 data element on the report.

Reporting Institutions

If your institution consists of multiple campuses, enter institution IDs in the Reporting Institutions field to create records in the CAST.SB.WORK file for students at a particular campus. If you enter multiple institution IDs, Colleague creates an SB record for each student at each campus. For example, if you have students who received financial aid at one campus, but took all their courses at a second campus, you can create SB records for the student at both campuses by entering each of the institution IDs in the Reporting Institutions field.

If you leave this field blank, Colleague creates records only for the students who registered for courses at each of the campuses. For each of the institutions entered, Colleague displays the GI01 code that will be reported in the GI01 Identifier field on the Student Basics (SB) Report.

Name/Address Hierarchy

Specify the address Colleague extracts for each student by entering the ID of an existing Name and Address Hierarchy.

Default Academic Level

Enter the academic level that is used during the deviation of the SB15 data element when the student is enrolled in multiple academic levels. When deriving the SB15 Student Enrollment Status value, it is necessary to use the Enroll Status and/or the Admit Status from a single academic level because each academic level can have a unique status.

If a student enrolled in courses in a single academic level during the reporting time period, then that academic level, regardless if the academic level matches the level entered in the Default Academic Level field, is used to determine the Enroll and/or Admit Status for the SB15 calculation.

Student Selection Groups

If you want to create records in the CAST.SB.WORK file only for a specific group of students, enter **`Yes`** in any of the following fields:

- Report Registered Students Only
- Report EOPS Students Only
- Report DSPS Students Only
- Report Financial Aid Students Only
- Report Vocational Students Only

If you leave all the fields set to "No," Colleague creates records in the CAST.SB.WORK file for all the students who meet the other selection criteria entered on the Build Stu Basics (SB) Data (CASB) form.

Saved List Name

You can enter a saved list of IDs from the PERSON file to limit the students included in the work file. Each student in the saved list is included in the CAST.SB.WORK file, regardless of other selection criteria entered on the Build Stu Basics (SB) Data (CASB) form, even if there are errors in the data. If you leave this field blank, Colleague selects the students based on the other selection criteria entered on the CASB form.

Students

You can identify specific students to be included in the extract by entering their names or IDs. If you leave this field blank, Colleague selects the students based on the other selection criteria entered. If you enter a saved list, you cannot enter students in this field.

Procedure for Building the SB Work File

Follow the steps below to build the SB work file for a specific reporting period.

Step 1. Access the Build Stu Basics (SB) Data (CASB) form.

Step 2. Enter a value in the GI03 Identifier field.

The GI03 value that you enter in this field must first be defined on the California MIS Report Dates (CAMD) form.

Step 3. To process only specific students use one of the following methods:

- Enter a saved list containing student IDs in the Saved List Name field.
- Enter `Yes` in any of the student selection group fields.
- Enter information in the Reporting Institutions field.
- Enter IDs in the Students field.

Note: The Saved List Name field, student selection fields, and Students fields are mutually exclusive, meaning that you can only use one of the three selection criteria options.

Step 4. To specify which address Colleague should use to derive a student's residence status, enter a value in the Name/Address Hierarchy field.

Step 5. Enter the default academic level that should be used to determine the SB15 data element is the student is enrolled in multiple academic levels.

Step 6. Run the CASB process by finishing from the form.

Maintaining the SB Work File

In This Chapter

This chapter explains how to maintain the information stored in the SB work file (CAST.SB.WORK). Table 5-8 lists the topics covered in this chapter.

Table 5-8: Topics in this Chapter

Before You Begin

Before you can maintain the work file data, you must have built the SB work file. For information about building the SB work file, see "Generating the Student Basics (SB) Report" beginning on page 5-5.

In addition, you must have a thorough understanding of how Colleague extracts the information contained in the Sections Report. For detailed information on how this data is extracted and/or calculated by Colleague, see "Student Basics Export (SB)" beginning on page 5-25.

Understanding SB Work File Maintenance

After you have built the SB work file, you have the ability to alter the information in the work file records. There are three general approaches to correcting data errors:

- Update the data in the Colleague database and rebuild the affected work file
- Correct individual records in Colleague and in the affected work file
- Correct the individual records in the affected work file

Note: Datatel recommends that you correct the data in the Colleague database and rebuild the work file to avoid repeating the same error the next time the report is generated.

When you are maintaining the work file data, you are editing the exact data that will be submitted on the SB report, which also means that you must enter the data in the formats defined by the Chancellor’s Office. For example, if you want to edit a field that contains a date, the numbers displayed are in the YYMMDD format and if you change the date you must enter the new date in that format.

Form Used

Table 5-9 lists the form used in the chapter and a description of the form.

Form	Description
Stu Basics (SB) Maintenance (CSBM)	Maintain records in the CAST.SB.WORK file. You can also add and delete records from the work file using the CSBM form.

Table 5-9: Form for Maintaining the SB Work File

File Used

Table 5-10 lists the primary file used in this chapter and a brief description of the file.

File	Description
CAST.SB.WORK	Contains a record for each student that was selected by the Build Stu Basics (SB) Data (CASB) process. The work file can contain records for multiple reporting periods.

Table 5-10: File Used with Maintaining the SB Work File

Correcting the Colleague Database

You can make corrections directly in the Colleague database if necessary. The easiest type of data to change in the Colleague database is one-to-one extractions from Colleague, such as gender. Because this type of field is not derived from additional calculations or subroutines, it is easy to make the correction on the database itself. When this happens, it is necessary to rebuild the work file to extract the updated information from the Colleague database for it to be included in the work file. If the data is not a one-for-one extraction, it may be necessary to correct it in the work file instead.

Procedure for Correcting Data in Colleague

Follow the general steps below to make corrections to information in the Colleague database.

Step 1. Build the work file for Student Basics (SB) Report.

For more information, see “Generating the Student Basics (SB) Report” beginning on page 5-5.

Step 2. Review any error listings.

Step 3. Determine the data that must be entered in Colleague to correct the errors.

Refer to “Student Basics Export (SB)” on page 5-25 for more information about the data elements for the SB report.

Step 4. Correct the data on the Colleague database.

Step 5. Rebuild the work file data.

Step 6. Repeat Step 1 through Step 5 until all the errors are corrected.

Correcting the Work File Data

Use the Stu Basics (SB) Maintenance (CSBM) form to maintain individual work file records. The CSBM form also provides the ability to add records to the work file and delete records from the work file.

Note: The values displayed on the CSBM form are exactly what will be included on the SB report. When you enter information in any of the fields you must enter the data in the formats defined by the Chancellor's Office.

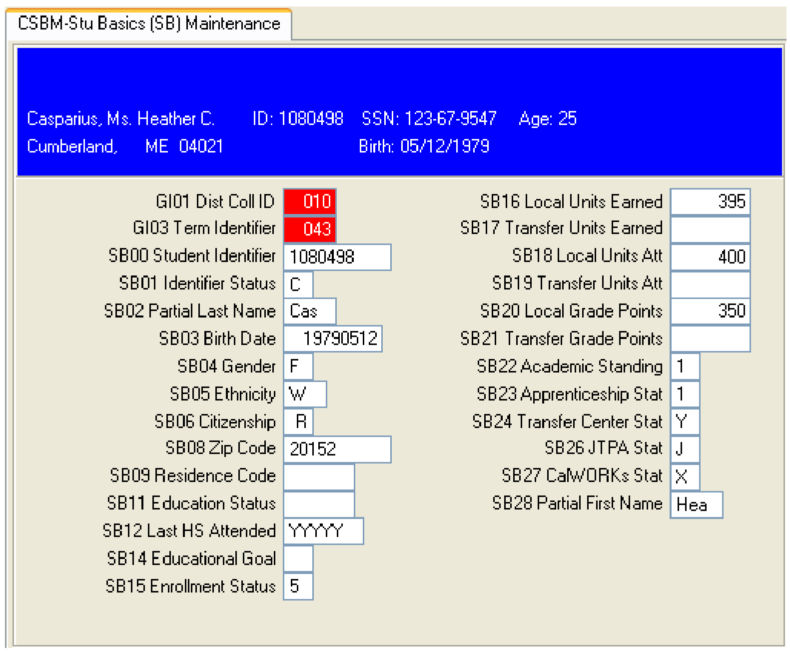


Figure 5-2: The Stu Basics (SB) Maintenance (CSBM) Form

Noteworthy Fields on the CSBM Form

The majority of the fields on the CSBM form can be included in one of the following categories:

- Student Demographic Data Elements
- Academic Data Elements
- Program Status Data Elements

A description of each of the categories are provided beginning on page 5-20.

Note: Leaving fields blank on the CSBM form will cause the record to be rejected by the Chancellor's Office because all the data is required on the report.

District ID

The code displayed in this field is assigned by the Chancellor's Office and represents the college code for your institutions district. The format of the district ID is a three digit code, and you must always enter it as such.

Colleague uses the first department listed for the course section on the Sections (SECT) form to determine which District ID to use. You can change the District ID if necessary.

Term Identifier

The Term Identifier field displays the GI03 code associated with the SB record. You can change the value in this field if necessary, but you can only change the GI03 code to a code that has been defined on the California MIS Report Dates (CAMD) form. A GI03 code is a three digit code with a format of *YYT*, where *YY* is the last two digits of the year and the *T* is the term identifier. The GI03 code must always be entered as a three digit code.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Term Identifier LookUp. You can only add a new record for a GI03 code that has been defined on the CAMD form.

Student Demographic Data Elements

The Student Demographic Data Elements consist of the following:

- **SB00 Student Identifier.** This is a nine digit code of either the students social security number or a unique identifier (Colleague ID).
- **SB01 Student Identifier Status.** This is a single digit code that is either a “S” if SB00 is the social security number or a “C” if SB00 is the student’s Colleague ID.
- **SB02 Partial Last Name.** This is a three letter code that represents the first three letters of the student’s last name.
- **SB03 Birth Date.** This is an eight digit numeric code formatted as YYYYMMDD that represents the birthday of the student.
- **SB04 Gender.** This is a single digit code of “F,” “M,” or “X” that represents the gender of the student.
- **SB05 Ethnicity.** This is a two digit code that represents the student’s ethnic background. The valid ethnic codes are defined by the Chancellor’s Office.
- **SB06 Citizenship.** This is a single digit code that indicates if the student is an U.S. citizen or not. The valid citizenship codes are defined by the Chancellor’s Office.
- **SB08 Zip Code.** This is a nine digit numeric code that indicates the zip code of the student’s residence.
- **SB09 Residence Code.** This is a five digit code that indicates the student’s residence status. For example, if a student is a residence of California, you would enter **`50000`**.

Academic Data Elements

The Academic Data Elements consist of the following:

- **SB11 Education Status.** This is a five digit code that identifies the student’s highest level of education. For example, if the student is enrolled in course at your institution while still enrolled in high school, you would enter **`10000`**.
- **SB12 Last HS Attended.** This is a six digit code that identifies the high school that the student graduated from. For example, if the student graduated from a high school outside of California, you would enter **`6XXXXX`**.
- **SB14 Educational Goal.** This is a one digit code that indicates what the student’s principal educational goal is. For example, if a student was enrolled in a vocational program, you would enter **`E`** to indicate that the student’s goal was to earn a vocational certificate.
- **SB 15 Enrollment Status.** This is a one digit code that indicates a student’s attendance at your institution. For example, if a student is enrolled in

courses at a college for the first time, you would enter a `1` for first-time student.

- **SB16 Local Units Earned.** This is a six digit numeric code with four digits before the implied decimal point and two after the implied decimal point. A student's local earned units is a cumulative total of degree applicable credits earned at your institution.
- **SB17 Transfer Units Earned.** This is a six digit numeric code with four digits before the implied decimal point and two after the implied decimal point. A student's transfer earned units is a cumulative total of degree applicable credits earned at another institution.
- **SB18 Local Units Att.** This is a six digit numeric code with four digits before the implied decimal point and two after the implied decimal point. A student's local attempted units is a cumulative total of degree applicable credits attempted at your institution
- **SB19 Transfer Units Att.** This is a six digit numeric code with four digits before the implied decimal point and two after the implied decimal point. A student's transfer attempted units is a cumulative total of degree applicable credits attempted at another institution.
- **SB20 Local Grade Points.** This is a six digit numeric code with four digits before the implied decimal point and two after the implied decimal point. A student's GPA is a cumulative value of degree applicable units received at your institution
- **SB21 Transfer Grade Points.** This is a six digit numeric code with four digits before the implied decimal point and two after the implied decimal point. A student's GPA is a cumulative value of degree applicable units received at another institution.

Program Status Data Elements

The Program Status Data Elements consist of the following:

- **SB22 Academic Standing.** This is a single digit code that indicates the student's academic standing at your institution at the end of the reporting period.
- **SB23 Apprenticeship Stat.** This is a single digit code that indicates whether the student is a registered apprentice with the Department of Industrial Relations.
- **SB24 Transfer Center Stat.** This is a single digit code that indicates whether the student received services from a Transfer Center program.
- **SB26 JTPA Stat.** This is a one digit code that indicates whether the student participated in a Job Training Partnership Act (JTPA) program.
- **SB27 CalWORKs Stat.** This is a single digit code that indicates whether the student is a participant in the community college's CalWORKs program.
- **SB28 Partial First Name.** This a three digit code that consists of the first three characters of the student's first name.

Procedure for Maintaining the SB Work File

Follow the steps below to maintain the information in the SB work file.

Step 1. Access the Stu Basics (SB) Maintenance (CSBM) form.

Step 2. Access the student that you want to maintain.

If you are adding a new record to the work file the following prompt is displayed:

```
CAST.SB.Work Record not found - Add a new record (Y/N)?
```

Enter **`Y`** to add the record to the work file. Colleague displays the GI03 Identifier resolution form so you can specify which reporting period the student record should be associated with. After you have selected a GI03 code, you can then add information for the record.

Step 3. Add or change the GI01 District College Identifier, if necessary.

Step 4. Add or change the GI03 Term Identifier, if necessary.

Step 5. Add or change any of the information in the following categories:

- Student Demographic Data Elements
- Academic Data Elements
- Program Status Data Elements

Step 6. Save your changes by finishing from the form.

Step 7. Repeat Step 2 through Step 6 for each SB record that requires maintenance.

Student Basics Export (SB)

In This Chapter

This chapter describes how to produce the Student Basics Export (SB) for California State Reporting. It lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic
- translation table (if any)
- additional information (if any)

Table 5-11 lists the topics covered in this chapter.

Table 5-11: Topics in this Chapter

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASB

The Record Code, set to **SB** on extract mapping, identifies the record as a student basics export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INSTITUTIONS file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CAMD

The Term Identifier is derived from the value entered on the CASB form. The format of this field is YYT, where:

- YY = the last two digits of the reporting year.
- T = the single-digit term-type identifier as defined by the Chancellor's Office.

The Term Identifier must be defined on the California MIS Report Dates (CAMD) form before you can create a report for the specific reporting time frame.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- if the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits
- a D (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier

STUDENT-IDENTIFIER-STATUS [SB01]

Colleague Data Element: Derived from SB00
Form Mnemonic: derived

The Student Identifier Status indicates whether the Student Identifier [SB00] reported is the SSN or the Colleague ID as follows:

- the student's SSN is reported as S
- the student's Colleague ID is reported as C

STUDENT-BIRTH-DATE [SB03]

Colleague Data Element: BIRTH.DATE
Form Mnemonic: NAE

The Student Birth Date is the student's date of birth.

STUDENT-GENDER [SB04]

Colleague Data Element: GENDER
Form Mnemonic: NAE

The Student Gender indicates if the student is male or female. If this field is blank, an **X** is reported.

STUDENT-ETHNICITY [SB05]

Colleague Data Element: ETHNIC
Form Mnemonic: NAE
Translation Table: CAST.SB05

Student Ethnicity is the student's ethnic code indicating the ethnic origin of the student. The student ethnicity is derived by translating the ethnic code from the PERSON record using the CAST.SB05 translation table. This table converts the ethnic code into the required code. If no ethnic code is on file for the student, an X is reported.

STUDENT-CITIZENSHIP [SB06]

Colleague Data Element: IMMIGRATION.STATUS
Form Mnemonic: FPER or FINF
Translation Table: CAST.SB06

Student Citizenship is derived by translating the immigration status from the PERSON record using the CAST.SB06 translation table. This table converts the immigrant status into the required state code. If this field is blank, the student is considered a U.S. Citizen and a 1 is reported. To report a status of unknown/uncollected, a value representing unknown/uncollected must be entered for the student on the FPER or FINF forms.

Note: Alien Status on the FPER form is not required to be entered if the student is a U.S. Citizen, when you are adding a new application.

STUDENT-LANGUAGE [SB07]

Filled with spaces.

STUDENT-ZIP-CODE [SB08]

Colleague Data Element: ZIP (in ADDRESS)
Form Mnemonic: NAE

The Student Zip Code contains the zip code associated with the name/address hierarchy entered on the CASB form, or the preferred address if a hierarchy is not entered. The zip-code is formatted as follows:

- If zip code length is equal to five (5) characters than output the five (5) character zip code plus “XXXX” appended for a total of nine (9) characters;
- If zip code length is less than five (5) characters then output “XXXXXXXXX” for a total of nine (9) characters;
- If the zip code length is greater than five (5) but less than nine (9) characters, then output the first five (5) characters of the zip code plus append “XXXX” for a total nine (9) characters;
- If zip code is all zeroes or blank, then output “XXXXXXXXX” for a total of nine (9) characters;
- If Colleague cannot extract the zip code with all nine characters, an error is produced.

STUDENT-RESIDENCE-CODE [SB09]

Colleague Data Element: STU.RESIDENCY.STATUS, RESIDENCE.STATE
Form Mnemonic: SHAP / ASPR / NAE / RGPE
Translation Table: CAST.SB09

The Student Residence Code is the student's residency status (STU.RESIDENCY.STATUS) indicating if the student resides in-state, out-of-county, etc. Since this is a multi-valued field, Colleague reports the residency status active at the beginning of the reporting period based on the dates defined on the California MIS Report Dates (CAMD) form. The student residence code is derived by translating the residency status from the STUDENTS record using the CAST.SB09 translation table. This table converts the residency status into the required state code.

If the residency status translates to 6 from the CAST.SB09 translation table, Colleague checks for a RESIDENCE.STATE for the student. If the field exists, SB09 is reported as 6 followed by 00 followed by the state code. If the field does not exist, SB09 is reported as 6XXXX.

If no residency status exists, XXXXX is reported.

STUDENT-EMPLOYMENT-EXPECTATION [SB10]

Filled with spaces.

STUDENT-EDUCATION-STATUS [SB11]

Colleague Data Element: derived
Form Mnemonic: SHAP, IASU, SPRO
Translation Table[1]*:* CAST.SB11, CAST.SB11.B, SB.EDUC.STATUS

The Student Education Status identifies the student's highest level of education such as college degree (if any), or high school gradation status. To accurately report student education status, you must set up graduation type codes for the following:

- No longer enrolled in high school, not a graduate of high school
- GED or High School Certificate of Equivalency/Completion
- Foreign Secondary School Diploma/Certificate of Graduation
- California High School Proficiency Certificate

Colleague looks at all the institutions attended by a student as follows:

- If any academic degrees (ACAD.DEGREE) were awarded, each corresponding degree type (ODEG.TYPE) is translated via the CAST.SB11 translation table. The highest translated value is used along with the year the degree was awarded (ACAD.DEGREE.DATE) to set this field. If there is no degree date, the last 2 characters are reported as XXXX.
- If there are no academic degrees, the highest graduation type (INSTA.GRAD.TYPES) is translated via the SB.EDUC.STATUS translation table along with the year the student's association with the institution ended (INSTA.YEAR.ATTEND.END or INSTA.END.DATES).
- If there are no institutions attended records for the student or the information does not translate to a valid value, the student type (from STU.TYPES) that is active at the end of the reporting term is translated via the CAST.SB11.B translation table and reported.
- If the student type does not translate into a valid state code, XXXXX is reported.

STUDENT-HIGH-SCHOOL-LAST [SB12]

Colleague Data Element: derived, INST.LOCAL.GOVT.ID, INST.COUNTRY, INST.STATE, INST.COUNTY
Form Mnemonic: SHAP/HSA/IASU
Translation Table: CAST.SB12

Student High School Last identifies the high school from which the student graduated, or if the student did not graduate, identifies the last high school attended.

1. When setting up the CAST.SB11, CAST.SB11.B, and SB.EDUC.STATUS translation tables enter only the first character of the code that should be reported in SB11 in the New Code field on the File Translation Table (FLTT) form. Colleague appends the remaining 4 characters with the year. For example, if you have CAST.SB11 set up to translate the original code of GED to a new value of 4, Colleague appends the year to the 4 and report 42003 as the SB11 value.

This data element is optional for students twenty two years of age and older. The last high school the student attended is determined as follows:

- If SB11 (Student-Education-Status) is **10000**, or if the student is 22 years of age or older and reported no high schools, **`YYYYYY`** is reported.
- If no High Schools are identified, **`000000`** is reported.
- If at least one high school is identified, the one with most recent end date is used as follows:
- If there is a local government ID, that value is reported.
- If it is a foreign high school (Country is not blank), **`8XXXXX`** is reported.
- If it is an out of state high school (State is not blank and does not equal CA), **`6XXXXX`** is reported.
- If the State is CA, and there is a County code, the two digit county code is converted via the CAST.SB12 translation table, and reported as **`CCXXXX`** where **`CC`** is the translated county code.
- If a high school is reported, but the location can't be derived, **`XXXXXX`** is reported.

STUDENT-COLLEGE-LAST [SB13]

Filled with spaces.

STUDENT-EDUCATIONAL-GOAL [SB14]

Colleague Data Element: APP.ORIG.EDUC.GOAL
Form Mnemonic: SHAP
Translation Table: SB.EDUC.GOALS

The Student Education Goal is the student's original educational goal at the time of application to the college. The student education goal is derived by translating the original education goal code from the PERSON record using the SB.EDUC.GOALS translation table. This table converts the education goal code into the required state code.

STUDENT-ENROLLMENT-STATUS [SB15]

Colleague Data Element: derived
Form Mnemonic: STAL, IASU
Translation Table: CAST.SB15, CAST.SB15.B

The Student Enrollment Status indicates the student's current standing with respect to attendance at the reporting college. This field is usually updated on a term by term basis per student.

The student enrollment status is derived as follows:

- If Student-Education-Status [SB11] is **10000**, a **Y** (Not Applicable) is reported.
- If the student is only enrolled in non-credit courses, an **X** (Uncollected/ Unreported) is reported.
- If the student is not enrolled for the current reporting term, an **X** (EOPS) is reported.
- If all the institutions that the student was ever enrolled in up to the end of reporting period does not include only transfer credits, a **5** is reported if the student is enrolled in the reporting period you are reporting for and the previous primary term. A **3** is reported is the student is enrolled in the reporting term you are reporting for, but not the previous primary term, but a reporting period in the past.
- If the student was enrolled at the institution with only transfer credits, the enrollment status is derived by translating the value in STA.ENROLL.STATUS using the CAST.SB15 translation table.
- If the status cannot be derived from the CAST.SB15 translation table, or if the student's STA.ENROLL.STATUS is null, the student's admit status (STA.ADMIT.STATUS) is translated via the CAST.SB15.B translation table and reported.

STUDENT-UNITS-EARNED-LOCAL [SB16]

Colleague Data Element: sum of all STC.ALTCUM.CONTRIB.CMPL.CRED with STC.CREDIT.TYPE not equal to T
Form Mnemonic: STAT

Units earned and attempted are derived from the student's academic credit records. Student academic credit records with a credit type that has a credit type category of **T**, for "Transfer," are counted as transfer credits. Other academic credit records are counted as local credits. The SB16 is the sum of all of the values in the STC.ALTCUM.CONTRIB.CMPL.CRED field with STC.CREDIT.TYPE not equal to **T**.

All of the information used to derive elements SB16 - SB21 is displayed on the Student Academic Transcript (STAT) form.

STUDENT-UNITS-EARNED-TRANSFER [SB17]

Colleague Data Element: sum of all STC.ALTCUM.CONTRIB.CMPL.CRED with STC.CREDIT.TYPE equal to T
Form Mnemonic: STAT

Refer to SB16 for information.

STUDENT-UNITS-ATTEMPTED-LOCAL [SB18]

Colleague Data Element: sum of all STC.ALTCUM.CONTRIB.ATT.CRED with STC.CREDIT.TYPE not equal to T
Form Mnemonic: STAT

Refer to SB16 for information.

STUDENT-UNITS-ATTEMPTED-TRANSFER [SB19]

Colleague Data Element: sum of all STC.ALTCUM.CONTRIB.ATT.CRED with STC.CREDIT.TYPE equal to T
Form Mnemonic: STAT

Refer to SB16 for information.

STUDENT-TOTAL-GRADE-POINT-LOCAL [SB20]

Colleague Data Element: sum of all STC.ALTCUM.CONTRIB.GRADE.PTS with STC.CREDIT.TYPE not equal to T
Form Mnemonic: STAT

Refer to SB16 for information.

STUDENT-TOTAL-GRADE-POINT-TRANSFER [SB21]

Colleague Data Element: sum of all STC.ALTCUM.CONTRIB.GRADE.PTS with STC.CREDIT.TYPE equal to T
Form Mnemonic: STAT

Refer to SB16 for information.

STUDENT-ACADEMIC-STANDING [SB22]

Colleague Data Element: use highest within reporting period of STS.ACAD.STANDING w/ STS.TERM = reporting term
Form Mnemonic: STAL
Translation Table: CAST.SB22

The Student Academic Standing indicates the student's highest standing within the reporting term. The reporting term is determined by selecting the academic term associated with the STUDENT.ACAD.CRED record that is active within the reporting period.

The Calculate Academic Standing (CACS) process is used to calculate a student's academic standing at the end of the term, and is rule driven. When defining the academic standing rules, the most important conditions (i.e. those with the highest priority) should be checked first.

Academic progress is one of the items that must be checked by the CACS process. Rules can be written to check items by term, academic program, or academic level. A rule can be written that will calculate how many courses a student has withdrawn from, and react accordingly.

The academic standing status is set as follows:

- If the student's academic standing is good, a 1 is reported.
- If the student's academic standing is progress probation, a 3 is reported.
- If the student's academic standing is academic probation, a 4 is reported.
- If the student's academic standing is both progress and academic probation, a 5 is reported.
- If the student's academic standing is progress dismissal/disqualification, a 6 is reported.
- If the student's academic standing is academic dismissal/disqualification, a 7 is reported.
- If the student's academic standing is progress and academic dismissal/disqualification, an 8 is reported.
- If a student's academic standing cannot be determined, an X is reported.
- If a student's academic standing is not good and they have attempted less than 12 semester credits, a Y is reported.

STUDENT-APPRENTICESHIP-STATUS [SB23]

Colleague Data Element: CRS.COURSE.TYPES, CRS.LEVELS (SAM classes [CB09] counted)
Form Mnemonic: derived
Translation Table: CAST.LOC.INSTS, CAST.SB.INST.FLAGS

The Student Apprenticeship Status identifies students who are registered apprentices. The Apprenticeship status is determined as follows:

- If the student took any courses with a course type that translates to **`AP`** (Apprentice), a **`1`** (Registered with the Department of Industrial Relations) is reported.
- If the student took any courses with a course level that translated to **`AP`**, but did not have a course type that translated to **`AP`**, a **`0`** (zero) is reported.
- If none of the above, an **`X`** (Unknown/uncollected) is reported.

STUDENT-TRANSFER-CENTER-STATUS [SB24]

Colleague Data Element: ACTIVITY.TYPE, ACTIVITY.DATE, ACTIVITY.END.DATE, ACTIVREL.ATTENDED.FLAG, CONTACT.TYPE, CONTACT.ACTUAL.DATE
Form Mnemonic: derived
Translation Table: CAST.LOC.INSTS, CAST.SB.INST.FLAGS

The Student Transfer Center Status indicates the student's status relative to services from a formal Transfer Center program (funded or unfunded) as follows.

- If the institution indicates that it does not have a transfer center a Y is reported.
- If the student has any activities (with an activity type) that translates to TR (Transfer Center) via the SM.ACTIVITY translation table, or contacts (with a contact type) that translates to TR (Transfer Center) via the SM.CONTACT translation table within the reporting period, a 1 is reported.
- For all other conditions, a 0 (zero) is reported.

STUDENT-GAIN-STATUS [SB25]

Filled with spaces.

STUDENT-JTPA-STATUS [SB26]

Colleague Data Element: STTR.JTPA.PARTICIPANT.FLAG
Form Mnemonic: VTEA

The Student JTPA Status is the student's status in the Job Training Partnership Act (JTPA) program as follows:

- If the JTPA status is **Y**, a **J** is reported.
- If the JTPA status in not a **Y**, an **N** is reported.

In order to determine which JTPA status to report, Colleague uses the reporting term associated with the STUDENT.ACAD.CRED record that is active within the reporting period to determine the correct status.

STUDENT-CALWORKS-STATUS [SB27]

Colleague Data Element: STTR.CALWORKS.STATUS
Form Mnemonic: ASTR, VTEA
Translation Table: CAST.SB27

The Student CALWORKS Status indicates the student's in the CALWORKS program, and is reported as follows:

- If the student is a TANF recipient and is attending the community college on his or her own accord and is or will be in the process of obtaining an approved Welfare to Work plan through their county welfare office, a **2** is reported.
- If the student is a TANF recipient and was referred to the community college by the county welfare office and has an approved Welfare to Work plan, a **3** is reported.
- If the student is off cash assistance due to unsubsidized employment and is in compliance with their county welfare office, a **6** is reported.
- If the student did not participate in the CalWORK program or their status is unknown or uncollected, a **0** is reported.

In order to determine which CALWORKS status to report, Colleague uses the reporting term associated with the STUDENT.ACAD.CRED record that is active within the reporting period to determine the correct status.

STUDENT-NAME-PARTIAL [SB28]

Colleague Data Element: FIRST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's first name. This data element is for use in the Cal-PASS initiative and is optional for California MIS reporting, but as long as the student has a first name stored in Colleague, the information will be included on the export. If the student does not have a first name that is stored in Colleague, blank spaces are reported.

Generating the Student Basic Export

Use the Student Basics (SB) Export (CSBE) form to generate the Student Basics Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file.

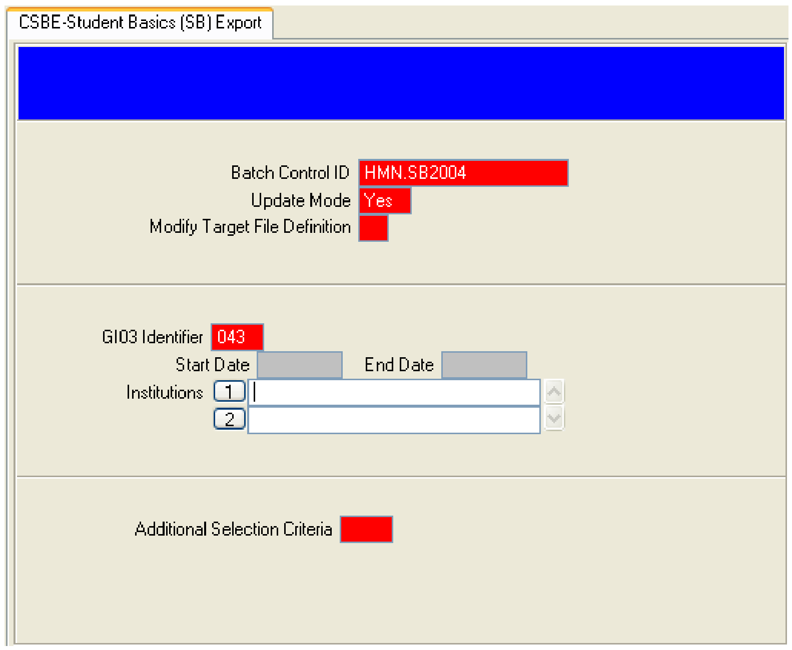


Figure 5-3: The Student Basics (SB) Export (CSBE) Form

Noteworthy Fields on the CSBE Form

The fields listed below allow you to define basic information for creating the export. For additional information about the CSBE form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SB) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

GI03 Identifier

Use the GI03 Identifier field to populate the start and end dates for the reporting period, which are then used as part of the selection criteria to determine which students should be included on the report (unless you entered a saved list). Before you can enter a GI03 code in this field you must have set up the GI03 code on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.

The GI03 code entered in this field is also the code that is reported in the GI03 data element on the report.

Institutions

If your institution consists of multiple campuses, use the Institutions field to export records in the CAST.SB.WORK file for students at a particular campus. If you leave this field blank, Colleague exports all the records in the work file for the reporting period.

Procedure for Generating the Student Basics Export

Complete the following steps to generate the Student Basics (SB) Export.

Step 1. Access the Student Basics (SB) Export (CSBE) form.

Step 2. Enter the export parameters.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter the GI03 Identifier to specify the reporting time frame of the export file.

Step 4. Enter institution IDs if you want to export only the records for a particular campus.

The Institutions field allow you to determine specific records to be included in the export file. If you do not enter the IDs of any institutions, all the records in the CAST.SB.WORK file are exported for the reporting period.

Step 5. Export the data to the target file by finishing from the CSBE form.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Using CA State Reporting: MIS Reports

6. Generating the Student Enrollment Report

Understanding the SX Report

In This Part

This part of the manual provides the information you need to prepare the Student Enrollment (SX) Report required by the Chancellor's Office, which can be generated by Colleague. The chapter that you are reading now gives you the background knowledge you need to perform the procedures detailed in subsequent chapters.

Before You Begin

Before you can complete the procedures in this part, you must define the parameters on the California MIS Dates (CAMD) form. For more information, see "Defining California MIS Report Dates" beginning on page 2-30.

Reports That Can Be Generated

Colleague’s Student System can generate the Student Enrollment (SX) Report that is required by the Chancellors’s Office.

The SX report is due during each of the end of term collection periods.

Student Enrollment (SB) Report

This report provides the Chancellor’s Office with information about each of the students who attended classes at your institution during the reporting period. Colleague produces a file of the information, which can be submitted to the Chancellor’s Office. For information on how to generate this report, see “Generating the Student Enrollment (SX) Report” beginning on page 6-5.

Understanding Colleague's Capabilities

Using Colleague, you can enter the data necessary to generate the student enrollment records. For information about where Colleague extracts the data from, refer to "Student Enrollment Export (SX)" beginning on page 6-21 in this part.

Forms Used

Table 6-1 shows an alphabetical list of the forms used in this part and a description of each.

Form	Purpose
Build Stu Enroll (SX) Data (CASX)	Generate the work file that contains the data necessary for the Student Enrollment (SX) Report.
Stu Enrollment (SX) Maint (CSXM)	Maintain records contained in the CAST.SX.WORK file. You can also add and delete records from work file using the CSXM form.
Stu Enrollment (SX) Export (CSXE)	Generate a flat file containing the data for the Student Enrollment (SX) Report.
Non-Scheduled Mtg Attendance (NSMA)	Maintain the number of hours a student attends a non-scheduled course.

Table 6-1: Forms Used

Files Used

Table 6-2 lists the primary files used in this part and a description of each.

File	Description
CAST.SX.WORK	Contains a record for each student enrolled in a course section. The work file can contain records for multiple reporting periods.
COURSES	Contains the course name reported in the CB01 data element.
STUDENT.ACAD.CRED	Contains information about a student's status in a course section, including effective date and drop date.

Table 6-2: Files Used

File	Description
STUDENT.COURSE.SEC	Contains the number of hours a student attended a course section reported in the SX05 data element.
COURSE.SECTIONS	Contains the section identifier reported in the XB00 data element.

Table 6-2: Files Used (cont'd)

Steps at a Glance

Table 6-3 provides a summary of the steps used to generate the SX report. For detailed information about each of the steps, see the pages referenced below.

Step	Task	Form	For More Information, See...
1.	Set-up the parameters for the SX report.	California MIS Report Dates (CAMD)	page 2-30
2.	Create records in the SX work file for each of the students.	Build Stu Enroll (SX) Data (CASX)	page 6-5
3.	Create the SX export file to submit to the Chancellor's Office.	Stu Enrollment (SX) Export (CSXE)	page 6-26
4.	Submit data.	Data Submission (COMIS)[a]	http://www.cccco.edu/divisions/tris/mis.htm
5.	Review error reports generated by the Chancellor's Office.	Syntactical and Referential Reports (COMIS)[b]	http://www.cccco.edu/divisions/tris/mis.htm
6.	Add, modify, or delete SX work file records.	Stu Enrollment (SX) Maint (CSXM)	page 6-13

Table 6-3: Steps at a Glance for Generating the SX Report

a. The submission of data is completed using the Chancellor's Office Web site and not through Colleague.
b. The Syntactical and Referential Reports are not generated by Colleague, and must be retrieved directly from the Chancellor's Office.

If the data you submit to the Chancellor's Office contains errors, you can modify the data using the Stu Enrollment (SX) Maint (CSXM) form. After you have made all the necessary corrections, you must create a new export file using the Stu Enrollment (SX) Export (CSXE) process.

Generating the Student Enrollment (SX) Report

In This Chapter

This chapter explains how to generate the work file used to create the Student Enrollment (SX) Report. Table 6-4 lists the topics covered in this chapter.

Table 6-4: Topics in this Chapter

Before You Begin

Before you can build the SX work file used for the Student Enrollment Report, you must have already set up your Colleague database with the necessary codes and tables. Refer to "Defining Codes & Tables for MIS Reporting" beginning on page 2-1 for a complete list of the codes and tables required to produce all of the California State Reports. Table 6-5 lists the codes and tables used specifically by the Student Enrollment (SX) Report.

Code Files	Validation Code Tables	Translation Tables
SESSIONS		
GRADES		CAST.SX04
	STUDENT.ACAD.CRED.STATUSES	CAST.SX04.A

Table 6-5: Student Enrollment Code Files and Tables

Understanding Work Files

Work files are temporary files created by extracting information from the Colleague database, and then converting that data to specific formats used by the Student Enrollment (SX) report. While some data can be extracted directly from Colleague at the time the work files are created, other types of data are derived from multiple fields in Colleague and then combined into a single work file field. A work file field may also require additional translation in order to export the data in the format required by the Chancellor's Office.

The SX work file (CAST.SX.WORK) contains student enrollment data. The work file selects information for the SX records from enrollment information for each course section (i.e. data from the STUDENT.ACAD.CRED file)

You can override the information that Colleague creates and stores in the work file for individual course sections. For information about maintaining the data in the SX work file, see "Maintaining the SX Work File" on page 6-13.

Forms Used

Table 6-6 lists the forms used in the chapter and a brief description of the forms.

Form	Description
Build Stu Enroll (SX) Data (CASX)	Generate the work file that contains the data necessary for the Student Enrollment (SX) Report.
Non-Scheduled Mtg Attendance (NSMA)	Maintain the number of hours a student attends a non-scheduled course.

Table 6-6: Forms for Building the SX Work File

Files Used

Table 6-7 lists the primary files used in this chapter and a brief description of the files.

File	Description
CAST.SX.WORK	Contains a record for each student enrolled in a course section. The work file can contain records for multiple reporting periods.
COURSES	Contains the course name reported in the CB01 data element.
STUDENT.ACAD.CRED	Contains information about a student's status in a course section, including effective date and drop date.
STUDENT.COURSE.SEC	Contains the number of hours a student attended a course section reported in the SX05 data element.
COURSE.SECTIONS	Contains the section identifier reported in the XB00 data element.

Table 6-7: Files Used when Building the SX Work File

Maintaining Student Attendance Data

Prior to building the work file for the Student Enrollment (SX) Report, you might need to enter attendance data for non-scheduled courses. Use the Non-Scheduled Meeting Attendance (NSMA) form to maintain student attendance hours for a non-scheduled course section. This form can be used only for positive attendance-type courses, and must have a funding accounting method that identifies it as such.

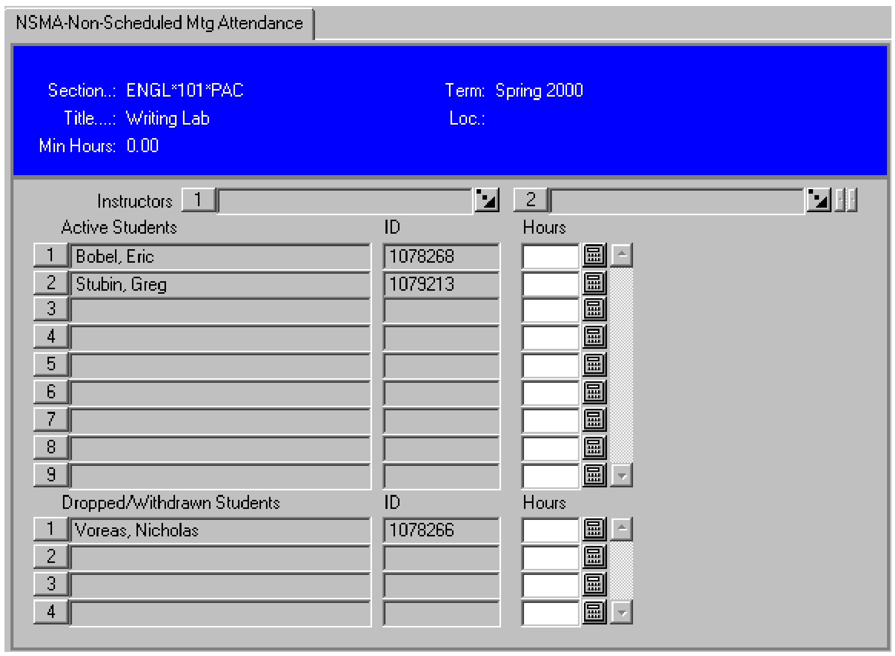


Figure 6-1: The Non-Scheduled Meeting Attendance (NSMA) Form

Colleague uses the number of hours entered on this form when deriving the Enrollment Positive Attendance Hours (SX05) data element for non-scheduled course sections.

For more information about how to use the NSMA form, see the online help.

Building the SX Work File

Colleague does the following to determine which students to include in the work file:

- If a saved list is entered in the Saved List Name field on the Build Stu Enrollment (SX) Data (CASX) form, Colleague creates records in the work file for all the students in the saved list regardless of the other selection criteria on the CASX form.
- If saved list is not entered, Colleague selects all the STUDENT.ACAD.CRED records that are within the date range that is determined by the GI03 Identifier.
- If you enter credit types in the Excluded Credit Types field, Colleague limits the STUDENT.ACAD.CRED records to only those with a credit type that does not match the credit types entered.
- If you enter institution IDs, Colleague limits the STUDENT.ACAD.CRED records to only those for enrollments at the particular campuses.
- If you enter student IDs, Colleague limits the STUDENT.ACAD.CRED records to only the students entered.
- For each STUDENT.ACAD.CRED record that meets the selection criteria, an SX record is created.

For each enrollment that meets the selection criteria, information is populated in each of the data elements. For more information about how a data element is derived, see “Student Enrollment Export (SX)” beginning on page 6-21.

Creating the Student Enrollment Work File Data

Use the Build Stu Enroll (SX) Data (CASX) form to build the CAST.SX.WORK file used to create the Student Enrollment (SX) Report. You can define parameters, as well as enter selection criteria that determines which records are created in the work file.

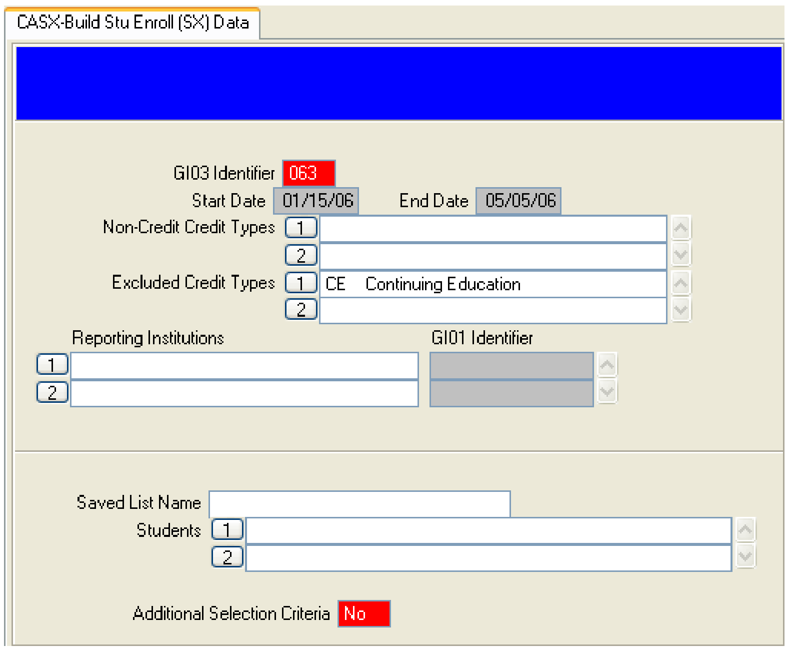


Figure 6-2: The Build Stu Enroll (SX) Data (CASX) Form

When you run the CASX process multiple times for the same reporting period, Colleague does not clear the work file for that specific reporting period. Colleague updates any records currently stored in the work file, and also creates new records based on the selection criteria entered on the CASX form. If you want to clear the work file prior to creating records, you can use the California Work File Purge (CAFP) process. For more information about the CAFP process, see “Purging the MIS Work Files” beginning on page 7-1.

Noteworthy Fields on the CASX Form

The fields on the CASX form are described below. For additional information about the CASX form, see the online help.

GI03 Identifier

Enter a GI03 code in the GI03 Identifier field to determine the start and end dates for the reporting period, which are then used as part of the selection criteria to determine which students should be included on the report (unless you entered a saved list). Before you can enter a GI03 code in this field, you must have set up the GI03 code on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.

The GI03 code entered in this field is also the code that is reported in the GI03 data element on the report.

Non-Credit Credit Types

The credit types identify the courses that are counted as non-credit courses. The number of enrolled units is reported as “8888” for non-credit courses. By default, Colleague looks at the minimum credit field on the course section to determine whether or not the section is non-credit or not.

If you have courses with zero credits that should not be considered non-credit courses, you can use this field to list one or more credit types to be treated as non-credit. If you do, Colleague considers any section with one of these credit types as non-credit, regardless of the actual credit value, and reports other sections that have a zero credit value as “0000” instead of “8888.”

Excluded Credit Types

Enter credit types to exclude specific enrollments from the CAST.SX.WORK file. Courses with a credit type that does not match the credit types entered in the Excluded Credit Types field are processed by Colleague and an SX record is created.

If you leave this field blank, Colleague processes all of a student’s STUDENT.ACAD.CRED records regardless of the credit type.

Reporting Institutions

If your institution consists of multiple campuses, use the Reporting Institutions field to create records in the CAST.SX.WORK file for students at a particular campus. If you leave this field blank, Colleague creates records for all of your students at each of the campuses. For each of the institutions entered, Colleague displays the GI01 code that will be reported in the GI01 Identifier field.

Saved List Name

You can enter a saved list of IDs from the STUDENT.ACAD.CRED file to limit the students included in the work file. Each student in the saved list is included in the CAST.SX.WORK file, regardless of other selection criteria entered on the Build Stu Enroll (SX) Data (CASX) form, even if there are errors in the data. If you leave this field blank, Colleague selects the students based on the other selection criteria entered on the CASX form.

Students

You can identify specific students to be included in the work file by entering their names or IDs. If you leave this field blank, Colleague selects the students based on the other selection criteria entered. If you enter a saved list, you cannot enter students in this field.

Procedure for Building the SX Work File

Follow the steps below to build the SX work file for a specific reporting period.

Step 1. Access the Build Stu Enroll (SX) Data (CASX) form.

Step 2. Enter a value in the GI03 Identifier field.

The GI03 value that you enter in this field must first be defined on the California MIS Report Dates (CAMD) form.

Step 3. To process only specific students use one of the two following methods:

- Enter a saved list containing Student IDs in the Saved List Name field.
- Enter information in the Reporting Institutions field and/or the Students fields.

Step 4. Enter credit types in the Excluded Credit Types field to exclude enrollment from particular course from being reported.

Step 5. Run the process by finishing from the CASX form.

Maintaining the SX Work File

In This Chapter

This chapter explains how to maintain the information stored in the SX work file (CAST.SX.WORK). Table 6-8 lists the topics covered in this chapter.

Table 6-8: Topics in this Chapter

Before You Begin

Before you can maintain the work file data, you must have built the SX work file. For information about building the SX work file, see "Generating the Student Enrollment (SX) Report" beginning on page 6-5.

In addition, you must have a thorough understanding of how Colleague extracts the information contained in the Sections Report. For detailed information on how this data is extracted and/or calculated by Colleague, see "Student Enrollment Export (SX)" beginning on page 6-21.

Understanding SX Work File Maintenance

After you have built the SX work file, you have the ability to alter the information in the work file records. There are three general approaches to correcting data errors:

- Update the data in the Colleague database and rebuild the affected work file
- Correct individual records in Colleague and in the affected work file
- Correct the individual records in the affected work file

Note: Datatel recommends that you correct the data in the Colleague database and rebuild the work file to avoid repeating the same error the next time the report is generated.

When you are maintaining the work file data, you are editing the exact data that will be submitted on the SX report, which also means that you must enter data in the formats defined by the Chancellor's Office. For example, if you want to edit a field that contains a date, the numbers displayed are in the YYMMDD format and if you change the date you must enter the new date in that format.

Form Used

Table 6-9 lists the form used in the chapter and a description of the form.

Form	Description
Stu Enrollment (SX) Maint (CSXM)	Maintain records contained in the CAST.SX.WORK file. You can also add and delete records from the work file using the CSXM form.

Table 6-9: Form for Maintaining the SX Work File

File Used

Table 6-10 lists the primary file used in this chapter and a brief description of the file.

File	Description
CAST.SX.WORK	Contains a record for each student enrolled in a course section. The work file can contain records for multiple reporting periods.

Table 6-10: File Used with Maintaining the SX Work File

Correcting the Colleague Database

You can make corrections directly in the Colleague database if necessary. The easiest type of data to change in the Colleague database is one-to-one extractions from Colleague, such as CEUs. Because this type of field is not derived from additional calculations or subroutines, it is easy to make the correction on the database itself. When this happens, it is necessary to rebuild the work file to extract the updated information from the Colleague database for it to be included in the work file. If the data is not a one-for-one extraction, it may be necessary to correct it in the work file instead.

Procedure for Correcting Data in Colleague

Follow the general steps below to make corrections to information in the Colleague database.

Step 1. Build the work file for the Student Enrollment (SX) Report.

For more information, see “Generating the Student Enrollment (SX) Report” beginning on page 6-5.

Step 2. Review any error listings.

Step 3. Determine the data that must be entered in Colleague to correct the errors.

Refer to “Student Enrollment Export (SX)” on page 6-21 for more information about the data elements for the SX report.

Step 4. Correct the data on the Colleague database.

Step 5. Rebuild the work file data.

Step 6. Repeat Step 1 through Step 5 until all the errors are corrected.

Correcting the Work File Data

Use the Stu Enrollment (SX) Maint (CSXM) form to maintain individual work file records. The CSXM form also provides the ability to add records to the work file and delete records from the work file.

Note: The values displayed on the CSXM form are exactly what will be included on the SX report. When you enter information in any of the fields you must enter the data in the formats defined by the Chancellor’s Office.

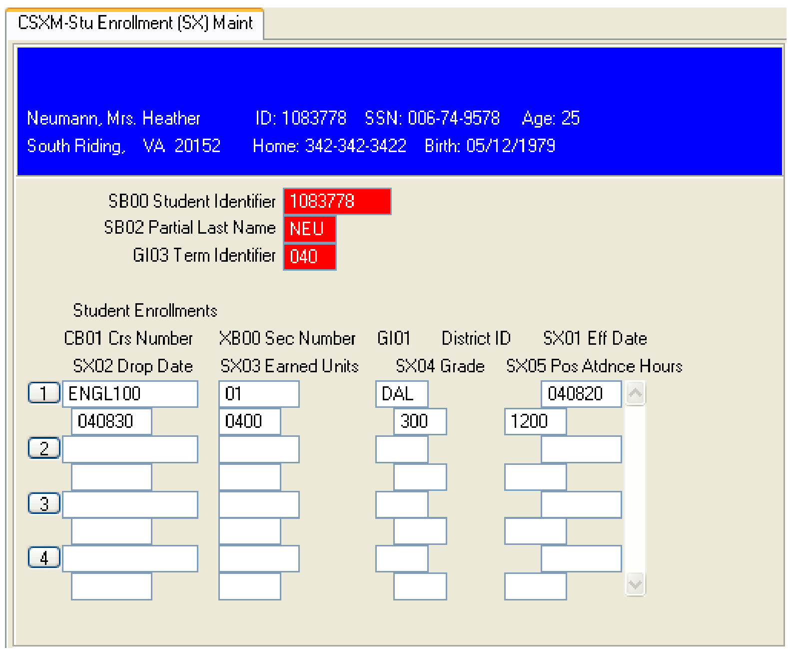


Figure 6-3: The Stu Enrollment (SX) Maintenance (CSXM) Form

Noteworthy Fields on the CSXM Form

The fields on the CSXM form are explained below. For additional information about the CSXM form, see the online help.

Note: Leaving fields blank on the CSXM form will cause the record to be rejected by the Chancellor’s Office because all the data is required on the report.

SB00 Student Identifier

The code displayed in this field is a nine digit code of either the student's social security number or a unique identifier (Colleague ID).

Term Identifier

The Term Identifier field displays the GI03 code associated with the course section. You can change the value in this field if necessary, but you can only change the GI03 code to a code that has been defined on the California MIS Report Dates (CAMD) form. A GI03 code is a three digit code with a format of YYT, where YY is the last two digits of the year and the T is the term identifier. The GI03 code must always be entered as a three digit code.

If you are adding a new record to the work file, Colleague defaults the information in this field based on the information that you enter at the Term Identifier LookUp. You can only add a new record for a GI03 code that has been defined on the CAMD form.

CB01 Crs Number

The CB01 Crs Number field displays the subject and course number of the class in which the student is enrolled. For example, if a student is enrolled in Math 100, the subject is Math and the course number is 100. If necessary you can change the information in this field. The course number field can be up to 12 characters in length and is padded with spaces when the work file data is exported and the field contains less than 12 characters.

XB00 Sec Number

The XB00 Sec Number field displays the section identifier for the course displayed in the CB01 Crs Number field. The value for this field is taken from the Sections (SECT) form. You can change the information in this field if necessary. The section number can be up to six characters in length and is padded with spaces when the work file is exported and the field contains less than six characters.

GI01 District ID

The code displayed in this field is assigned by the Chancellor's Office and represents the college code for your institutions district. The format of the district ID is a three digit code, and you must always enter it as such.

Colleague uses the first department listed for the course section on the Sections (SECT) form to determine which District ID to use. You can change the District ID if necessary.

SX01 Eff Date

The SX01 Eff Date field displays the date the student enrolled in the course section. The format of the effective date is YYMMDD. You must enter the two digit year, month, and day in the correct order without entering delimiters to separate the values.

SX02 Drop Date

The SX02 Drop Date field displays the date the student dropped or withdrew from the course section. The format for the drop date is YYMMDD. You must enter the two digit year, moth, and day in the correct order without entering delimiters to separate the values. If the student completed the course section, “888888” is reported.

SX03 Earned Units

The SX03 Earned Units field displays the number of credits the student earned by taking the course section. The format for the earned units is a four digit code with an implied decimal after the second digit. When you enter a value you must enter all four digits, including zeros if the value is not four digits long. For example, if the number of earned credits is 3.5, you would enter `0350` in the SX03 Earned Units field.

SX04 Grade

The SX04 Grade field displays the outcome a student earned for the course section. The format for the grade field is a three digit code. If the code is less than three digits, it is padded with spaces when the work file data is exported.

SX05 Pos Atdnce Hours

The SX05 Pos Atdnce Hours field displays the student’s total number of hours of attendance in the course section. The format for the positive attendance hours field is a four digit code with an implied decimal after the third digit. When you enter the number of hours you must enter all four digits, including zeros if the value is not four digits long. For example, if the number of hours was 98, you would enter 0980 in the SX05 Pos Atdnce Hours field. If the course section is a census course, “8888” is reported.

Procedure for Maintaining the SX Work File

Follow the steps below to maintain the information in the SX work file.

Step 1. Access the Stu Enrollment (SX) Maint (CSXM) form.

Step 2. Access the student that you want to maintain.

If you are adding a new record to the work file the following prompt is displayed:

```
CAST.SX.Work Record not found - Add a new record (Y/N)?
```

Enter **Y** to add the record to the work file.

Step 3. Add or change the following information about the student as necessary:

- SB00 Student Identifier.
- SB02 Partial Last Name.

Step 4. Add or change the following information about a student’s enrollments:

- CB01 Crs Section
- XB00 Sec Number
- GI01 District ID
- SX01 Eff Date
- SX02 Drop Date
- SX03 Earned Units
- SX04 Grade
- SX05 Pos Atdnce Hours

Step 5. Save your changes by finishing from the form.

Step 6. Repeat Step 2 through Step 5 for each SX record that requires maintenance.

Student Enrollment Export (SX)

In This Chapter

This chapter describes how to produce the Student Enrollment Export (SX) for California State Reporting. It lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic
- translation table (if any)
- additional information (if any)

Table 6-11 lists the topics covered in this chapter.

Table 6-11: Topic in this Chapter

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided if necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASX

The Record Code, set to **`SX`** on extract mapping, identifies the record as a student enrollment export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INSTITUTIONS file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CAMD

The Term Identifier is derived from the value entered on the CASX form. The format of this field is YYT, where:

- YY = the last two digits of the reporting year.
- T = the single-digit term-type identifier as defined by the Chancellor's Office.

The Term Identifier must be defined on the California MIS Report Dates (CAMD) form before you can create a report for the specific reporting time frame.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A 'D' (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

COURSE-DEPARTMENT-NUMBER [CB01]

Colleague Data Element: CRS.NAME
Form Mnemonic: CRSE

The Course Department Number is the course name (CRS.NAME), a combination of the subject and course number separated by a pre-defined delimiter (for example, MATH*101).

SECTION-IDENTIFIER [XB00]

Colleague Data Element: SEC.NO
Form Mnemonic: SECT

The Section Identifier is the section number used to identify the course section. This is a unique number for each course section.

ENROLLMENT-EFFECTIVE-DATE [SX01]

Colleague Data Element: STC.STATUS.DATE
Form Mnemonic: RGN

The Enrollment Effective Date is the first (most current) section status date indicating when the student enrolled in the section.

ENROLLMENT-DROP-DATE [SX02]

Colleague Data Element: STC.STATUS.DATE
Form Mnemonic: RGN

The Enrollment Drop Date is the date the student dropped or withdrew from the section. Colleague looks at the most recent section status with a special processing code of 3 or 4 (indicating dropped or withdrawn), and uses the associated date. If the course has not been dropped or withdrawn from, `888888` is reported.

ENROLLMENT-UNITS-EARNED [SX03]

Colleague Data Element: STC.CMPL.CRED
Form Mnemonic: RGN

The Enrollment Units Earned indicates the number of credits completed by the student. If the credit type for the course section matches the non-credit credit type field on the Build Stu Enroll (SX) Data (CASX) form, the course section is a non credit course, and `8888` is reported. If the minimum number of credits for the course section is set to zero, an `8888` is reported because course is considered to be a non credit course. If the course section is a credit course, the value in STC.CMPL.CRED field is reported.

ENROLLMENT-GRADE [SX04]

Colleague Data Element: STC.VERIFIED.GRADE
Form Mnemonic: FGRN / FGID / FGCL / FGRR / SACD
Translation Table: CAST.SX04, CAST.SX04.A

The Enrollment Grade indicates the grade or other outcome a student earned for a particular course section. If there is a grade, the grade is translated via the CAST.SX04 translation table, and reported for normally graded courses, Pass/Fail courses, and Incomplete courses.

If there is no grade and if:

- the section has been dropped (SX02 is not 888888), the student's status in the section is translated via the CAST.SX04.A translation table and reported.
- the Section End Date is later than Term End Date, **IP** (In Progress) is reported.
- it is an ungraded section (i.e. Sec.Grade.Scheme is blank) and if:
  - there are graded co-requisite courses or sections, **UD** (Ungraded Dependent) is reported.
  - there are no co-requisites or ungraded co-requisites, **UG** (Ungraded, Non-Credit) is reported.
- there is a grading scheme, **RD** (Report Delayed) is reported (because there should have been a grade).
- there is still no grade, an **XX** (none of the above/unknown) is reported.

ENROLLMENT-POSITIVE-ATTENDANCE-HOURS [SX05]

Colleague Data Element: SCS.ATTENDANCE.HOURS
Form Mnemonic: NSMA

The Enrollment Positive Attendance Hours indicates the student's actual hours of attendance in the particular "positive attendance" section (Section Funding Accounting Method = **P**). It is the total from SCS.ATTENDANCE.HOURS. All other sections are reported as **8888**.

Generating the Student Enrollment Export

Complete the Stu Enrollment (SX) Export (CSXE) form to generate the Student Enrollment Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file.

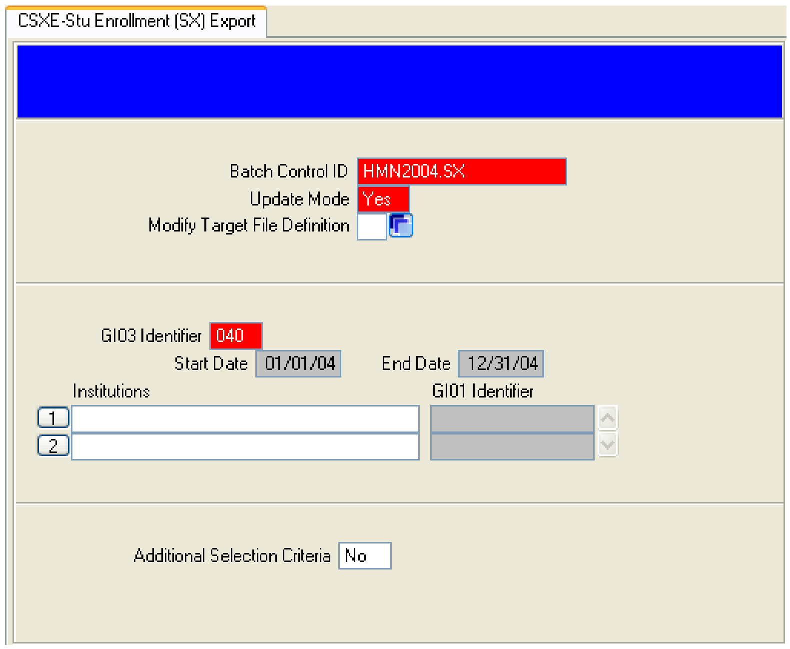


Figure 6-4: The Stu Enrollment (SX) Export (CSXE) form

Noteworthy Fields on the CSXE Form

The fields on the CSXE form are explained below. For additional information about the CSXE form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SX) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

GI03 Identifier

Use the GI03 Identifier field to populate the start and end dates for the reporting period, which are then used as part of the selection criteria to determine which CAST.SX.WORK file records to include in the export. Before you can enter a GI03 code in this field you must have set up the GI03 code on the California MIS Report Dates (CAMD) form. For more information about the CAMD form, see “Defining California MIS Report Dates” on page 2-30.

The GI03 code entered in this field is also the code that is reported in the GI03 data element on the report.

Reporting Institutions

If your institution consists of multiple campuses, use the Reporting Institutions field to export records in the CAST.SX.WORK file for students at a particular campus. If you leave this field blank, Colleague exports all the records in the work file for the reporting period. For each of the institutions entered, Colleague displays the GI01 code that will be reported in the GI01 Identifier field.

Procedure for Generating the Student Enrollment Export

Complete the following steps to generate the Student Enrollment (SX) Export.

Step 1. Access the Stu Enrollment (SX) Export (CSXE) form.

Step 2. Enter the export parameters.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter the GI03 Identifier to specify the reporting time frame of the export file.

Step 4. Enter institution IDs if you want to export records for a particular campus.

The Institutions field allow you to determine specific records to be included in the export file. If you do not enter the IDs of any institutions, all the records in the CAST.SB.WORK file are selected.

Step 5. Export the data to the target file by finishing from the CSXE form.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Using CA State Reporting: MIS Reports

7. Purging the MIS Work Files

Purging the MIS Work Files

In This Chapter

This chapter explains how to purge the work file(s) for the MIS Reports.

Note: Currently the California Work File Purge (CAFP) process only purges the XB,XF, XE, SB, and SX work files.

Table 7-1 lists the topics covered in this chapter.

Topic	Page
“Understanding Purging of MIS Work Files”	7-2
“Purging MIS Work File Data”	7-3

Table 7-1: Topics in this Chapter

Before You Begin

Before you purge the MIS work files you should build and export the information in the work files to the Chancellor’s Office.

Understanding Purging of MIS Work Files

After you build a work file you can store the data in the work file as long as necessary. When you decide to remove the work file data from Colleague you can use the California Work File Purge (CAFP) process. Table 7-2 lists the options available when purging work file data.

Purge Option	Description
Purge Per Report	This option allows you to purge all the data in specific work file regardless of what the GI03 code is.
Purge Per Report per GI03 code	This option allows you to purge data from specific work files for a specific GI03 code.
Purge Per GI03 code	This options allows you to purge data from all the work file for a specific GI03 code
Purge All	This option allows you to purge all the data from all the work files.

Table 7-2: Purging Work File Data

Purging MIS Work File Data

Use the California Work File Purge (CAFP) process to clear the work files used by the MIS reports.

Note: Currently the California Work File Purge (CAFP) process only purges the XB,XF,XE, SB, and SX work files.

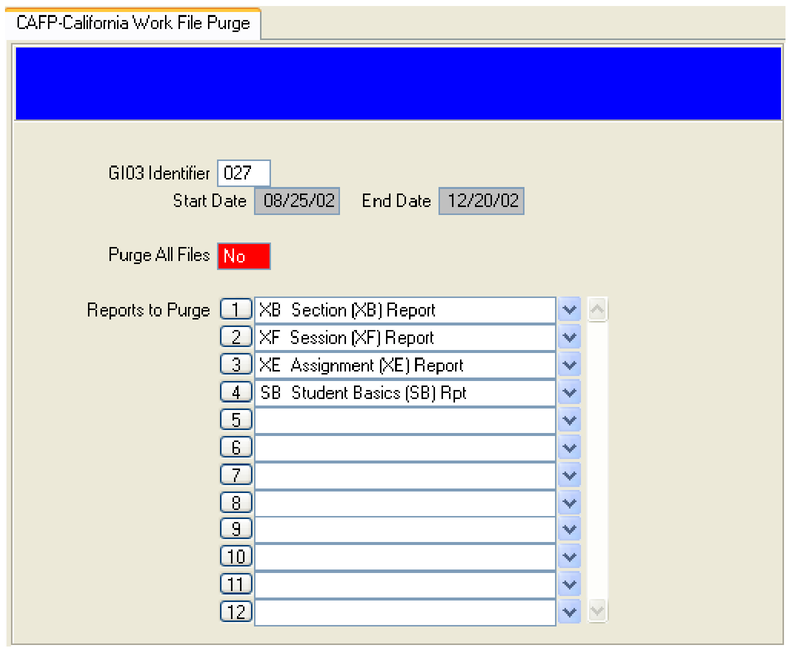


Figure 7-1: The California Work File Purge (CAFP) Form

Noteworthy Fields on the CAFP Form

The fields on the CAFP form are explained below. For additional information about the CAFP form, see the online help.

GI03 Identifier

Use the GI03 Identifier field as part to identify the reporting time frame for which you want to purge records. When a GI03 code is entered Colleague only selects records from the work files with a matching GI03 code. You also have the following options after you enter a GI03 code:

- Enter “Yes” in the Purge All Files field or leave the Reports to Purge field blank to remove records from all the work files with a matching GI03 code.
- Enter value(s) in the Reports to Purge field to remove records from specific work files with a matching GI03 code.

Purge All Files

Use the Purge All Files field to indicate that you want to remove records from all the work files. If you set the field to “Yes” you have the following options:

- Enter a GI03 code to purge records from all the work files with the matching GI03 code.
- Do not enter any other selection criteria to purge all the records on all the work files.

If you set this field to “No,” you must use the Reports to Purge field to select which work files should be purged.

Reports to Purge

Use the Reports to Purge field to indicate which work files you want to purge data from. You have the following options when you enter values in this field:

- Enter a GI03 code to purge records from the work files specified with a matching GI03 code.
- Do not enter any other selection criteria to purge all the records in the specified work files.

Note: If you enter “No” in the Reports to Purge field, you must enter value(s) in the Reports to Purge field.

Procedure for Purging MIS Work File Data

Follow the steps below to purge data from the MIS work files.

Note: Currently the California Work File Purge (CAFP) process only purges the XB,XF,XE, SB, and SX work files.

Step 1. Access the California Work File Purge (CAFP) form.

Step 2. Enter your selection criteria using the following fields to determine which records should be purged:

- **GI03 Identifier.** Limits the records selected to only those with a matching GI03 code.
- **Reports to Purge.** Limits the records selected to only those that are in the work files for the reports entered.
- **Purge All Files.** If this field is set to “Yes,” the records from all the work files will be purged.

Step 3. Run the CAFP process by finishing from the form.

Using CA State Reporting: MIS Reports

8. Generating Other Student Reports

Student Disability Export (SD)

In This Chapter

This chapter describes how to produce the Student Disability Export (SD) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data element(s)
- Colleague form mnemonic
- translation table (if any)
- additional information (if any)

Table 8-1 lists the topics covered in this chapter.

Table 8-1: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting:

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
DISABILITY		CAST.SD01
	STAFF.REMINDER.TYPES	CAST.SD02 CAST.LOC.INSTS

Table 8-2: Student Disability Code Files and Tables

Understanding Student Disability Export

The Student Disability Export is generated at the end of each term or quarter, and provides a snapshot of all students who reported disabilities and registered for at least one course during the reporting term. Students with no active disabilities are not reported.

Selection Criteria

This export selects all students with reported disabilities who registered for at least one course during the reporting term.

Form Used

Table 8-3 lists the form used in the chapter and a brief description of the form.

Form	Description
Student Disability (SD) Export (CASD)	Creates an export file containing the information for the Student Disability (SD) report.

Table 8-3: Form for Generating the Student Disability Report

Files Used

Table 8-4 lists the primary files used in this chapter and a brief description of the files.

File	Description
DISABILITY	Contains information about a student's disabilities.
CONTACT	Contains information about a staff members contact with a student about their disability.

Table 8-4: Files Used with Generating the Student Disability Report

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASD

The Record Code, set to **`SD`** on extract mapping, identifies the record as a student disability export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.*OTHER*.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INSTITUTIONS file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague uses the INSTITUTION.ID linked to the department associated with the selected STUDENT.COURSE.SEC record. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CASD
Translation Table: CAST.GI03

The Term Identifier is derived from the term entered on CASD form. The format of this field is YYT, where:

- YY = the last two digits of the reporting year in which the term occurs as taken from the reporting year field of the TERMS record.
- T= the single-digit term-type identifier as derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A D (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-PRIMARY-DISABILITY [SD01]

Colleague Data Element: DISABILITIES, DISABILITY.START.DATE and DISABILITY.END.DATE (in PERSON)
Form Mnemonic: EMER
Translation Table: CAST.SD01

Student Primary Disability is the student's first active disability code (if any). A student can have an unlimited number of disabilities, but only the first active disability displayed on the Emergency Information (EMER) form is reported here. An active disability is defined as having:

- blank start and end dates (permanent disability)
- a valid start date and a blank end date (permanent disability)
- a date range within the reporting term (temporary disability)

The student's primary disability is derived by translating the disability code from the PERSON record with a disability type of "PRI" on the Emergency Information (EMER) form, using the CAST.SD01 translation table. The CAST.SD01 translation table converts the disability code into the required state code. If the primary disability type does not exist, Colleague selects the first disability listed on the EMER form.

STUDENT-PRIMARY-DISABILITY-SERVICE-CONTACTS [SD02]

Colleague Data Element: CONTACT.ACTUAL.DATE, CONTACT.TYPE
Form Mnemonic: CON
Translation Table: CAST.SD02, CAST.LOC.INSTS

The Student Primary Disability Service Contact indicates the number of service contacts that pertain to the student's primary disability received by the student during the reporting term. This value is incremented as follows:

- If a student receives a service contact with a contact type that translates to the Student Primary Disability code, 1 contact is added.

The student primary disability service contact is derived by translating the contact type from the CONTACT record using the CAST.SD02 translation table. This table converts the contact type into the required state code.

STUDENT-SECONDARY-DISABILITY [SD03]

Colleague Data Element: DISABILITIES, DISABILITY.START.DATE and DISABILITY.END.DATE (in PERSON)
Form Mnemonic: EMER
Translation Table: CAST.SD01

Student Secondary Disability is the student's second active disability code (if any). A student can have an unlimited number of disabilities, but only the second active disability displayed on the Emergency Information (EMER) form is reported. An active disability is defined as having:

- blank start and end dates (permanent disability)
- a valid start date and a blank end date (permanent disability)
- a date range within the reporting term (temporary disability)

The student's primary disability is derived by translating the disability code from the PERSON record with a disability type of "SEC" on the Emergency Information (EMER) form, using the CAST.SD01 translation table. The CAST.SD01 translation table converts the disability code into the required state code. If the secondary disability type does not exist, Colleague selects the second disability listed on the EMER form.

STUDENT-SECONDARY-DISABILITY-SERVICE-CONTACTS [SD04]

Colleague Data Element: CONTACT.ACTUAL.DATE, CONTACT.TYPE
Form Mnemonic: CON
Translation Table: CAST.SD02

The Student Second Disability Service Contact indicates the number of service contacts that pertain to the student's secondary disability received by the student during the reporting term. This value is incremented as follows:

- If a student receives a service contact with a contact type that translates to the Student Secondary Disability code, 1 contact is added.

The student secondary disability service contact is derived by translating the contact type from the CONTACT record using the CAST.SD02 translation table. This table converts the contact type into the required state code.

STUDENT-DISABILITY-DEPT-REHAB [SD05]

Colleague Data Element: STTR.REHAB.DEPT.CLIENT.FLAG
Form Mnemonic: ASTR

Student Disability Department Rehabilitation indicates whether or not a student is a client of the Department of Rehabilitation of the State of California, and is reported as follows:

- For students that are not clients of the Department of Rehabilitation, a `0` is reported.
- For students that *are* clients of the Department of Rehabilitation, a `1` is reported.

Generating the Student Disability Exports

Use the Student Disability (SD) Export (CASD) form to generate the Student Disability Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

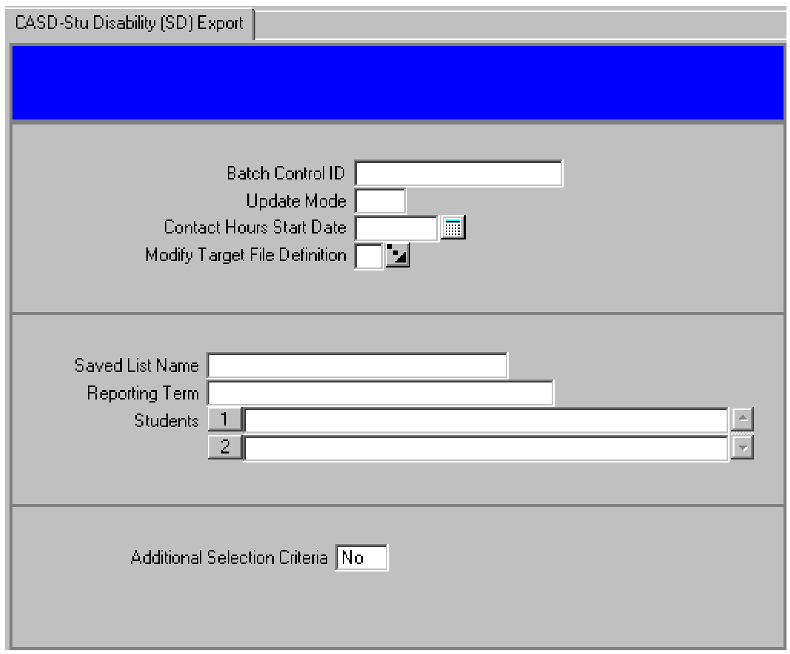


Figure 8-1: The Student Disability (SD) Export (CASD) Form

The fields on the CASD form are explained below. For additional information about the CASD form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SD) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Contact Hours Start Date

Entering a date in this field allows you to override the start term date when contact hours are needed that are prior to the reporting term. If this field is left blank then the start term date will be used.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the STUDENT.COURSE.SEC file to limit the students included in the extract.

Reporting Term

The reporting term further identifies which students are included in the extract. Students registered in any course sections active as of the end date of the term entered, and that meet any other selection criteria entered, are included in the extract.

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Procedure for Generating the Student Disability Export

Complete the following steps to generate the Student Disability (SD) Export.

Step 1. Access the Student Disability (SD) Export (CASD) form.

Step 2. Enter the export parameters.

Use Update Mode **N** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to `Y`.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CASD form.

Student EOPS Export (SE)

In This Chapter

This chapter describes how to produce the Student EOPS Export (SE) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic
- translation table (if any)
- additional information (if any)

Table 8-5 lists the topics covered in this chapter.

Table 8-5: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting:

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
	EOPS.ELIGIBILITY.FACTORS	
	EOPS.TERM.END.STATUSES	
	EOPS.CARE.STATUSES	
	MARITAL.STATUSES	CAST.SE07
WITHDRAW.REASONS		CAST.SE10

Table 8-6: Student EOPS Code Files and Tables

Understanding Student EOPS Export

The Student EOPS Export is generated at the end of each term or quarter, and provides a snapshot of student information for all students participating in the EOPS program during the reporting term.

Selection Criteria

This export selects all students with any EOPS activity during the reporting term.

Note: Refer to "The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields." on page 8-24 for information on further limiting records included in the Student EOPS Export.

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided if necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASE

The Record Code, set to **SE** on extract mapping, identifies the record as a student EOPS export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CASE
Translation Table: CAST.GI03

The Term Identifier is derived from the term entered on CASE form. The format of this field is YYT, where:

- YY= the last two digits of the reporting year in which the term occurs as taken from the reporting year field of the TERMS record.
- T= the single-digit term-type identifier as derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A `D` (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-EOPS-ELIGIBILITY-FACTOR [SE01]

Colleague Data Element: STEOPS.ELIGIBILITY
Form Mnemonic: EOPS

The Student EOPS Eligibility Factor indicates the factor by which the student is qualified to participate in the EOPS program.

STUDENT-EOPS-TERM-OF-ACEPTANCE [SE02]

Colleague Data Element: STEOPS.ACCEPT.TERM
Form Mnemonic: EOPS
Translation Table: CAST.GI03

The Student EOPS Term of Acceptance indicates the term and reporting year in which the student was accepted into the EOPS program. This data can be maintained on the Student EOPS Information (EOPS) form. The format of this field is YYT, where:

- YY= the last two digits of the reporting year in which the term occurs, and is taken from the reporting year field of the TERMS record.
- T= the single-digit term-type identifier is derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

STUDENT-END-OF-TERM-EOPS-STATUS [SE03]

Colleague Data Element: STEOPS.TERM.END.STATUS
Form Mnemonic: EOPS

The Student End of Term EOPS Status indicates if the student, at the end of the reporting term, continues to be eligible to participate in the EOPS program for the following term.

STUDENT-EOPS-UNITS-PLANNED [SE04]

Colleague Data Element: STEOPS.PLANNED.CRED
Form Mnemonic: EOPS

The Student EOPS Units Planned indicates the total number of credits or Continuing Education Units (CEUs) in which the student plans to enroll during the reporting term.

STUDENT-EOPS-CARE-STATUS [SE05]

Colleague Data Element: STEOPS.CARE.STATUS
Form Mnemonic: EOPS

The Student EOPS CARE Status indicates the status of the student in the Cooperative Agencies Resources for Education (CARE) program.

STUDENT-CARE-TERM-OF-ACCEPTANCE [SE06]

Colleague Data Element: STEOPS.CARE.ACCEPT.TERM
Form Mnemonic: EOPS
Translation Table: CAST.GI03

The Student CARE Term of Acceptance indicates the term and reporting year in which the student was accepted into the CARE program. This data can be maintained on the Student EOPS Information (EOPS) form. The format of this field is YYT, where:

- YY= the last two digits of the reporting year in which the term occurs, and is taken from the reporting year field of the TERMS record.
- T= the single-digit term-type identifier is derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

STUDENT-CARE-MARITAL-STATUS [SE07]

Colleague Data Element: MARITAL.STATUS (from PERSON)
Form Mnemonic: EOPS
Translation Table: CAST.SE07

The Student CARE Marital Status indicates whether the student is single, married, divorced, etc. for the purposes of the CARE program.

STUDENT-CARE-NUMBER-OF-DEPENDENTS [SE08]

Colleague Data Element: STEOPS.CARE.NO.DEPENDENTS
Form Mnemonic: EOPS

The Student CARE Number of Dependents indicates the number of dependents that the student is claiming for the purposes of the CARE program. This field is used for California MIS only, and does not affect the number of dependents claimed by the student for Financial Aid or Human Resources purposes.

STUDENT-CARE-AFDC-DURATION [SE09]

Colleague Data Element: STEOPS.CARE.AFDC.NO.YEARS
Form Mnemonic: EOPS

The Student CARE AFDC Duration indicates, at the time of enrollment for the reporting term, the number of years that the student has received AFDC. This field is used for California MIS only, and does not affect the information claimed by the student for Financial Aid purposes.

STUDENT-EOPS-CARE-WITHDRAWAL-REASON [SE10]

Colleague Data Element: STEOPS.WITHDRAW.REASON
Form Mnemonic: EOPS
Translation Table: CAST.SE10

Student EOPS CARE Withdrawal indicates the reason the student is withdrawing from the EOPS and/or CARE program. This data can be maintained on the Student EOPS Information (EOPS) form. The withdrawal reason is determined as follows:

- If a value has been entered on EOPS, the value is translated by the CAST.SE10 translation table and reported
- If a value cannot be translated or has not been entered on EOPS, a Y is reported.

Maintaining Students EOPS Data

Use the Student EOPS Information (EOPS) form to maintain term-related EOPS information for a student. Refer to online help for more information on each individual field.

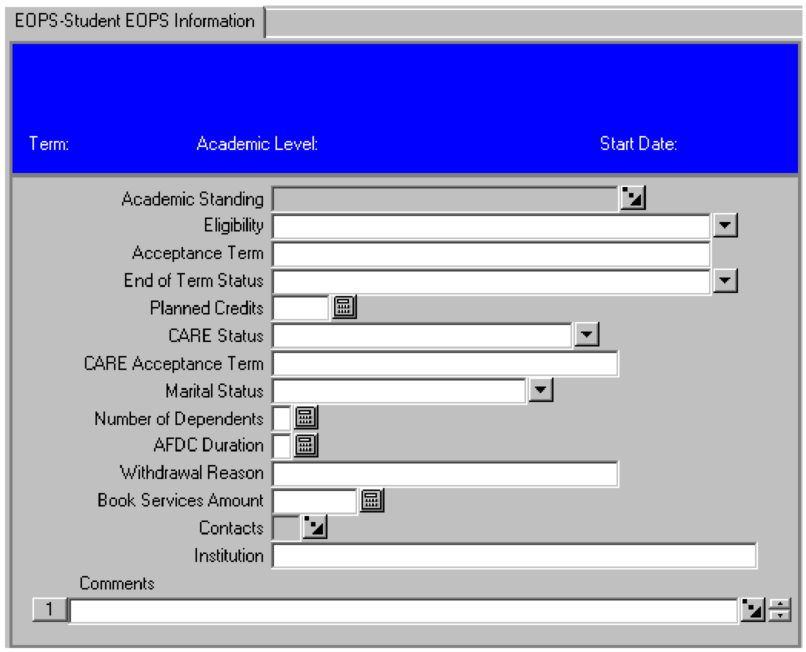


Figure 8-2: The Student EOPS Information (EOPS) Form

Note: If you access this form for a term for which the student has no EOPS information, Colleague attempts to carry forward the EOPS information from the most recent term for which the student was registered.

Generating the Student EOPS Export

Use the Student EOPS (SE) Export (CASE) form to generate the Student EOPS Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

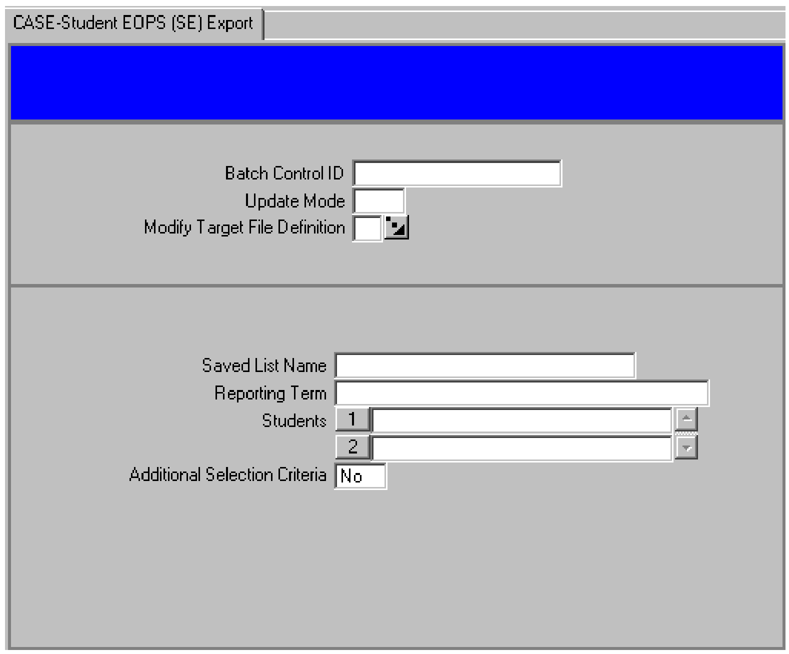


Figure 8-3: The Student EOPS (SE) Export (CASE) Form

The fields on the CASE form are explained below. For additional information about the CASE form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SE) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the STUDENT.EOPS file to limit the students included in the extract.

Reporting Term

The reporting term further identifies which students are included in the extract. Any students registered for at least one course, or had any EOPS activity during the reporting term entered, and that meet any other selection criteria entered, are included in the extract.

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Procedure for Generating the Student EOPS Export

Complete the following steps to generate the Student EOPS (SE) Export:

Step 1. Access the Student EOPS (SE) Export (CASE) form.

Step 2. Enter the export parameters.

Use Update Mode **N** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to **Y**.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CASE form.

Student Financial Aid Export (SF)

In This Chapter

This chapter describes how to produce the Student Financial Aid (SF) Export for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS. Table 8-7 lists the topics covered in this chapter.

Table 8-7: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting.

Code Files	Validation Code Tables	Translation Tables
	FA.DECISIONS	CAST.SF01
	SAP.STATUSES	CAST.SF01B
		CAST.SF03
	FA.MARITAL.STATUSES	CAST.SF07
		CAST.SF.GI03
		CAST.SF21
		CAST.SF21.A
		CAST.SF.TRAILING.AWARDS
		CAST.SF.TRAILING.WAIVERS

Table 8-8: Student Financial Aid Code Files and Tables

There are several things to consider when you are defining the following translation tables:

- CAST.SF21
- CAST.SF21.A
- CAST.SF.TRAILING.AWARDS
- CAST.SF.TRAILING.WAIVERS

All institutions must define the CAST.SF21 and CAST.SF21.A translation tables. The CAST.SF21 translation table must include all the award codes for the awards that you want to report to the Chancellor's Office. The CAST.SF21.A translation table must include all the AR invoice codes for the fee waivers you want to report to the Chancellor's Office.

If your institution does not grant trailing awards or fee waivers, you must leave the CAST.SF.TRAILING.AWARDS and the CAST.SF.TRAILING.WAIVERS translation tables blank.

For institutions that grant awards during a trailing award period, you must define the CAST.SF.TRAILING.AWARDS translation table with the award codes for each of the awards that are trailing in addition to the CAST.SF21 translation table.

Note: The award codes that you enter on the CAST.SF.TRAILING.AWARDS translation table must also be defined on the CAST.SF21 translation table.

For institutions that grant fee waivers during a trailing award period, you must define the CAST.SF.TRAILING.WAIVERS translation table with the AR invoice codes for each of the fee waivers that are trailing in addition to the CAST.SF21.A translation table.

Note: The AR invoice codes that you enter on the CAST.SF.TRAILING.WAIVERS translation table must also be defined on the CAST.SF21.A translation table.

The CAST.SF21 and CAST.SF21.A translation tables create a super set of awards and fee waivers that are included on the SF report. Any awards and fee waivers not included in the translation tables are not reported to the Chancellor's Office. The CAST.SF.TRAILING.AWARDS and CAST.TRAILING.WAIVERS translation tables determine the subset of awards that are given during a trailing academic term.

Figure 8-4 is an example of how to define your translation tables if your institution grants trailing awards. If your institution does not grant trailing awards, you do not define the CAST.SF.TRAILING.AWARDS translation table as shown in the figure below.

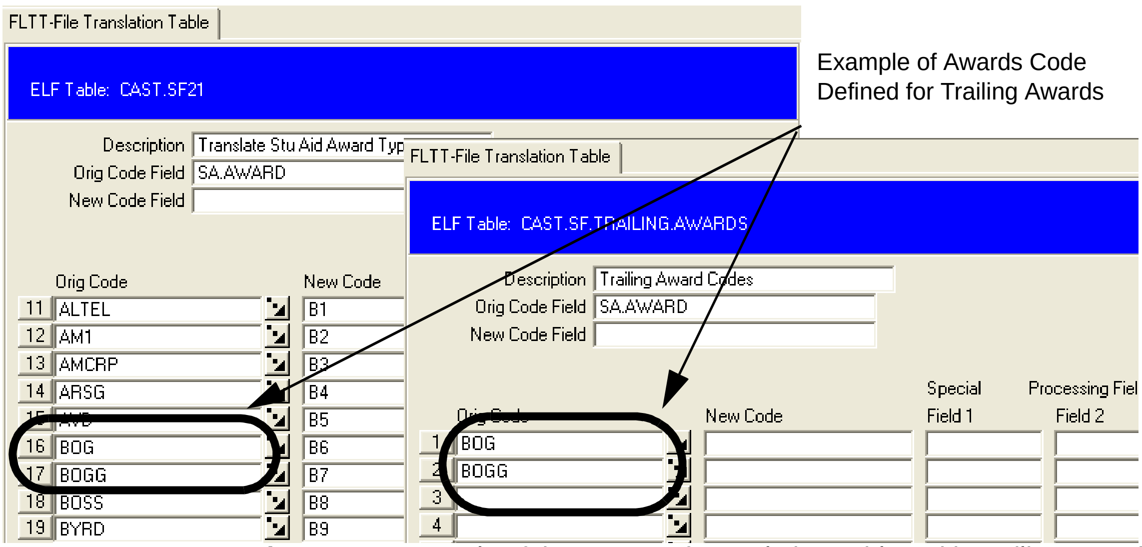


Figure 8-4: Example of the Set Up of Translation Tables with Trailing Awards

Understanding Student Financial Aid Export

The Student Financial Aid (SF) Export is generated each October for the previous year. For example, if the current year is 2004, the information included on the SF report is taken from the 2003 financial aid file suite. The report includes the following records for each student:

- A single SF record containing financial aid demographic data about the student.
- One or more FA records containing information about an award the student received for a specific term. Each award the student received is reported on a separate FA record.

Each of the records has a specific record layout that contains several data elements in each. During the creation of the SF records, Colleague first tries to report data from the FAFSA/ISIR form. If the FAFSA/ISIR data is blank, Colleague uses data from the BOG application. For more information about each of the data elements, see “California MIS Data Elements” on page 8-30.

Forms Used

Table 8-9 lists the forms used in the chapter and a brief description of the forms.

Form	Description
Stu Financial (SF) Export (CASF)	Creates all the records for the Student Financial Aid (SF) report and exports the SF recrods to a flat file.
Stu Financial Aid (FA) Export (CAFA)	Exports the FA records for the SF report to a flat file.

Table 8-9: Form for Generating the Student Financial Aid Export

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

Financial Aid Applicant (SF) Data Elements

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASF

The Record Code, set to “SF” on extract mapping, identifies the record as a student financial aid export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INSTITUTIONS file. Multiple-institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single-institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the start date from the earliest term and the end date of the latest term from the list of terms defined for the reporting year on the California MIS SF Parameters (CSFP) form to determine a student’s active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form.
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form.
3. DEFAULT.HOST.CORP.ID from the ID and LookUp Parameters (PID2) form.

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CASF

The Term Identifier is taken from the Reporting GI03 entered on the Stu Financial Aid (SF) Export (CASF) form. This is a concatenated field consisting of the last two digits of the reporting year and a `0` (zero) as the third character.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than eight digits in length, it is truncated to eight digits.
- A `D` (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-AID-APPLICANT-STATUS [SF01]

Colleague Data Element: derived
Form Mnemonic: n/a
Translation Table: CAST.SF01, CAST.SF01.B

The Student Aid Applicant Status indicates whether a financial aid applicant received financial aid or not, and the reason if they did not. Colleague evaluates the conditions described below, and reports the value of the first true condition:

`1` = A student has at least one occurrence of an accepted student aid award with an amount greater than 0 (zero).

`2` = A student has no academic records (no ACAD.CRED records) on file for the institution during the reporting period.

3 = A student's financial aid file is incomplete.

4 = A student's amount of need is 0.

5 = The FA decision code indicates that no funds are available.

6 = Colleague evaluates the Satisfactory Academic Progress Results (SAPR) record. If the SAP type is a type that should be processed and is within the reporting period, the process reports the SAP status. If there is a code, and the code translates to a **6** via the CAST.SF01.B translation table, a **6** is reported.

7 =Any other FA decision codes that are reported to the state as "Other."

X = If the student fails all other criteria.

STUDENT-AID-BUDGET-CATEGORY [SF03]

Colleague Data Element: CS.HOUSING.CODE
Form Mnemonic: n/a
Translation Table: CAST.SF03

The Student Aid Budget Category data element indicates the standard budget category upon which the student's financial aid eligibility was based for the reported award year. The Student Aid Budget Category is determined as follows:

- If the student's total budget aid amount (SF04) is 99999, an **X** (unknown budget) is reported.
- If the student's housing code is 1, a **C** (on-campus budget) is reported.
- If the student's housing code is a 2, an **O** (off-campus budget) is reported.
- If the student's housing code is a 3, an **H** (at home with parent[s] budget) is reported.
- If the student's housing code is anything else, an **X** (unknown budget) is reported.

STUDENT-AID-TOTAL-BUDGET-AMT [SF04]

Colleague Data Element: CS.BUDGET.ADJ, CS.STD.TOTAL.EXPENSES
Form Mnemonic: INB

The Student Aid Total Budget Amount data element indicates the final campus-based student budget, including any adjustments made during the year. The Student Aid Total Budget Amount is derived from the Colleague data elements CS.BUDGET.ADJ and CS.STD.TOTAL.EXPENSES, which are maintained on the Individual Need and Budgets (INB) form. If the Student Aid Total Budget Amount is determined to be blank (null), **99999** is reported.

STUDENT-AID-DEPENDENCY-STATUS [SF05]

Colleague Data Element: CS.DEPENDENCY.STATUS, CI.CPS.OVER.DEPEND
Form Mnemonic: DS03/CPSO and BOGW

The Student Aid Dependency Status indicates the student's need for aid status as follows:

- If the CPS Override Dependency Status equals I, an **O** is reported.
- If the CPS Override Dependency Status is blank (null), an **X** is reported.
- If the CPS Override Dependency Status equals anything other than I or blank, the calculated value for Dependency Status is reported.
- If any of the first five BOGW Dependency Questions is Y, an **I** is reported.
- If all of the BOGW Dependency Questions are N, an **I** is reported.
- If all of the first five BOGW Dependency Questions are N, and either of the remaining questions is Y, a **D** is reported.

STUDENT-AID-HOUSEHOLD-SIZE [SF06]

Colleague Data Element: CI.S.NBR.FAMILY, CI.P.NBR.FAMILY, BG.P.NBR.FAMILY, or BG.S.NBR.FAMILY
Form Mnemonic: PI03, DS03, BOGW

The Student Aid Household Size indicates the number of family members in the household and is determined as follows:

- If SF05 is I or O, the value in CI.S.NBR.FAMILY is reported.
- If CI.S.NBR.FAMILY is null and SF05 is I or O, the value in BG.S.NBR.FAMILY is reported.
- If SF05 is D, the value in CI.P.NBR.FAMILY is reported.
- If CI.P.NBR.FAMILY is null and SF05 is D, the value in BG.P.NBR.FAMILY is reported.
- If SF05 is anything else, **99** is reported.

STUDENT-AID-FAMILY-STATUS [SF07]

Colleague Data Element: CI.OTHER.DEPEND and CI.S.DEPEND.CHILDREN
Form Mnemonic: SD03/DS03
Translation Table: CAST.SF07

The Student Aid Family Status is a two-character field which consists of the student's marital status as the first character. The second character is reported as follows:

- If a student has legal dependents, a **D** is reported.
- If a student has no legal dependents, an **N** is reported.
- If student legal dependents is blank (null), an **X** is reported.

STUDENT-AID-INCOME-AGI-PARENT [SF08]

Colleague Data Element: C.P.AGI, BG.P.AGI
Form Mnemonic: PI03, BOGW

The Student Aid Income AGI Parent is the parents' adjusted gross income and is determined as follows:

- If the student tax return file status is 1 or 2, then the SF09 data element is set as follows:
  - If CI.P.AGI is a negative number, a `0` is reported.
  - If CI.P.AGI is greater than 0, the value in CI.P.AGI is reported.
  - If CI.P.AGI does not contain a value, the value in BG.P.AGI is reported if one exists.
- If the student tax return file status is 3, then `000000` is reported.
- If the student tax return file status is blank, but a value exists in CI.P.AGI, the value is reported.
- If all the above items are null, `999999` is reported.

STUDENT-AID-INCOME-AGI-STUDENT [SF09]

Colleague Data Element: CI.S.AGI, BG.S.AGI
Form Mnemonic: SI03, BOGW

The Student Aid Income AGI Student is the students' adjusted gross income and is determined as follows:

- If the student tax return file status is 1 or 2, then the SF09 data element is set as follows:
  - If CI.S.AGI is a negative number, a `0` is reported.
  - If CI.S.AGI is greater than 0, the value in CI.S.AGI is reported.
  - If CI.S.AGI does not contain a value, the value in BG.S.AGI is reported if one exists.
- If the student tax return file status is 3, then `000000` is reported.
- If the student tax return file status is blank, but a value exists in CI.S.AGI, the value is reported.
- If all the above items are null, `999999` is reported.

STUDENT-AID-UNTAX-INC-PARENT [SF10]

Colleague Data Element: derived
Form Mnemonic: PI03

The Student Aid Untax Inc Parent indicates the income of the student's parent(s) as documented by the Financial Aid Office. This includes all untaxed income (including earned portion) for non-tax filers, and any other income not included in the parent(s) adjusted gross income (AGI), and is calculated as follows:

- If the student tax return file status is equal to 3, Colleague reports the total of the following items:
  - CI.P.FATHER.INC
  - CI.P.MOTHER.INC
  - CI.P.INCOME.CREDIT
  - CI.P.TOTAL.AMT.WKSHTA
  - CI.P.TOTAL.AMT.WKSHTB
- If the student tax return file status is not equal to 3, Colleague reports the total of the following items:
  - CI.P.INCOME.CREDIT
  - CI.P.TOTAL.AMT.WKSHTA
  - CI.P.TOTAL.AMT.WKSHTB

- If the untaxed income cannot be determined from the above items, BG.P.OTH.INC is reported.
- If the value from the above items is negative, `000000` is reported.
- If all of the above items are `0` (zero), `999999` is reported.

STUDENT-AID-UNTAX-INC-STUDENT [SF11]

Colleague Data Element: derived
Form Mnemonic: SI03

The Student Aid Untax Inc Student indicates the untaxed income of the student (and spouse) as documented by the Financial Aid Office. This includes all untaxed income (including earned portion) for non-tax filers, and any other income not included in the student's (and spouse's) adjusted gross income (AGI). It is calculated as follows:

- If the student tax return file status is equal to 3, Colleague reports the total of the following items:
  - CI.S.STUD.INC
  - CI.S.SPOUSE.INC
  - CI.S.INCOME.CREDIT
  - CI.S.TOTAL.AMT.WKSHTA
  - CI.S.TOTAL.AMT.WKSHTB
- If the student tax return file status is not equal to 3, Colleague reports the total of the following items:
  - CI.S.INCOME.CREDIT
  - CI.S.TOTAL.AMT.WKSHTA
  - CI.S.TOTAL.AMT.WKSHTB
- If the untaxed income cannot be determined from the above items, BG.S.OTH.INC is reported.
- If the value from the above items is negative, `000000` is reported.
- If all of the above items are `0` (zero), `999999` is reported.

STUDENT-AID-EXPECTED-FAMILY-CONTRIBUTION [SF17]

Colleague Data Element: CS.FC, CS.INST.ADJ,CS.PGI
Form Mnemonic: INB

The Student Aid Expected Family Contribution is the amount, if any, that the student's family is expected to contribute. It is the total of the federal expected family contribution plus any family contribution adjustments.

- If the student has a Pell award, the value in CS.PGI is reported.
- If the student doesn't have Pell awards and CS.FC contains a value or CS.INST.ADJ contains a value, the sum of CS.FC and CS.INST.ADJ is reported.
- If the above items are null, `99999` is reported.

Financial Aid (FA) Data Elements

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASF

The Record Code, set to FA on extract mapping, identifies the record as a student financial aid export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INSTITUTIONS file. Multiple-institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single-institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the start date from the earliest term and the end date of the latest term from the list of terms defined for the reporting year on the California MIS SF Parameters (CSFP) form to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form.
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form.
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form.

TERM.IDENTIFIER (term of submission) [GI03]

Colleague Data Element: derived
Form Mnemonic: CASF
Translation Table: CAST.GI03

The Term Identifier is taken from the Reporting GI03 entered on the Stu Financial Aid (SF) Export (CASF) form. This is a concatenated field consisting of the last two digits of the reporting year and a `0` (zero) as the 3rd character.

TERM.IDENTIFIER (term of award given) [GI03]

Colleague Data Element: derived
Form Mnemonic: AWPD, CSFP
Translation Table: CAST.SF.GI03

The Term Identifier is a concatenated field consisting of the last two digits of the reporting year and a `0` (zero) as the 3rd character, which is determined as follows:

1. Colleague selects the award period from the award.
2. Colleague then searches for the earliest academic term associated to the award period in the list of academic terms on the California MIS SF Parameters (CSFP) form for the reporting year.
3. If Colleague finds a match, the GI03 code associated with the academic term is reported.
4. If a match is not found, the award is not reported.

Note: An FA year should not appear multiple times in the FA Year field on the Award Period Definition (AWPD) form. Having multiple FA years will not translate correctly.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than eight digits in length, it is truncated to eight digits.
- A `D` (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-AID-AWARD-TYPE [SF21]

Colleague Data Element: SA.AWARD, INVI.AR.CODE
Form Mnemonic: AIDE, MCRG
Translation Table: CAST.SF21, CAST.SF21.A

The Student Aid Award Type indicates the type of financial aid received by the student. Only the amounts transmitted for accepted awards are reported; all other amounts are ignored. Colleague uses the CAST.SF21 translation table to translate the award type into the state code.

If your institution tracks BOG awards using fee waivers in Accounts Receivable, the invoice AR code is translated to the state code using the CAST.SF21.A translation table as follows:

- To determine if an invoice falls within the reporting period, Colleague uses the term associated to the invoice and searches for that term in the list of terms from the California MIS SF Parameters (CSFP) form. If Colleague finds the term on the invoice in the list on the CSFP form, the invoice is reported.
- For each invoice item, Colleague translates the AR code using the CAST.SF21.A translation table. If the AR code translates to a state code, it is added to the list of awards reported and the amount is reflected in the Student Aid Amount Received [SF22] data element.

Note: When you define your CAST.SF21 and CAST.SF21.A translation tables, verify that the award code is not defined on both translation tables.

STUDENT-AID-AMOUNT-RECEIVED [SF22]

Colleague Data Element: SA.CWS.EARNINGS, TA.TERM.XMIT.AMT, TA.TERM.LOAN.FEES, TA.TERM.AMOUNT
Form Mnemonic: n/a (derived)

The Student Aid Amount Received indicates the type of financial aid received by the student and is determined as follows:

- For transmittable awards (destinations 1, 6, and 7), sum of the amount transmitted and the loan fees are reported.
- For student employment awards (destinations 3 and 5), only the earnings (shown in the CWS-Earn field on the Award Detail Entry [AIDE] form) are reported.

Note: Colleague does not store an amount per term. In order to report the employment awards by term, the amount is divided by the number of terms in which the student had financial aid activity.

- For non-transmittable, non-employment awards (destination 2 and 4), only the accepted award amount (shown in the award amount field on the Award Detail Entry [AIDE] form that has an action status code of A) is reported.

Note: For information about destination codes, refer to the online help for the Destination field on the Award Definition (AWD) form.

- For waivers the following is reported:
  - For invoice items with a unique award code and GI03 code, the sum of the credit amounts and the charge amount is reported.
  - For invoice items with the same award code and GI03 code, the sums of the credit amounts and the charge amounts are totaled and then reported.

The following records are created in the SF work file, but are not exported to the CAST.FA file because the Chancellor's Office rejects the records:

- For any awards where the SF21 data element does not equal BOG and the SF22 data element is equal to zero. The Chancellor's Office does accept BOG awards with an amount equal to zero.
- For any awards where the SF21 data element equals BOG and the SF22 data element is null. The Chancellor's Office does not accept BOG awards or waivers with a null amount. These awards or waivers were not actually given to the student and therefore should not be reported.

Generating the Student Financial Aid Export

Generating the Student Financial Aid Export requires that you use both of the following forms:

1. Stu Financial Aid (SF) Export (CASF)
2. Stu Financial Aid (FA) Export (CAFA)

You must run the exports in the proper sequence to successfully report all the records. The CASF process builds SF and FA records, and exports the SF records. The CAFA process exports the FA records. If you change data needed for an FA record, you must re-run the CASF process to build the records again with the corrected data.

Processing of the Student Financial Aid (SF) Export

Colleague does the following to determine which students and awards to include in the SF export:

- Colleague uses the following information to define the reporting period:
  - The GI03 code entered on the Stu Financial Aid (SF) Export (CASF) form in the Reporting GI03 field.
  - The GI03 codes associated to the Reporting GI03 code on the California MIS SF Parameters (CSFP) form.
  - The academic terms on the CSFP form associated with each of the GI03 codes.
- Colleague uses the start date of the earliest term and the end date of the latest term on the CSFP form to define the reporting period and determine the student’s applicant status, academic program, and SAP status.
- For academic terms where the Trailing Flag field on the CASP form does not equal “T,” Colleague selects the students to be included on the SF export as follows:
  - If a saved list is entered on the CASF form, all the students in the saved list, regardless of the other selection criteria on the CASF form, are processed.
  - If a saved list is not entered, students with the current year in the FA.CS.YEARS or FA.SA.YEARS fields from the FIN.AID file suite are selected.

Note: The current year is defined as the year prior to the reporting GI03 code entered, and is indicated in the Financial Aid File Suite Year field on the CASF form.

- Colleague then selects all awards with an award action category equal to “A” or any fee waivers during the academic terms, that are on the CAST.SF21 or CAST.SF21.A translation tables.

Note: For non-trailing award periods and if you have the Trailing field on the CSFP form set to “N,” Colleague also checks the CAST.SF.TRAILING.AWARDS and CAST.SF.TRAILING.WAIVERS translation tables to prevent trailing awards from being reported incorrectly. If you have the Trailing field set to “A,” all the awards given in the academic term are selected.

- Each award or fee waiver is then processed and the appropriate SF and FA records are created.
- For academic terms where the Trailing Flag field on the CASP form equals “T,” Colleague selects the students to be included on the SF export as follows:
  - Students contained in the saved list, or students with the previous year in the FA.CS.YEARS or FA.SA.YEARS fields from the FIN.AID file suite indicated on the CASF form are selected.
  - Colleague then selects all awards on the CAST.SF21 and CAST.SF.TRAILING.AWARDS translation tables given during the academic terms with an award action category equal to “A.”
  - Colleague then selects fee waivers given during the academic terms selected that are on the CAST.SF21.A and CAST.SF.TRAILING.WAIVERS translation tables.
- Each award or fee waiver is processed and the appropriate SF and FA records are created.

Note: The information in the SF record for students who do not have FA records in the current year is taken from the file suite for the previous year. For example, if your reporting GI03 code is 040, the current year is 2003 and the previous year is 2002.

For more information about the data that is reported in the SF and FA records, see “California MIS Data Elements” on page 8-30.

Stu Financial Aid (SF) Export

Use the Stu Financial (SF) Export (CASF) form to generate the SF and FA records for the Student Financial Aid Export, and to export the SF records. The FA records are exported using the Stu Financial Aid (FA) Export (CAFA) form. For more information about the CAFA form, see “Stu Financial Aid (FA) Export” on page 8-46.

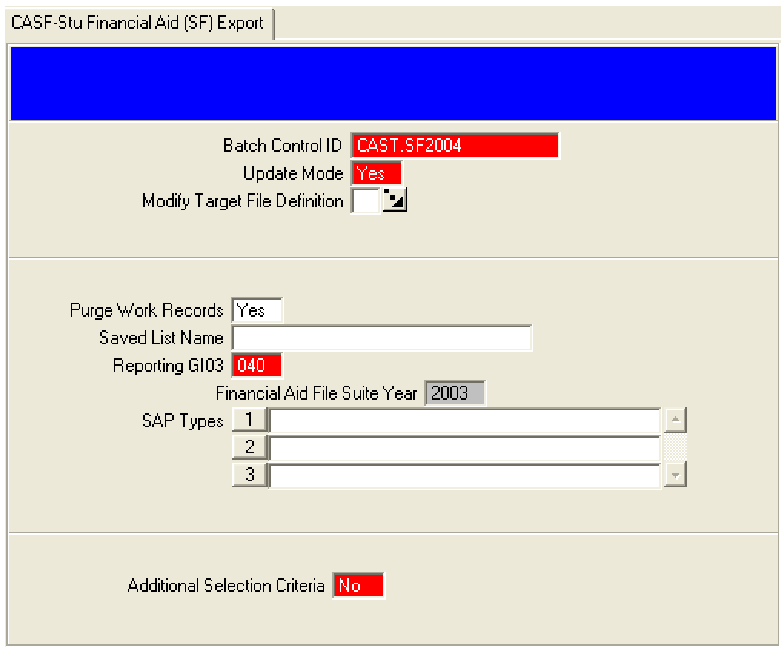


Figure 8-5: The Stu Financial Aid (SF) Export (CASF) Form

Noteworthy Fields on the CASF Form

The fields on the CASF form are explained below.

Batch Control ID

Use the Batch Control ID field to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode field determines if the intermediate files (CAST.SF and CAST.FA) are populated with the extracted Colleague data. If you enter **N**, you can run the export and review the reports as many times as needed before populating the intermediate file. If you enter **Y**, the intermediate file is populated and any reports are produced. If errors are detected, the records are still exported to the intermediate files. To fix the errors, you must correct the data in Colleague and re-run the export.

Modify Target File Definition

You can use the default target file definition for this process, or you can detail to the Electronic Transfer File (ELFT) form to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Purge Work Records

If you do not clear all the SF and FA records, Colleague updates any records currently stored in the work file with identical data and appends new records to the file. If you do clear all the SF and FA records, Colleague creates new records for every student and award processed.

Saved List Name

You can enter a saved list of IDs from the FIN.AID file to limit the students included in the extract. Only the students in the saved list are included on the export regardless of the other selection criteria on the Student Financial (SF) Export (CASF) form. If Colleague cannot find awards in the current or previous reporting years for the student, Colleague creates an SF record with the Student-Aid-Applicant-Status (SF07) data element set to “X,” and does not create FA records for the student.

If a student was given an award during a trailing award period, but did not receive financial aid for the current year, data from the previous year is reported.

Reporting GI03

Enter the GI03 code that represents the annual reporting year. For example, if you are reporting financial aid awarded in 2005/2006, you would enter 060. The reporting year further identifies which students are included in the extract. Any students receiving financial aid during the reporting year, and that meet any other selection criteria entered, are included in the extract.

The reporting year is also used to identify the FA file suite used in the processing of awards.

Note: The GI03 code that you enter must first be defined on the California MIS SF Parameters (CSFP) form.

SAP Types

You can identify specific Satisfactory Academic Progress (SAP) types to be processed. If you leave this field blank, Colleague selects all the SAP types.

Stu Financial Aid (FA) Export

Use the Stu Financial Aid (FA) Export (CAFA) form to export the FA records that are a part of the Student Financial Aid (SF) report. When running the CAFA export you do not have the option of additional selection criteria because each of the FA records were created in conjunction with a student's SF record and therefore must be exported to California MIS.

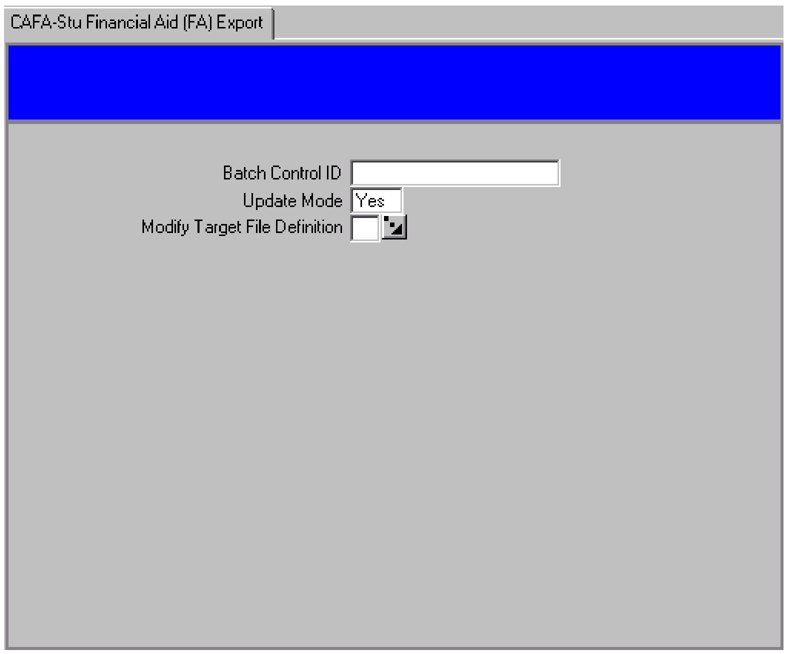


Figure 8-6: The Stu Financial Aid (FA) Export (CAFA) Form

Noteworthy Fields on the CAFA Form

The fields on the CAFA form are explained below.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode field determines if the intermediate file (CAST.FA) is exported. If you enter **N**, you can run the export and review any error reports as many times as needed. If you enter **Y** and any errors are detected, correct any errors, re-run the Stu Financial Aid (SF) Export (CASF) export in order to update the data files with the correct information, and then re-run the CAFA export. Records with reported errors are exported to the intermediate files.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Procedure for Generating the Student Financial Aid Export

Complete the following steps to generate the Student Financial Aid (SF) Export.

Step 1. Access the Student Financial Aid (SF) Export (CASF) form.

Step 2. Enter the export parameters.

You can run the export in non-update mode as many times as needed to review and correct any errors using the SF award report and the error report, prior to actually exporting the data. If you run the process in update mode, the data is exported to the target file, and the SF award report and error report are produced.

Step 3. Enter the Reporting GI03 code.

Step 4. To limit the students selected, enter a saved list.

All the students in the saved list will be included on the SF report regardless of whether they received financial aid for the reporting year.

If you do not enter any selection criteria, the process selects all the students who received financial aid during the reporting year.

Step 5. Run the process by finishing from the form.

Step 6. Access the Stu Financial Aid (FA) Export (CAFA) form.

Step 7. Enter the export parameters.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data. If you run the process in update mode, the data is exported to the target file and an error report is produced.

Step 8. Run the export by finishing from the form.

If any of the FA records contain errors, you correct the data in Colleague and then re-run the CASF and CAFA exports.

Student Program Export (SP)

In This Chapter

This chapter describes how to produce the Student Program Export (SP) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

Table 8-10 lists the topics covered in this chapter.

Table 8-10: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting:

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
LOCAL.GOVT.CODES		
OTHER.DEGREES		CAST.SP02
OTHER.CCDS		CAST.SP02.A

Table 8-11: Student Program Code Files and Tables

Understanding Student Program Export

The Student Program Export is generated annually each October 1st, and provides a snapshot of student program award information for all students receiving degrees or certificates during the prior academic year.

Selection Criteria

This export selects all student academic records which have a Degree or Certificate Awarded Date during the prior fiscal year.

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided if necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASP

The Record Code, set to **`SP`** on extract mapping, identifies the record as a student program export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CASP
Translation Table: CAST.GI03

The Term Identifier is derived from the academic year entered on CASP form. This is a concatenated field consisting of the following:

- The last two digits of the reporting year entered on the CASP form are reported as the first 2 characters
- `0` (zero) is reported as the 3rd character.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A **`D`** (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-PROGRAM-IDENTIFIER [SP01]

Colleague Data Element: ACPG.LOCAL.GOVT.CODES
Form Mnemonic: PROG

The Student Program Identifier is the Local ID associated with the student's academic program, which defaults from the student's major. The first Local ID is reported. If Local ID is blank, `999999` is reported.

ALERT! When entering a student program identifier with a decimal point, there must not be more than four digits in front of the decimal point and no more than two digits after the decimal point. If you are entering a number without a decimal point the ID must contain six digits, otherwise errors will occur on Student Program (SP) (CASP) export. Datatel recommends that you do not use decimals when inputting data to avoid errors in reporting.

STUDENT-PROGRAM-AWARD [SP02]

Colleague Data Element: ACAD.DEGREE or ACAD.CCD
Form Mnemonic: AACR
Translation Table: CAST.SP02, CAST.SP02.A

The Student Program Award is the type of degree or certificate awarded to the student for this academic program. Colleague reports the degree type, if a degree was awarded. If the student did not receive a degree, the first CCD listed is reported. The student program award is derived by translating the degree type or CCD from the ACAD.CRE record using the CAST.SP02 translation table. This table converts the degree type or CCD into the required state code.

STUDENT-PROGRAM-AWARD-DATE [SP03]

Colleague Data Element: ACAD.DEGREE.DATE or ACAD.CCD.DATE
Form Mnemonic: AACR

The Student Program Award Date is the date on which the student received the degree or CCD.

RECORD-NUMBER-IDENTIFIER [GI92]

Colleague Data Element: derived
Form Mnemonic: n/a

The Record Number identifies the number of the student's academic program record. When academic program records are created for a student, they are numbered sequentially from 0 through 9.

STUDENT-PROGRAM-CO-UNIQUE-CODE [SP04]

Colleague Data Element: ACPG.LOCAL.GOVT.CODES
Form Mnemonic: PROG

The Student Program Co-Unique Code indicates the program associated with the student's awarded academic credential, and is derived from the second value of the Local IDs field (ACPG.LOCAL.GOVT.CODES). The first value of Local IDs is used for the SP01 data element.

For non-credit programs, be sure to code the second value of the Local IDs field as YYYYY. If you do not assign a second value to the program, Colleague reports this field as 99999 and a warning message is produced with the student's ID and academic program.

If SP02 STUDENT-PROGRAM-AWARD is equal to "E" or "O" and the second value of ACPG.LOCAL.GOVT.CODES is blank, then 99999 is reported.

Generating the Student Program Export

Complete the Student Program (SP) Export (CASP) form to generate the Student Program Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

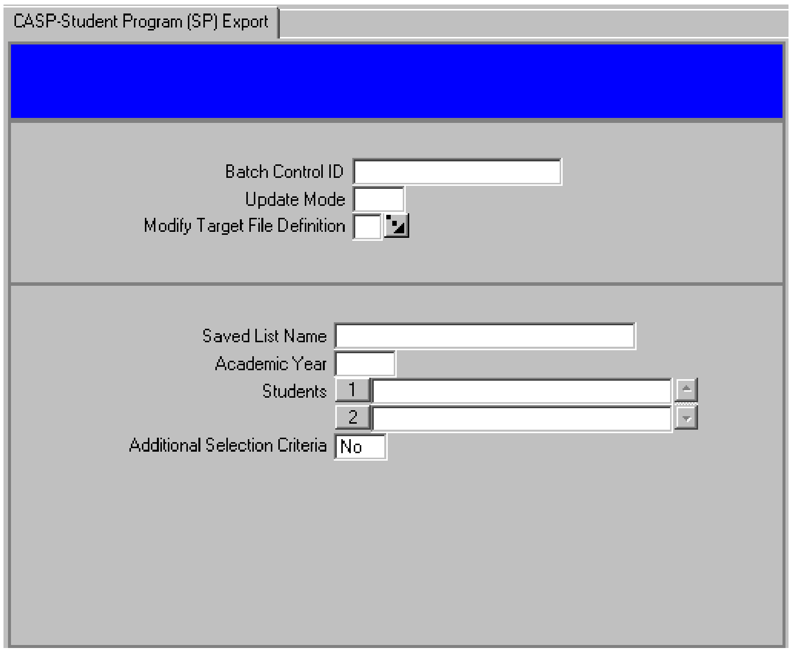


Figure 8-7: The Student Program (SP) Export (CASP) Form

The fields on the CASP form are explained below. For additional information about the CASP form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SP) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the ACAD.CREDENTIALS file to limit the students included in the extract.

Academic Year

Enter the calendar year in which the academic year ends. For example, if the academic year extends from July 1, 1997 through June 30, 1998, enter 1998.

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Procedure for Generating the Student Program Export

Complete the following steps to generate the Student Program (SP) Export.

Step 1. Access the Student Program (SP) Export (CASP) form.

Step 2. Enter the export parameters.

Use Update Mode **N** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to **Y**.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CASP form.

Student Matriculation Export (SM)

In This Chapter

This chapter describes how to produce the Student Matriculation Export (SM) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

Table 8-12 lists the topics covered in this chapter.

Table 8-12: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting:

Code Files	Validation Code Tables	Translation Tables
		CAST.LOC.INSTS
TERMS		CAST.GI03
SESSIONS		
	EDUCATION.GOALS	SB.EDUC.GOALS
	EDUCATION.GOALS	SB.EDUC.GOALS.TIMES
	STUDENT.SPECIAL.SERVICES	SM.SPECIAL.SERVICE.NEEDS
	SPECIAL.SERVICES.NEED.CODES	SM.SPECIAL.SERV.NEEDS.POS
MAJ.LOCAL.GOVT.CODES		
	COURSE.TYPES	SM.COURSE.TYPES
ACTIVITY		SM.ACTIVITY
CONTACT		SM.CONTACT
	NON.COURSE.CATEGORIES	SM.TEST
	STAFF.REMINDER.TYPES	
		SB.DEGREE

Table 8-13: Student Matriculation Code Files and Tables

Once the various codes and tables have been set up, define your matriculation parameters using the Matriculation Parameters (MATP) form. Refer to “Setting Up Parameters” beginning on page 2-25 for information on how to define matriculation parameters. For information on how to update matriculation data for an individual student, refer to “Maintaining Student Matriculation Data” on page 8-73.

Understanding Student Matriculation Export

The Student Matriculation Export is generated at the end of each term or quarter, and provides a snapshot of matriculation information for all students who meet at least one of following requirements:

- enrolled in at least one class as of the first or second census date
- attended at least one meeting of a positive attendance class
- enrolled in at least one class that resulted in a notation on the student's official record

Selection Criteria

This export selects student course section records for each student who is enrolled in a least one class at a college during the reporting term for which the associated student academic credit does not have a current status of "deleted."

Forms Used

Table 8-14 lists the forms used in the chapter and a brief description of the forms.

Form	Description
Matriculation Information (MATI)	Use to enter and maintain a student's matriculation services.
Student Matriculation (SM) Export (CAMA)	Creates the export file with the information for the Student Matriculation (SM) report.

Table 8-14: Forms for Generating the Student Matriculation Report

File Used

Table 8-15 lists the primary file used in this chapter and a brief description of the file.

File	Description
STUDENT.MATRIC	Contains information about the services a student receives after admission.

Table 8-15: File Used with Generating the Student Matriculation Report

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CAMA

The Record Code, set to **SM** on extract mapping, identifies the record as a student matriculation export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below
Translation Table: CAST.LOC.INSTS

The District College Identifier is the other ID from the INSTITUTIONS file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CAMA
Translation Table: CAST.GI03

The Term Identifier is translated from the term entered on the CAMA form. The format of this field is YYT, where:

- YY = the last two digits of the reporting year in which the term occurs as taken from the reporting year field of the TERMS record.
- T = the single-digit term-type identifier as derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A **D** (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-MATRICULATION-GOALS [SM01]

Colleague Data Element: PST.EDUC.GOALS
Form Mnemonic: MATI
Translation Table: SB.EDUC.GOALS, SB.EDUC.GOAL.TIMES

Student Matriculation Goals indicate the student's goals while enrolled in the the college, and as they change throughout the student's academic career. Student matriculaton goals are derived by translating the education goals code from the PERSON record using one translation table, SB.EDUC.GOALS.

This table converts the education goals code into the required state code. A second translation table, SB.EDUC.GOAL.TIMES, converts the same education goals code (for the first code listed) into the state time required code. The value of student matriculation goals field is determined as follows:

- If the student is exempt from matriculation orientation, assessment, and counseling; or if the student is enrolled in noncredit courses only, **YYYY** is reported.
- If the student is not exempt:
- The first three occurrences of education goals are reported to populate the first three characters of this field. These are stored in the order of importance and are converted via the SB.EDUC.GOALS translation table.
- The time required to reach the first educational goal is reported as the last character of this field. This is derived by converting the first educational goal via the SB.EDUC.TIMES translation table.
- If this field cannot be derived, XXXX is reported.

STUDENT-MATRICULATION-MAJOR [SM02]

Colleague Data Element: MAJ.LOCAL.GOVT.CODES or ACPG.LOCAL.GOVT.CODES
Form Mnemonic: MATI

The Student Matriculation Major identifies the student's major area of emphasis while enrolled in the reporting college as reported by the student during the reporting term. Colleague selects the course sections for the reporting term by student, and then by college. For each student in each college, Colleague performs the following steps:

1. Examines all of the academic programs for the student, extracting those that are:
   - active for the entered term and
   - have an academic level that is equal to the Matriculation Academic Level entered on the Matriculation Parameters (MATP) form.
2. If the student has more than one academic program, repeats the above step, checking for academic programs that were active as of the end of the reporting period.
3. If the student still has more than one academic program, Colleague uses the academic program with the start date closest to, but before the end of, the reporting period.
4. After determining the academic program to be used:
   - Looks at the majors associated to the academic program.
   - If there are academic program majors, and they are not undecided (as defined on the CAMA form), reports the first local government code associated with the first major in the list. Undecided majors are not exported.

- If there are no academic program majors, or if the major code is undecided (as defined on the CAMA form), looks at the student program additional majors. Undecided majors are not exported.
- If there are student program additional majors, reports the first local government code associated with the first active major in the list.
- If there are no student program additional majors, or if there are no active student program additional majors, reports the academic program local government codes.
- If the academic program local government codes field is blank, reports `000000`.

STUDENT-MATRICULATION-SPECIAL-SERVICES-NEEDS [SM03]

Colleague Data Element: STU.SPECIAL.SERVICES, STU.SPECIAL.SERV.NEED.CODES, and STU.SPECIAL.SERV.NEED.DATES
Form Mnemonic: MATI
Translation Table: SM.SPECIAL.SERV.NEEDS.POS & SM.SPECIAL.SERVICE.NEEDS

Student Matriculation Special Services Needs indicate specialized support services needs identified by the student and/or staff through the matriculation process at the college during the reporting term.

When an application is created for an applicant, and the applicant becomes a student, any special services listed on the application are copied to the STUDENT record.

Note: When this happens, the student special service need codes and the student special service need dates fields are left blank. The extract process considers the student special services code active as of the beginning of the first term in which the student is enrolled. This avoids having to update the Matriculation Information (MATI) form for each newly admitted student.

If an application is created for an existing Student using the SHAP form, any special services listed on the application are *not* added to the existing student special services codes. For these students, you must enter the start date on the MATI form.

Two translation tables are used to derive special services needs information. The first translation table, SM.SPECIAL.SERV.NEEDS.POS, translates the special services code into its respective position number (for example, 1 - 14). The second translation table, SM.SPECIAL.SERVICE.NEEDS, translates the special services need code into the required state code as follows:

- If the student is exempt, **Y** is reported in all positions.
- If there are no Special Service Codes for a position, **0** (zero) is reported for that position.
- If there is a Special Service Code for a position, but no associated Need Code, the default need code (as defined on the CAMA form) is reported for that position.
- There may be more than one Special Service Code for each position. The highest value is reported based upon the order **0,X,1,2,3,4**.

STUDENT-MATRIC-ORIENTATION-EXEMPT-STATUS [SM04]

Colleague Data Element: Derived, but may be overridden. Override values will be stored in STMC.OVR.ORIENT.STATUS
Form Mnemonic: MATI / EVPL / CON
Translation Table: SM.ACTIVITY, SM.CONTACT, SB.DEGREE

The Student Matriculation Orientation Exempt Status indicates whether the student was directed to or exempted from matriculation orientation services at the college.

The orient status override field (STMC.OVR.ORIENT.STATUS) entered for a student on the Matriculation Information (MATI) form allows you to override the system-calculated status for matriculation orientation services. The override status is only used if it is different from the system-calculated status. Colleague determines and reports the first two exemption statuses as follows:

- If the student is registered for noncredit courses only, **YYYY** is reported.
- If the orient status override field is not blank, the override value is reported.
- If the overall matriculation status is M, an A is reported.
- If the student has been invited to an activity with an activity type that translates to **OR** (Orientation) via the SM.ACTIVITY translation table, an **A** is reported.
- If the student has a contact record with a contact type that translates to **OR** (Orientation) via the SM.CONTACT translation table, an **A** is reported.
- If the student has an academic degree, or a graduation type that translates via the SB.DEGREE translation table to an Associates or Bachelor’s degree, a **D** is reported.
- If any orientation exemption rules entered on the Matriculation Parameters (MATP) form evaluate to true, an **O** is reported.

The last two positions of the matriculation orientation exempt status field are always reported as **YY**.

STUDENT- MATRIC-ASSESSMENT-EXEMPT-STATUS [SM05]

Colleague Data Element: Derived, but may be overridden. Override values will be stored in STMC.OVR.TESTING.STATUS
Form Mnemonic: MATI / EVPL / CON
Translation Table: SM.ACTIVITY, SM.CONTACT, SB.DEGREE

The Student Matriculation Assessment Exempt Status indicates whether the student was directed to, or exempted from, matriculation assessment services at the college.

The assess status override field (STMC.OVR.TESTING.STATUS) entered for a student on the Matriculation Information (MATI) form allows you to override the system-calculated status for matriculation testing services. The override status is only used if it is different from the system-calculated status. Colleague determines and reports the first two exemption statuses as follows:

- If the student is registered for noncredit courses only, **YYYY** is reported.
- If the assess status override field is not blank, the override value is reported.
- If the overall matriculation status is M, an **A** is reported.
- If the student has been invited to an activity with an activity type that translates to **AE** (Assessment) via the SM.ACTIVITY translation table, an **A** is reported.
- If the student has a contact record with a contact type that translates to **AE** (Assessment) via the SM.CONTACT translation table, an **A** is reported.
- If the student has an academic degree, or a graduation type that translates via the SB.DEGREE translation table to an Associates or Bachelor’s degree, a **D** is reported.
- If any testing exemption rules entered on the Matriculation Parameters (MATP) form evaluate to true, an **O** is reported.

The last two positions of the matriculation orientation exempt status field are always reported as **YY**.

STUDENT-MATRIC-COUNSELING/ADVISEMENT-EXEMPT-STATUS [SM06]

Colleague Data Element: Derived, but may be overridden. Override values will be stored in STMC.OVR.ADVISE.STATUS
Form Mnemonic: MATI / EVPL / CON
Translation Table: SM.ACTIVITY, SM.CONTACT, SB.DEGREE

The Student Matriculation Counseling/Advisement Exempt Status indicates whether the student was directed to, or exempted from, matriculation counseling/advisement services at the college.

The advise status override field (STMC.OVR.ADVISE.STATUS) entered for a student on the Matriculation Information (MATI) form allows you to override the system-calculated status for matriculation counseling/advisement services. The override status is only used if it is different from the system-calculated status. Colleague determines and reports the first two exemption statuses as follows:

- If the student is registered for noncredit courses only, **`YYYY`** is reported.
- If the advise status override field is not blank, the override value is reported.
- If overall matriculation status is M, an A is reported.
- If the student has been invited to an activity with an activity type that translates to a **`CE`** (Counseling/Advisement) via the SM.ACTIVITY translation table, an **`A`** is reported.
- If the student has a contact record with a contact type that translates to a **`CE`** (Counseling/Advisement) via the SM.CONTACT translation table, an **`A`** is reported.
- If the student has an academic degree, or a graduation type that translates via the SB.DEGREE translation table to an Associates or Bachelor's degree, a **`D`** is reported.
- If any advisement exemption rules entered on the Matriculation Parameters (MATP) form evaluate to true, an **`O`** is reported.

The last two positions of the matriculation orientation exempt status field are always reported as **`YY`**.

STUDENT-MATRIC-ORIENTATION-SERVICES [SM07]

Colleague Data Element: STMC.REFUSE.ORIENT.FLAG or derived
Form Mnemonic: MATI / EVPL / ATCO / CON
Translation Table: SM.TEST, SM.ACTIVITY, SM.CONTACT, SM.COURSE.TYPES

Student Matriculation Orientation Services indicates whether the student *ever* received orientation services as a part of the matriculation process at the college. This field is *not* reporting period driven, cannot be overridden, and is determined as follows:

- If the student is registered for noncredit courses only, a **N** is reported.
- If the orientation refused flag is **Y**, an **R** is reported.
- If the student has a noncourse record with a category that translates to **P** (Placement) via the SM.TEST translation table, an **A** is reported, as placement is considered part of orientation (see SM08).
- If the student has a noncourse record with a category that translates to a **O** (Orientation) via the SM.TEST translation table, an **A** is reported.
- If the student has been invited to an activity with an activity type that translates to **OR** (Orientation) via the SM.ACTIVITY translation table, and the attended flag is **Y**, an **A** is reported.
- If the student has a contact record with a contact type that translates to **OR** (Orientation) via the SM.CONTACT translation table, an **A** is reported.
- If the student has not been invited to an activity with an activity type that translates to an **OR**, or if the student has been invited to an activity with an activity type that translates to an **OR** and the attended flag is **N**, an **N** is reported.
- If the student has ever taken a course with a course type that translates to **OR** (Orientation) via the SM.COURSE.TYPES translation table, an **A** is reported.

STUDENT-MATRIC-ASSESSMENT-SERVICES-PLACEMENT [SM08]

Colleague Data Element: STMC.REFUSE.ASSES.FLAG or derived
Form Mnemonic: MATI / NCRS / EVPL / ATCO / CON

Translation Table: SM.TEST, SM.ACTIVITY, SM.CONTACT

Student Matriculation Assessment Services Placement indicates whether the student *ever* received assessment services as a part of the matriculation process at the college. This field is *not* reporting period driven, cannot be overridden, and is determined as follows:

- If the student is registered for noncredit courses only, **`N`** is reported.
- If the assessment refused flag is **`Y`**, an **`R`** is reported.
- If the student has a noncourse record with a category that translates to **`P`** (Placement) via the SM.TEST translation table, an **`A`** is reported.
- If the student has been invited to an activity with an activity type that translates to **`AE`** (Assessment Services) via the SM.ACTIVITY translation table, and the attended flag is **`Y`**, an **`H`** is reported.
- If the student has a contact record with a contact type that translates to **`AE`** (Assessment Services) via the SM.CONTACT translation table, an **`H`** is reported.
- If the student has received both placement testing and other assessment services, a **`B`** is reported.
- If the student has received neither service, an **`N`** is reported.

STUDENT-MATRIC-ASSESSMENT-SERVICES-OTHER [SM09]

Colleague Data Element: STMC.CATEGORY
Form Mnemonic: NCRS
Translation Table: SM.TEST

Student Matriculation Assessment Services Other indicate whether the student *ever* received other supportive assessment services as a part of the matriculation process at the college. This field is *not* reporting period driven, cannot be overridden, and is determined as follows:

- If the student is registered for noncredit courses only, **`000`** is reported.
- If the student has a noncourse record with a category that translates to **`A`** (Aptitude) via the SM.TEST translation table, a **`1`** is reported in the first position of this field; otherwise, a **`0`** (zero) is reported.
- If the student has a noncourse record with a category that translates to **`S`** (Study/Learning Skills) via the SM.TEST translation table, a **`1`** is reported in the second position of this field; otherwise, a **`0`** (zero) is reported.
- If the student has a noncourse record with a category that translates to **`C`** (Career Planning/Interest) via the SM.TEST translation table, a **`1`** is reported in the third position of this field; otherwise, a **`0`** (zero) is reported.

STUDENT-MATRIC-STUDY-SKILLS-EVALUATION-SERVS [SM10]

This item has been converted to filler (deleted).

STUDENT-MATRICULATION-SPECIAL-SERVICES-REFERRAL [SM11]

This item has been converted to filler (deleted).

STUDENT-MATRIC-COUNSELING/ADVISEMENT-SERVICES [SM12]

Colleague Data Element: STMC.REFUSE.ADVISE.FLAG or derived
Form Mnemonic: MATI / EVPL / ATCO / CON
Translation Table: SM.ACTIVITY, SM.CONTACT

Student Matriculation Counseling/Advisement Services indicates whether the student received counseling/advisement services as part of the matriculation process of the college during the reporting term. This field cannot be overridden, and is determined as follows:

- If the student is registered for noncredit courses only, **N** is reported.
- If the student refused counseling/advisement services during the reporting term (Advise Refused flag is **Y** for the term), an **R** is reported.
- If the student has been invited to an activity with an activity type that translates to **CE** (Counseling/Advisement Services) via the SM.ACTIVITY translation table, and the attended flag is **Y**, and the activity date is within the reporting period, an **A** is reported.
- If the student has a contact record with a contact type that translates to **CE** (Counseling/Advisement Services) via the SM.CONTACT translation table, and the contact date is within the reporting period, an **A** is reported.
- If the student has been invited to an activity with an activity type that translates to **EP** (Education Plan) via the SM.ACTIVITY translation table, and the attended flag is **Y**, and the activity date is within the reporting period, a **P** is reported.
- If the student has a contact record with a contact type that translates to **EP** (Education Plan) via the SM.CONTACT translation table, and the contact date is within the reporting period, a **P** is reported.
- If the student has received both of the above services within the reporting term, a **B** is reported.
- If the student has received neither of the above services within the reporting term, an **N** is reported.
- If the student has ever taken a course with a course type that translates to **OR** (Orientation) via the SM.COURSE.TYPES translation table, an **A** is reported.

STUDENT-MATRIC-ACADEMIC-FOLLOW-UP-SERVICES [SM13]

Colleague Data Element: derived
Form Mnemonic: EVPL / ATCO / CON
Translation Table: SM.ACTIVITY, SM.CONTACT

Student Matriculation Academic Follow Up Services indicates whether the student received academic follow-up services as part of the college's matriculation process. The reporting period is defined by the term start and end dates. This field is determined as follows:

- If the student is registered for noncredit courses only, a **Y** is reported.
- If the student has been invited to an activity with an activity type that translates to F (Academic Follow-up) via the SM.ACTIVITY translation table, and the attended flag is Y, and the activity date is within the reporting period, an AF is reported.
- If the student has a contact record with a contact type that translates to **AF** (Academic Follow-up) via the SM.CONTACT translation table, and the contact date is within the reporting period, an **A** is reported.
- If neither of the above are true, an **N** is reported (no services provided).

Maintaining Student Matriculation Data

Use the Matriculation Information (MATI) form to maintain term-related matriculation data for a student. Refer to online help for more information on each individual field.

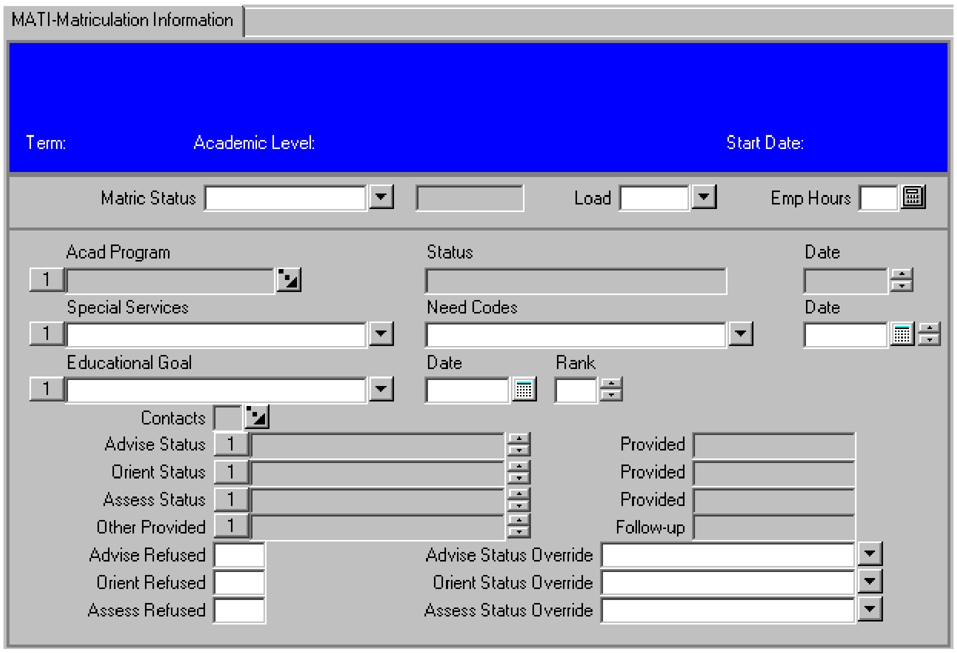


Figure 8-8: The Matriculation Information (MATI) Form

Generating the Student Matriculation Export

Use the Student Matriculation (SM) Export (CAMA) form to generate the Student Matriculation Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

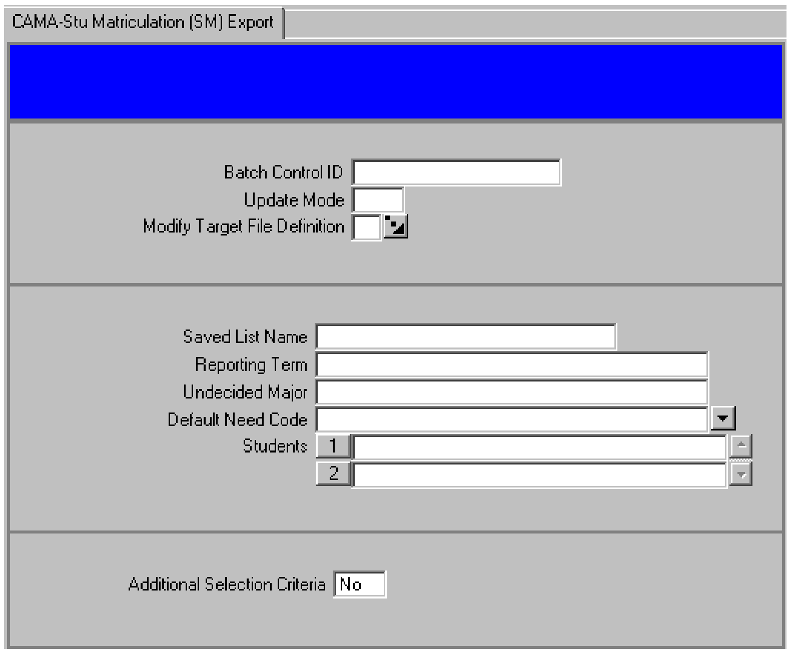


Figure 8-9: The Student Matriculation (SM) Export (CAMA) Form

The fields on the CAMA form are explained below. For additional information about the CAMA form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SM) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the STUDENT.COURSE.SECTIONS file to limit the students included in the extract.

Reporting Term

The term further identifies which students are included in the extract.

Undecided Major. Enter the major code used to indicate “Undecided Major.” Undecided majors do not have a local government code associated with them. If they are not identified here, they are not included in the export.

Default Need Code

If there is a Special Services Code for a student that is not associated with a Need Code, enter a default Need Code to be reported for the student.

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Procedure for Generating the Student Matriculation Export

Complete the following steps to generate the Student Matriculation (SM) Export.

Step 1. Access the Student Matriculation (SM) Export (CAMA) form.

Step 2. Enter the export parameters.

Use Update Mode **`N`** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to `Y`.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CAMA form.

Student Assessment Export (SA)

In This Chapter

This chapter describes how to produce the Student Assessment Export (SA) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

Table 8-16 lists the topics covered in this chapter.

Table 8-16: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting:

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
NON. COURSES		CAST.SA01
		CAST.SA01.A
	NON.COURSE.FACTORS	CAST.SA03
	NON.COURSE.CATEGORIES	CAST.SA04

Table 8-17: Student Assessment Code Files and Tables

Understanding Student Assessment Export

The Student Assessment Export is generated at the end of each academic year, and provides a snapshot of information for all student assessment tests administered during the prior academic year.

Selection Criteria

This export selects all accepted student noncourse records for assessments delivered during the reporting year.

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASA

The Record Code, set to **SA** on extract mapping, identifies the record as a student assessment export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CASA
Translation Table: CAST.GI03

The Term Identifier is derived from the reporting year entered on CASA form. This is a concatenated field consisting of the following:

- The last two digits of the reporting year entered on the CASA form are reported as the first 2 characters
- 0 (zero) is reported as the 3rd character.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A **D** (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-ASSESSMENT-INSTRUMENT [SA01]

Colleague Data Element: STNC.NON.COURSES or STNC.TEST.FORM.NAME
Form Mnemonic: TEST
Translation Table: CAST.SA01, CAST.SA01.A

The Student Assessment Instrument identifies the specific assessment used to evaluate the student's skills, such as ACT ASSET, CPT, DTLS, etc. Refer to the California MIS manual for a complete list of valid values for this field.

When setting up your codes for this in Colleague, you should assign a 1-character code (if possible) for each test. The code for this data element is obtained as follows:

- If a value exists on Test Scores (TEST), value translated and reported.
- If a value cannot be translated, Colleague produces an error
- If a value is not found, Colleague produces and error

STUDENT-ASSESSMENT-FORM [SA02]

This item has been converted to filler (deleted).

STUDENT-ASSESSMENT-ACCOMMODATION [SA03]

Colleague Data Element: STNC.SPECIAL.FACTORS
Form Mnemonic: TEST
Translation Table: CAST.SA03

The Student Assessment Accommodation code identifies any special circumstances under which the assessment test was taken, such as extra time, translated into another language, etc. Colleague reports the first 4 occurrences of this field, and reports any unused positions as **Y**.

If no student assessment accommodation codes can be found, Colleague reports **NYYY**.

STUDENT-ASSESSMENT-PURPOSE [SA04]

Colleague Data Element: STNC.CATEGORY
Form Mnemonic: TEST
Translation Table: CAST.SA04

The Student Assessment Purpose identifies the reason the assessment was given to the student, such as Admissions Placement, Credit Equivalency, etc.

Note: The SA04 element is required to be two positions. If a student only has once reason code then the second position is set to “Y.”

STUDENT-ASSESSMENT-DATE [SA05]

Colleague Data Element: STNC.START.DATE
Form Mnemonic: TEST

The Student Assessment Date identifies the date on which the assessment noncourse began, or the date on which the assessment test was taken.

STUDENT-ASSESSMENT-RAW-SCORE [SA06]

This item has been converted to filler (deleted).

Generating the Student Assessment Export

Use the Student Assessment (SA) Export (CASA) form to generate the Student Assessment Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

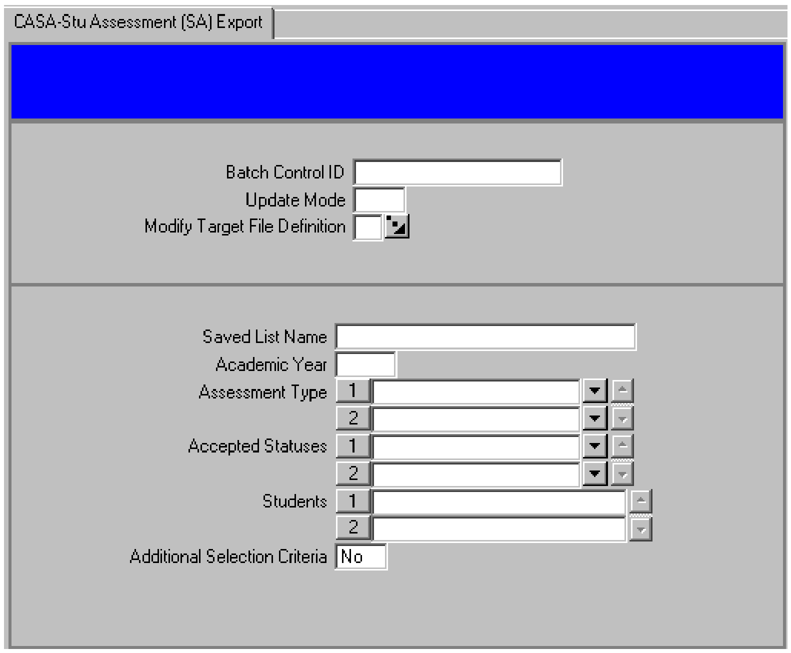


Figure 8-10: The Student Assessment (SA) Export (CASA) Form

The fields on the CASA form are explained below. For additional information about the CASA form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SA) is populated with the extracted Colleague data. If you enter “N,” you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter “Y” to populate the intermediate file, and any errors are detected, you must re-run the export with a different Batch ID. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the STUDENT.NON.COURSES file to limit the students included in the extract.

Academic Year

Enter the calendar year in which the academic year ends. For example, if the academic year extends from July 1, 1997 through June 30, 1998, enter 1998.

Assessment Type

Select one or more codes that identify the types of noncourses included in the export. For example, you can distinguish between assessment (or testing) type non-courses such as SAT tests and other noncourse types such as life experience.

Accepted Statuses

Select one or more codes that identify a noncourse as “accepted.”

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Procedure for Generating the Student Assessment Export

Complete the following steps to generate the Student Assessment (SA) Export.

Step 1. Access the Student Assessment (SA) Export (CASA) form.

Step 2. Enter the export parameters.

Use Update Mode “N” until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to **`Y`**.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CASA form.

Student Basic Skills Export (PS)

In This Chapter

This chapter describes how to produce the Student Basic Skills Export (PS) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements(s)
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any).

Note: The Basic Skills Export actually reports on <u>pre</u>-collegiate basic <u>skills</u> (PS).

Table 8-18 lists the topics covered in this chapter.

Table 8-18: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting:

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
		CAST.CB04
		CAST.CB08

Table 8-19: Student Basic Skills Code Files and Tables

Understanding Student Basic Skills Export

The Student Basic Skills Export is generated at the end of each term or quarter, and provides a snapshot of student information for all students enrolled in Precollegiate Basic Skills (PBS) courses.

Selection Criteria

This export selects all student course section records that meet the criteria listed below during the reporting term entered on the Basic Skills (PS) Export (CAPS) form:

- enrolled in at least one class as of the first or second census date

or

- attended at least one meeting of a positive attendance class

or

- enrolled in at least one class that resulted in a notation on the student's official record

and

- enrolled in at least one PBS course during the reporting term

and

- were not enrolled in an Immigrant Education course

and

- are not learning disabled

Students who are Learning Disabled (according to SD01 or SD03) are not reported. Learning Disabled students should be marked on the Emergency Information (EMER) form with a code specified for Learning Disabilities. That code needs to be translated to an L on the CAST.SD01 translation table. Disability start and end dates can be left blank or dates can be entered. If no dates are entered CAPS excludes the student no matter what term is used on the CAPS form. If dates are entered and the start or end date falls within the term then CAPS exludes the student.This check occurs in the export, not when students are selected.

All "Credit, Non-Degree Applicable" (according to CB04) Precollegiate Basic Skills credit (according to CB08) up to and including courses in the reporting term are summed.

All Credit, Non-Degree Applicable Precollegiate Basic Skills credit earned in a semester in which the student also took an ESL course (according to the parameter) are ignored.

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CAPS

The Record Code, set to **`PS`** on extract mapping, identifies the record as a student basic skills export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: n/a
Translation Table: CAST.GI03

The Reporting Term is translated from the term entered on the CAPS form. The format of this field is YYT, where:

- YY= the last two digits of the reporting year in which the term occurs, as taken from the reporting year field of the TERMS record.
- T= the single-digit term-type identifier is derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student's last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN). If the SSN does not exist, the student's Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A `D` (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

PBS-STUDENT-UNITS-ACCUMULATED [PS01]

Colleague Data Element: derived
Form Mnemonic: n/a
Translation Table: CAST.CB04, CASTCB08

The PBS Student Units Accumulated identifies the cumulative number of credits through the reporting period for courses identified as precollegiate, credit, and non-degree. Courses with an ESL (English as a Second Language)

Course Type specified on the CAPS form are not included in this number. In addition, courses taken during the same term as a course with an ESL course type are not included in this number.

Courses that are included in this number have a credit type that translates to "C - Credit, Non-Degree Applicable" in the CAST.CB04 translate table and have a course type that translates to "P - Precollegiate Basic Skills" in the CAST.CB08 translate table.

PBS-STUDENT-UNIT-LIMIT-WAIVER-STATUS [PS02]

Colleague Data Element: STTR.CRED.LIMIT.WAIVE.FLAG
Form Mnemonic: ASTR

The PBS Student Unit Limit Waiver Status indicates if a credit limit for PBS courses has been established as follows:

- If the credit limit has been waived, a **W** is reported.
- If the credit limit has not been waived, an **N** is reported.
- If the credit limit is blank, an **X** is reported.

Generating the Student Basic Skills Export

Use the Student Basic Skills (PS) Export (CAPS) form to generate the Student Basic Skills Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

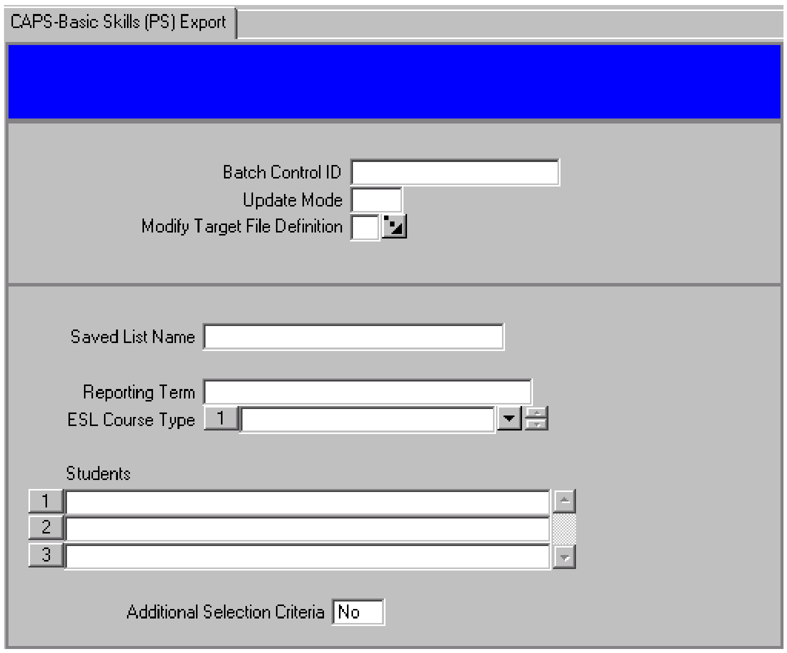


Figure 8-11: The Student Basic Skills (PS) Export (CAPS) Form

The fields on the CAPS form is explained below. For additional information about the CAPS form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.PS) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the STUDENT.COURSE.SEC file to limit the students included in the extract.

Reporting Term

The reporting term further identifies which students are included in the extract. The reporting term is used in deriving the number of PBS units accumulated by a student.

ESL Course Type

Enter the course types associated with English as a Second Language courses. Students enrolled in ESL courses are not included in this export.

Credit, Non-Deg Applicable Credit Type

Enter the course type associated with credit, non-degree applicable credits.

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Procedure for Generating the Student Basic Skills Export

Complete the following steps to generate the Student Basic Skills (PS) Export.

Step 1. Access the Student Basic Skills (PS) Export (CAPS) form.

Step 2. Enter the export parameters.

Use Update Mode **N** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to `Y`.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CAPS form.

Student VTEA Export (SV)

In This Chapter

This chapter describes how to produce the Student VTEA Export (SV) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

Table 8-20 lists the topics covered in this chapter.

Table 8-20: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following code files and tables in Colleague to facilitate California MIS reporting:

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
	ACAD.PROGRAM.TYPES	CAST.SV01
	VATEA.ECONOMIC.STATUSES	CAST.SV03.A
	VATEA.ECONOMIC.STATUS.SOURCES	CAST.SV03.B
	MARITAL.STATUSES	CAST.SV04
	COURSE.TYPES	CAST.SV06
	ACAD.PROGRAM.TYPES	CAST.SV08

Table 8-21: Student VTEA Code Files and Tables

Understanding Student VTEA Export

The Student VTEA Export is generated at the end of each term or quarter, and provides a snapshot of student information for all students participating in VTEA funded activities.

Selection Criteria

This export selects any student meeting the criteria outlined below during the reporting term entered on the Student VTEA (SV) Export (CASV) form:

- enrolled in at least one class as of the first or second census date

or

- attended at least one meeting of a positive attendance class

or

- enrolled in at least one class that resulted in a notation on the student's official record

and

- has at least one of the following VTEA elements codes as true:
  SV02
  SV03 (codes **1-4**)
  SV04
  SV05
  SV06 (codes **O** or **G**)
  SV07
  SV08

and has either

- been enrolled in one or more courses having a SAM level designation of **A**, **B**, **C**, or **D**
  or
- been accepted into a specific occupational program or has a certified intent to enroll in a vocational program (SV01 = **A**).

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASV

The Record Code, set to SV on extract mapping, identifies the record as a student VTEA export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first uses the reporting year start and end dates to determine a student's active academic program during that time period. The academic program is then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: derived
Form Mnemonic: CASV
Translation Table: CAST.GI03

The Term Identifier is derived from the reporting term entered on the CASV form. The format of this field is YYT, where:

- YY = the last two digits of the reporting year in which the term occurs as taken from the reporting year field of the TERMS record.
- T = the single-digit term-type identifier as derived by translating the session code in the TERMS record using the CAST.GI03 translation table. This table converts the session code into the required state code.

STUDENT-NAME-PARTIAL [SB02]

Colleague Data Element: LAST.NAME (in PERSON)
Form Mnemonic: NAE

The Student Name Partial is the first three characters of the student’s last name.

STUDENT-IDENTIFIER [SB00]

Colleague Data Element: SSN (in PERSON) or ID (in PERSON)
Form Mnemonic: NAE

The Student Identifier is the student’s Social Security Number (SSN). If the SSN does not exist, the student’s Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A **D** (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student’s identifier.

STUDENT-VOCATIONAL-PROGRAM-PLAN-STATUS [SV01]

Colleague Data Element: ACPG.TYPES
Form Mnemonic: PROG
Translation Table: CAST.SV01

The Student Vocational Program Plan Status indicates whether the student has been formally accepted into a specific occupational program, or it has been certified that the student intends to enroll in an occupational program. The student vocational status is derived by translating the academic program type from the ACAD.PROGRAMS record using the CAST.SV01 translation table. This table converts the academic program into the required state code as follows:

- If the student has an active academic program with a type that translates to VTEA, an A is reported.
- Otherwise, an N is reported.

STUDENT-VATEA-FUNDED-STATUS [SV02]

Filled with spaces.

STUDENT-VATEA-ECONOMICALLY-DISADV-STATUS [SV03]

Colleague Data Element: STVATEA.ECON.STATUS, STVATEA.ECON.STATUS.SOURCE
Form Mnemonic: VTEA
Translation Table: CAST.SV03.A, CAST.SV03.B

The Student VTEA Economically Disadvantaged Status indicates whether the student has been identified as economically disadvantaged during the reporting term. The purpose of this data element is to identify economically disadvantaged students that have not already been identified through such programs as BOGG, Pell, GAIN, or JTPA. Colleague derives the student VTEA economically disadvantaged status as follows:

- If the Student VTEA status is blank, or meets one of the following conditions, NN is reported:
- receives a BOGG Award (check Financial Aid)
- receives a PELL Award (check Financial Aid)
- participates in the GAIN program (see SB25). If the student GAIN status translates to 1, 2, 3, or 8, the student is participating in the GAIN program.
- participates in the JTPA program (see SB26). If the student JTPA participant flag translates to J, the student is participating in the JTPA program.
- If the student does not meet any of the above conditions:
- the status VTEA economically disadvantaged status code is translated via the CAST.SV03.A translation table
- the student VTEA economic status source code is translated via the CAST.SV03.B translation table
- the translated codes are concatenated and reported

STUDENT-VATEA-SINGLE-PARENT-STATUS [SV04]

Colleague Data Element: STVATEA.SINGLE.PARENT.FLAG
Form Mnemonic: VTEA
Translation Table: CAST.SV04

The Student VTEA Single Parent Status indicates whether the student has been identified as a single parent during the reporting term. This status is created by accessing the Student VTEA Information (VTEA) form for a student, and defaults in from the student's marital status in the PERSON file. The student VTEA single parent status is determined as follows:

- If the student VTEA single parent flag is **Y**, a **P** is reported.
- If the student VTEA single parent flag is **N**, an **N** is reported.
- If the student VTEA single parent flag does not exist, the marital status from the PERSON record is translated and reported as follows:
- If the marital status (from PERSON is **Y**, a **P** is reported.
- Otherwise, an **N** is reported.

STUDENT-VATEA-DISPLACED-HOMEMAKER-STATUS [SV05]

Colleague Data Element: STVATEA.DISPL.HOMAKER.FLAG
Form Mnemonic: VTEA

The Student VTEA Displaced Homemaker Status indicates if the student has been identified as a displaced homemaker during the reporting term. This status is entered on the Student VTEA Information (VTEA) form and is determined as follows:

- If the student VTEA displaced homemaker status is **Y**, a **D** is reported.
- Otherwise, an **N** is reported.

STUDENT-COOP-WORK-EXPERIENCE-EDUCATION-TYPE [SV06]

Colleague Data Element: SEC.COURSE.TYPE
Form Mnemonic: derived from CB10
Translation Table: CAST.SV06

The Student Co-op Work Experience Education Type looks at the course type of the course section. If the course type has been identified as a co-op work experience course via the CAST.CB10 translation table, Colleague then looks at the course type to determine if it matches any of those listed in the CAST.SV06 translation table. If it does, the corresponding code is reported. If it does not match, an **N** is reported.

STUDENT-CRIMINAL-OFFENDER-STATUS [SV07]

Filled with spaces.

STUDENT-VATEA-TECH-PREP-STATUS [SV08]

Colleague Data Element: STTR.TECH.PREP.FLAG, ACPG.TYPES, SEC.COURSE.LEVEL
Form Mnemonic: ASTR
Translation Table: CAST.SV08

The Student VTEA Tech Prep Status indicates whether the student is a participant in a Tech Prep education program. For any of the following conditions, a **T** is reported:

- If the Tech Prep flag is set to **Y.**
- If the student has an active academic program with a program type that translates to **T** via the CAST.SV08 translation table.
- If the student enrolled in any course section identified as a tech prep class via the CAST.CB09 translation table

Maintaining Student VTEA Data

Use the Student VTEA Information (VTEA) form to maintain term-related VTEA information for a student. Refer to online help for more information on each individual field.

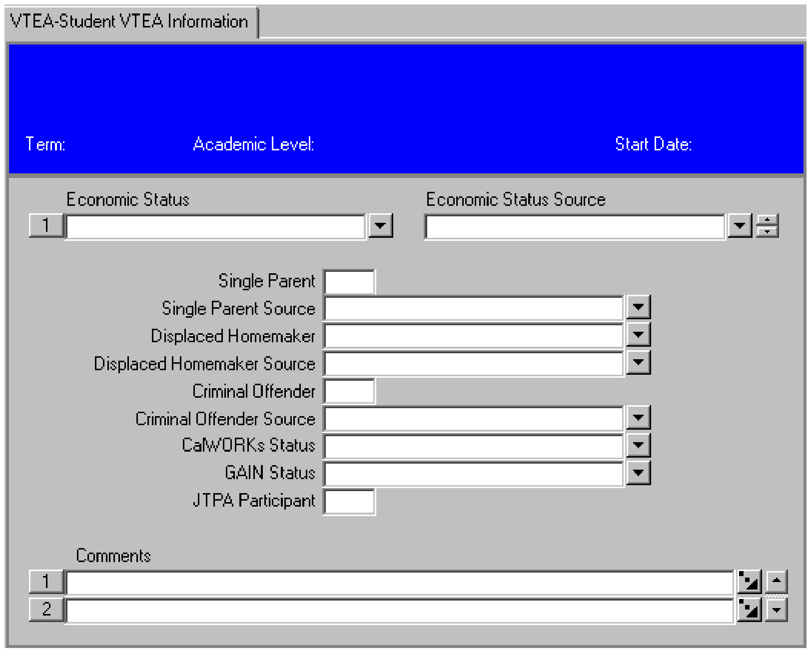


Figure 8-12: The Student VTEA Information (VTEA) Form

Note: If you access this form for a term for which the student has no VTEA information, Colleague attempts to carry forward the VTEA information from the most recent term for which the student was registered.

Generating the Student VTEA Export

Use the Student VTEA (SV) Export (CASV) form to generate the Student VTEA Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

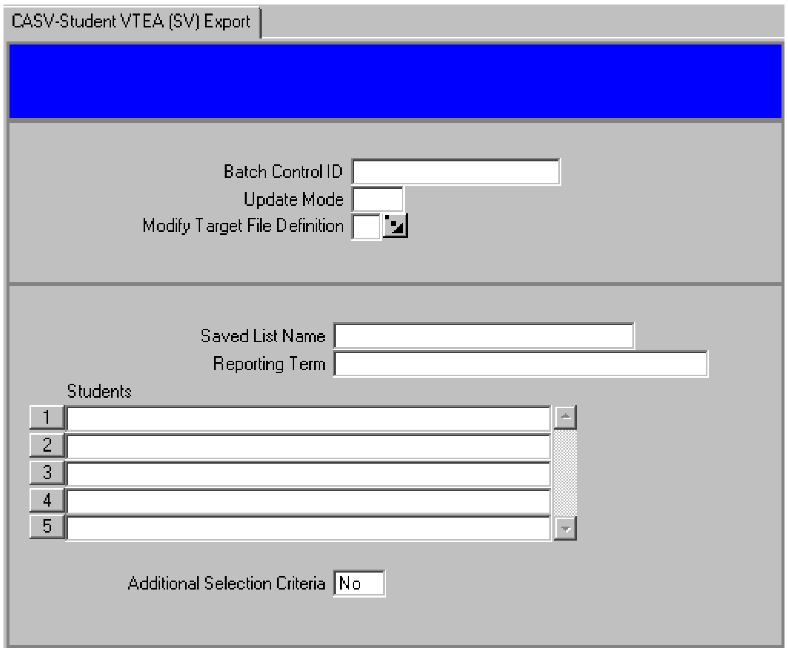


Figure 8-13: The Student VTEA (SV) Export (CASV) Form

The fields on the CASV form are explained below. For additional information about the CASV form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SV) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the STUDENT.COURSE.SEC file to limit the students included in the extract.

Reporting Term

The reporting term further identifies which students are included in the extract.

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Generating the Student VTEA Export

Complete the following steps to generate the Student VTEA (SV) Export:

Step 1. Access the Student VTEA (SV) Export (CASV) form.

Step 2. Enter the export parameters.

Use Update Mode **N** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to **Y**.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CASV form.

Student Identifier Export (SI)

In This Chapter

This chapter describes how to produce the Student Identifier Export (SI) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements
- Colleague form mnemonic for data element maintenance
- translation table (if any)
- additional information (if any)

Table 8-22 lists the topics covered in this chapter.

Table 8-22: Topics in this Chapter

Before You Begin

Before you begin, you must set up Colleague using the Define Field History (DHST) form to keep a history of changes made to the Social Security Number.

Understanding Student Identifier Export

The Student Identifier Export is submitted along with all other term and annual California MIS exports.

Selection Criteria

This export selects any student with a change in Social Security Number (SSN) during the time period specified on the Student Identifier (SI) Export (CASI) form. You can set up Colleague to keep a history of changes made to the SSN. When this function is activated, every change in a person's SSN creates a PERSON.HIST.LOG record which holds the old data and the new data. Multiple changes report only the original (old) value and the most recent (new) value.

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CASI

The Record Code, set to “SI” on extract mapping, identifies the record as a student identifier record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: INST.OTHER.ID
Form Mnemonic: see below

The District College Identifier is the other ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, the export process determines the first associated department of the student’s academic program active during the reporting dates entered, and uses the DEPTS.INSTITUTIONS.ID from the first or most current department. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

STUDENT-IDENTIFIER [SB00.OLD]

Colleague Data Element: HIST.OLD.VALUES or the HIST.ID number
Form Mnemonic: n/a

The Student Identifier is either the student's old Social Security Number (HIST.OLD.VALUES) or the student's old Colleague ID number (HIST.ID), depending on what is being changed.

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A 'D' (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's old identifier.

STUDENT-IDENTIFIER-STATUS [SB01.OLD]

Colleague Data Element: derived from field in SB00 (old)
Form Mnemonic: derived

The Student Identifier Status is determined as follows:

- If a new SSN is listed, an "S" is reported.
- Otherwise, a "C" is reported.

STUDENT-IDENTIFIER [SB00.NEW]

Colleague Data Element: HIST.NEW.VALUES or the HIST.ID number
Form Mnemonic: NAE

The Student Identifier is the student's Social Security Number (SSN) or the student's Colleague ID number (PERSON.ID), depending on what is being changed.

- If the Colleague ID is longer than 8 digits in length, it is truncated to 8 digits.
- A 'D' (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the student's identifier.

STUDENT-IDENTIFIER-STATUS [SB01]

Colleague Data Element: derived from field in SB00 (new)
Form Mnemonic: derived

The Student Identifier Status is determined as follows:

- If a new SSN is listed, an "S" is reported.
- Otherwise, a "C" is reported.

Generating the Student Identifier Export

Use the Student Identifier (SI) Export (CASI) form to generate the Student Identifier Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

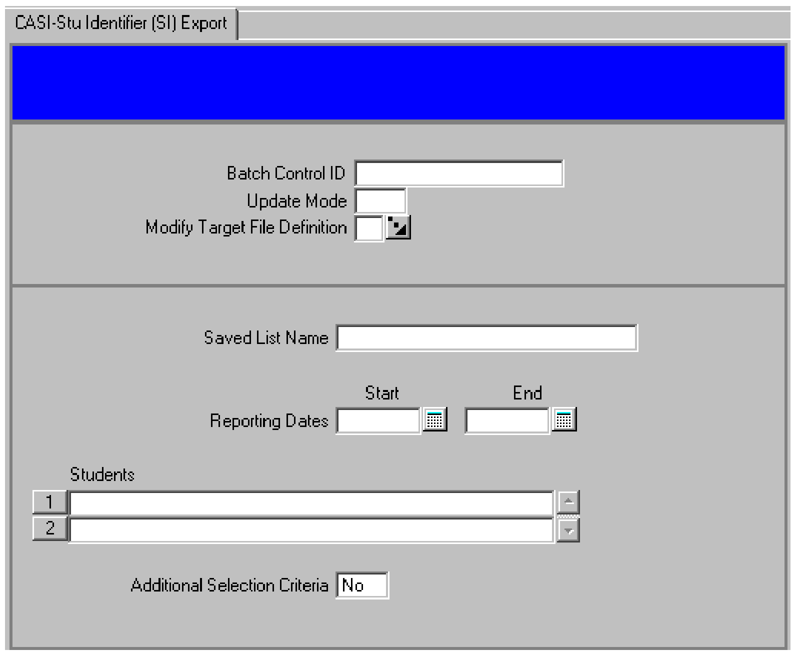


Figure 8-14: The Student Identifier (SI) Export (CASI) Form

The fields on the CASI form are explained below. For additional information about the CASI form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.SI) is populated with the extracted Colleague data. If you enter “N,” you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter “Y” to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the PERSON.HIST.LOG file to limit the students included in the extract.

Reporting Dates

The reporting dates further identifies which students are included in the extract. For example, the Start Date is usually the day after the last time this export was generated. The End Date is usually the current date.

Students

You can identify specific students to be included in the extract by entering their names or IDs.

Generating the Student Identifier Export

Complete the following steps to generate the Student Identifier (SI) Export:

Step 1. Access the Student Identifier (SI) Export (CASI) form.

Step 2. Enter the export parameters.

Use Update Mode “N” until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the data in Colleague.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to ‘Y’.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CASI form.

Using CA State Reporting: MIS Reports

9. Generating the College Calendar Report

College Calendar Export (CC)

In This Chapter

This chapter describes how to produce the College Calendar Export (CC) for California State Reporting. It outlines the codes and tables that must be defined prior to running the export, and lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements
- Colleague form mnemonic
- translation table (if any)
- additional information (if any)

Table 9-1 lists the topics covered in this chapter.

Table 9-1: Topics in this Chapter

Before You Begin

Before you begin, you must have created the following files and tables in Colleague:.

Code Files	Validation Code Tables	Translation Tables
TERMS		CAST.GI03
SESSIONS		
	CALENDAR.DAY.TYPES	CAST.CC05
		CAST.CC02

Table 9-2: College Calendar Code Files and Tables

Also before you can create the CC export, all terms through June 30th of the following year must be defined on the Reporting Years and Terms (RYAT) form. For more information about RYAT, see *Getting Started with Colleague Student*.

Understanding College Calendar Export

The College Calendar Export is generated annually within 30 days of the end of the spring term for the forthcoming academic year. For example, you might export this file the end of May 1998 for the academic year beginning July 1, 1998 through June 30, 1999. A record is produced for each day in the reporting year, beginning with July 1st.

Selection Criteria

This export selects the campus calendars specified on the College Calendar (CACC) form in ascending order by the associated terms start date, by the associated terms end date.

Form Used

Table 9-3 lists the form used in the chapter and a brief description of the form.

Form	Description
College Calendar (CC) Export (CACC)	Creates an export file of information used for the College Calendar (CC) report.

Table 9-3: Form for Generating the College Calendar Report

Files Used

Table 9-4 lists the primary files used in this chapter and a brief description of the files.

File	Description
TERMS	Contains information about each of the terms defined at you institution.
CAMPUS.SPECIAL.DAY	Contains information about the campus calendar, including the type for a particular day on the calendar.

Table 9-4: Files Used with Generating the College Calendar Report

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s) and the Colleague form mnemonic on which the data element is maintained. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided if necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CACC

The Record Code, set to **`CC`** on extract mapping, identifies the record as a campus calendar export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: entered on the export parameter form
Form Mnemonic: CACC

The District College Identifier is the 3-digit value entered on the CACC form at the time the export is created. The ID you enter should be the same as the DEFAULT.HOST.COPR.ID, but there is no validation performed by Colleague to verify the ID. The value you enter on the CACC form is the value reported.

TERM.IDENTIFIER [GI03]

Colleague Data Element: entered on export parameter form
Form Mnemonic: CACC

The Reporting Term is translated from the reporting year entered on CACC form. This is a concatenated field consisting of the following:

- The last two digits of the reporting year entered on the CACC form are reported as the first 2 characters
- 0 (zero) is reported as the 3rd character.

COLLEGE-CALENDAR-DAY-ID [CC01]

Colleague Data Element: derived
Form Mnemonics: CACC

The College Calendar Day ID identifies a specific day of the reporting year, and are numbered from 1 - 365 (except for leap years containing 366 days). The reporting year extends from July 1st through June 30th, with July 1st being Day 1.

COLLEGE-CALENDAR-DAY-PRINCIPAL-TERM [CC02]

Colleague Data Element: derived
Form Mnemonics: CACC and RYAT
Translation Table: CAST.CC02

The College Calendar Day Principal Term identifies the term associated with a specific day in the campus calendar. For most days the primary term will be the only term associated with that day. If there is more than one term associated with a specific day, Colleague automatically considers the term with the later start date to be the Primary term, unless otherwise indicated. For example, if the Spring campus calendar identifies the Spring term as extending from January 20 to May 25th and the Summer campus calendar identifies the Summer Session as May 20 to June 20th, Colleague will consider the Summer session to be the Primary term, and the Spring term as the overlapping term.

If you want to associate a day with an earlier term, you can do so by entering the overlapping term information on the CACC form. For example, if you still want the primary term for May 20th - 25th to be the earlier Spring term, you can enter those days in the overlap start and end dates, and identify the primary term as Spring.

The term reported is further derived by translating the session of the term using the CAST.CC02 translation table. This converts the term into the required state code. If a calendar day has no term associated with it, such as New Year’s Day, it’s primary term is reported as **N**.

You can view information about terms on the Reporting Years and Terms (RYAT) form. For more information about RYAT, see *Getting Started with Colleague Student*.

COLLEGE-CALENDAR-DAY-OVERLAPPING-TERM [CC03]

Colleague Data Element: derived
Form Mnemonic: CACC
Translation Table: CAST.CC02

The College Calendar Overlapping Term identifies the secondary term a calendar day is associated with, if a day is associated with more than one term. As in the example for CC02, the overlapping term for May 20th - 25th would ordinarily be the Spring term, since the later Summer term would be considered as the primary term. You can override the primary term calculated by Colleague by entering the overlapping dates and identifying a different primary term for them.

The term reported is further derived by translating the session of the term using the CAST.CC02 translation table. This converts the term into the required state code. If a calendar day has no term associated with it, such as New Year's Day, it's primary term is reported as **N**.

Note: According to California MIS regulations, only terms that translate to **F** (Summer Intersession), **G** (Winter Intersession), or **H** (Other Intersession) can be reported as overlapping terms.

COLLEGE-CALENDAR-DAY-INSTRUCTION-STATUS [CC04]

Colleague Data Element: entered on export parameter form
Form Mnemonic: CACC

The College Calendar Day Instruction Status identifies whether a day is a Primary Instruction day. All Mondays through Fridays (except Holidays) that fall within a term's start and end dates (for the list of terms from the selected campus calendars) are set to Primary Instruction days.

For Weekends and Holidays within the Term, if a Weekend/Holiday Breakpoint Hours value is entered, and:

- if it is a State Mandated Holiday (CC07=**H**), an **N** (Non-Instructional Day) is reported (cannot have Instructional Days on State Holidays).
- if there are no Instructional hours for the day, an **N** is reported.
- if the number of instructional hours offered on a day is greater than or equal to the breakpoint hours, a **P** (Primary Instructional day) is reported.
- if the number of hours is less than the breakpoint value, an **S** (Secondary Instructional day) is reported.

If no Weekend/Holiday Breakpoint Hours value was entered, all weekend and holiday days are reported as Non-Instructional days.

To derive instructional hours, Colleague selects all course sections that fall within the reporting date range, and sums up the time from each associated calendar schedules record.

Refer to College Calendar Flex Day Status [CC05] to determine if a day is a holiday or not.

COLLEGE-CALENDAR-DAY-FLEX-STATUS [CC05]

Colleague Data Element: CMSD.TYPE
Form Mnemonic: CMPC / CMPS
Translation Table: CAST.CC05

The College Calendar Day Status (Flex, Holiday, and Exam) identifies days which have special teaching instructions (holidays, flex days, etc.). In Colleague, these days are coded as “special days.” Data elements CC05, CC07, and CC08 must all be coded using special day types (CMSD.TYPE).

Since all three values [CC05, CC07, and CC08] are stored in the special day types (CMSD.TYPE) field, unique codes must be defined for each use of the special day. Examples of special day codes for flex days are listed in table 9-5 below. The special day code is translated using the CAST.CC05 translation table. This table converts the special day code into the required state code.

Colleague Code	Definition	California MIS Code
F	Mandatory Flex Day	F
V	Variable Flex Day	V
blank	Not a Special Day	N

Table 9-5: Examples of Calendar Day Types for CC05

If the College is not on a flexible calendar (specified on the CACC form), a value of **Y** is reported for each day.

COLLEGE-CALENDAR-DAY-CENSUS-STATUS [CC06]

Colleague Data Element: entered on export parameter form
Form Mnemonic: CACC

The College Calendar Day Census Status indicates if the day is a first census date for a term. This only applies to terms that are translated via the CAST.CC02 translation table to state codes **A**, **B**, **C**, **D**, or **E**.

COLLEGE-CALENDAR-DAY-HOLIDAY-STATUS [CC07]

Colleague Data Element: CMSD.TYPE
Form Mnemonic: CMPC / CMPS
Translation Table: CAST.CC05

The College Calendar Day Status (Flex, Holiday, and Exam) identifies days which have special teaching instructions (holidays, flex days, etc.). In Colleague, these days are coded as “special days.” Data elements CC05, CC07, and CC08 must all be coded using special day types (CMSD.TYPE).

Since all three values [CC05, CC07, and CC08] are stored in the special day types (CMSD.TYPE) field, unique codes must be defined for each use of the special day. Examples of special day codes for holidays are listed in table 9-6 below. The special day code is translated using the CAST.CC05 translation table. This table converts the special day code into the required state code.

Colleague Code	Definition	California MIS Code
H	State Holiday	H
L	Local Holiday	L
blank	Not a Special Day	N

Table 9-6: Examples of Calendar Day Types for CC07

COLLEGE-CALENDAR-DAY-EXAM-STATUS [CC08]

Colleague Data Element: CMSD.TYPE
Form Mnemonic: CMPC / CMPS
Translation Table: CAST.CC05

The College Calendar Day Status (Flex, Holiday, and Exam) identifies days which have special teaching instructions (holidays, flex days, etc.). In Colleague, these days are coded as “special days.” Data elements CC05, CC07, and CC08 must all be coded using special day types (CMSD.TYPE).

Since all three values [CC05, CC07, and CC08] are stored in the special day types (CMSD.TYPE) field, unique codes must be defined for each use of the special day. Examples of special day codes for exam days are listed in table 9-5 below. The special day code is translated using the CAST.CC05 translation table. This table converts the special day code into the required state code.

Colleague Code	Definition	California MIS Code
D	Regular Final Exam Day	D
E	Evening/Saturday Final Exam Day	E
B	Both final Exam Day	B
blank	Not a Special Day	N

Table 9-7: Examples of Calendar Day Types for CC08

Generating the College Calendar Export

Use the College Calendar (CC) Export (CACC) form to generate the College Calendar Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file. If the data included in the file contains any errors, an error report is printed. You can then make the necessary corrections to the Colleague database and run the export again.

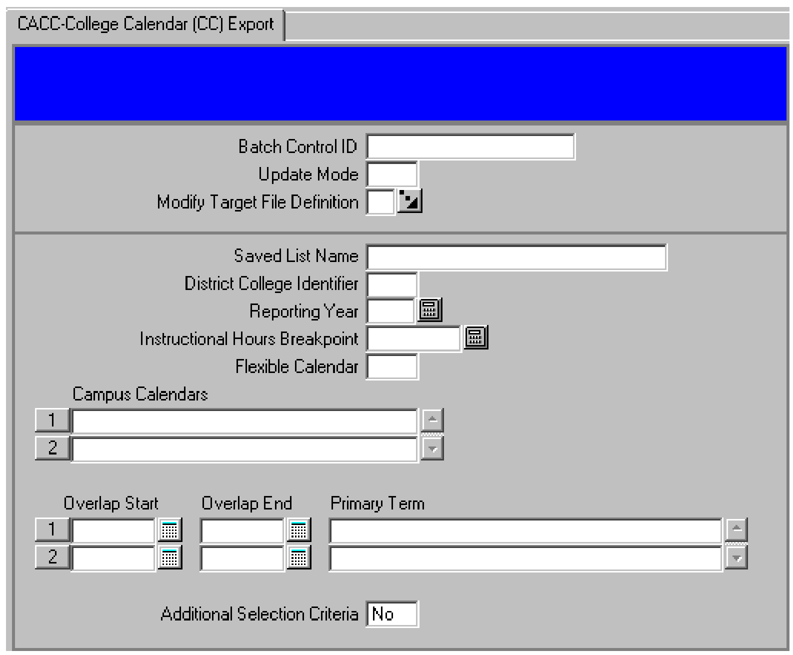


Figure 9-1: The College Calendar (CC) Export (CACC) Form

The fields on the CACC form are explained below. For additional information about the CACC form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The Update Mode determines if the intermediate file (CAST.CC) is populated with the extracted Colleague data. If you enter **N**, you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter **Y** to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the ELF menu.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of IDs from the CAMPUS.CALENDARS file to limit the campus calendars included in the extract. Or you can specify individual campus calendars in the Campus Calendars field on this form.

District College Identifier

Enter the 3-digit code by which the state identifies your institution.

Reporting Year

The reporting year extends from July 1st through June 30th. Enter the year in which the reporting year ends. For example, if the reporting year extends from 7/1/97 through 6/1/98, enter 1998 here.

Instructional Hours Breakpoint

Enter the number of hours used to determine a primary instructional day. Days with fewer hours are considered secondary instructional days.

Flexible Calendar

Enter **Y** or **N** to indicate if your college uses flexible scheduling. Flexible scheduling can be used to release instructional staff from apportionment eligible instruction. Flex days must be entered as “special days” on the appropriate campus calendar.

Campus Calendars

Enter the campus calendars associated with the reporting term. You can create separate calendars to accommodate different scheduling needs. For example, different calendars can be created for undergraduate and graduate levels.

Overlap Dates and Term

You can identify the primary term of days which overlap other terms. Enter the start and end dates of the overlap time period and the primary session with which they are to be associated. For example, you can associate days which overlap the Spring and Summer sessions as having the Spring session as the primary term. Otherwise, Colleague automatically associates a day with the later term unless you enter a different primary term here.

Generating the College Calendar Export

Complete the following steps to generate the College Calendar (CC) Export.

Step 1. Access the College Calendar (CC) Export (CACC) form.

Step 2. Enter the export parameters.

Use Update Mode **N** until all errors are corrected.

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 3. Enter any selection criteria.

The selection criteria fields allow you to determine specific records to be included in the export file. Selection fields can be used alone, or used in conjunction with other selection fields.

If you do not enter any selection criteria, all records are selected.

Step 4. Run the export by finishing from the form.

Step 5. Review any error reports printed.

Step 6. Make the necessary corrections to the Colleague database.

Step 7. Rerun the export.

Step 8. Repeat Step 1 through Step 7 as needed to correct any errors.

Step 9. When all errors have been corrected, change the Update Mode to **`Y`**.

You can also modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Step 10. Export the data to the target file by finishing from the CACC form.

Using CA State Reporting: MIS Reports

10. Generating 320 Report

Maintaining Data for 320 Reporting

In This Chapter

This chapter provides information about setting up your codes correctly and using them consistently throughout the system so that the 320 report process will accurately reflect the student information at your institution. Table 10-1 lists the topics covered in this chapter.

Table 10-1: Topics in this Chapter

Before You Begin

Before you begin, you must have already set up your code files and tables that are used with the 320 reporting process. Refer to “Defining Codes for 320 Reporting” beginning on page 2-13 for more information about defining your codes.

Understanding Colleague Maintenance

Setting up your codes correctly and using them consistently throughout the system will guarantee that the 320 report process will accurately reflect the student information at your institution.

Some of the areas in Colleague that you want to consider how you set up are:

- Academic programs
- Academic terms
- Buildings
- Courses
- Course Sections
- Students

Each of these areas is discussed in the following sections.

Academic Programs

Although your institution can have many academic programs, the 320 Apprenticeship reports are concerned only with apprenticeship academic programs. You can define any number of academic programs with the academic program type you defined to mean “Apprenticeship.”

Use the Academic Programs (PROG) form to define the academic programs offered by your institution. Enter the academic program type that means “Apprenticeship” in the Types field, as shown in figure 10-1.

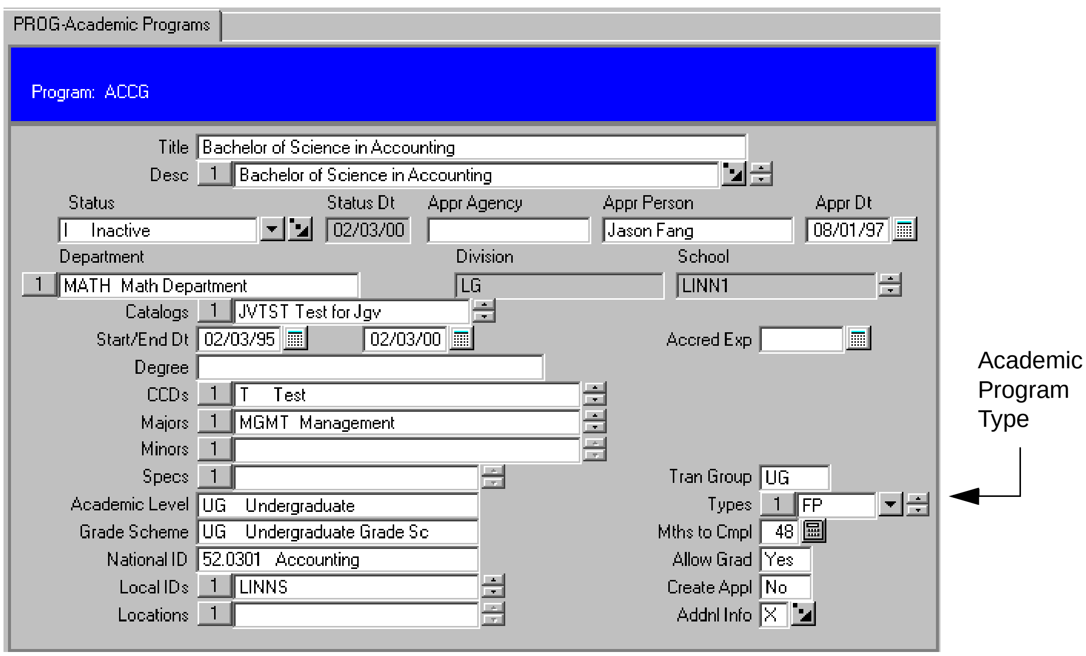


Figure 10-1: Assigning an Apprentice Type to an Academic Program

See “Academic Program Types” on page 2-15 for more information about defining your apprenticeship academic program types.

Academic Terms

An academic term describes the various academic time periods used by your institution. For the purposes of the 320 reports, you need to be aware of how you define the following components of your academic terms:

- Term Census Dates
- Term Location Census Dates (optional)

Term Census Dates

Enter the default weekly census dates that are to be assigned to all course sections that are created with this academic term and no location code.

Since "Non-Credit, Independent Study, Distance Learning" courses require two census dates, and may be defined as "Weekly" census, you should enter two term census dates.

Use the Academic Terms (ACTM) form to define your term census dates. You can only access the (ACTM) form by detailing from the Reporting Years and Terms (RYAT) form as shown in figure 10-2.

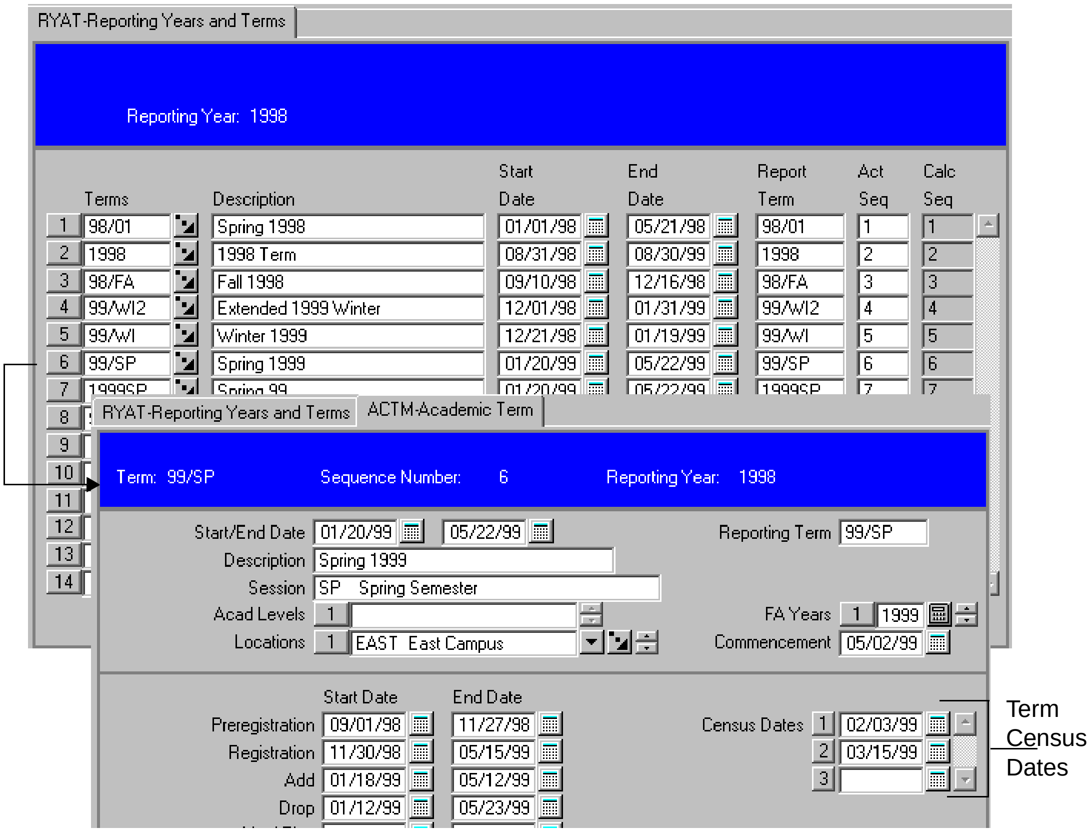


Figure 10-2: Forms Used to Define an Academic Term

Term Location Census Dates

If some of your courses use academic term information based on location, you need to also define term location census dates.

Use the Term Location Dates (TLOC) form to define census dates that will be assigned to all course sections that are created with a particular academic term and a particular location.

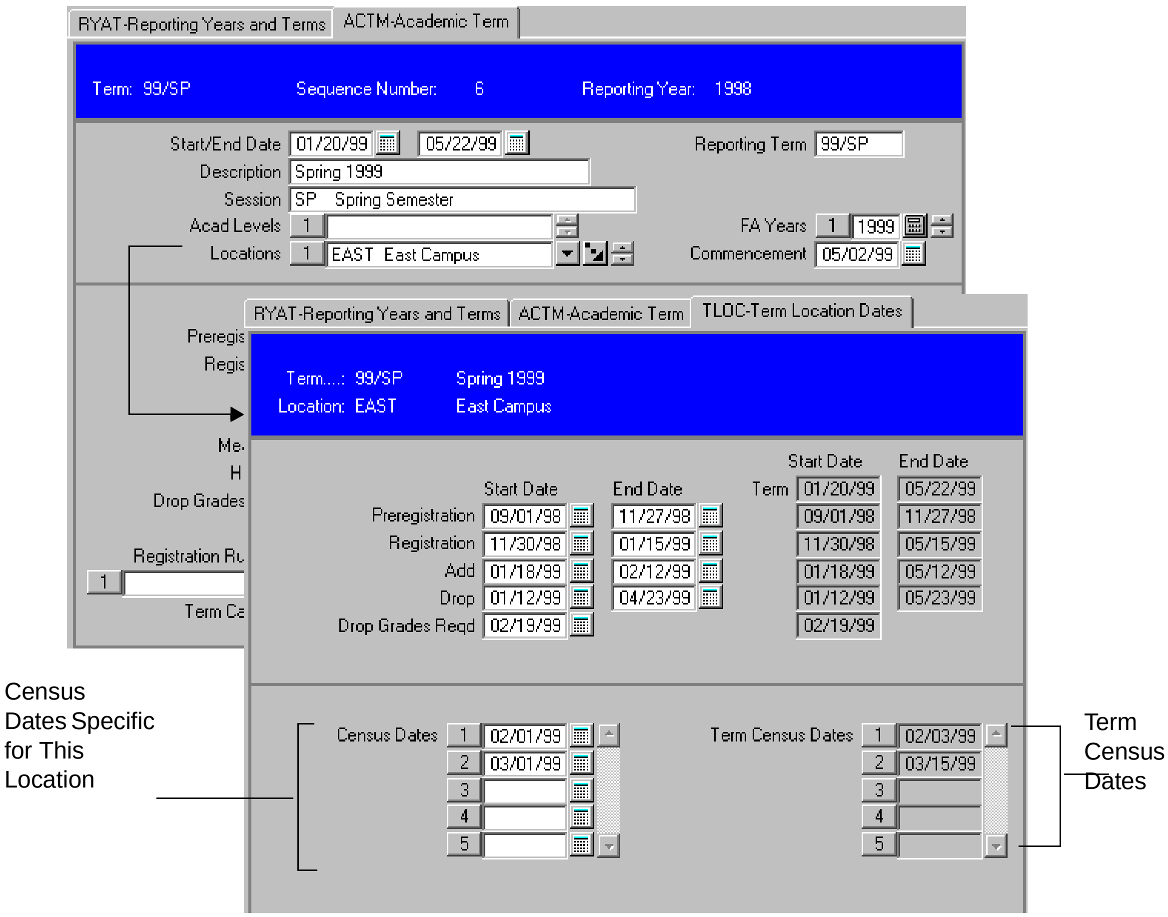


Figure 10-3: Defining Term Location Dates

Since “Non-Credit, Independent Study, Distance Learning” courses require two census dates, and may be defined as “Weekly” census, two term location census dates should be entered.

Courses

For the purposes of the 320 reports, you need to be aware of how you define the following components of your courses:

- Course types
- Funding accounting method
- Course offering information

Each of these components will default to all sections created from this course. The following sections discuss each of these components.

Course Types

The 320 reports contain specific supporting reports for the four particular course types listed in table 10-2 below:

Course Type	Supporting Report
Apprentice	Apprenticeship Report
Basic Skills	Basic Skills/Immigrant Education Report
In-service Training	In-Service Course Report
Immigrant Education	Basic Skills/Immigrant Education Report

Table 10-2: Course Type Reports

Other course types are included in the District Summary, Section Summary and Section Detail reports.

Use the Courses (CRSE) form, as shown in figure 10-4 to define the course types associated with each course. You can assign multiple course types to a course.

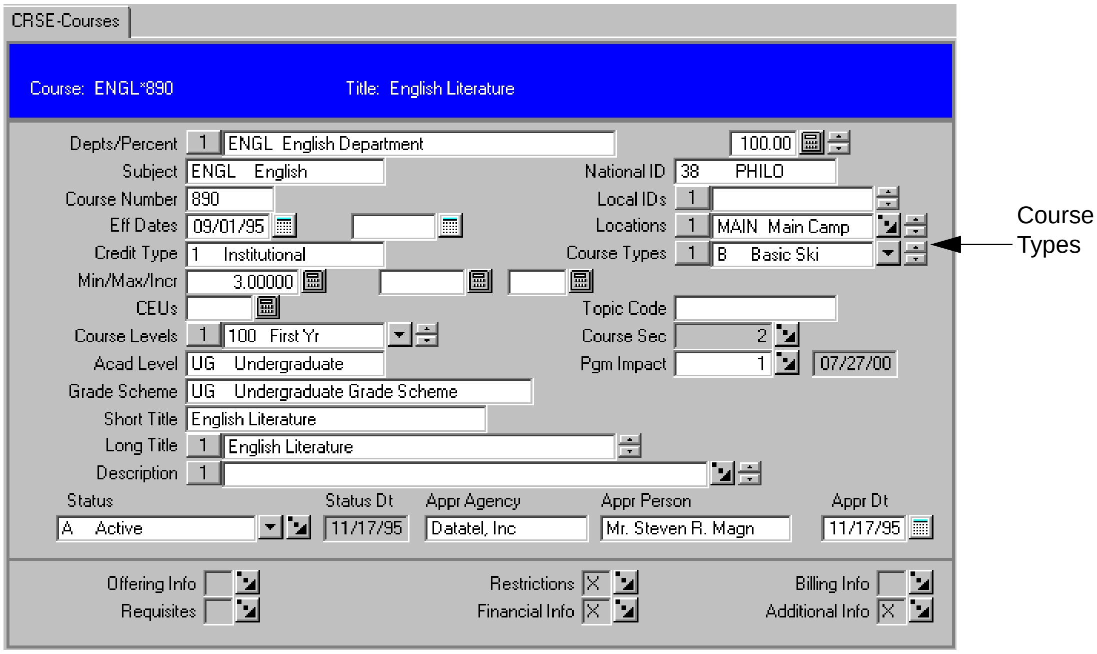


Figure 10-4: Assigning a Course Type

See “Course Types” on page 2-16 for more information about defining these course types. See “Defining 320 Reporting Parameters” on page 2-38 for more information about defining them as parameters for use on the 320 reports.

Funding Accounting Method

The funding accounting method you assign to a course defaults into all course sections created from this course, but can be changed at the section level. The funding accounting method of the course section is used to determine enrollment for the purposes of state funding. See “Funding Accounting Methods” on page 2-16 for more information about defining these funding accounting methods.

Use the Course Financial Info (CFIN) form to define the funding accounting method for each course. You can access the CFIN form directly or by detailing from the CRSE form, as shown in figure 10-5.

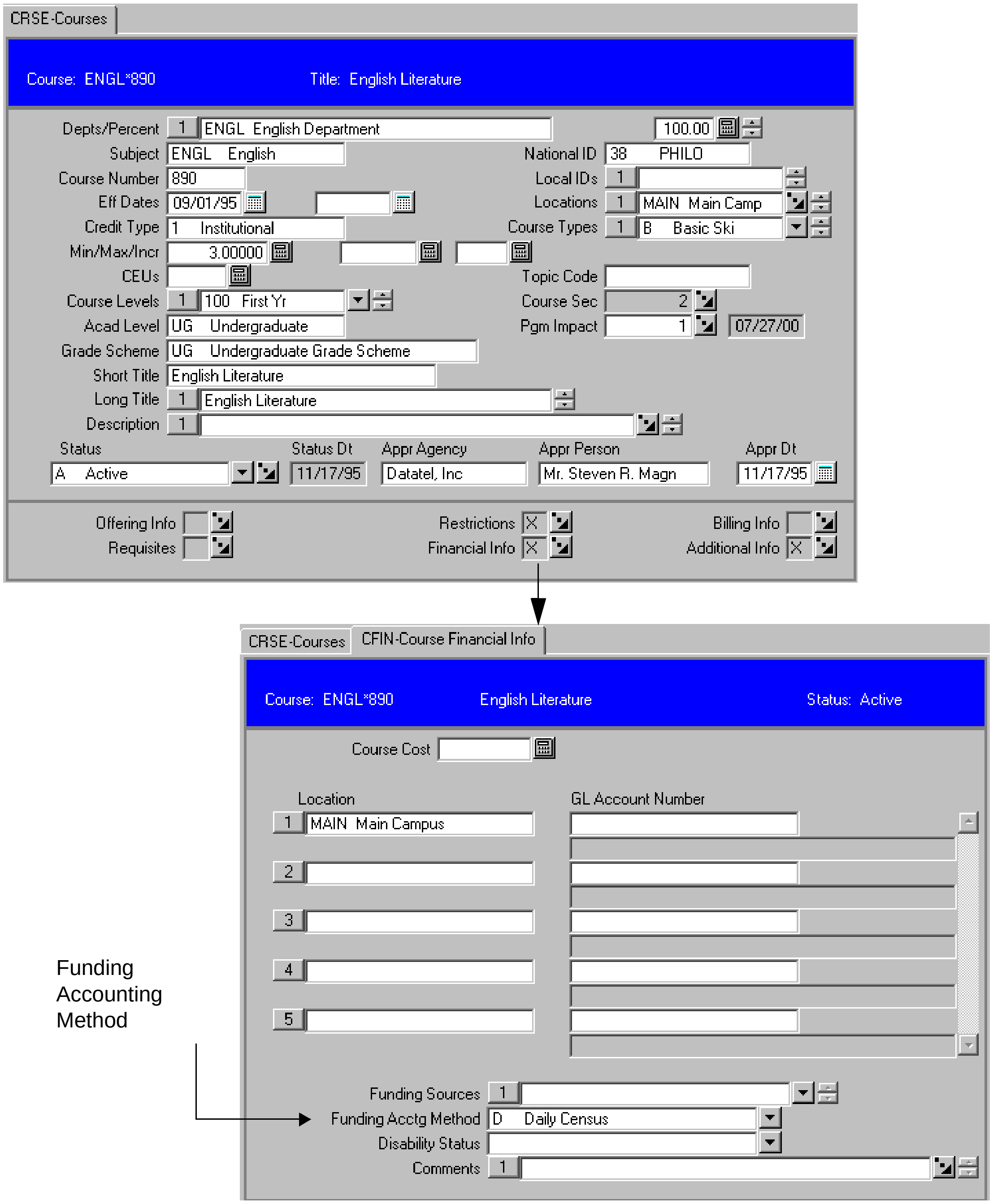


Figure 10-5: Assigning a Funding Accounting Method to a Course

Note: Courses identified as apprentice type courses must have a funding accounting method of "PACI" or PANI" in order for FTES to be calculated correctly.

Course Offering Information

The course offering information that you assign to a course defaults into all course sections created from this course. The 320 reporting process is concerned with the following course offering information:

- contact hours
- contact measure
- number of weeks in the course

Contact Hours and Contact Measure

Determine the number of contact hours for the course section, depending on the course census type. Contact hours are assumed to be term-based. For Daily-census type sections, if the contact measure is "D", the contact hours will be interpreted as daily contact hours. For Weekly-census type sections, if the contact measure is "W," the contact hours will be interpreted as weekly contact hours. In all other cases, the contact hours will be interpreted as the total contact hours for the course section.

Number of Weeks

For courses with a weekly census type, the number of weeks is divided into the number of contact hours to calculate the number of “weekly contact hours.”

Use the Course Offering Info (COFF) form to define these components. You can access the COFF form directly from the menu or by detailing from the Courses (CRSE) form as shown in figure 10-6. You can also change course offering information at the section level using the Section Offering (SOFF) form.

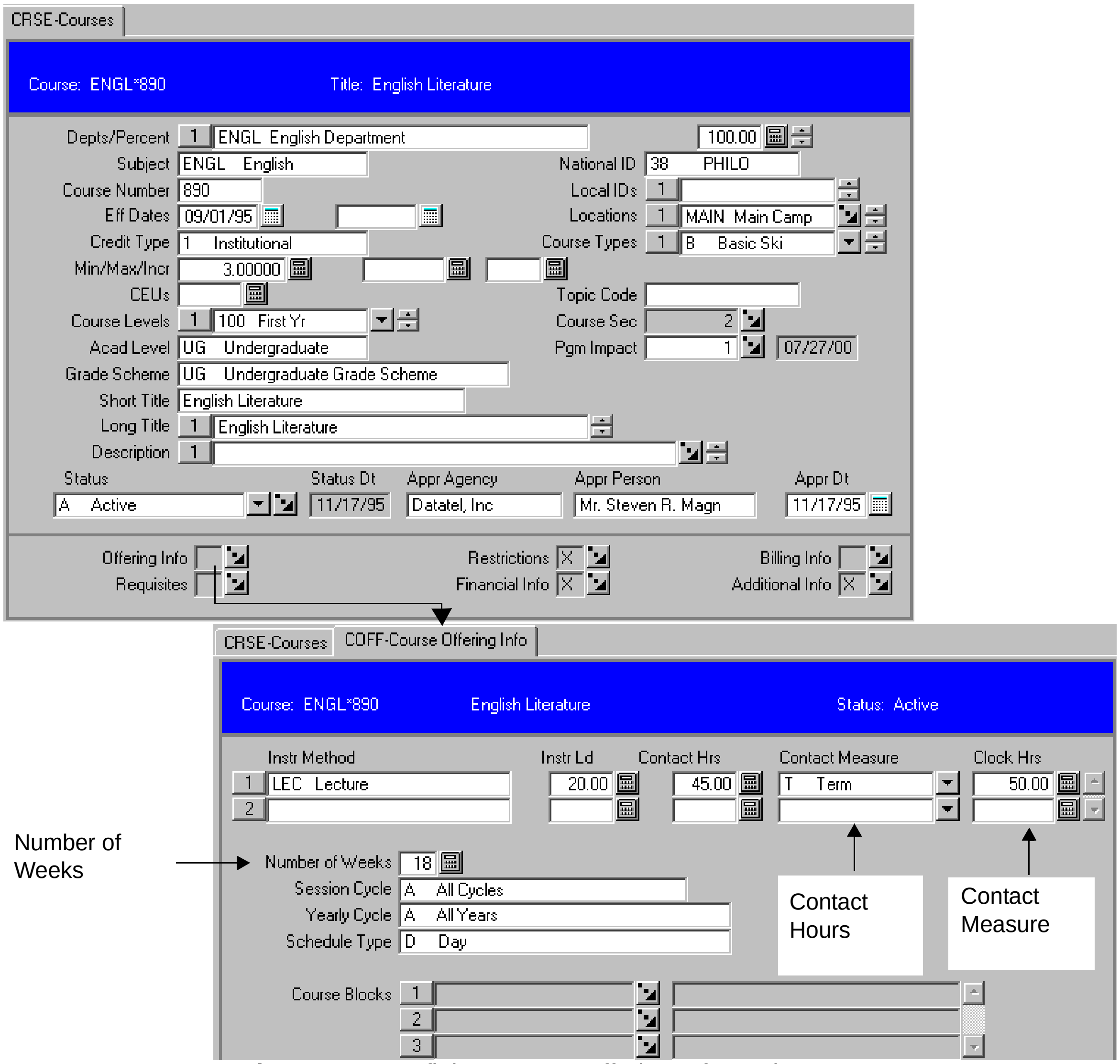


Figure 10-6: Defining Course Offering Information

Course Sections

As you define each course section for your institution, you need to be aware of the following section components as they relate to the 320 reports:

- academic term
- start/end dates
- course type
- funding accounting method
- census dates
- contact hours
- contact measure
- meeting place

The next sections describe the forms you need to use to define each of these components.

General Course Section Information

Use the Sections (SECT) form, shown in figure 10-7, to define the general course section information that is relevant to the 320 report processing, including the academic term, the start and end dates and the associated course types.

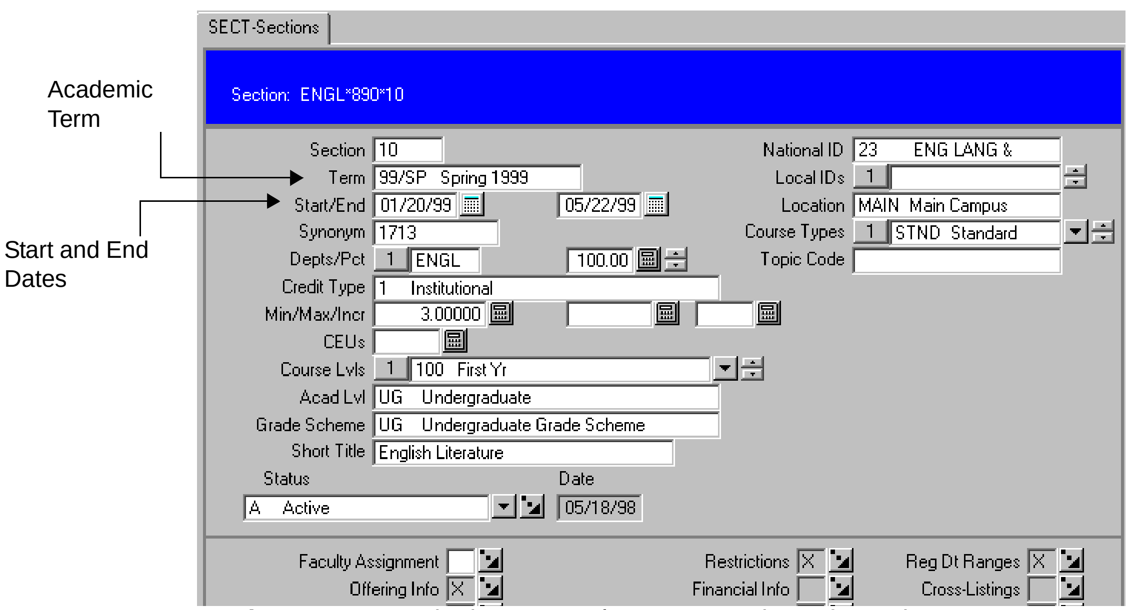


Figure 10-7: Assigning General Course Section Information

Section Academic Term

This is the academic term in which this course section will be offered.

Section Start and End Dates

The start and end dates are used to calculate the number of weeks for the course section if you do not specify a Number of Weeks on the Section Offering Info (SOFF) form.

Course Types

If course types were assigned to the course from which the section was created, those course types defaulted into the new course section. The 320 reports generate specific supporting reports for the course types meaning the following:

- Apprentice
- Basic skills
- Immigrant education
- In-service training

Refer to Table 10-2 on page 10-7 for information on course types and supporting reports. See “Course Types” on page 2-16 about defining your course type codes.

Funding Accounting Method

The funding accounting method of the course section is used to determine enrollment for the purposes of state funding. If you assigned a funding accounting method to the course used to create the course section, that method defaulted into the new section. See “Funding Accounting Method” on page 10-9 for more information about assigning these funding accounting methods to a course.

Use the Section Financial Info (SFIN) form to assign a funding accounting method to a course section. You can access the SFIN form directly or by detailing from the SECT form, as shown in figure 10-8.

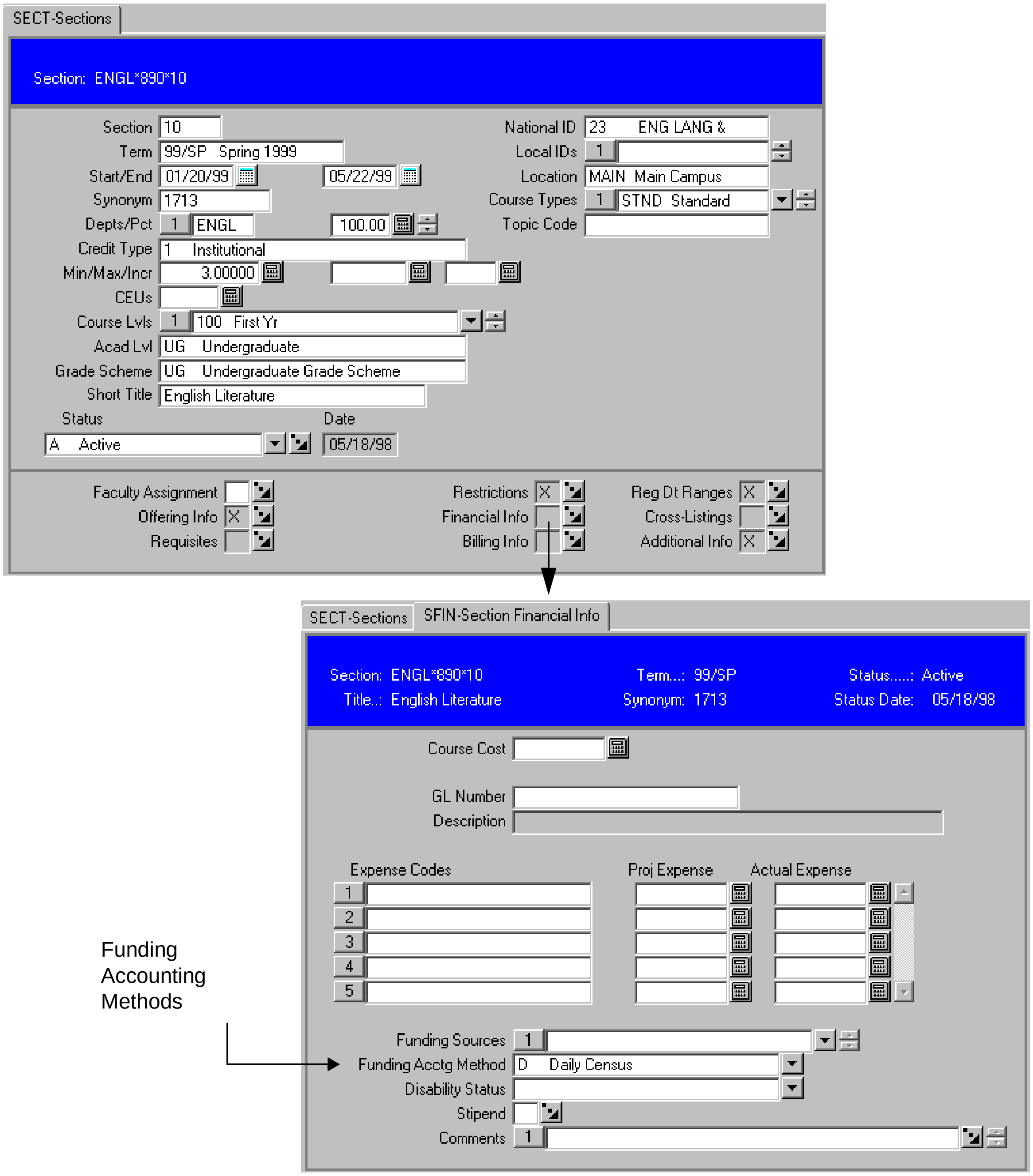


Figure 10-8: Assigning a Funding Accounting Method to a Course Section

Note: Course sections identified as apprentice type courses must have a funding accounting method of “PACI” or PANI” in order for FTES to be calculated correctly.

Section Census Dates

You can define census dates specifically for each section. If you do not define census dates for a course section, Colleague uses the census dates defined for the associated term and location. If no term location census dates are defined, Colleague uses the census dates defined for the associated academic term.

If a course section is associated with a funding accounting method which is associated with a “Daily” census type, you need to define census dates at the course section level. The section census dates override those dates defined for the associated term or term location. (See “Funding Accounting Method” on page 10-14 for more information about assigning a funding accounting method to a section.)

Use the Section Reg Date Ranges (SRGD) form to define course section specific census dates. You can detail to the SRGD form from the SECT form, as shown in figure 10-9. The default term or term location dates are displayed for your reference.

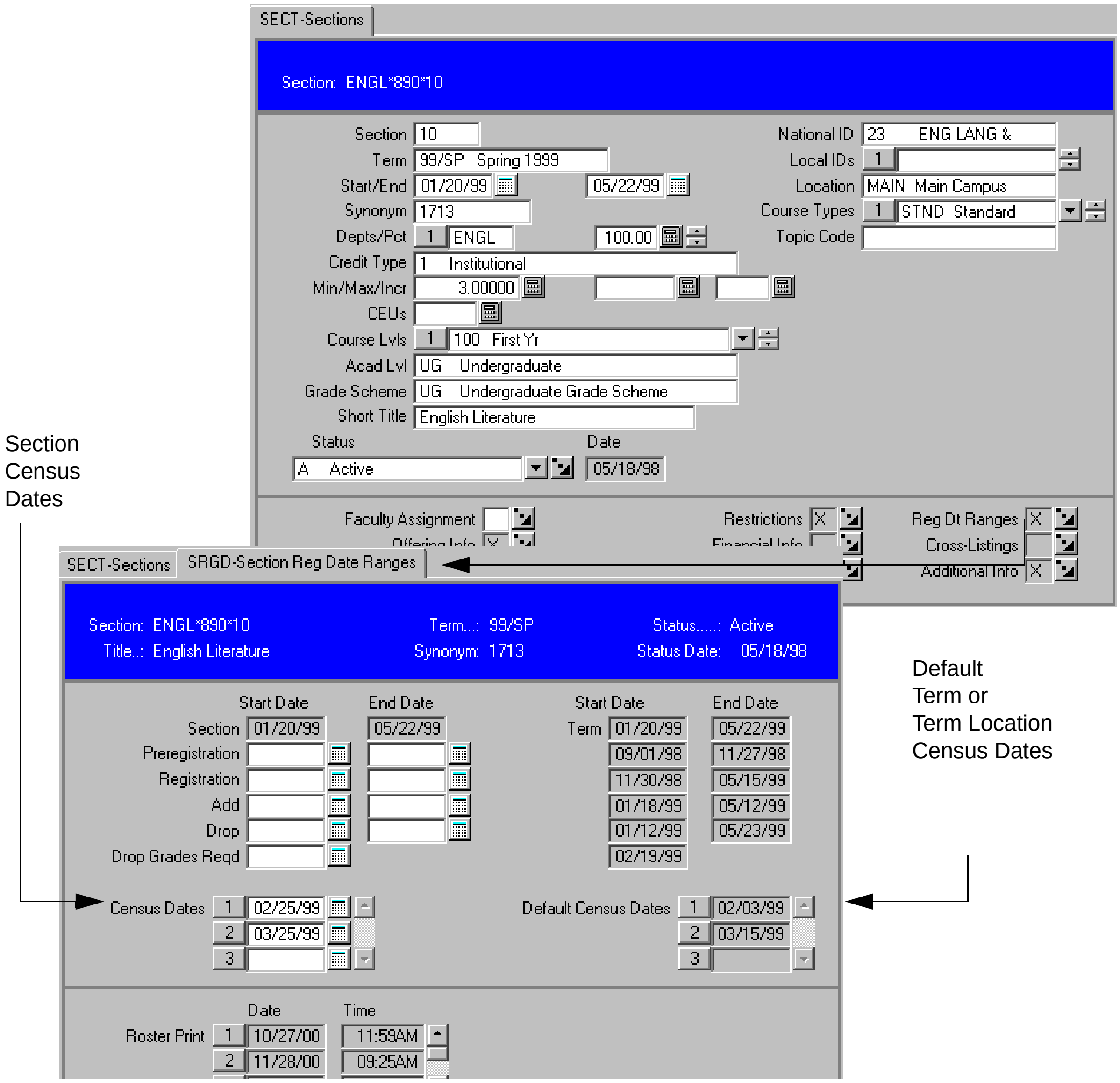


Figure 10-9: Defining Section Census Dates

See “Term Census Dates” on page 10-4 and “Term Location Census Dates” on page 10-6 for more information about defining your academic term and term location census dates.

Section Offering Information

The 320 reporting process is concerned with the following course offering information:

- contact hours
- contact measure
- building
- number of weeks in the section

Contact Hours and Contact Measure

Determine the number of contact hours for the course section, depending on the course census type. Contact hours are assumed to be term-based. For Daily-census type sections, if the contact measure is "D", the contact hours will be interpreted as daily contact hours. For Weekly-census type sectoins, if the contact measure is "W," the contact hours will be interpreted as weekly contact hours. In all other cases, the contact hours will be interpreted as the total contact hours for the course section.

Number of Weeks

For course sections with a weekly census type, the number of weeks is divided into the number of contact hours to calculate the number of “weekly contact hours.”

Building Assignment

The building and room assignment information is used to determine if any of the meetings are held in “Leased/Rented” space. See “Buildings” on page 10-21 for more information about defining the ownership status of your buildings.

Use the Section Offering Info (SOFF) form to define these components. You can access the (SOFF) form directly from the menu or by detailing from the Sections (SECT) form as shown in figure 10-10.

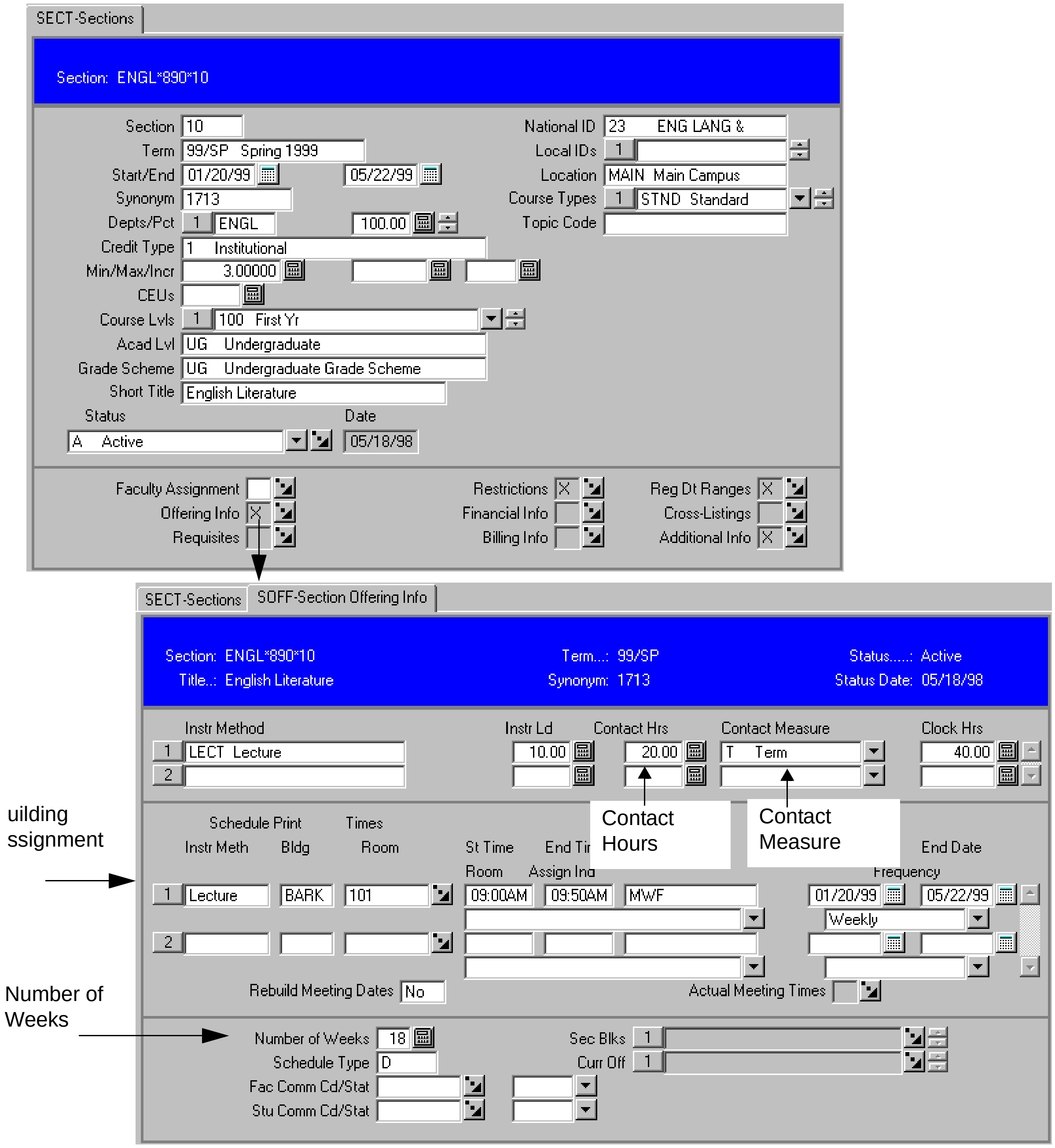


Figure 10-10: Defining Section Offering Information

Buildings

If you lease or rent some of the buildings used as meeting space for course sections, you need to indicate that as you are defining your buildings. Use the Buildings (BLDG) form in the Colleague Core module, shown in figure 10-11, to maintain each building's ownership status.

Building Ownership Status

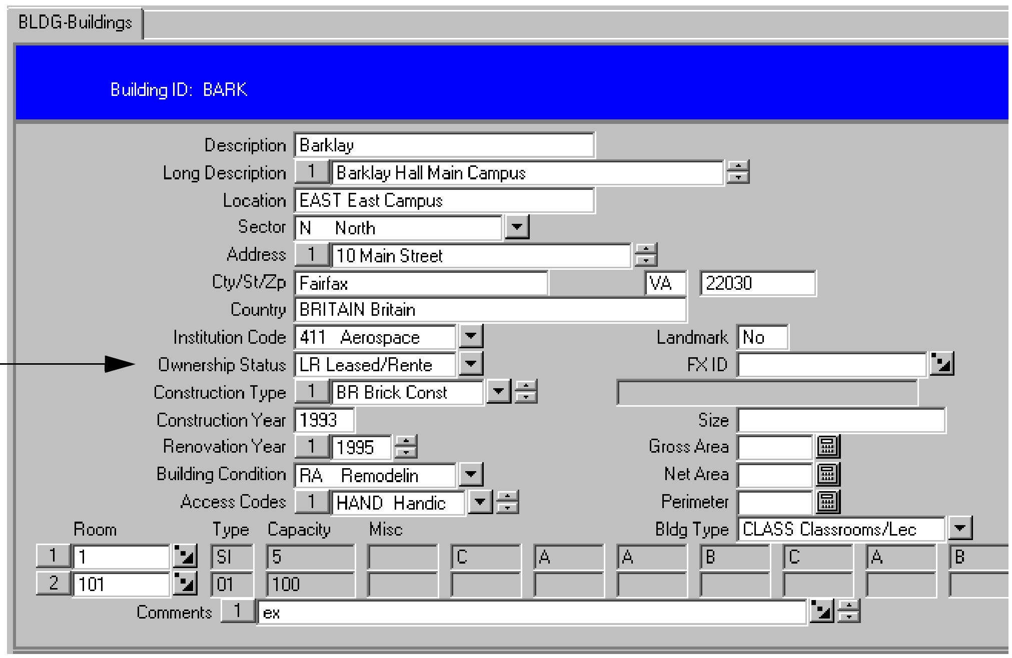


Figure 10-11: Assigning an Ownership Status to a Building

Enter the building ownership status code that is defined to mean "Leased/ Rent" in the Ownership Status field. See "Building Ownership Statuses" on page 2-15 for more information about defining your building ownership statuses.

Students

To receive accurate information from the 320 report processing, you need to define the following for each student enrolled during the census period:

- residency status and date
- positive attendance
- academic program
- notes code (if applicable)

Residency

If a student’s record contains one of the residency codes defined on the 320 Reporting Parameters (CA3P) form as of the period effective date, the student is considered a resident. Otherwise, the student is considered a non-resident.

See “Residency Statuses” on page 2-38 for more information about defining your residency statuses so they are recognized during the 320 report processing. Refer to “Calculations by Census Type” beginning on page 8-4 for information how period effective dates are determined.

Use the Addnl Student Profile Info (ASPR) form to assign each student a residency status and an associated date. You can access the ASPR form directly from the menu or detail from the Student Profile (SPRO) form as shown in figure 10-12.

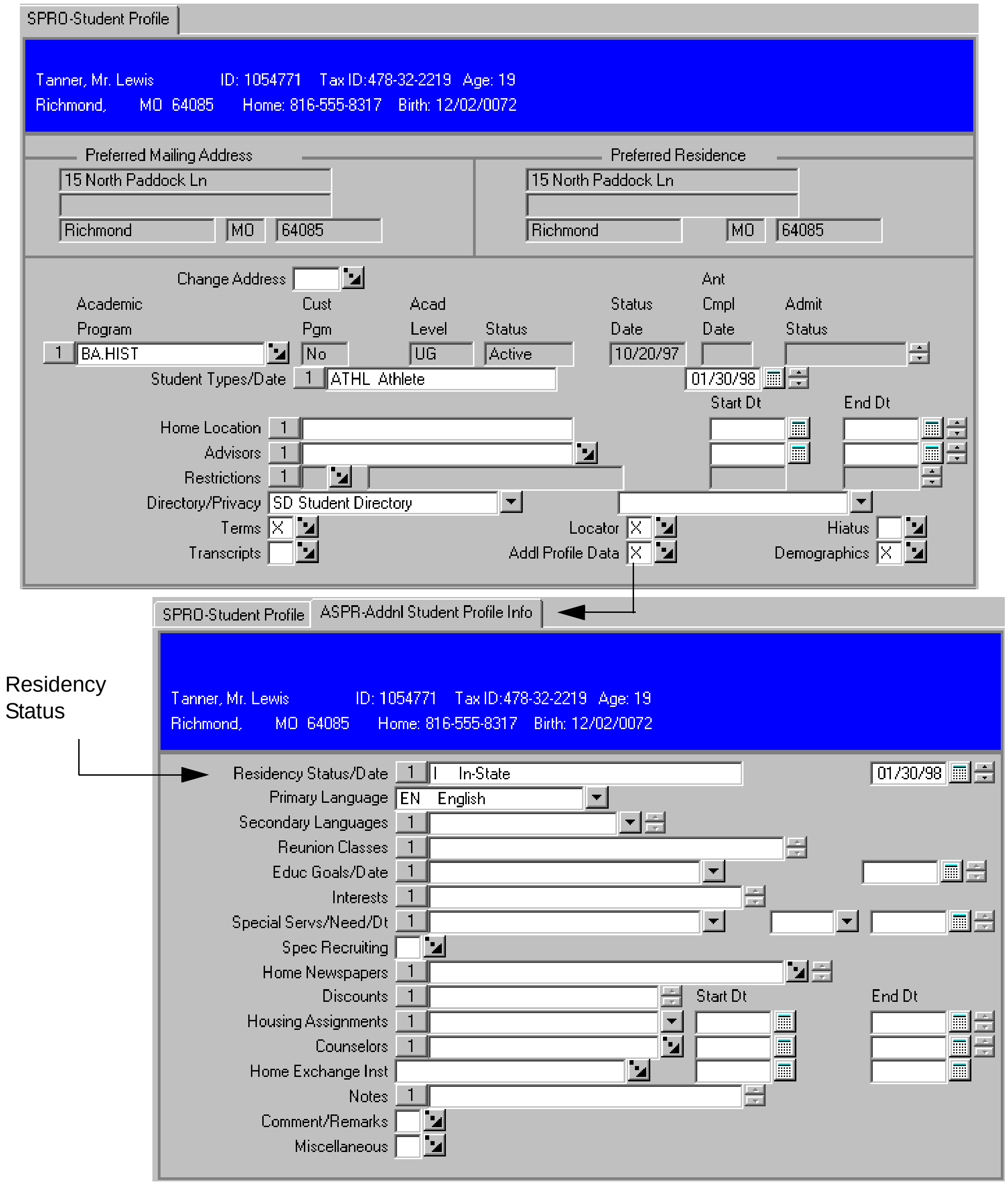


Figure 10-12: Entering Student Residency on the ASPR Form

Alternately, if you use the Registration Person Entry (RGPE) form to enter students during registration, you can enter their residency status on the (RGPE) form, as shown in figure 10-13.

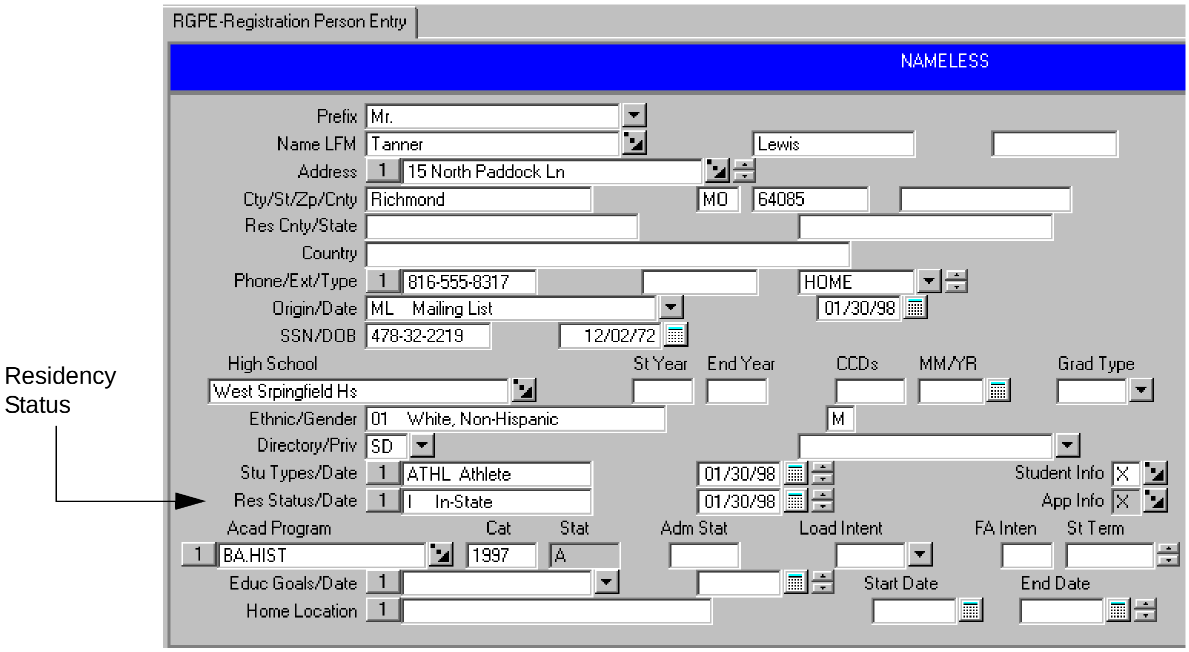


Figure 10-13: Entering Student Residency on the RGPE Form

Positive Attendance

When dealing with courses that are considered “Positive Attendance,” the actual number of hours each student spent in class must be recorded.

Use the Non-Scheduled Meeting Attendance (NSMA) form, shown in figure 10-14, to record positive attendance. You can access each positive attendance course section and Colleague displays a list of the students registered for the section. You can then record the number of hours each student spent in class.

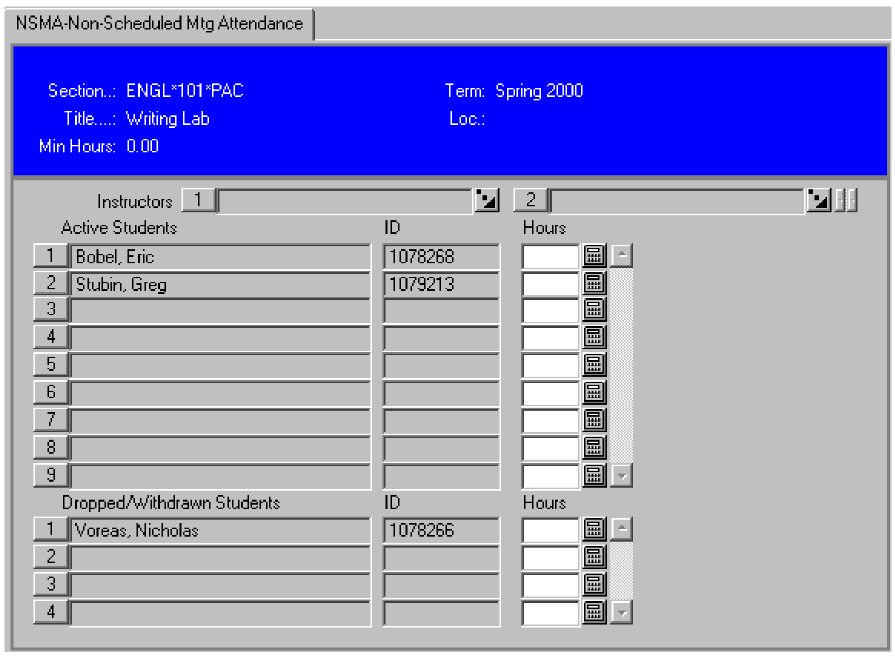


Figure 10-14: Recording Positive Attendance

Academic Program

After you have set up your apprenticeship academic programs, you need to assign them to students. You can do this initially as students apply to your institution using the Applications (APPN) form. Alternately, if you use the Registration Person Entry (RGPE) form to enter students during registration, you can enter their academic program on the (RGPE) form, as shown in figure 10-15.

Academic Program

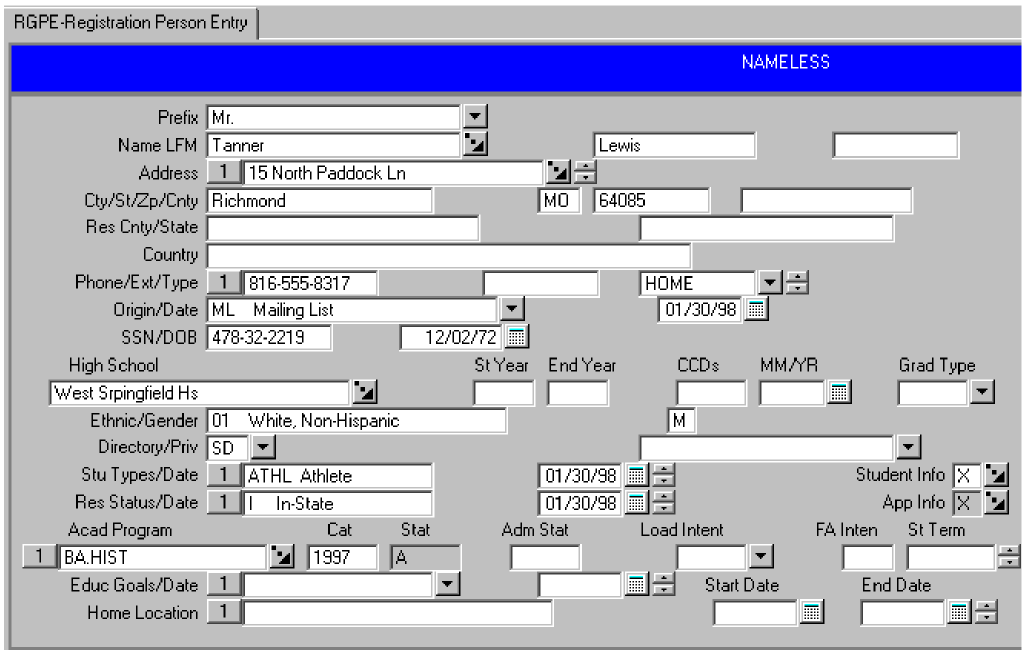


Figure 10-15: Entering a Student’s Academic Program on the (RGPE) Form

If you need to add an apprenticeship academic program to a student later in their history at your institution, use the Student Profile (SPRO) form.

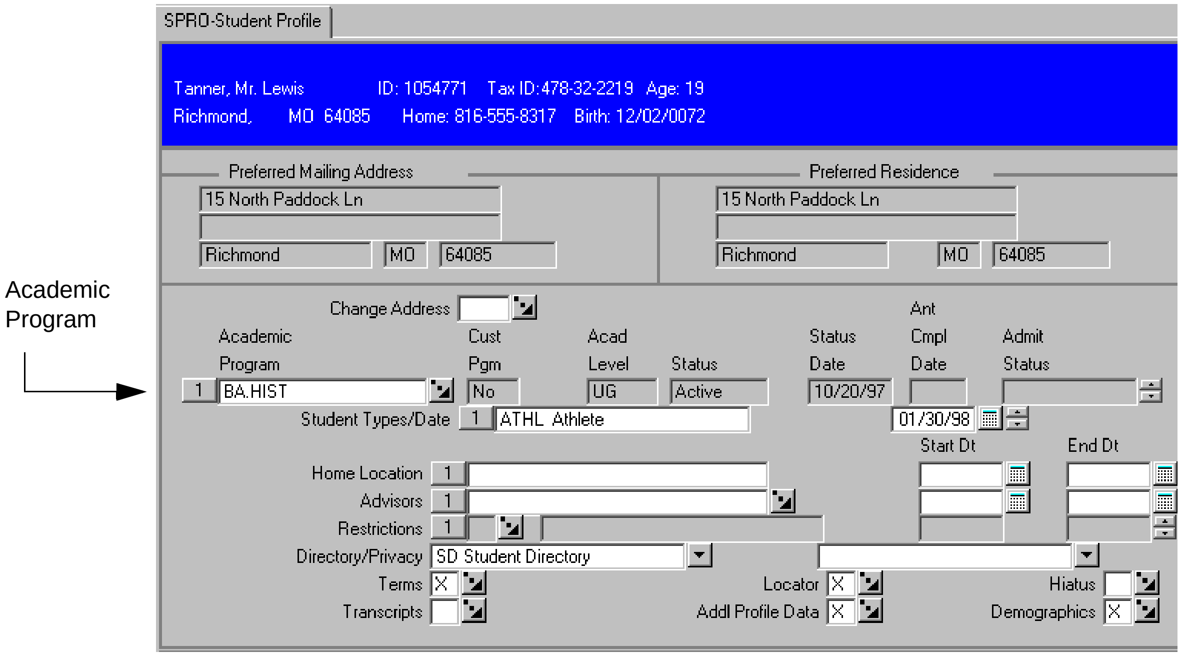


Figure 10-16: Adding an Apprentice Academic Program

See “Academic Program Types” on page 2-15 for more information about defining your apprentice academic programs.

Notes Code

When a student is enrolled in a non-funded course at your institution, you need to assign a note code to the student's academic credit record to identify the course as being excluded from FTES calculations. A course may be excluded if the student is cross-enrolled at a community college, or if the student is enrolled in a non-funded repeated course (has taken the course too any times to receive funding again). Use the Student Acad Cred Comments (STNC) form to assign a note to a student's academic record, as shown in figure 10-17.

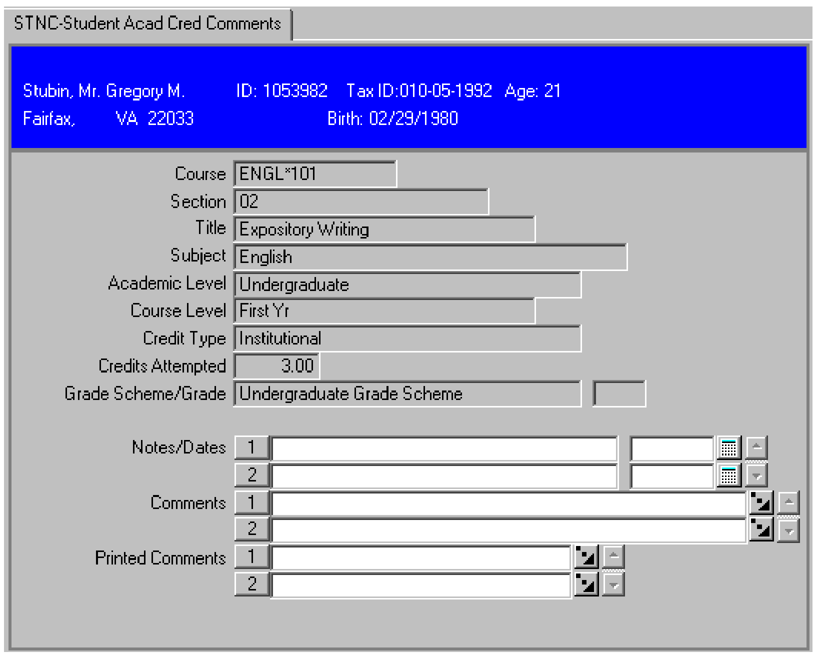


Figure 10-17: Assigning a Notes Code

Creating the 320 Work File

In This Chapter

This chapter describes how to create an intermediate work file used to generate 320 reports. Using the parameters defined on the 320 Reporting Parameters (CA3P) form in addition to other selection criteria, you create a work file with students and courses eligible for 320 reporting. Table 10-3 lists the topics covered in this chapter.

Table 10-3: Topics in this Chapter

Before You Begin

Before you begin you must have already set up your codes files and tables to facilitate 320 reporting, and have defined your 320 reporting parameters. Refer to "Defining Codes for 320 Reporting" beginning on page 2-13 for more information on setting up your Colleague code files and tables. Refer to "Defining 320 Reporting Parameters" beginning on page 2-38 for more information on defining your 320 reporting parameters.

Understanding the 320 Work File

This section explains the calculations that Colleague uses to derive the data on the 320 reports. In order to understand how the calculations work, Table 10-4 on page 10-30, provides a definition of the terms for the variables used in the calculations.

The calculations are then listed for each census type and include how Colleague:

- determines the period effective date
- calculates the number of contact hours (including any Positive Attendance hours)
- calculates the number of Full Time Equivalent Students (FTES)

Calculation Terms

In order to know how the 320 data is obtained, it is necessary to understand the variables used. The table below lists and explains each variable used in the calculations.

Term	Definition
Chrs?	**Contact Hours (Non-Credit courses only)** This is the number of contact hours calculated for a student registered in a non-credit course. Since Non-Credit courses use two census dates to calculate FTES, the "?" represents the 1st or 2nd census date on which the contact hours are calculated. For example, Chrs1 = contact hours calculated for the student as of the first census date.
DE. Factor	**Distance Education Contact Hours Factor (Non-Credit courses only)** This is an institutional parameter used as the multiplier when working with Distance Education courses, and is entered on the 320 Reporting Parameters (CA3P) form.
FTES Annualizer	**Full Time Equivalent Students Annualizer** This is an institutional parameter and is entered on the 320 Reporting Parameters (CA3P) form.
NC.CLen	**Non-Credit Course Length (Non-Credit courses only)** This is an institutional parameter and is entered on the 320 Reporting Parameters (CA3P) form.

Table 10-4: Definition of 320 Reporting Terms

Term	Definition
Rpt.Div	**Report Divisor** This value is mandated by the state of California and is entered on the 320 Reporting Parameters (CA3P) form.
TChrs	**Total Contact Hours (Non-Credit courses only)** This is the total number of section contact hours for the course section in which the student is enrolled.
TSCH(?)n	**Total Student Contact Hours** This number represents the Total Student Contact Hours for a Census Type, within a reporting period. The “?” represents the Census Type (such as W for Weekly), and the ‘n’ represents the reporting period (1,2, or 3). For example, TSCHW1 = Total Student contact Hours, Weekly Census Method, First Reporting Period.
TLMn	**Term Length Multiplier** There are up to three Term Length Multipliers (TLM1, TLM2, and TLM3). These are institutional parameters and are entered on the 320 Reporting Parameters (CA3P) form.

Table 10-4: Definition of 320 Reporting Terms (cont’d)

Calculations by Census Type

General Information

The information listed below applies to most census types, except where otherwise noted.

- The number of Contact Hours for a student is a generic number and not specific to any report. It is calculated when the 320 work file is built using the Create 320 Work File (CA3B) process (see “Creating the 320 Work File” beginning on page 10-29 for more information). The calcuations used to calculate contact hours depend on the course census type (Weekly, Daily, etc).

- The number of FTES is calculated when the individual reports are generated. This information is specific to individual reports and cannot be created in the 320 work file.
- Any sections added by students before the first census date are included in the calculations for the 320 reports, except for Daily Census [D] and Independent Study, Daily [ID] census type courses.
- Any sections dropped by students on or after the first census date are included in the calculations for the 320 reports, except for Daily Census [D] and Independent Study, Daily [ID] census type courses.
- Any sections cancelled before the first census date are reported with `0` (zero) contact hours, except for Positive Attendance [PAC & PANC] census type courses. Any contact hours recorded for a Positive Attendance course before it is cancelled are reported.

Weekly [W]

Weekly Census courses are full-term courses that meet at regularly scheduled times. The calculations performed by Colleague to derive weekly census data are listed below.

Number of Census Dates. There is one census date used for Weekly Census courses.

Census Dates(s). The census date for Weekly Census course sections is defined at the term level. All weekly census courses, regardless of when they meet, have the same census date.

Period Effective Date. The Period Effective Date is the date on which Colleague obtains course section enrollment data. For Weekly Census courses, the Census Date is used. The Census Date consists of one of the dates listed below, and is obtained in the order listed:

1. Term Location Census Date
2. Term Census Date

Reporting Period. Weekly census courses are reported in the period in which the census date falls.

Contact Hours. If you have not specified a contact measure for a course section, or if you specified term (T) as the contact measure, the number of contact hours for the course section is calculated by dividing the sum of all of the contact hours for the section (SEC.CONTACT.HOURS) by the number of weeks for the section (SEC.NO.WEEKS). If SEC.NO.WEEKS is null, Colleague derives the number of weeks based on the section start and end dates.

Contact Hours (term-based) = Sum (SEC.CONTACT.HOURS) / SEC.NO.WEEKS

If you specified the contact measure for a course section as weekly (W), the number of contact hours for the course section is calculated by summing the contact hours for the section (SEC.CONTACT.HOURS).

Contact Hours (weekly) = Sum (SEC.CONTACT.HOURS)

FTES. The number of Full-Time Equivalent Students (FTES) for Weekly Census courses is calculated as follows:

First Reporting Term

FTES = ((TSCHW1 * TLM1) / Rpt.Div) * FTES Annualizer

Second Reporting Term

FTES = ((TSCHW2 * TLM2) / Rpt.Div) * FTES Annualizer

Third Reporting Term

FTES = (TSCHW3 * TLM3) / Rpt.Div

Daily [D]

Daily Census courses are courses that meet at regularly scheduled times, but not for a full term. For example, summer courses might be considered Daily Census type courses because of the shortened term. The calculations performed by Colleague to derive Daily Census data are listed below.

Number of Census Dates. There is one census date used for Daily Census courses.

Census Date(s). The census date occurs 20% of the way through the course. Unlike weekly census courses, daily census courses (probably) have unique census dates due to varied start and end dates. If the census date is the same as the first meeting date, students who added the course section before or on the first meeting date are counted as registered as of that date. Similarly, students who dropped the course section on the census date are not counted.

Period Effective Date. The Period Effective Date is the date on which Colleague obtains course section enrollment data. For Daily Census courses, the Census Date is used. The Census Date consists of the Course Section Override Census Date. If that date does not exist, the course section is not processed and is reported as an error.

Reporting Period. Daily census courses are reported in the period in which the census date falls.

Contact Hours. If you have not specified a contact measure for a course section, or if you specified term (T) as the contact measure, the number of contact hours for the course section is calculated by by dividing the sum of all of the contact hours for the section (SEC.CONTACT.HOURS) by the number of meetings for the section as defined on the Section Schedule Detail (SESC) form.

Contact Hours (term-based) = Sum (SEC.CONTACT.HOURS) / Number of section meetings

If you specified the contact measure for a course section as daily (D), the number of contact hours for the course section is calculated by summing the contact hours for the section (SEC.CONTACT.HOURS).

Contact Hours (daily) = Sum (SEC.CONTACT.HOURS)

FTES. The number of Full-Time Equivalent Students (FTES) for Daily Census courses is calculated as follows:

First Reporting Term

FTES = (TSCHD1 / Rpt.Div) * FTES Annualizer

Second Reporting Term

FTES = (TSCHD2 / Rpt.Div) * FTES Annualizer

Third Reporting Term

FTES = TSCHD3 / Rpt.Div

Note: If processing a Summer course section (as per the Reporting Term), the FTES Annualizer is set to `1.Px`

Positive Attendance, Credit [PAC]

Positive Attendance, Credit (PAC) Courses are credit courses that meet at irregularly scheduled times, or have a different type of attendance tracking. The calculations performed by Colleague to derive PAC Census data are listed below.

Number of Census Dates. Census dates are not used for positive attendance courses.

Census Date(s). Any date calculations are performed using the reporting period start and end dates.

Period Effective Date. The Period Effective Date is the date on which Colleague obtains class enrollment data. For PAC courses, the section end date (SEC.END.DATE) is used.

Reporting Period. Positive attendance courses are reported in the period in which the course section ends (as per the SEC.END.DATE).

Contact Hours. The number of Contact Hours is number of the hours actually spent in class by each student. This number must be recorded on the Non-Scheduled Meeting Attendance (NSMA) form.

FTES. The number of Full-Time Equivalent Students (FTES) for Positive Attendance courses is calculated as follows:

First Reporting Term

FTES = (TSCHPAC1 / Rpt.Div) * FTES Annualizer

Second Reporting Term

FTES = (TSCHPAC2 / Rpt.Div) * FTES Annualizer

Third Reporting Term

FTES = TSCHPAC3 / Rpt.Div

Note: If processing a Summer course section (as per the Reporting Term), the FTES Annualizer is set to `1.`

Positive Attendance, Non-Credit [PANC]

Positive Attendance, Non-Credit (PANC) Courses are non-credit courses that meet at irregularly scheduled times, or have a different type of attendance tracking. The calculations performed by Colleague to derive PANC Census data are listed below.

Number of Census Dates. Census dates are not used for positive attendance courses.

Census Date(s). Any date calculations are performed using the reporting period start and end dates.

Period Effective Date. The Period Effective Date is the date on which Colleague obtains class enrollment data. For PANC courses, the section end date (SEC.END.DATE) is used.

Reporting Period. Positive attendance courses are reported in the period in which the course section ends (as per the SEC.END.DATE).

Contact Hours. The number of Contact Hours is number of the hours actually spent in class by each student. This number must be recorded on the Non-Scheduled Meeting Attendance (NSMA) form.

FTES. The number of Full-Time Equivalent Students (FTES) for Positive Attendance courses is calculated as follows:

First Reporting Term

FTES = (TSCHPANC1 / Rpt.Div) * FTES Annualizer

Second Reporting Term

FTES = (TSCHPANC2) / Rpt.Div) * FTES Annualizer

Third Reporting Term

FTES = TSCHPANC3 / Rpt.Div

Note: If processing a Summer course section (as per the Reporting Term), the FTES Annualizer is set to `1.`

Independent Study, Weekly [IW]

The calculations performed by Colleague to derive the Independent Study and Work Experience, Weekly Census data are listed below.

Number of Census Dates. There is one census date used for Weekly Census courses.

Census Dates(s). The census date for Independent Study, Weekly Census course sections is defined at the term level. All weekly census courses, regardless of when they meet, have the same census date.

Period Effective Date. The Period Effective Date is the date on which Colleague obtains class enrollment data. For Weekly Independent Study and Work Experience courses, the Census Date is used. The Census Date consists of one of the dates listed below, and is obtained in the order listed:

1. Term Location Census Date
2. Term Census Date

Reporting Period. Weekly census courses are reported in the period in which the census date falls.

Contact Hours. The number of contact hours is the number of credits attempted for the section by the student (STC.CRED).

Contact Hours = STC.CRED

FTES. The number of Full-Time Equivalent Students (FTES) for Independent Study and Work Experience courses is calculated as follows:

First Reporting Term

FTES = ((TSCHIW1 * TLM1) / Rpt.Div) * FTES Annualizer

Second Reporting Term

FTES = ((TSCHIW2 * TLM2) / Rpt.Div) * FTES Annualizer

Third Reporting Term

FTES = (TSCHIW3 * TLM3) / Rpt.Div

Independent Study, Daily [ID]

The calculations performed by Colleague to derive the Independent Study and Work Experience, Daily Census data are listed below.

Number of Census Dates. There is one census date used for Daily Census courses.

Census Date(s). The census date occurs 20% of the way through the course. Unlike weekly census courses, daily census courses (probably) have unique census dates due to varied start and end dates. If the census date is the same as the first meeting date, students who added the course section before or on the first meeting date are counted as registered as of that date. Similarly, students who dropped the course section on the census date are not counted.

Period Effective Date. The Period Effective Date is the date on which Colleague obtains course section enrollment data. For Independent Study, Daily Census courses, the Census Date is used. The Census Date consists of one of the dates listed below, and is obtained in the order listed:

1. Course Section Census Date
2. Term Location Census Date
3. Term Census Dates

Reporting Period. Daily census courses are reported in the period in which the census date falls.

Contact Hours. The number of contact hours is the number of credits attempted for the section by the student (STC.CRED) multiplied by the course length (SEC.NO.WEEKS).

Contact Hours = STC.CRED * SEC.NO.WEEKS

FTES. The number of Full-Time Equivalent Students (FTES) for Daily Census courses is calculated as follows:

First Reporting Term

FTES = TSCHID1 / Rpt.Div * FTES Annualizer

Second Reporting Term

FTES = (TSCHID2) / Rpt.Div) * FTES Annualizer

Third Reporting Term

FTES = TSCHID3 / Rpt.Div

Note: If processing a Summer course section (as per the Reporting Term), the FTES Annualizer is set to **1.**

Non-Credit [NC]

The calculations performed by Colleague to derive the Non-Credit, Independent Study, Distance Education Weekly Census data are listed below.

Number of Census Dates. There are two census dates used for Non-Credit, Independent Study, Distance Education Weekly courses.

Census Dates(s). The census dates for Non-Credit, Independent Study, Distance Education Weekly Census courses are defined at the term level. All weekly census courses, regardless of when they meet, have the same census dates.

Period Effective Date. The Period Effective Date is the date on which Colleague obtains class enrollment data. Non-Credit courses use 2 census dates. The Census Dates are taken from one of the dates listed below, and are obtained in the order listed:

1. Course Section Census Dates
2. Term Location Census Dates
3. Term Census Dates

Reporting Period. Distance Learning courses are reported in the period in which the first census date occurs.

Contact Hours. The number of contact hours for each student is calculated as follows:

- TChrs = Sum of all section contact hours (SEC.CONTACT.HOURS)
- DE.Factor = Distance Education Contact Hours Factor as mandated by the state of California. This value must be entered on the 320 Parameters (CA3P) form.
- NC.CLen = Non Credit Course Length as mandated by the state of California. This value must be entered on the 320 Parameters (CA3P) form.

Contact Hours (CHrs) = TChrs / DE.Factor * NC.Clen

FTES. The number of Full-Time Equivalent Students (FTES) for Non-Credit, Independent Study, Distance Education Weekly Census courses is calculated as follows:

Average TSCHNC = (Chrs1 + Chrs2) / 2

First Reporting Term

FTES = (Average TSCHNC1 / Rpt.Div) * FTES Annualizer

Second Reporting Term

FTES = (Average TSCHNC2) / Rpt.Div) * FTES Annualizer

Third Reporting Term

FTES = TSCHNC3 / Rpt.Div

Note: If processing a Summer course section (as per the Reporting Term), the FTES Annualizer is set to `1`.

Non Supported [X]

Courses with a Non Supported Census type are not included in the 320 Apportionment Attendance Reports, and are reported as `0` (zeros) to the state.

Generating the 320 Work File

Work files are temporary files created by extracting information from the Colleague database and converting that data to specific formats used by the 320 Reports. The information extracted represents the Colleague database for a particular reporting period. Work files contain two types of data:

- one-for-one conversions of individual Colleague data fields
- data derived from multiple Colleague data fields and subroutines

Before generating a report, you must first build the work file based on the selection criteria specified for the work file. Use the Create 320 Work File (CA3B) form to build the work file needed to populate the 320 reporting file.

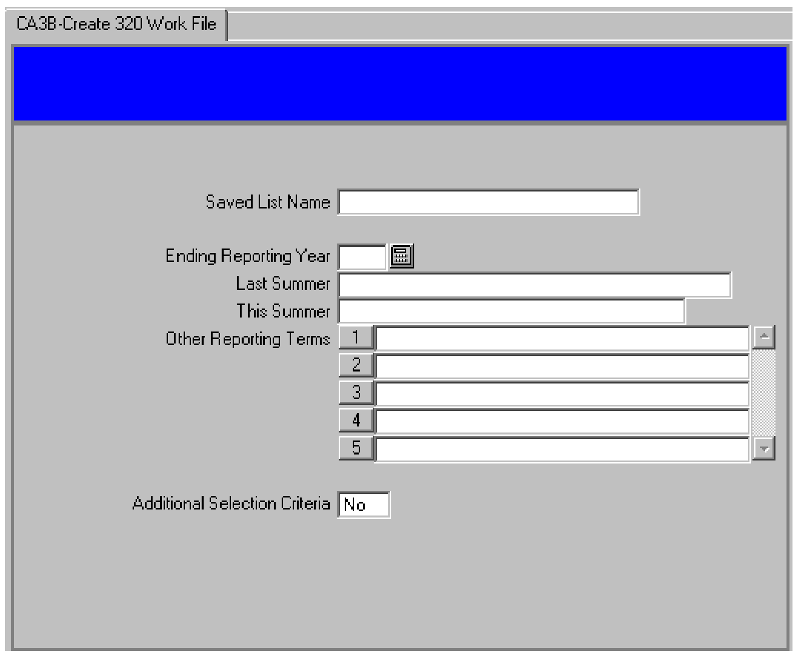


Figure 10-18: Create 320 Work File (CA3B) Form

The fields on the CA3B form are described below. For additional information about the CA3B form, see the online help.

Saved List Name

You can enter a saved list of IDs from the STUDENT.COURSE.SEC file to limit the records extracted for the work file.

Ending Reporting Year

You can enter a year used to calculate the reporting date ranges. This is the year in which the reporting period ends. For example, if 1997 is entered as the reporting year (RY), the reporting periods are calculated as follows:

Period	Date Range	Formula Range
First	7/1/96 - 12/31/96	7/1/(RY - 1) - 12/31/(RY - 1)
Second	1/1/97 - 4/15/97	1/1/RY - 4/15/RY
Third	4/16/97 - 6/30/97	4/16/RY - 6/30/RY

Table 10-5: Example of Reporting Year Date Ranges

This field is optional.

Last Summer

Enter the academic term code used to identify the “Last Summer” reporting period.

An entry in this field is required.

This Summer

Enter the academic term code used to identify the “This Summer” reporting period.

An entry in this field is required.

Other Reporting Terms

You can identify your primary academic terms (for example, 96/FA and 97/SP) to be included in this extract.

An entry in this field is required.

Procedure for Creating the 320 Work File

Complete the following steps to create the 320 work file:

Step 1. Access the Create 320 Work File (CA3B) work file form.

Step 2. Enter the required selection criteria and any optional selection criteria.

Step 3. Create the work file by finishing from the form.

320 Reports

In This Chapter

This chapter describes how to generate the individual reports required by 320 Reporting.

Note: The Faculty Contact Hours Adjustment Report (320F) is not supported by Datatel at this time.

Table 10-6 lists the topics covered in this chapter.

Table 10-6: Topics in this Chapter

Before You Begin

Before you begin to generate reports, you must have already completed the following:

Task	Reference
set up your Colleague code files and tables in accordance with 320 reporting requirements	“Defining Codes for 320 Reporting” beginning on page 2-13
defined your 320 reporting parameters	“Defining 320 Reporting Parameters” beginning on page 2-38
set up your course and student records in accordance with 320 reporting requirements	“Maintaining Data for 320 Reporting” beginning on page 10-1
created your 320 work file	“Maintaining Data for 320 Reporting” beginning on page 10-29

Table 10-7: Tasks to Complete Before Generating Your 320 Reports

Understanding 320 Report Generation

Once you have successfully created your 320 work file, you can print your 320 reports. You can choose to print single or multiple reports at one time, as well as identify specific work file records to be reported.

Use the 320 Printed Reports (CA3R) form as shown in figure 10-19 to generate the 320 Reports as described below.

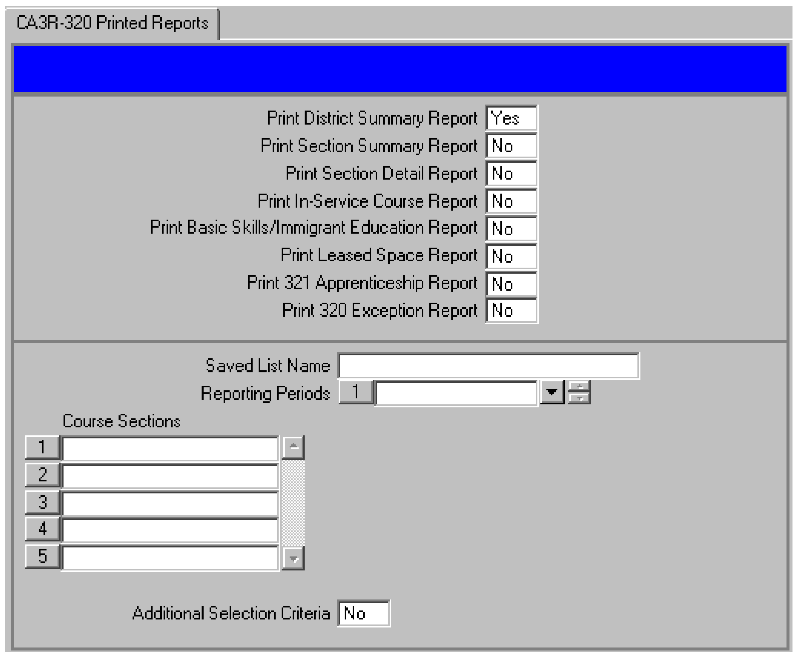


Figure 10-19: The 320 Printed Reports (CA3R) Form

The CA3R form is divided into a report seleciton and a selection criteria section.

Report Selection

Each of the fields listed in this section allow you to print a specific report. Identify which one(s) you want to print by entering a ‘Y’ in the field for the report(s) listed below.

Print District Summary Report

The District Summary Report lists the ‘total’ Contact Hours and annualized FTES[1] for ALL of the Community Colleges in a District. This report is sub-totaled by: Census Type, Reporting Period, Day/Extended Day, and College. The results for each Census Type are reported on a separate page. Courses with a census type of “X” (Not Supported) and apprenticeship records are not included in this report.

Print Section Summary Report

The Section Summary Report lists the course sections that make up the results on the 320 District Summary Report. The information is listed in the same order as on the 320 District Summary Report, but is sub-totaled by: Census Type, Reporting Period, Day Type, College, and Location. In addition, the information on this report is further sorted and listed by Section Term (not Reporting Term), and by Section Name (for example, Math*101*01).

Print Section Detail Report

The Section Detail Report lists all of the Students in EACH of the Course Sections that are listed on the 320 Section Summary Report. All of the students in each section are listed regardless of whether they generated contact hours or not.

This information is listed in order by: College, Section Term (not Reporting Period), and Section Name. Each course section appears on a separate page.

Print In-Service Course Report

The In-Service Course Report is similar to the 320 Section Summary Report in that it displays a summary listing of the course sections that are “In-Service” courses. Since all In-Service courses are Positive Attendance courses, only the Resident and Non-Resident Positive Attendance hours and FTES are listed on the report.

The information on this report is listed by: College, Reporting Term, Section Term (not Section Reporting Term), and Section Name.

1. Note that FTEs are annualized only on the District Summary Report. All detail reports show actual FTEs.

Print Basic Skills/Immigrant Education

The Basic Skills/Immigrant Education Report displays those course sections that are marked with either a Basic Skills or Immigrant Education Course Type. This report is very similar to the Leased Space report described below, except the data is sorted by Credit and Non-Credit course sections first. Any course section with a Census Type of “PANC” or “NC” is listed in the Non-Credit portion while all other course sections are listed in the Credit portion. The Non-Credit courses are listed first.

Print Leased Space Report

The Leased Space Report is similar to the 320 Section Summary Report except that ONLY those course sections that were taught in leased space are listed.

The information is listed by: College, Section Term (not Reporting Term), Building, Section Name, totaling all of the Contact Hours and FTES, sub-totaled by each of the above.

Print 321 Apprenticeship Report

The 321Apprenticeship Report totals the contact hours and FTES for all apprentice students taking apprentice courses. The number of contact hours and FTES are divided up into two groups, credit and non-credit apprentice courses. Non-Credit courses are defined as those with Calculation Types of “PANC” or “NC.”

Print 320 Exception Report

The 320 Exception Report lists those course sections that had some kind of enrollment, but did not have contact hours associated with them. This report can be used to verify whether these course sections should actually have contact hours associated with them.

Selection Criteria

Use this section to further identify the records from that work file that you want to include on the 320 reports. You can enter a saved list of IDs from the work file, enter specific reporting periods, as well as enter specific course sections that you want to report on.

Procedure for Generating 320 Reports

Complete the following steps to generate 320 Reports:

Step 1. Access the 320 Printed Reports (CA3R) form.

You must have already created the 320 work file prior to generating reports. Refer to “Creating the 320 Work File” beginning on page 10-29 for information on how to create the 320 work file.

Step 2. Select the reports you want to print.

Step 3. Enter any selection criteria to limit the records included on the report.

Step 4. Generate the report(s) by finishing from the form.

Step 5. Review the reports for accuracy.

Step 6. Make any necessary corrections to the Colleague data base.

Step 7. Rebuild the 320 work file.

Step 8. Regenerate the selected 320 reports.

Step 9. Repeat Step 1 through Step 8 as needed to correct any errors.

Step 10. Finish from the CA3R form.

Using CA State Reporting: MIS Reports

11. Generating the Employee Reports

Understanding the EB/EJ Reports

In This Part

This part of the manual provides the information you need to prepare the Employee Demographics (EB) and Employee Assignment (EJ) reports required by the Chancellor's Office, and which can be generated by Colleague. The chapter that you are reading now gives you the background knowledge you need to perform the procedures detailed in subsequent chapters.

Before You Begin

Before you can complete the procedures in this part, you must define the parameters on the California MIS EB/EJ Defaults (CADE) form. For more information, see "Setting Up EB and EJ Defaults" beginning on page 2-43.

Reports That Can Be Generated

Colleague's Human Resources System can generate the following reports, which are required by the Chancellors's Office:

- Employee Demographics (EB) Report
- Employee Assignment (EJ) Report

The submission of the employee demographic and assignment records are due during the Fall Collection period, which reflects employee activity during the Fall term. The employee demographic records are also due one month after the end of each term. The information in this chapter assists you with generating the data for the Fall Collection period. For information about the steps necessary to generate the end of term submission, see "Understanding the XB/XE/XF Reports" on page 4-1.

Employee Demographics (EB) Report

This report provides the Chancellor's Office with demographic information about the personnel employed at your institution. Colleague produces a file of the information, which can be submitted to the Chancellor's Office. For information on how to generate this report, see "Building the Employee Demographics (EB) Report" beginning on page 11-31.

Employee Assignment (EJ) Report

This report provides the Chancellor's Office with information about the positions each employee has at your institution. Colleague produces a file of the information, which can be submitted to the Chancellor's Office. For information on how to generate this report, see "Building the Employee Assignment (EJ) Report" beginning on page 11-7.

Understanding Colleague's Capabilities

Using Colleague, you can enter the data necessary to generate the employee demographic and employee assignment records. For information about where Colleague extracts the data from, refer to "Employee Demographics Export (EB)" beginning on page 11-49 and "Employee Assignment Export (EJ)" beginning on page 11-63.

Forms Used

Table 11-1 shows an alphabetical list of the forms used in this part to generate the employee demographic and employee assignment records and a description of each.

Form	Purpose
EJ Non-Instructional Extract (EJNI)	Creates employee non-instructional assignment records in the CAHR.EJWORK work file.
EJ Release Time Data Extract (EJRT)	Creates Campus Organization Data records in the CAHR.EJWORK work file.
EJ Section Build EB Work Records (BEWF)	Creates EB work file records and summarizes EJ work file records.
EJ Section Extract (EJSE)	Creates course section employee assignment records in the CAHR.EJWORK work file.
Employee Assignment (CAEA)	View and maintain individual EJ word file records.
Employee Assignment Export (CAEJ)	Creates the export file with the employee assignment records that can be submitted to the Chancellor's Office.
Employee Demographic Export (CAEB)	Creates the export file with the employee demographic records that can be submitted to the Chancellor's Office.
Employee Demographics (CAEM)	View and maintain information in the EB work file.
Employee Summary (CAES)	View and maintain information about an employee's assignments.
Purge Employee Reporting Recs (PERR)	Use to purge the EB and EJ work files.

Table 11-1: Forms Used

Files Used

Table 11-2 lists the primary files used in this part to generate the employee demographic and employee assignment records.

File	Description
CAHR.EJ.SUMMARY	Contains the summarized EJ work records.
CAHR.EB.WORK	Contains the employee demographic work records.
CAHR.EJWORK	Contains the employee assignment data used in the employee exports.

Table 11-2: Files Used

Steps at a Glance

Table 11-3 provides a summary of the steps used to generate the EB and EJ reports. For detailed information about each of the steps, see the pages referenced below.

Step	Task	Form	For More Information, See...
1.	Set-up the parameters for the reports.	California MIS EB/EJ Defaults (CADE)	page 2-43
2.	Purge any existing records from the work files.	Purge Employee Reporting Recs (PERR)	page 11-75
3.	Create records in the EJ work file for the classroom assignment from sections.	EJ Section Extract (EJSE)	page 11-11
4.	Create records in the EJ work file for faculty reassignments for non-classroom faculty.	EJ Release Time Data Extract (EJRT)	page 11-16
5.	Create records in the EJ work file for management positions and classified assignments.	EJ Non-Instructional Extract (EJNI)	page 11-20
6.	Modify or delete records in the EJ work file.	Employee Assignment (CAEA)	page 11-25
7.	Summarize EJ records and build employee demographic records.	Build EB Work Records (BEWF)	page 11-31
8.	Export the EJ work file records to the CAST.EJ file.	Employee Assignment Export (CAEJ)	page 11-71
9.	Export the EB work file records to the CAST.EB file.	Employee Demographic Export (CAEB)	page 11-58
10.	Submit Data.	Data Submission (COMIS)[a]	http://www.cccco.edu/divisions/tris/mis.htm
11.	Review error reports generated by the Chancellor's Office.	Syntactical and Referential Reports (COMIS)[b]	http://www.cccco.edu/divisions/tris/mis.htm
12.	Add, modify, or delete EJ summary records.	Employee Summary (CAES)	page 11-44
13.	Add, modify, or delete EB records.	Employee Demographics (CAEM)	page 11-46

Table 11-3: Steps at a Glance for Generating the EB and EJ Reports

a. The submission of data is completed using the Chancellor's Office web site and not through Colleague.
b. The Syntactical and Referential Reports are not generated by Colleague, and must be retrieved directly from the Chancellor's Office.

If the data you submit to the Chancellor's Office contains errors, you can modify the data using the Employee Summary (CAES) or Employee Demographics (CAEM) forms. After you have made all the necessary corrections, you must create new export files using the Employee Assignment Export (CAEJ) and Employee Demographic Export (CAEB) processes.

Building the Employee Assignment (EJ) Report

In This Chapter

This chapter provides the information needed to build the EJ work file used for California MIS reporting. Unlike the other California exports which originate in the Student System, the employee exports are generated from Colleague's Human Resources System. Forms mentioned in this and other chapters in this part that are related to employee exports are found in the California MIS module of the HR application. Table 11-4 lists the topics covered in this chapter.

Table 11-4: Topics in this Chapter

This chapter does not address how to add or correct data contained in the work file. Refer to "Maintaining the EJ Work File" beginning on page 11-25 for more information on maintaining work file data.

Before You Begin

To successfully create the EJ work file used by the employee reports, your institution must be using the following aspects of Datatel's software:

- Colleague Release 17
- HR4 (or higher), including being live on the Personnel module (being live on the Payroll module is optional)
- Faculty Contracts by Assignment (Colleague's interface between the Human Resources System and the Student System. For more information about assignment contacts, see *Using Personnel*).

Before you can build the EJ work file used for the employee reports, you must have already set up your Colleague database with the necessary codes and tables. Refer to "Defining Codes & Tables for MIS Reporting" on page 2-1 for a complete list of the codes and tables required to produce all of the California State Reports. Table 11-5 listed below outline the codes and tables used specifically by the Employee Assignment (EJ) exports.

Code Files	Validation Code Tables	Translation Tables
		CAHR.GI01
ASGMT.CONTRACT.TYPES	CA.EJ.ASSIGN.TYPES	CAHR.EJ01.TEACH.ARRGT[a] CAHR.EJ01.CRED.TYPE CAHR.EJ01.POS.CLASS CAHR.EJ01.CONTRACT.TYPE
	LEAVE.TYPES CA.EJ.LEAVE.STATUSES	CAHR.EJ.ROLES[b]
		CAHR.EJ.CONTACT.MEASURES[c]
		CAHR.EJ.EARNTYPES[d]

Table 11-5: Employee Assignment Code Files and Tables

a. The CAHR.TEACH.ARRGT translation table must be defined in the ST application. For more information, see the comments on the File Translation Tables (FLTT) form.
b. The CAHR.EJ.ROLES translation table must be defined in the ST application. For more information, see the comments on the File Translation Tables (FLTT) form.
c. The CAHR.EJ.CONTACT.MEASURES translation table must be defined in the ST application. For more information, see the comments on the File Translation Tables (FLTT) form.
d. The CAHR.EJ.EARNTYPES translation tables must be populated if you want to report non-instructional assignments. If the translation tables is blank, Colleague does not create any records when the EJ Non-Instructional Extract (EJNI) process is run.

After you have defined your codes and tables, you must also define the defaults used by Colleague to create the EJ work file. Refer to "Setting Up EB and EJ Defaults" on page 2-43 for information about setting up the defaults used to select data included in the EJ work file.

Understanding Work Files

Work files are temporary files created by extracting information from the Colleague database, and then converting that data to specific formats used by the California employee reports. While some data can be derived directly from Colleague at the time the exports are created, other types of data are extracted from multiple fields in Colleague and then combined into a single work file field. A work file field may also require additional translation in order to export the data in the format required by the state.

The EJ work file (CAHR.EJWORK) contains assignment data. The work file collects information for the EJ records from the following sources:

- Non-instructional positions eligible for reporting (for example, secretary)
- Instructional assignments eligible fore reporting (for example, teaching MATH*100)
- Campus organization assignments (for example, club advisor or club member)

Note: If Colleague cannot create at least one EJ record for an employee, an EB record is not created either, and the employee is excluded from the work file and not reported.

You can override the information that Colleague creates and stores in the work file for individual employees. The fields that you can override are identified in the chapter for the EJ export.

Note: During the initial extract of the EJ records each record remains separate. This allows for maintenance of the EJ records through the Employee Assignment (CAEA) form. During the extract of the EB records the EJ records are summarized and linked to an EB record.

Forms Used

Table 11-6 shows an alphabetical list of the forms used in the chapter and a description of each.

Form	Description
EJ Non-Instructional Extract (EJNI)	Creates employee non-instructional assignment records on the CAHR.EJWORK work file.

Table 11-6: Forms for Building the EJ Work File

Form	Description
EJ Release Time Data Extract (EJRT)	Creates Campus Organization Data records on the CAHR.EJWORK work file
EJ Section Extract (EJSE)	Creates course section employee assignment records on the CAHR.EJWORK work file

Table 11-6: Forms for Building the EJ Work File (cont'd)

File Used

Table 11-7 lists the primary file used in building the EJ work file.

File	Description
CAHR.EJWORK	Contains the employee assignment data used in the employee exports.

Table 11-7: File Used with Building the EJ Work File

Building EJ Section Records

Colleague does the following to determine which instructional assignments to include in the work file:

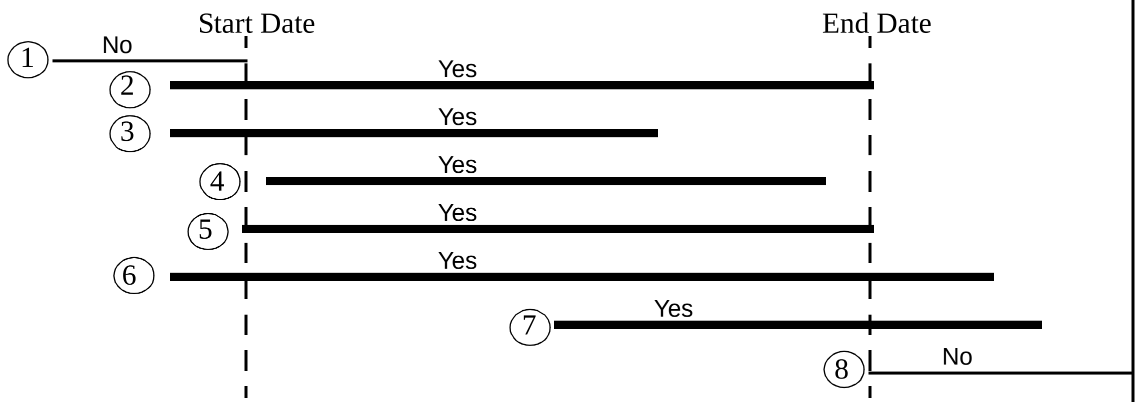
1. Colleague selects all the instructional assignments from COURSE.SECTIONS that meets the following selection criteria.
   - If a Reporting Term is entered on the EJSE form, only COURSE.SECTIONS with a matching term from SEC.REPORTING.TERM are selected.
   - If reporting start and end dates are entered on the EJSE form, only COURSE.SECTIONS that begin prior to end date of reporting period and end after the start date of the reporting period are selected.
   - If a saved list is entered on the EJSE form, only the COURSE.SECTIONS in the saved list.
2. After Colleague selects the instructional assignments, Colleague selects the employees wage records in order to extract information about their positions. The selection of wage records is as follows:
   - Selects wage records that start before the assignment end date and do not end before the assignment end date.
   - If the employee has multiple wage records, Colleague selects the wage record that either does not have an end date or whose end date is furthest in the future.
   - If the employee has multiple wage records, that all end on the same day, all of the wage records are selected.
3. Once the instructional assignments and wage records are selected, Colleague creates EJ records in the CAHR.EJWORK file. For more information about the information included in each of the EJ records, see “California MIS Data Elements” on page 11-65.

Additional Selection Criteria Information

Figure 11-1 on page 11-12 illustrates how each of the following types of records records are selected based on the date range entered the EJ Section Extract (EJSE) form:

- course sections (only if Reporting Start and End Dates are entered)
- wage assignments.

Note: The date ranged entered on the EJSE form is represented by the dash line and the records are represented by the horizontal lines.



1 – begins and ends prior to the start date of the reporting period and would not be reported.
2 – begins prior to the start date and ends on the end date of the reporting period and would be reported.
3 – begins prior to the start date and ends prior to the end date of the reporting period and would be reported.
4 – begins after the start date and ends before the end date and would be reported.
5 – begins and ends on the dates of the reporting period and would be reported.
6 – begins prior to the start date and ends after the end date of the reporting period and would be reported.
7 – begins after the start date and ends after the end date of the reporting period and would be reported.
8 – begins and ends after the reporting time frame and would not be reported.

Figure 11-1: Records Selected Based on Start and End Dates

Creating the EJ Section Extract Work File Data

Use the EJ Section Extract (EJSE) form to create course section work records on the EJ work file.

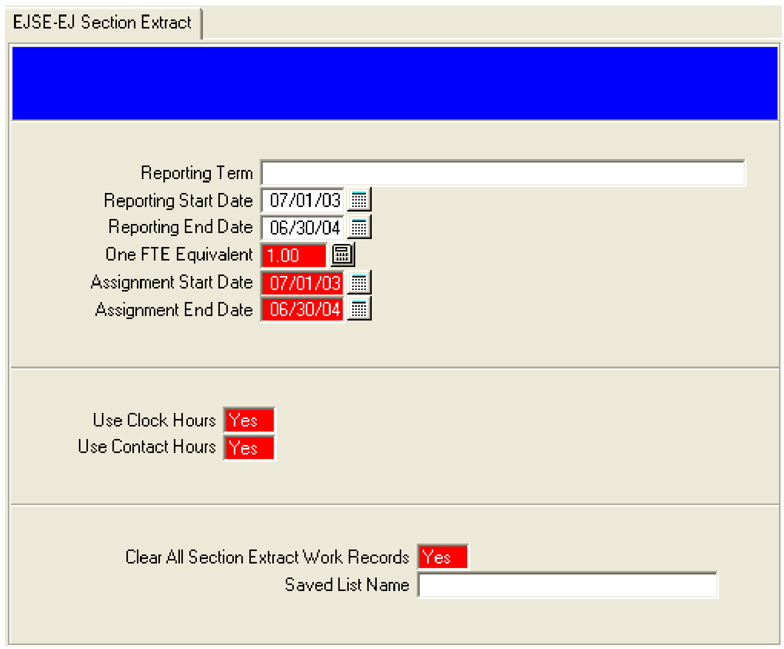


Figure 11-2: The EJ Section Extract (EJSE) Form

Noteworthy Fields on the EJSE Form

The fields on the EJSE form are explained below. For additional information about the EJSE form, see the online help.

Reporting Period

To determine which course sections should be selected you can choose between two options. The first choice is to enter a Reporting Term. Any course sections that are offered during the term entered in the Reporting Term field are selected. The second option is to enter dates in the Reporting Start Date and Reporting End Date fields to create a reporting period. Any course sections that started before the end date of the reporting period and ended after the start date reporting period are selected. For more information about using the reporting start and end dates, see “Additional Selection Criteria Information” on page 11-11.

You can enter either a term or a start and end date, but not both.

One FTE Equivalent

To determine the Full Time Equivalent (FTE) load factor, enter the percent or number of units that represent a full-time load. For example, if your institution expresses a full-time load as a percent you would enter 100.00 for a regular full-time load. If your institution expresses a full-time load in terms of units, you would enter the number of credit hours that is considered full time.

Note: If you are running the report for a specific term or session you need to adjust your FTE to correlate to that portion of the year, and not what is considered full time for the entire year.

Assignment Start and End Date

The Assignment Start Date and End Date fields are used to determine which wage record should be used for reporting purposes for a particular assignment. When running the EJSE extract the end date should be the end of the term. Entering the date for the end of term instead of the end of the year avoids the possibility of using the wrong hourly rate. For more information about the records selected, see "Additional Selection Criteria Information" on page 11-11.

Clock Hours vs. Contact Hours

To determine the faculty contact hours, either section clock hours or section contact hours can be used. Enter Yes in the Use Clock Hours and/or Use Contact Hours field to select how you want to determine faculty contact hours. At least one of the two fields must be set to Yes, or you can set both clock hours and contact hours to Yes, but they can not be both set to No. Colleague first checks for clock hours and if that is null, Colleague uses section contact hours to determine the faculty contact hours.

Clear All Section Extract Records

If you do not clear all section extract records, Colleague updates any records currently stored in the EJ work file. Records with identical data in the following data elements are considered to be the same and are updated:

- GI01 - District College Identifier
- EB00 - Employee Identifier
- EJ01 - Employee Assignment Type
- EJ02 - Employee Assignment Leave Status
- EJ03 - Employee Assignment Account Code
- COURSE.SEC.FACULTY.ID - course section faculty ID

Procedure for Creating the EJ Section Extract Work Records

Follow the steps below to create EJ section extract records in the EJ work file.

Step 1. Access the EJ Section Extract (EJSE) form.

Step 2. Enter either a fall term or Reporting Start and End Dates to limit the course section selected.

Step 3. Enter the number that represents the One FTE Equivalent at your institution.

Step 4. Enter the Assignment Start and End Date.

Step 5. Enter **`Y`** in Use Clock Hours, Use Contact Hours, or both.

At least one of the fields must set to Yes.

If you enter Yes for both fields, Colleague first checks for clock hours and if clock hours is null it checks for contact hours.

Step 6. To override existing section extract records, enter No in the Clear All Section Extract Work Records.

If you enter Yes, Colleague removes all the section extract records on the work file before if creates any new section extract records.

Step 7. Run the process by finishing from the form.

Building EJ Release Time Records

Colleague does the following to determine which instructional assignments to include in the work file:

1. Colleague selects all campus organization member and advisor assignments that meets the following selection criteria:
   - If Contact Load Periods are entered, only assignments that are associated with the load periods are selected.
   - If a saved list is entered, only the people who are included in the saved list will have either assignments selected.
2. After Colleague selects the assignments, Colleague selects the employees wage records in order to extract information about their positions. The selection of wage records is as follows:
   - Selects wage records that start before the assignment end date and do not end before the assignment end date.
   - If the employee has multiple wage records, Colleague selects the wage record that either does not have an end date or whose end date is furthest in the future.
   - If the employee has multiple wage records, that all end on the same day, all of the wage records are selected.
3. Once the assignments and wage records are selected, Colleague creates EJ records in the CAHR.EJWORK file. For more information about the information included in each of the EJ records, see "California MIS Data Elements" on page 11-65.

Creating the EJ Release Time Work File Data

Use the EJ Release Time Data Extract (EJRT) form to create release time work records on the EJ work file.

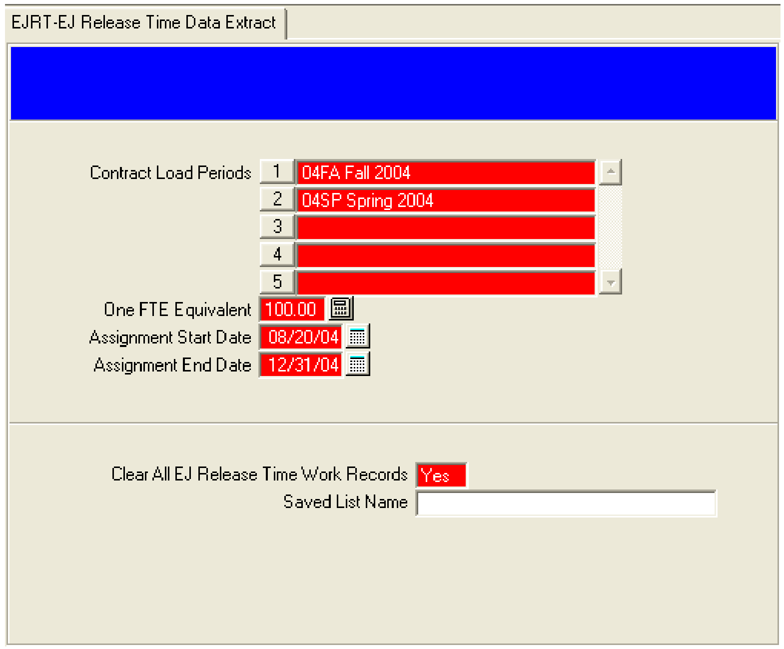


Figure 11-3: The EJ Release Time Data Extract (EJRT) Form

Noteworthy Fields on the EJRT Form

The fields on the EJRT form are explained below. For additional information about the EJRT form, see the online help.

Contract Load Periods

The Load Periods entered here are used to select Campus Org. Advisors and Campus Org. Members data to be reported. Only faculty who have advisor or member assignments in a load period entered in this list are selected for reporting.

One FTE Equivalent

To determine the Full Time Equivalent (FTE) load factor, enter the percent or number of units that represent a full-time load. For example, if your institution expresses a full-time load as a percent you would enter 100.00 for a regular full-time load. If your institution expresses a full-time load in terms of units, you would enter the number of hours that is considered full time.

Note: If you are running the report for a specific term or session you need to adjust your FTE to correlate to that portion of the year, and not what is considered full time for the entire year.

Assignment Start and End Dates

The Assignment Start Date and the Assignment End Date are used to determine which wage record should be used for reporting purposes for a particular assignment. When running the EJRT extract the end date should be the end of the term. Entering the date for the end of term instead of the end of the year avoids the possibility of using the wrong hourly rate.

Clear All Release TIme Work Records

If you do not clear all release time records, Colleague updates any records currently stored in the EJ work file. Records with identical data in the following data elements are considered to be the same and are updated:

- GI01 - District College Identifier
- EB00 - Employee Identifier
- EJ01 - Employee Assignment Type
- EJ02 - Employee Assignment Leave Status
- EJ03 - Employee Assignment Account Code
- Assignment ID (PAC.LP.ASGMT.ID or CAHREJW.PLPA.ASGMT.ID)
- PAC.LOAD.PERIODS.ID - a person’s assignment contract load period ID

Procedure for Creating EJ Release Time Work Records

Follow the steps below to create release time work records in the EJ work file.

Step 1. Access the EJ Release Time Data Extract (EJRT) form.

Step 2. Enter the contact load periods for which you are reporting.

Step 3. Enter the number that represents the One FTE Equivalent at your institution.

Step 4. Enter the Assignment Start and End Dates.

Step 5. If you do not want to clear the EJ release time work records, enter No.

If you enter Yes, Colleague removes all the release time records on the work file before if creates any new release time records.

Step 6. Run the process by finishing from the form.

Building EJ Non-Instructional Records

Colleague does the following to determine which instructional assignments to include in the work file:

1. Colleague selects all records on the HRPER file.
2. Colleague checks that the person has a primary position that is active. If the person does not have an active primary position, they are not processed.
3. Colleague then checks the start and end dates of the position to find positions that were active during the reporting period that is defined by the Fiscal Year Start and End Date fields.
4. For each position that was active, Colleague then checks the position classification for a matching code on the CAHR.EJ01.POS.CLASS translation table. If the position classification code is on the translation table, the position is selected.
5. For each employee, Colleague checks if the earnings type associated with the assignment is included on the CAHR.EJ.EARNTYPES translation table.
   - If the earnings type for the assignment is on the translation table, the assignment continues to the next selection criteria.
   - If the earnings type is not on the translation table, the assignment is not reported.
6. Once the active positions are selected, Colleague creates EJ records in the CAHR.EJWORK file. For more information about the information included in each of the EJ records, see "California MIS Data Elements" on page 11-65.

Creating the EJ Non-Instructional Work File Data

Use the EJ Non-Instructional Extract (EJNI) form to create work file records about non-instructional activities on the EJ work file.

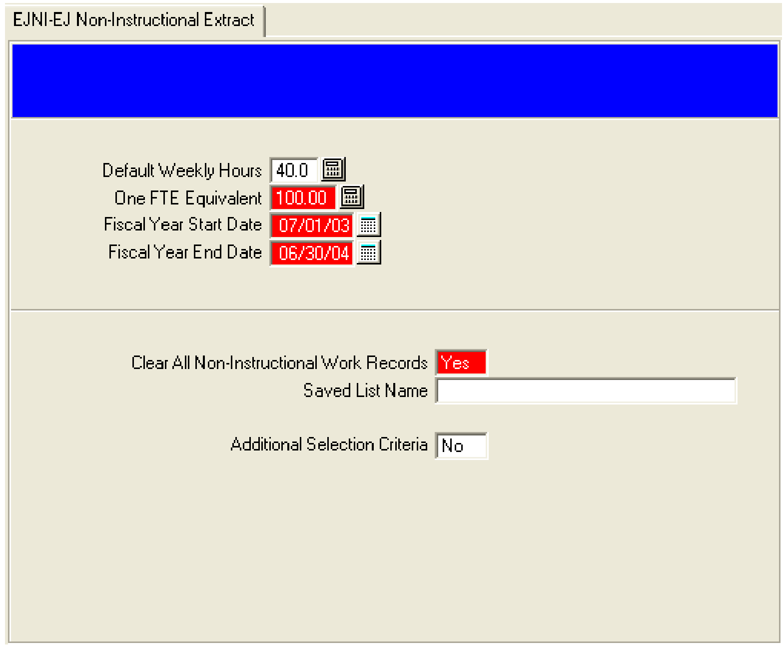


Figure 11-4: The Non-Instructional Extract (EJNI) Form

Noteworthy Fields on the EJNI Form

The fields on the EJNI form are explained below.

Default Weekly Hours

Enter the value for the default weekly hours (EJ04) for all EJ non-instructional records. This value is used when a person's position record (PERPOS) does not have a work schedule defined for it.

One FTE Equivalent

To determine the Full Time Equivalent (FTE) load factor, enter the percent or number of units that represent a full-time load. For example, if your institution expresses a full-time load as a percent you would enter 100.00 for a regular full-time load. If your institution expresses a full-time load in terms of units, you would enter the number of hours that is considered full time.

Note: If you are running the report for a specific term or session you need to adjust your FTE to correlate to that portion of the year, and not what is considered full time for the entire year.

Fiscal Year Start and End Dates

The Fiscal Year Start Date and the Fiscal Year End Date are used to determine which wage record should be used for reporting purposes for a particular assignment. Enter the dates that represent the fiscal year at your institution.

Clear all Non-Instructional Work Records

If you do not clear all non-instructional records, Colleague updates any records currently stored in the EJ work file. Records with identical data in the following data elements are considered to be the same and are updated:

- GI01 - District College Identifier
- EB00 - Employee Identifier
- EJ01 - Employee Assignment Type
- EJ02 - Employee Assignment Leave Status
- EJ03 - Employee Assignment Account Code
- HRPER.ID - person’s position ID

Procedure for Creating EJ Non-Instructional Work Records

Follow the steps below to create EJ Non-institutional work records in the EJ work file.

Step 1. Access the EJ Non-Instructional Extract (EJNI) form.

Step 2. Enter the Default Weekly Hours.

The number of hours entered in the Default Weekly Hours field is used when a person's position does not have a schedule defined.

Step 3. Enter the number that represents the One FTE Equivalent at your institution.

Step 4. Enter the Fiscal Year Start and End Dates.

Step 5. If you do not want to clear the EJ non-instructional work records, enter No.

If you enter Yes, Colleague removes all the non-instructional records on the work file before if creates any new non-instructional records.

Step 6. Run the process by finishing from the form.

Maintaining the EJ Work File

In This Chapter

This chapter explains how to maintain the EJ work file records created during the extract processes. Each EJ record contains the exact data as it has been extracted from Colleague, and has not yet been combined with any other EJ work file records.Table 11-8 lists the topics covered in this chapter.

Table 11-8: Topics in this Chapter

You cannot maintain EB records on the Employee Assignment (CAEA) formform.

Before You Begin

Before you can maintain the work file data, you must have already built the EJ work file. Refer to "Building the Employee Assignment (EJ) Report" beginning on page 11-7.

In addition, you must have a thorough understanding of how Colleague extracts the information contained in the Employee Assignment export. For detailed information on how this data is extracted and/or calculated by Colleague, refer to "Employee Assignment Export (EJ)" beginning on page 11-63.

Understanding EJ Work File Maintenance

If you define your codes and tables in Colleague with the California MIS reports in mind, Colleague should be able to produce accurate and reliable EJ export. However, there may be occasions when your institution finds it necessary to alter the export data extracted from the Colleague database. When this need arises, you have two options for correcting the data reported.

Form Used

The procedure in this chapter requires access to the following form.

Form	Description
Employee Assignment (CAEA)	Use to view and maintain individual EJ work file records.

Table 11-9: Form Used to Maintain the EJ Work File

File Used

Table 11-10 lists the primary file used during the maintenance of EJ work file records.

File	Description
CAHR.EJWORK	Contain EJ work file data.

Table 11-10: File Used to Maintain EJ Work File Records

Correcting the Colleague Database

If the data in need of correction is a one-for-one extraction from Colleague, such as an employee's gender, you can make that correction directly in the Colleague database. Since this type of field is not derived from additional calculations or subroutines, it's possible to make the correction on the database itself. When this happens, however, it's necessary to rebuild the work file to extract the updated information from the Colleague database for it to be included it in the corresponding export file. If the data is not a one-for-one extraction, it may be necessary to correct it in the work file instead, as explained below.

Procedure for Correcting Data in Colleague

Follow the general steps below to make corrections to information in the Colleague database.

Step 1. Build the work file for the desired report.

Step 2. Review any error listings

Step 3. Determine the data that must be entered in Colleague to correct the errors.

Refer to "Employee Assignment Export (EJ)" beginning on page 11-63.

Step 4. Enter the required information on the Colleague database.

Step 5. Rebuild the work file data.

Step 6. Repeat Step 1 through Step 5 until all the errors are corrected.

Making Corrections to Work File Data

Use the Employee Assignment (CAEA) form to maintain individual EJ work file records.

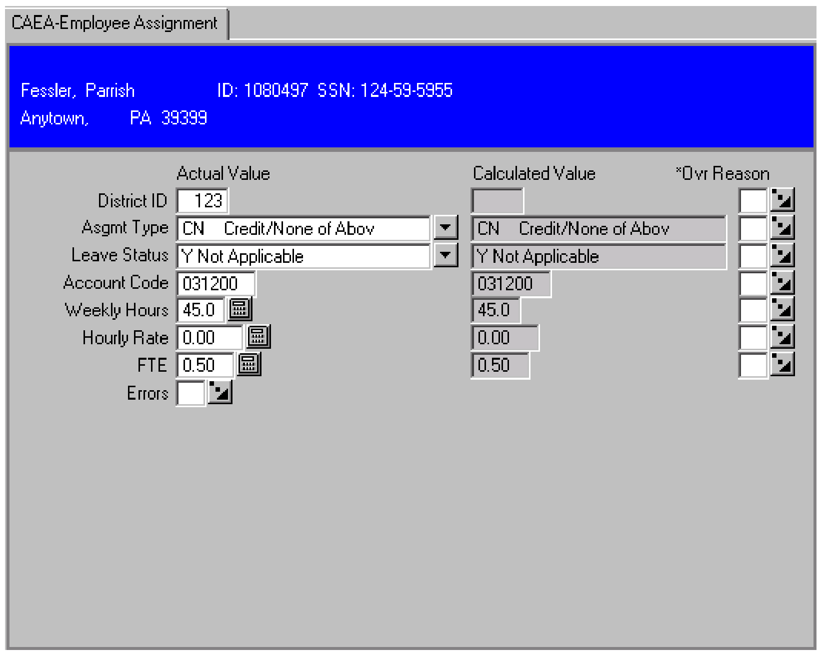


Figure 11-5: The Employee Assignment (CAEA) Form

You do not have the ability to add new EJ work file records to the EJ work file through the CAEA form. Once the EB work file has been built, you can add EJ records by accessing the Employee Demographics (CAEM) form. For more information about the CAEM form, see “Maintaining EB and EJ Summary Work File Data” beginning on page 11-41.

You can access a list of errors associated with an EJ work file record by detailing on the Errors field. A text editor form is displayed with each error listed on a separate line. You can correct the errors by using the CAEA form. Once you have corrected the error, the information is removed from the list of errors.

Procedure for Maintaining the EJ Work File

Follow the steps below to change employee assignment data.

Step 1. You must have already built the EJ work file prior to maintaining any work file records.

Refer to “Building the Employee Assignment (EJ) Report” beginning on page 11-7 for more information.

Step 2. Access the Employee Assignment (CAEA) form.

Step 3. Add or change the desired assignment information.

Step 4. Detail on the Errors field to view any errors for the work record.

Errors listed can be corrected by using the fields on the CAEA form.

Step 5. Save your changes by finishing from the form.

Step 6. Repeat Step 2 through Step 5 for each EJ record that requires maintenance.

Building the Employee Demographics (EB) Report

In This Chapter

This chapter provides the information needed to build the Employee Demographic (EB) work file used for California MIS reporting. Unlike the other California exports which originate in the Student System, the employee exports are generated from Colleague's Human Resources System. Forms mentioned in this and other chapters in this part that are related to employee exports are found in the California MIS module of the HR application. Table 11-11 lists the topics covered in this chapter.

Table 11-11: Topics in this Chapter

Before You Begin

To successfully create the EB work file used by the employee reports, your institution must be using the following aspects of Datatel's software:

- Colleague Release 17
- HR4 (or higher), including being live on the Personnel module (being live on the Payroll module is optional)
- Faculty Contracts by Assignment (Colleague's interface between the Human Resources System and the Student System. For more information about assignment contracts, see *Using Personnel*).

Before you can build the work file used for the employee reports, you must have already set up your Colleague database with the necessary codes and tables. Refer to "Defining Codes & Tables for MIS Reporting" on page 2-1 for a complete list of the codes and tables required to produce all of the California State Reports. The codes and tables listed below are required to produce the Employee Demographics (EB) records:

Code Files	Validation Code Tables	Translation Tables
ETHNICS		CAHR.EB04
	IMMIGRATION.STATUSES	CAHR.EB05
DISABILITY		
EEO.CATEGORY	CA.EB.OCC.ACTIVITIES	CAHR.EB07
CLASSIFICATIONS	CA.EB.CLASSIFICATIONS	CAHR.EB08 CAHR.EB08.TENURE.TYPES
APPOINTMENT.REASONS	CA.EB.STATUSES	CAHR.EB09
EARNTYPE		CAHR.EB.POSITION.ET CAHR.EB.STIPEND.ET

Table 11-12: Employee Demographics Code Files and Tables

Before you begin you must also have created records in the EJ work file. For more information about the EJ work file, see “Building the Employee Assignment (EJ) Report” beginning on page 11-7.

Understanding the EB Work File

The EB work file (CAHR.EB.WORK) contains employee demographic data. An EB work file record is created for the employee's primary position, provided that they have at least on employee assignment (EJ) record. When the EB work file is built, Colleague also creates EJ summary records, which are 2 or more EJ work file records that have specific data in common and can be combined or any unique EJ records.

The EB work file can be used to generate both the Fall Staff Submission and the Term End Submission. Procedures to generate each of the submissions are provided in this chapter.

About Work Files

Work files are temporary files created by extracting information from the Colleague database, and then converting that data to specific formats used by the California employee reports. While some data can be derived directly from Colleague at the time the exports are created, other types of data are extracted from multiple fields in Colleague and then combined into a single work file field. A work file may also require additional translation in order to export the data in the format required by the state.

Note: If Colleague cannot create at least one EJ record for an employee, an EB record is also not created. The employee therefore is excluded from the work file and not reported.

You can override the information that Colleague creates and stores in the work file for individual employees. For more information about maintaining the work file information, see "Maintaining EB and EJ Summary Work File Data" beginning on page 11-41.

About the EJ Summary Process

During the summary process Colleague looks at all the EJ records for an employee and uses the following set of data elements to determine which EJ work records can be combined:

- GI01 - District College Identifier
- EJ01 - Employee Assignment Type
- EJ02 - Employee Assignment Leave Status
- EJ03 - Employee Assignment Account Code
- EB00 - Employee Identifier

When Colleague determines that two or more EJ work records have the above data in common, Colleague does the following calculations:

- Adds Weekly Hours (EJ04) together
- Averages Hourly Rate (EJ05)
- Adds FTEs (EJ08) together

Once Colleague completes the calculations, an EJ summary record is created with the appropriate values in the CAHR.EJ.SUMMARY file.

For any EJ records that are unique, which means that the data does not match the data in another EJ record, an identical EJ summary record is created.

For example, the following EJ records were created for Employee X during the EJ extract processes.

Data Element	Record 1	Record 2	Record 3
GI01	123	123	123
EB00	1080497	1080497	1080497
EJ01	IN	IN	IR
EJ02	D	D	Y
EJ03	500000	500000	500000
EJ04	40.4	40.4	40.4
EJ05	50.50	50.50	50.50
EJ08	50.50	50.50	50.50

Table 11-13: EJ Records Created During the Extract Process

Record 1 and Record 2 can be combined into one EJ summary record because the first five data elements contain identical data. Record 3 is unique because there is unique data in at least one of the first five data elements and a separate EJ summary record is created.

Table 11-14 displays the EJ summary records for Employee X after the EJ summary process is complete.

Data Elements	EJ Summary Record 1	EJ Summary Record 2
GI01	123	123
EB00	1080497	1080497
EJ01	IN	IR
EJ02	D	Y
EJ03	500000	500000
EJ04	80.8	40.4
EJ05	50.50	50.50
EJ08	101.0	50.50

Table 11-14: EJ Summary Records

Form Used

Table 11-15 shows a list of the form used in this chapter and a description of the form.

Form	Description
Build EB Work Records (BEWF)	Creates EB work file records and summarizes EJ work file records.

Table 11-15: Form Used

Files Used

Table 11-16 lists the primary files used in this chapter and a description of each.

File	Description
CAHR.EJ.SUMMARY	Contains the summarized EJ work records.
CAHR.EB.WORK	Contains the employee demographic work records.

Table 11-16: Files Used

Building the EB Work File

Colleague does the following to determine the demographic data to include in the work file:

- Colleague summarizes all the EJ records to create unique EJ records. For more information about the EJ summary process, see “About the EJ Summary Process” on page 11-34.
- Colleague selects all the employee IDs based on the EJ records.
- For each unique employee ID, Colleague creates an EB record with the corresponding demographic data. For more information about how each data element is derived, see “California MIS Data Elements” on page 11-51.

Creating the Demographic Work File Data

Use the Build EB Work Records (BEWF) form to create EB work file records. During the build of the EB work files, EJ work file records are summarized and are linked to an EB work record. For more information about EJ summary records, see “About the EJ Summary Process” on page 11-34.

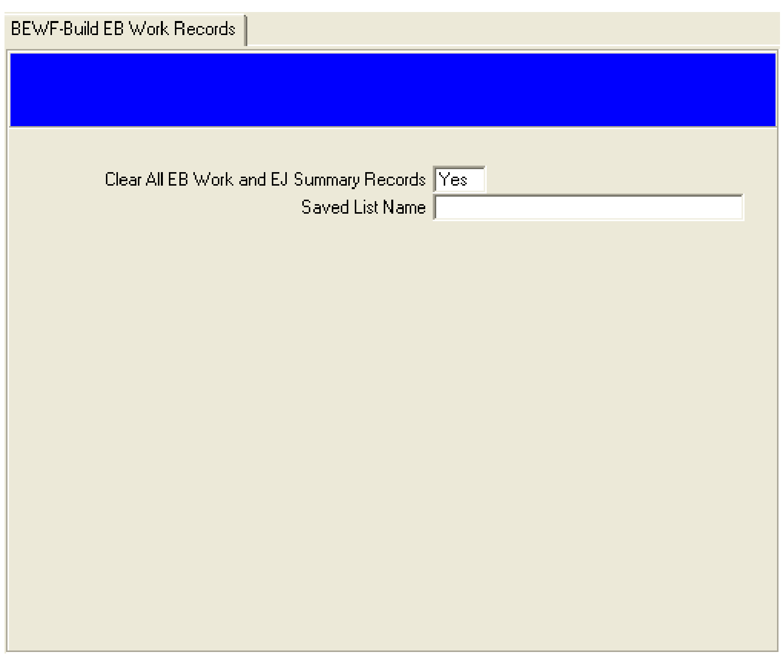


Figure 11-6: The Build EB Work Records (BEWF) Form

Noteworthy Fields on the BEWF Form

The key fields on the BEWF form are explained below.

Clear All EB and EJ Summary Records

Enter **N** in the Clear All EB and EJ Summary Records field, to leave the existing records in the EB work file and the EJ summary file, and update the existing records if any information has been updated. The EB work file records with identical employee identifiers are considered to be the same and could be updated. The EJ work file records with the same data in the following data elements are considered to be identical and could be updated:

- GI01 - District College Identifier
- EJ01 - Employee Assignment Type
- EJ02 - Employee Assignment Leave Status
- EJ03 - Employee Assignment Account Code
- EB00 - Employee Identifier

Setting this field to “N” is useful for when you have already created the EB work file and EJ summary file for a particular reporting period, and you then made corrections to data in the Colleague data base. If you set this field to “N” and enter a saved list, Colleague only updates the records for the people contained in the saved list. If you set this field to “N” and do not enter any selection criteria, each record in the EB work file or EJ summary file could potentially be updated if any data in Colleague has been updated since the last time the Build EB Work Records (BEWF) process was run.

Enter **Y** to clear all the records in the EB work file and the EJ summary file. Colleague then creates new EB work records and EJ summary records.

Procedure for Creating the Fall Staff Submission

Follow the steps below to create EB records and EJ summary records for the Fall Staff Submission.

ALERT! Before you complete the steps below, you must purge the EJ summary and EB work files. For more information, see "Purging EB and EJ Work File Data" on page 11-75.

Step 1. Access the Build EB Work Records (BEWF) form.

Step 2. Verify that you are reporting for the correct reporting term by checking the GI03 code at the top of the form.

Note: The last digit of the GI03 code for the Fall Staff Submission should be either an 8 or a 9. If you need to change the GI03 code, use the California MIS EB/EJ Defaults (CADE) form. For more information, see "Setting Up EB and EJ Defaults" on page 2-43.

Step 3. If you do not want to clear the EB work records or the EJ summary records, enter **N**.

If you want to remove the records in the EB work file and EJ summary file, enter **Y**.

Step 4. Run the process by finishing from the form.

Procedures for Creating the Term End Submissions

As a part of the term end submissions it is required that you report employee demographic data for each faculty member who is included on the Faculty Assignment (XE) report. In order to extract the faculty data necessary for the term end submissions, Datatel recommends that you complete the following steps.

ALERT! Before you complete the steps below, you must purge the EJ summary and EB work files. For more information, see "Purging EB and EJ Work File Data" on page 11-75.

Step 1. Verify that the GI03 code on the California MIS EB/EJ Defaults (CADE) form is the same as the GI03 code you are going to use to create the XE work file.

Step 2. Run the Build Assignment (XE) Data (CAXE) process in the ST application.

The CAXE process creates the necessary EJ work file records that are required by the Build EB Work Records (BEWF) process.

For more information about the CAXE process, see “Building the XE Work File” on page 4-45.

Step 3. Run the Build EB Work Records (BEWF) process.

For more information about the BEWF process, see “Building the Employee Demographics (EB) Report” beginning on page 11-31.

Step 4. Run the Employee Demographic Export (CAEB) process to create your export file.

For more information about the CAEB process, see “Generating the Employee Demographic Export” on page 11-58.

Maintaining EB and EJ Summary Work File Data

In This Chapter

This chapter describes how to add information to, and correct the data contained in the EB work file and the EJ summary file. For information on which work file fields can be maintained, refer to the individual chapters for the EB and EJ exports.Table 11-17 lists the topics covered in this chapter.

Table 11-17: Topics in this Chapter

Before You Begin

Before you can maintain or add to the work file data, you must have already built the employee work file. Refer to "Building the Employee Demographics (EB) Report" beginning on page 11-31 or more information on creating the employee work file.

In addition, you must have a thorough understanding of how Colleague extracts the information contained in the Employee Demographics and Employee Assignment exports. For detailed information on how this data is extracted and/or calculated by Colleague, refer to "Employee Demographics Export (EB)" beginning on page 11-49 and "Employee Assignment Export (EJ)" beginning on page 11-63.

Understanding Work File Data

If you define your codes and tables in Colleague with the California MIS reports in mind, Colleague should be able to produce accurate and reliable EB and EJ exports. However, there may be occasions when your institution finds it necessary to alter the export data extracted from the Colleague database. When this need arises, you have the following two options for correcting the data reported:

- Correct the Colleague database
- Correct the work file data

Forms Used

Table 11-18 shows an alphabetical list of the forms used in this section to generate the employee demographic and employee assignment records and a description of each.

Form	Purpose
Employee Demographics (CAEM)	Use to view and maintain information in the EB work file.
Employee Summary (CAES)	Use to view and maintain information about an employee's assignments.

Table 11-18: Forms Used to Maintain Employee Demographic Informaiton

Files Used

Table 11-19 lists the primary files used in maintaining the EB and EJ summary work files.

File	Description
CAHR.EJ.SUMMARY	Contains the summarized EJ work records.
CAHR.EB.WORK	Contains the employee demographic work records.

Table 11-19: Files Used with Flexible Spending Account

Correcting the Colleague Database

If the data in need of correction is a one-for-one extraction from Colleague, such as an employee's gender, you can make that correction directly in the Colleague database. Since this type of field is not derived from additional calculations or subroutines, it's possible to make the correction on the database itself. When this happens, however, it's necessary to rebuild the work file to extract the updated information from the Colleague database for it to be included it in the corresponding export file. If the data is not a one-for-one extraction, it may be necessary to correct it in the work file instead, as explained below.

Procedure for Correcting Data in Colleague

Follow the general steps below to make corrections to information in the Colleague database.

Step 1. Build the work file for the desired report.

Step 2. Review any error listings

Step 3. Determine the data that must be entered in Colleague to correct the errors.

Refer to "Employee Demographics Export (EB)" beginning on page 11-49.

Step 4. Enter the required information on the Colleague database.

Step 5. Rebuild the work file data.

Step 6. Repeat Step 1 through Step 5 until all the errors are corrected.

Correcting the EB and EJ Summary Work File

Since the calculations for the EB and EJ exports are so complex, Colleague may not always be able to derive the correct values programmatically. There may be instances where your institution needs to override the calculated values in order to report the correct information to the state.

To determine how Colleague derives each data element, refer to the individual chapters for the EB and EJ exports included in this manual. Each data element listed there also indicates whether or not you can override the calculated value. If an override is not allowed, you may need to verify that your codes, tables, and defaults have been defined correctly in Colleague. Or you may need to verify that an employee has been set up with the correct information in Colleague.

If an override is allowed, and Colleague cannot derive the desired output for a data element, you can change the calculated values directly in the work file.

You can make additions or changes to the following types of work file data:

- employee demographic (EB) records
- employee assignment (EJ) summary records

Each of these options is discussed on the following pages.

Note: Adding or maintaining EB and EJ summary work file records does not update the actual Colleague database. Employees maintained in the work file must already have an existing HRPER record on file. You cannot add employees to the Colleague database by adding them to the work file.

Maintaining Employee Demographic (EB) Data

Use the Employee Demographics (CAEM) form to maintain employee demographic information contained in the EB work file for an employee as shown in figure 11-7.

You can use the CAEM form for the following purposes:

- adding an EB (employee demographic) record to the EB work file
- changing demographic information for an employee in the EB work file
- adding EJ summary records for an employee in the EB work file

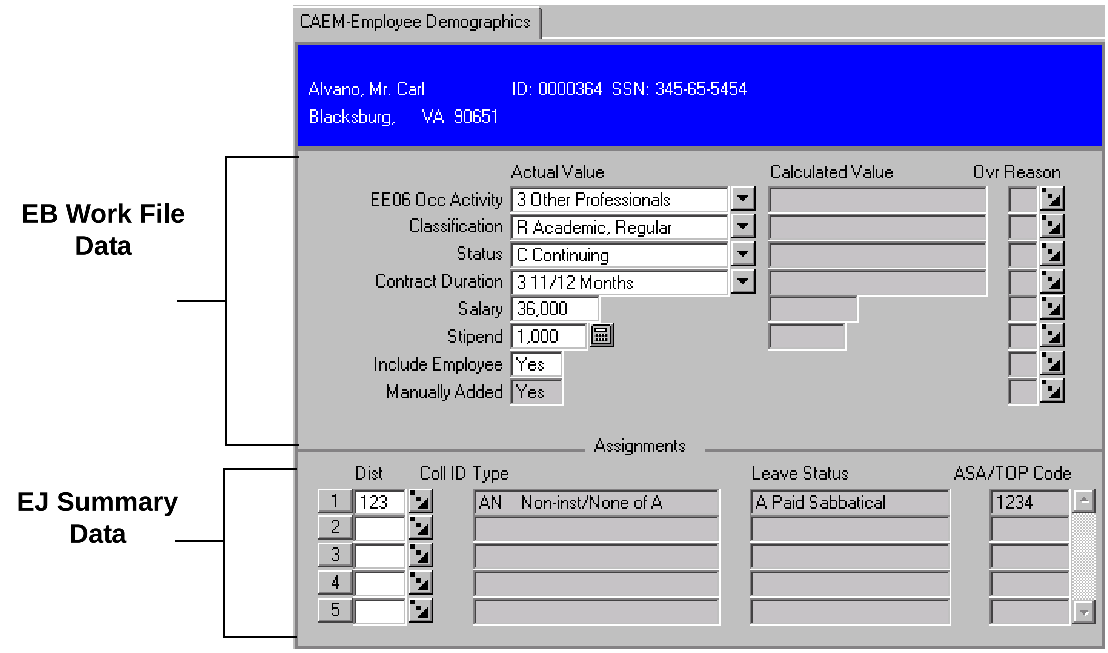


Figure 11-7: The Employee Demographics (CAEM) Form

The top part of the CAEM form displays the demographic data that you are allowed to override, and includes the following information:

- Actual value - actual and calculated values are initially displayed with the same values. If you make a change to the actual value, the original calculated value is still displayed next to the changed value. However, the changed or "actual" value is what is reported on the export.
- Calculated value - displays the value originally calculated by Colleague, and remains unchanged even if the actual value is overridden.
- Override reason - can be entered for any actual value that you override. You can detail on this field to enter a free-form reason for the change, if necessary.

In addition to changing demographic data for an employee record already included in the work file, you can use the CAEM form to add additional employee demographic records to the work file if, for some reason, they were not originally included. An employee being added to the work file must already have an HRPER record, and have at least one assignment/position as well. Refer to "Maintaining Employee (EJ) Summary Data" beginning on page 11-46 for more information on this topic.

Note: If you are adding an employee, only actual values are displayed as Colleague has not calculated any values for this employee.

Maintaining Employee (EJ) Summary Data

The bottom part of the CAEM form displays limited information about the employee's assignments records that have been summarized. You can detail on any line to access the Employee Summary (CAES) form to add or maintain employee assignment data as shown in figure 11-8.

You can use the CAES form for the following purposes:

- adding an EJ summary (employee assignment) record to the work file
- changing employee assignment information for an employee

Note: If you directly access the CAES form you cannot add a new summary record. You must first access the Employee Demographics (CAEM) form and detail to CAES.

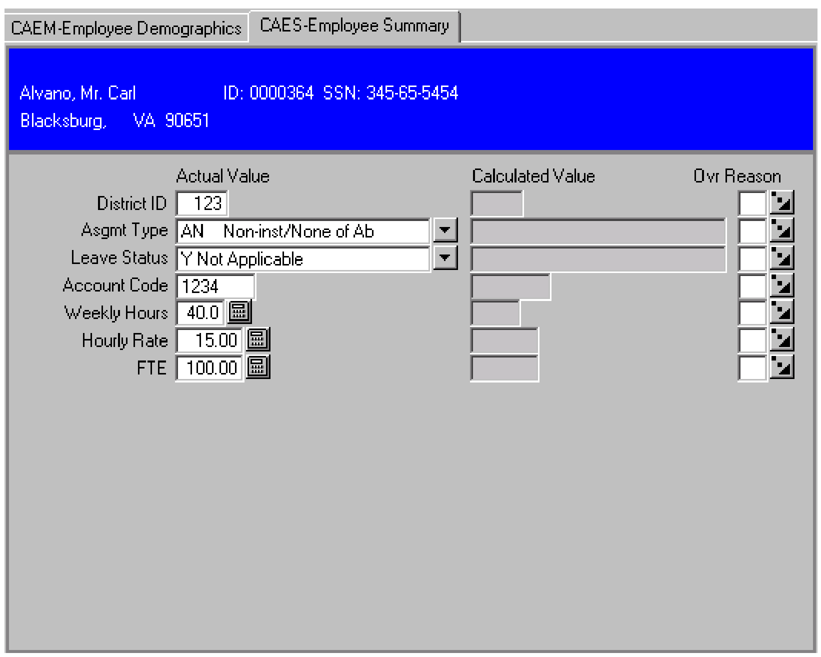


Figure 11-8: The Employee Summary (CAES) Form

The CAES form displays the assignment data that you are allowed to override, and includes the following information:

- Actual value - actual and calculated values are initially displayed with the same values. If you make a change to the actual value, the original calculated value is still displayed next to the changed value. However, the changed or “actual” value is what is reported on the export.

- Calculated value - displays the value originally calculated by Colleague, and remains unchanged even if the actual value is overridden.
- Override reason - must be entered for any actual value that you override. You can detail on this field to enter a free-form reason for the change.

In addition to changing assignment data for an employee record already included in the work file, you can use the CAES form to add additional employee assignment records to the work file if, for some reason, they were not originally included. An EB record must already exist or you must create an EB record, when creating at least one EJ summary record for any employee. Refer to “Maintaining Employee Demographic (EB) Data” beginning on page 11-44 for more information about creating and maintaining EB records.

Procedure for Maintaining EB and EJ Summary Records

Complete the following steps to maintain EB and/or EJ summary work file records:

Step 1. You must have already built the EB work file prior to maintaining any work file records.

Refer to “Building the Employee Demographics (EB) Report” beginning on page 11-31 for information about creating work file records.

To understand how Colleague derives individual EB data items, see “Employee Demographics Export (EB)” beginning on page 11-49.

Step 2. Access the Employee Demographics (CAEM) form for the desired employee.

a. If you are adding an employee to the work file, Colleague prompts you:

```
Add a new record (Y/N)?
```

Enter **Y** to add an EB record for an employee. The employee must already have an HRPER record on file. You cannot add employees to the database from here.

b. If you are adding or maintaining employee assignment data only, proceed to Step 4.

Step 3. Add or change the desired demographic information.

If you are adding an employee to the work file, you must also add at least one EJ summary (assignment) record.

You must enter an override reason for any data that you enter or modify.

Detail on the override reason field to enter a reason in free-form text.

Step 4. Access the Employee Summary (CAES) form to add or maintain assignment data.

You can detail to the CAES form from an existing assignment record to make changes to it.

Or, you can detail to the CAES form from a blank line to add a new assignment record.

Step 5. Add or change the desired assignment information.

If you are adding an employee to the work file, you must also add at least one EJ summary (assignment) record.

You must enter an override reason for any data that you enter or modify.

Detail on the override reason field to enter a reason in free-form text.

Step 6. Finish from the CAES form to save any assignment data entered.

Step 7. Finish from the CAEM form to save both the EB record and any EJ summary records added or modified.

Step 8. Repeat this procedure for each EB or EJ summary record that requires maintenance.

Employee Demographics Export (EB)

In This Chapter

This chapter describes how to produce the Employee Demographics Export (EB) for California State Reporting. It lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data elements
- Colleague form mnemonic
- translation table (if any)
- override allowed
- additional information (if any)

Table 11-20 lists the topics covered in this chapter.

Table 11-20: Topics in this Chapter

Before You Begin

Before you create the Employee Demographics (EB) export, you must have already successfully built an error-free EB work file. Refer to "Building the Employee Demographics (EB) Report" beginning on page 11-31 for more information about this topic.

For information on changing or adding information to the work file records, refer to "Maintaining EB and EJ Summary Work File Data" beginning on page 11-41.

Understanding Employee Demographics Export

The Employee Demographics Export provides a listing of all employees with one or more active positions on any of the entered report dates.

Selection Criteria

This export lists each personnel record that has one or more active positions on any of the entered report dates. Colleague extracts the demographic information for these individuals when the work file is built. See “Building the Employee Demographics (EB) Report” beginning on page 11-31 for detailed information on how Colleague extracts and derives work file data.

You can override the work file data created by Colleague by using the Employee Demographics (CAEM) and Employee Summary (CAES) maintenance forms. To see which work file fields are maintainable, refer to the “Override Allowed” indicator for each of the individual data items on the following pages. You can also flag individual employee records to be excluded from the export using the CAEM and the CAES forms. See “Maintaining EB and EJ Summary Work File Data” beginning on page 11-41 for specific information on manipulating the export data.

When you create the actual export file, you can also use the run-time selection criteria to limit the records exported to the state.

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s), the Colleague form mnemonic on which the data element is maintained, and whether you can override the work file value calculated by Colleague. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from export parameter form
Form Mnemonic: CAEB

The Record Code, set to EB on extract mapping, identifies the record as a employee demographics export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CAEB

The District College Identifier is the local government ID used by the state to identify your institution. This code is entered on the Employee Demographic Export (CAEB) form at the time the export is created.

TERM.IDENTIFIER [GI03]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CADE

The Term Identifier is derived from the reporting year and report type entered on the California MIS EB/EJ Defaults (CADE) form at the time that the export is created. The format of this field is YYT, where:

- YY = the last two digits of the reporting year as entered on the CADE form.
- T = is reported as “0” through “9,” as entered on the CADE form.

EMPLOYEE-IDENTIFIER [EB00]

Colleague Data Element: SSN or PERSON.ID
Form Mnemonic: NAE

Employee Identifier is the employee’s Social Security Number (SSN). If the SSN does not exist, the employee’s Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than eight digits in length, it is truncated to eight digits.
- A “D” (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the employee’s identifier.

EMPLOYEE-IDENTIFIER-STATUS [EB01]

Colleague Data Element: derived from field in EB00
Form Mnemonic: derived

The Employee Identifier Status is determined as follows:

- The employee’s SSN is reported as S.
- The employee’s Colleague ID is reported as C.

EMPLOYEE-BIRTH-DATE [EB02]

Colleague Data Element: BIRTH.DATE
Form Mnemonic: NAE

The Employee Birth Date is the employee’s date of birth, and is derived as follows:

- If BIRTH.DATE is not blank, the value is reported in YYYYMMDD format.
- If BIRTH.DATE is blank, 99999999 is reported.

EMPLOYEE-GENDER [EB03]

Colleague Data Element: GENDER
Form Mnemonic: NAE

The Employee Gender indicates if the employee is male or female. If this field is blank, a warning message is issued.

EMPLOYEE-ETHNICITY [EB04]

Colleague Data Element: ETHNIC
Form Mnemonic: NAE
Translation Table: CAHR.EB04

Employee Ethnicity is the employee's ethnic code indicating the ethnic origin of the employee. The employee ethnicity is derived by translating the ethnic code from the PERSON record using the CAHR.EB04 translation table. This table converts the ethnic code into the required state code.

EMPLOYEE-CITIZENSHIP [EB05]

Colleague Data Element: IMMIGRATION.STATUS
Form Mnemonic: FPER or FINF
Translation Table: CAHR.EB05

Employee Citizenship identifies whether the employee is considered an immigrant, and is derived by translating the immigration status from the PERSON record using the CAHR.EB05 translation table. This table converts the immigrant status into the required status code, and is derived as follows:

- If IMMIGRATION.STATUS is not blank, it is translated and reported.
- If IMMIGRATION.STATUS is blank, a C is reported.

EMPLOYEE-DISABILITY-STATUS [EB06]

Colleague Data Element: DISABILITIES, DISABILITY.START.DATE and DISABILITY.END.DATE (in PERSON)
Form Mnemonic: EMER

Employee Disability Status identifies whether the employee has an active disability. Active is defined as either having no start and end dates, or if the reporting date for the export is within the disability start and end dates. Employee Disability Status is derived as follows:

- If any disability is active (as defined above), a 1 is reported.
- If no disability codes are on file, a 2 is reported.

EMPLOYEE-EE06-OCCUPATIONAL-ACTIVITY [EB07]

Colleague Data Element: PERSTAT.EEO.CATEGORY, POS.EEO.CATEGORY
Form Mnemonic: FACL / NFAC / POSD
Translation Table: CAHR.EB07

Employee EE06 Occupational Activity indicates the occupational activity, or EEO category, to which the employee’s work assignment(s) belong, and is associated with the employee’s primary position. The employee’s EEO category is translated using the CAHR.EB07 translation table into the required state code, and is derived as follows:

- If the mostly recent active PERSTAT record for the employee’s primary position has a PERSTAT.EEO.CATEGORY, that value is translated and reported.
- If PERSTAT.EEO.CATEGORY does not exist, POS.EEO.CATEGORY is translated and reported.
- If the EEO Category for any position translates to 0 (ignore), a warning message is issued when the work file is built.
- If the EEO Category for any position cannot be translated, a warning message is issued when the work file is built.

EMPLOYEE-EMPLOYMENT-CLASSIFICATION [EB08]

Colleague Data Element: PERSTAT.TENURE.TYPE
Form Mnemonic: PSTA,FACL,CSTI
Translation Table: CAHR.EB08, CAHR.EB08.TENURE.TYPE

Employee Employment Classification identifies the primary employment classification, and is associated with the employee’s primary position. The value of this field is translated using the CAHR.EB08 translation table into the required state code, and depends on what is reported in the EEO Category field [EB07] as follows:

- If EB07 is 2 (Faculty), the employment classification is based on the EEO/ IPEDS Tenure Type (PERSTAT.TENURE.TYPE) translated via the CAHR.EB08.TENURE.TPES translation table:
- If EEO/IPEDS Tenure Type is null, this field is reported as T (Academic, Temporary: Non-Tenure Track).
- If EB07 is not 2, the POS.CLASS associated with the primary position is translated via the CAHR.EB08 translation table and reported.

EMPLOYEE-EMPLOYMENT-STATUS [EB09]

Colleague Data Element: PERPOS.START.DATE, PERPOS.APPOINTMENT.REASON
Form Mnemonic: FACL / NFAC / PPOS
Translation Table: CAHR.EB09

Employee Employment Status identifies the employee's current employment status. This is derived by a combination of the position's appointment reason and the starting date of the employee's current primary position, and is determined as follows:

- If the start date (PERPOS.START.DATE) is before the new hire calculation date as entered on the BEWF form and the reason translates to a 1, a 2 is reported.
- If the start date (PERPOS.START.DATE) is before the new hire calculation date as entered on the BEWF form and the reason translates to anything but a 1, a C (Continuing) is reported.
- If the start date (PERPOS.START.DATE) is before the new hire calculation date as entered on the BEWF form and the reason does not translation, EB09 is left blank.
- If the start date is on or after the new hire calculation date as entered on the BEWF form, the value is translated according to the CAHR.EB09 translation table.
- If the start date is on or after the new hire calculation date as entered on the BEWF form and the value cannot be translated, an error is issued.
- If PERPOS.APPOINTMENT.REASON is null, a C is reported.

Note: When an employee changes from an hourly faculty employee to a salaried faculty employee, or from a classified non-faculty employee to a full-time faculty employee, it is important that you record appointment reason as a new hire (N), *not* as a promotion (P). For more information, access the File Translation Table (FLTT) form for CAHR.EB09, and detail on the Comments field.

EMPLOYEE-DATE-OF-EMPLOYMENT [EB10]

The EB10 data element is no longer calculated and is not reported.

EMPLOYEE-EMPLOYMENT-CONTRACT-DURATION [EB11]

Colleague Data Element: PPWG.CONTRACT.LENGTH
Form Mnemonic: FACL / PWAG

Employee Employment Contract Duration indicates the number of months the employee was contracted to work on their primary position during the fiscal year, and is determined as follows:

- If number of months is less than 9, a 1 is reported.
- If number of months is 9 or 10, a 2 is reported.
- If the number of months is 11 or 12, a 3 (11/12 months) is reported
- If the number of months is not entered, a 3 (11/12 months) is reported
- If contract units are not entered as months, a warning message is issued when the work file is built

Note: To enter contract length for non-faculty employees, use the FACL form as you cannot enter contract length for non-faculty members using the NFAC form.

EMPLOYEE-ANNUAL-SALARY [EB12]

Colleague Data Element: PPWG.BASE.AMT, PPWG. MERIT.AMT, PPWG.OVERLOAD.AMT
Form Mnemonic: PWAG
Translation Table: CAHR.EB.POSITION.ET, CAHR.EB.STIPEND.ET

Employee Annual Salary is the sum of salary positions for an active employee within the reporting period, and is associated with the employee’s primary position. Colleague only selects the following positions when calculating the annual salary for an employee:

- all active positions, meaning positions without an end date or positions with an end date greater then the end date of the reporting period.
- unless an employee changed positions or if all their positions ended in the reporting period, then the position with the greatest end date is selected.
- if the employee had multiple positions that all ended in the reporting period, all their positions are selected.

To determine the salary amount, Colleague checks the CAHR.EB.POSITION.ET translation table for the matching earnings type. If the earnings type is on the translation table with the New Code field set to “EB12,” the salary amount is added to the total for the EB12 data element. If the earnings type has a value of “EB13” in the New Code field, the amount is added to the EB13 data element. If the earnings type is not on the CAHR.EB.POSITION.ET translation table, the salary amount is not included in the total for the annual salary.

For non-salary employees and employees on an unpaid full leave of absence, 000000 is reported.

EMPLOYEE-ANNUAL-STIPEND [EB13]

Colleague Data Element: STP.BASE.ET, STP.BASE.AMT
Form Mnemonic: PSTD
Translation Table: CAHR.EB.STIPEND.ET, CAHR.EB.POSITION.ET

Employee Annual Stipend is the employee’s extra compensation or stipends received for the report period which are in addition to the base salary (per salary schedule or contract). Stipends are reported for all employees regardless of their employment classification and are reported as follows:

- If no stipend is received, 000000 is reported.
- Only stipends recorded on the Person’s Stipend Summary (STPS) form are reported.
- Only those qualifying stipends that are active as of the entered reporting dates are reported.
- If EB12 equals all zeros, then EB13 is reported with all zeros.

To determine the stipend amount, Colleague checks the CAHR.EB.STIPEND.ET translation table for the matching earnings type. If the earnings type is on the translation table with the New Code field set to “EB13,” the salary amount is added to the total for the EB13 data element. If the earnings type has a value of “EB12” in the New Code field, the amount is added to the EB12 data element. If the earnings type is not on the CAHR.EB.STIPEND.ET translation table, the salary amount is not included in the total for the annual stipend.

Generating the Employee Demographic Export

Use the Employee Demographic Export (CAEB) form to generate the Employee Demographic Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file.

Note: You must have already built the EB work file prior to running the CAEB process. Refer to “Building the Employee Demographics (EB) Report” beginning on page 11-31 for information about building the employee work file.

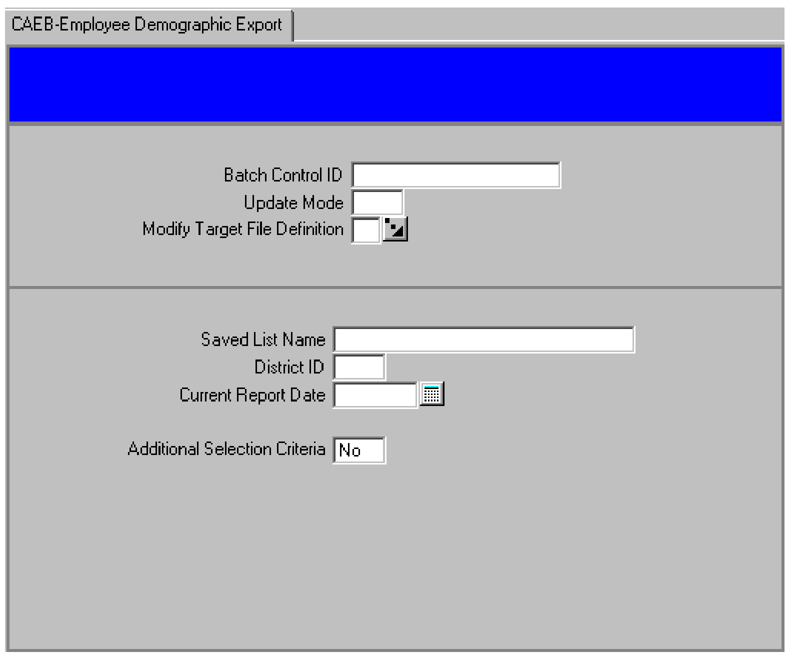


Figure 11-9: The Employee Demographic Export (CAEB) Form

If the data included in the export file contains any errors, an error report is printed. You can then make the necessary corrections to the EB work file and run the export again. See “Maintaining EB and EJ Summary Work File Data” beginning on page 11-41 for information about maintaining the employee work file data.

The fields on the CAEB form are explained below. For additional information about the CAEB form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The update mode determines if the intermediate file (CAHR.EB) is populated with the extracted Colleague data. If you enter "N", you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter "Y" to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the menu prompt.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Saved List Name

You can enter a saved list of record IDs from the work file to limit the individuals included in the extract.

District ID

You must enter the 3-digit local government ID used by the state to identify your institution.

Current Report Date

You can enter the current date that will be used to determine if an individual has an active disability [EB06].

Procedure for Generating the Employee Demographic Export

Complete the following steps to generate the Employee Demographic Export.

Step 1. You must have already built the EB work file prior to generating the Employee Demographic Export.

See “Building the Employee Demographics (EB) Report” and “Maintaining EB and EJ Summary Work File Data” for information about building and maintaining work file data.

Step 2. Access the Employee Demographic Export (CAEB) form.

Step 3. Enter the required export parameters:

- Batch Control ID
- Update Mode

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 4. Enter the required information:

- District ID
- Reporting Year
- Report Type

Step 5. Enter any additional selection criteria.

Step 6. Run the export by finishing from the form.

Step 7. Review any error reports printed.

Step 8. Make the necessary corrections to the EB work file.

Refer to “Maintaining EB and EJ Summary Work File Data” beginning on page 11-41 for information about maintaining work file data.

Step 9. Repeat Step 2 through Step 8 as needed to correct any errors.

Step 10. When all the errors have been corrected, change the Update Mode to “Y”.

Step 11. Export the data to the target file by finishing from the CAEB form.

You can modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Employee Assignment Export (EJ)

In This Chapter

This chapter describes how to produce the Employee Assignment Export (EJ) for California State Reporting. It lists each data element required by California MIS, including the following information:

- California MIS data element name and number
- corresponding Colleague data element(s)
- Colleague form mnemonic
- translation table (if any)
- override allowed
- additional information (if any)

Table 11-21 lists the topics covered in this chapter.

Table 11-21: Topics in this Chapter

Before You Begin

Before you create the Employee Assignments (EJ) export, you must have already successfully built an error-free EJ work file. Refer to “Building the Employee Assignment (EJ) Report” beginning on page 11-7 for more information about this topic.

For information on changing or adding information to the work file records, refer to “Maintaining the EJ Work File” beginning on page 11-25.

Understanding Employee Assignment Export

The export provides a listing of all employee assignments active on any of the entered report dates. An employee may have multiple assignments active during the reporting period.

Selection Criteria

This export selects each personnel record that has one or more active positions on any of the entered report dates. The same selection criteria is used for the Employee Demographic Export (EB). Although employee assignment records are selected based Human Resources System data, faculty information (where applicable) is extracted from the Student System.

You can override the work file data created by Colleague by using the Employee Assignment (CAEA) and Employee Summary (CAES) maintenance forms. To see which work file fields are maintainable, refer to the “Override Allowed” indicator for each of the individual data items on the following pages. You can also flag individual employee records to be excluded from the export using the CAEM and the CAEA forms. See “Maintaining the EJ Work File” beginning on page 11-25 for specific information on manipulating the export data.

When you create the actual export file, you can also use the run-time selection criteria to limit the records exported to the state.

Note: Refer to “Procedure for Generating the Employee Assignment Export” on page 11-72 for information on further limiting records included in the Employee Assignments Export.

Additional Information

Due to the type of processing needed to produce this export, it is created in two steps. The first step identifies the individuals to be reported on the Employee Demographics (EB) export. The second step creates the assignment records for the EJ export as follows:

- Non-instructional assignments eligible for reporting (for example, secretary).
- Instructional assignments eligible for reporting (for example, teaching MATH*100).
- Campus organization memberships (for example, club advisor).

California MIS Data Elements

For ease of reference, the data elements below are listed in the record layout order specified by the California Community Colleges Management Information System manual. Each California MIS data element references the corresponding Colleague data element(s), the Colleague form mnemonic on which the data element is maintained, and whether you can override the work file value calculated by Colleague. If the data element requires further translation upon export, the name of the translation table is provided. Additional information about the data element is provided as necessary.

RECORD-CODE [GI90]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CAEJ

The Record Code, set to EJ on extract mapping, identifies the record as a employee assignment export record.

DISTRICT-COLLEGE-IDENTIFIER [GI01]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CADE or INST
Translation Table: CAHR.GI01

The District College Identifier is the local government ID from the INST file. Multiple institution schools can define this at the SCHOOLS level, having a separate SCHOOLS record for each institution. Single institution schools can define this on the ID and LookUp Parameters (PID2) form.

To get the District College Identifier, Colleague first determines the department associated with the entity being processed as follows:

- For students, the department of the individual's current academic program.
- For teaching assignments, the department of the section being taught.
- For non-teaching assignments, the department associated with the position.

These departments are then used to get the associated DEPTS.INSTITUTIONS.ID. If the department does not have an Institution ID associated with it, the following fields are searched in the given order:

1. DIV.INSTITUTIONS.ID from the Divisions (DIV) form
2. SCHOOLS.INSTITUTIONS.ID from the Schools (SCHL) form
3. DEFAULT.HOST.CORP.ID from the ID And LookUp Parameters (PID2) form

TERM.IDENTIFIER [GI03]

Colleague Data Element: extracted from the export parameter form
Form Mnemonic: CADE

The Term Identifier is derived from the reporting year and report type entered on the California MIS EB/EJ Defaults (CADE) form at the time that the export is created. The format of this field is YYT, where:

- YY = the last two digits of the reporting year as entered on the CADE form.
- T = is reported as “0” through “9,” as entered on the CADE form.

EMPLOYEE-IDENTIFIER [EB00]

Colleague Data Element: SSN or PERSON.ID
Form Mnemonic: NAE

Employee Identifier is the employee’s Social Security Number (SSN). If the SSN does not exist, the employee’s Colleague ID number (PERSON.ID) is obtained as follows:

- If the Colleague ID is longer than eight digits in length, it is truncated to eight digits.
- A “D” (designated) is added to the front of the Colleague ID number, and this number is reported to the state as the employee’s identifier.

EMPLOYEE-ASSIGNMENT-TYPE [EJ01]

Colleague Data Element: PAC.TYPE
Form Mnemonic: PACT
Translation Table: CAHR.EJ01.CRED.TYPE, CAHR.EJ01.TEACH.ARRGT, CAHR.EJ.ROLES[1], CAHR.EJ01.POS.CLASS, CAHR.EJ01.CONTRACT.TYPE
*Validation Table:*CA.EJ.ASSIGN.TYPES [2]

Employee Assignment Type identifies the type of each employee’s active qualifying assignments to be reported. The assignment type is a 2 digit field, and is determined as follows:

---

1. The CAHR.EJ.ROLES translation table is used to determine both the EJ01 and EJ02 value. To correctly report the EJ01 value, each campus organization role as defined by the Chancellor’s Office must be entered in the New Code Column. To correctly report EJ02, the leave status for each campus organization role must be entered in Special Processing Field 1.

2. The CA.EJ.ASSIGN.TYPES validation code table is used to validate the assignment types entered on the Employee Assignment (CAEA) form and should only contain the values that should be reported.

For the course section extracts, the CAHR.EJ01.TEACH.ARRGT or CAHR.EJ01.CONTRACT.TYPE translation tables are used to translate the value for EJ01 based on how the faculty teaching arrangements are defined for a course section. For the release time extracts, the CAHR.EJ.ROLES translation table is used. For the non-instructional extract, the person's position is translated by the CAHR.EJ01.POS.CLASS translation table and reported. If the position could not be translated an error occurs and the person is not reported. If EJ03 is "SN" or "SL," then EJ01 is set to "IN' or "IL."

For section assignments the course credit type (CRS.CRED.TYPE) is translated using the translate table, CAHR.EJ01.CRED.TYPE. Position 1 of the EJ01 code is set to "C" or "N" depending on the credit type translation.

Note: The CAHR.EJ01.POS.CLASS translation table should only contain the codes for your non-instructional assignments that should be reported. If you do not limit the entries in the table, all classifications are considered valid and are reported.

EMPLOYEE-ASSIGNMENT-LEAVE-STATUS [EJ02]

Colleague Data Element: LPN.TYPE
Form Mnemonic: LEAD
Translation Table: CAHR.EJ.ROLES[3]
Validation Table: CA.EJ.LEAVE.STATUS[4]

Employee assignment leave status indicates the status of the employee's leave assignment, which is determined as follows:

- If the employee is on leave, Colleague uses the CAHR.EJ.ROLES translation table to determine the value to be reported.
- For the course section extract, a Y is reported.
- For non-instructional employees, a Y is reported.

3. The CAHR.EJ.ROLES translation table is used to determine both the EJ01 and EJ02 value. To correctly report the EJ01 value, each campus organization role as defined by the Chancellor's Office must be entered in the New Code Column. To correctly report EJ02, the leave status for each campus organization role must be entered in Special Processing Field 1.

4. The CA.EJ.LEAVE.STATUSES validation code table is used to validate leave statuses entered on the Employee Assignment (CAEA) form and should contain only the values that are to be reported.

EMPLOYEE-ASSIGNMENT-ACCOUNT-CODE [EJ03]

Colleague Data Element: derived
Form Mnemonic: SECT / PPFI
Translation Table: CAHR.EJ03

Employee Assignment Account Code indicates the category or activity of an employee's instructional or non-instructional activity, and is derived as follows:

- A custom subroutine can be used to calculate EJ03. For more information about using a custom subroutine, see "Setting Up EB and EJ Defaults" beginning on page 2-43.
- For instructional assignments (course sections taught), the ASA/TOP code reported is derived from the first value contained in the SEC.LOCAL.GOVT.CODES field of the course section.
- For non-instructional assignments, the ASA/TOP code contained in the GL account number paying for the position is reported. The GL account number is entered on the Pay Funding Information (PPFI) form. If more than one GL account number is on file for the position, multiple records are reported.
- The ASA/TOP code is derived from the GL account number using the defaults entered on the California MIS EB/EJ Defaults (CADE) form. The CADE form is used to define the account code starting position.

Note: If you do not want to derive the employee assignment account code using the method outlined above, you can create your own custom subroutine to extract this information. See "Setting Up EB and EJ Defaults" on page 2-43 for more information.

EMPLOYEE-ASSIGNMENT-WEEKLY-HOURS [EJ04]

Colleague Data Element: derived
Form Mnemonic: SOFF / PWSC / WRKS
Translation Table: CAHR.EJ.CONTACT.MEASURES

Employee Assignment Weekly Hours represent the average number of hours per week that the employee is contracted to spend (and is compensated for) on the assignment, and is derived using the following information:

- A custom subroutine can be used to calculate EJ04. For more information about using a custom subroutine, see "Setting Up EB and EJ Defaults" beginning on page 2-43.

- For instructional assignments, EJ04 is calculated as follows:
  - for weekly hours, reports the value from the calculation of the contact/clock hours times the faculty assignment percentage.
  - for term information, reports the value from the calculation of the contact/clock hours times the faculty assignment percentage, multiplied by the number of weeks from the Section Offering Info (SOFF) form, divided by the term annualizer on the California MIS EB/EJ Defaults (CADE) form.
  - for daily hours, uses the contact/clock hours are reported and an error is issued.
- For campus organization assignments, EJ04 is calculated as follows:
  - for weekly hours, reports the value from the calculation of the contact hours for the release time assignment times the GL percent distribution associated to the position for that GL.
  - for term information, reports the value from the calculation of the contact/clock hours times the GL percentage and divided by the term annualizer on the CADE form.
  - for daily hours, uses the contact hours for the course section and an error is issued.
- For non-instructional assignments, EJ04 is calculated by taking the Default Weekly Hours on the EJ Non-Instructional Extract (EJNI) form multiplying it by the GL percent distribution times the position assignment FTE.

EMPLOYEE-ASSIGMENT-HOURLY-RATE [EJ05]

Colleague Data Element: PPWG.BASE.AMT, PPWG.OVERLOAD.AMT, PPWG.PAY.RATE
Form Mnemonic: FACL / NFAC
Translation Table: CAHR.EJ.ROLES

Employee Assignment Hourly Rate represents the hourly compensation rate for the assignment, and is determined as follows for assignments that are not considered release time assignments:

- For salaried positions, `00000` is reported.
- For hourly positions, Colleague determines the person position wage record that is active as of the current report date entered on the BEWF form, and reports the pay rate from that record.

If the assignment is an release time assignment `00000` is reported, unless the CAHR.EJ.ROLES translation table contains a “Y” in the Special Processing Code 2 field. If the release time assignment translates to a value with a “Y” in the Special Processing Code 2 field, then the hourly rate is reported.

EMPLOYEE-ASSIGNMENT-TOTAL-ANNUAL-HOURS [EJ06]

Filled with spaces.

EMPLOYEE-ASSIGNMENT-TOTAL-PAYMENT [EJ07]

Filled with spaces.

EMPLOYEE-ASSIGNMENT-FTE [EJ08]

Colleague Data Element: SEC.LOAD, PERPOS.FTE, CSF.FACULTY.LOAD
Form Mnemonic: SOFF / NFAC

Employee Assignment FTE represents the reporting term full-time equivalent (FTE) load factor (expressed as a percentage) associated with this assignment, and is determined as follows:

- For the instructional assignments, the EJ08 value is (100 / One FTE Equivalent) * Faculty Load from the CSF.FACULTY.LOAD field.
- For the release time assignments, the EJ08 value is calculated by taking the Load for the release time assignment and multiplying it by the GL percent distribution associated to the position for that GL.
- For the non-instructional extract, EJ08 is calculated by taking the FTE for the person's position and multiplying it by the GL percent distribution. For example, if you have a position with four GL numbers funded 25% for each number, four EJ records are created with a GL percentage of 25% multiplied by the FTE.

Generating the Employee Assignment Export

Use the Employee Assignment Export (CAEJ) form to generate the Employee Assignment Export. You can define export parameters, as well as enter selection criteria that determine the records included in the export file.

Note: You must have already built the EB and EJ summary work file prior to running the CAEJ process.

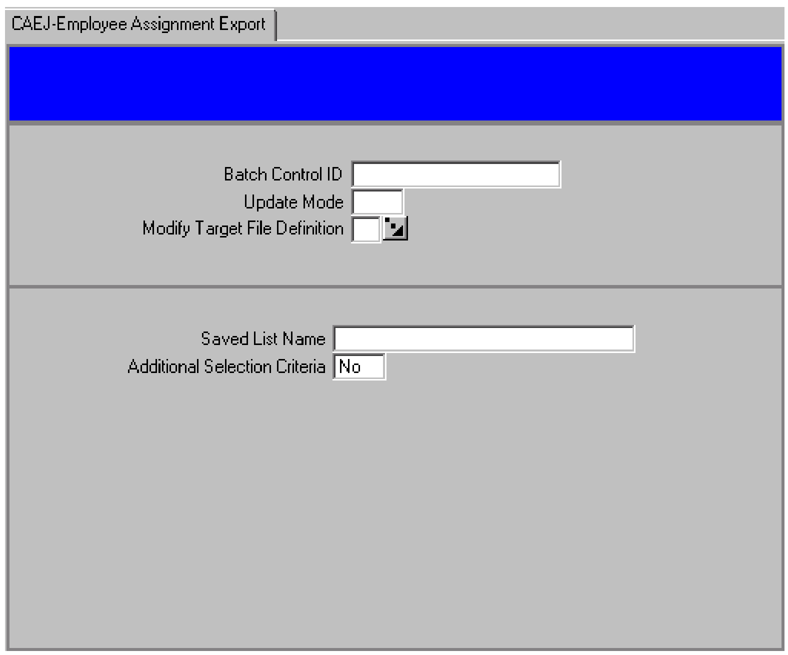


Figure 11-10: The Employee Assignment Export (CAEJ) Form

If the data included in the export file contains any errors, an error report is printed. You can then make the necessary corrections to the EJ work file and run the export again. See “Maintaining the EJ Work File” beginning on page 11-25 for information about maintaining the employee work file data.

The fields on the CAEJ form are explained below. For additional information about the CAEJ form, see the online help.

Batch Control ID

Use the Batch Control ID to uniquely identify the export file. You can assign different batch numbers for each run, or use an existing batch number. Any records existing in a previously used batch number are automatically purged by ELF.

Update Mode

The update mode determines if the intermediate file (CAHR.EJ) is populated with the extracted Colleague data. If you enter "N", you can run the export and review any error reports as many times as needed before populating the intermediate file. If you enter "Y" to populate the intermediate file and any errors are detected, correct any errors and re-run the export. Records with reported errors are not exported to the intermediate file.

Modify Target File Definition

You can use the default target file definition for this process, or you can access the Electronic Transfer File (ELFT) form from this field to redefine the file for a particular run. To permanently modify the target file definition, access the ELFT form directly from the menu prompt.

Note: If you do not change the default target file definition (for example, if you use the default file name each time you run the export in update mode), you must first delete the file that was created the previous time you ran the export. If you do not delete the previous file first, Colleague issues an error that the file already exists when you try to run a new export using the same file name.

Procedure for Generating the Employee Assignment Export

Complete the following steps to generate the Employee Assignment Export.

Step 1. You must have already built the EJ work file prior to generating the Employee Assignment Export.

Step 2. Access the Employee Assignment Export (CAEJ) form.

Step 3. Enter the required export parameters:

- Batch Control ID
- Update Mode

You can run the export in non-update mode as many times as needed to review and correct any errors prior to actually exporting the data.

Step 4. Enter the required selection criteria:

- Reporting Year
- Report Type

Step 5. Enter any additional selection criteria.

Step 6. Run the export by finishing from the form.

Step 7. Review any error reports printed.

Step 8. Make the necessary corrections to the EJ work file.

Refer to “Maintaining the EJ Work File” beginning on page 11-25 for information about maintaining work file data.

Step 9. Repeat Step 2 through Step 8 as needed to correct any errors.

Step 10. When all error have been corrected, enter `Y` in the Update Mode field.

Step 11. Export the data to the target file by finishing from the CAEJ form.

You can modify the target file by detailing from that field to the Electronic Transfer File (ELFT) form.

Purging EB and EJ Work File Data

In This Chapter

This chapter explains how to purge the EB and EJ work files after you have exported the data. Table 11-22 lists the topics covered in this chapter.

Table 11-22: Topics in this Chapter

Before You Begin

Before you can purge the EB and EJ work files, you must have already exported the data. Refer to “Understanding Employee Demographics Export” on page 11-50 and “Understanding Employee Assignment Export” on page 11-64 for more information about exporting the employee data.

Understanding Work File Purge

When you build a work file used to generate an employee report, it remains on the Colleague database until you remove it using a purge process. For each new reporting period, which is determined by the GI03 Term Identifier entered on the CADE form, you must purge the work files before you can extract data for a different term.

Form Used

Table 11-23 lists the form used in this chapter and a description of each.

Form	Description
Purge Employee Reporting Recs (PERR)	Use to purge the EB and EJ work files.

Table 11-23: Form Used to Purge the EB and EJ Work Files

Files Used

Table 11-24 lists the files purged by the process described in this chapter and a description of each.

File	Description
CAHR.EB.WORK	Contains Employee Demographic (EB) data.
CAHR.EJ.SUMMARY	Contains summarized EJ records.
CAHR.EJWORK	Contains Employee Assignment (EJ) data.

Table 11-24: Files Used During the EB and EJ Purge Process

Purging the EB and EJ Work Files

Use the Purge Employee Reporting Recs (PERR) form to delete EJ, EB, or EJ summary records from the employee assignment and employee demographic work files.

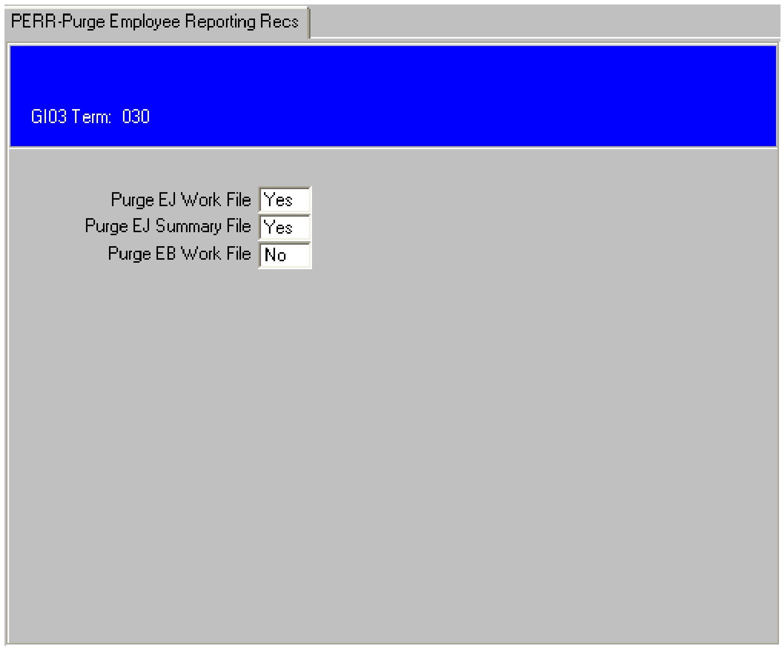


Figure 11-11: The Purge Employee Reporting Recs (PERR) Form

Using the following fields you can purge records from the EB and EJ work files:

- **Purge EJ Work File.** Purges all the records in the CAHR.EJWORK file.
- **Purge EJ Summary File.** Purges all the records in the CAHR.EJ.SUMMARY file.
- **Purge EB Work File.** Purges all the records in the CAHR.EB.WORK file.

Procedure for Purging the EB and EJ Work Files

Follow the steps below to purge the EB and EJ work files. It is recommended that you create a backup of the files before you purge the data.

Step 1. Access the Purge Employee Reporting Recs (PERR) form.

Step 2. Enter `Y` in the following fields to purge records as necessary:

- Purge EJ Work File
- Purge EJ Summary File
- Purge EB Work File

Step 3. Run the process by finishing from the form.

Troubleshooting EB/EJ

In This Chapter

This chapter provides information about how to find and resolve error messages that may occur when processing the employee reports. Step 11-25 lists the topics covered in this chapter.

Table 11-25: Topics in this Chapter

Before You Begin

Before you begin, you should have a thorough understanding of the data used for the employee reports. For detailed information about the data Colleague uses to create the employee reports, see “Employee Demographics Export (EB)” on page 11-49 and “Employee Assignment Export (EJ)” on page 11-63.

Determining Errors

During the extract process errors may be generated that need to be fixed before you report the employee data. In order to view the errors you must query the work files. Below are example of how you could query the CAHR.EJWORK file for errors.

- SELECT CAHR.EJWORK WITH CAHREJW.ERRORS NE “”

  -selects all CAHR.EJWORK records that have errors

- LIST CAHR.EJWORK WITH CAHREJW.ERRORS NE “” SORT BY CAHREJW.EMPLOYEE CAHREJW.ERRORS

  -selects all CAHR.EJWORK records that have errors, displays them sorted by employee ID and displays the errors.

If you want to query the database for work records created during a specific extract, use the following fields:

- **CAHREJW.COURSE.SEC.FACULTY -** Course section extract
- **CAHREJW.PAC.LDPD.ID -** Release time extract
- **CAHREJW.HRP.ID -** Non-instructional extract

Error Messages

Table 11-26 provides a description of the error messages that could be generated during the extract processes and information about how to resolve the error.

Process	Error Message	Cause	Resolution
EJSE	No available GI01 translate for COURSE.SECTIONS record \1.	The course section location, as defined on SECT, could not be found on the translate table CAHR.GI01.	1) The faculty associated with this course section record should not have been processed, therefore can be omitted from further processing by using a savedlist on the EJSE form. 2) Add the location of the course section to the translate table CAHR.GI01
EJSE	No EJ03 Account Code found in the Local Govt Codes for course section \1.	There was no entry in the Local IDs field for the course section on SECT, therefore creating a null EJ03 value.	Enter a Local ID for this course section on SECT. This ID should be in the correct format and range of TOPs codes defined by the Chancellor's Office
EJSE	WARNING: The number of weeks for crs sec \1 is not defined or is zero.	The Number of Weeks field on the Section Offering Info (SOFF) form is defined incorrectly.	Enter a value greater then zero in the Number of Weeks field on the SOFF form that represents the number of weeks the course section meets.
EJSE	Null teaching arrangement on translate table CAHR.EJ01.TEACH.ARRGT.	The teaching arrangement associated for the employee with the course section assignment could not be translated from the CAHR.EJ01.TEACH.ARRGT translate table.	1)Enter or change the teaching on FASC for the employee. 2) Add the teaching arrangement translation on the CAHR.EJ01.TEACH.ARRGT translate table.
EJSE	Assignment Contract not found on translate table CAHR.EJ01.CONTRACT.TYPE.	The assignment contract associated with the employee for the course section assignment has a contract type that was not found on the translate table CAHR.EJ01.CONTRACT.TYPE.	Assignment contract type to the CAHR.EJ01.CONTRACT.TYPE translation table.

Table 11-26: Error Messages

Process	Error Message	Cause	Resolution
EJSE	Teaching Arrangement not found on translate table CAHR.EJ01.TEACH.ARRGT.	The teaching arrangement associated with the employee for the course section assignment was not found on the translate table CAHR.EJ01.TEACH.ARRGT	1) Change the teaching arrangement associated with the employee to a valid value on FASC. 2) Add the teaching arrangement on the translate table CAHR.EJ01.TEACH.ARRGT.
EJSE	Assignment contract cannot be of type “L”.	Assignment contracts for employees assigned to course sections cannot have a translation on the table CAHR.EJ01.CONTRACT.TYPE resulting in a translation being an “L,” which means that the employee is on leave, and the employee should not be assigned the a course section.	1) Change the employee assigned to the course section or delete the assignment contract information and assign a new contract type on FASC. 2) The translation for this contract type on the translate table CAHR.EJ01.CONTRACT.TYPE needs to be changed so the second character is not an “L”.
EJSE	Null credit type translation for course section \1.	The credit type of the course section record being processed had a null translation in the CAHR.EJ01.CRED.TYPE translate table.	1)Change the credit type on SECT to a valid value. 2) Add the credit type to the translate table CAHR.EJ01.CRED.TYPE.
EJSE	No credit type translation found for course section \1.	The credit type of the course section record being processed was not found in the translate table CAHR.EJ01.CRED.TYPE.	1) The faculty associated with this course section record should not have been processed, therefore can be omitted from further processing by using a savedlist on the EJSE form. 2) Add the credit type of the course section to the translate table CAHR.EJ01.CRED.TYPE.
EJSE	No Assignment Contract ID found for Course Section \1.	There was no assignment contract ID assigned to the employee on FASC.	Enter assignment contract information for this course section on FASC.
EJSE	ERROR: EJ04 Weekly hours is larger than 99.9.	The weekly hours, which is taken either from course section clock or contact hours, is large than 99.9, which is defined by the Chancellor's Office as being the limit to the EJ04 weekly hours.	Go to FASC and reduce the amount of contact or clock hours for the employee to below 99.9.

Table 11-26: Error Messages (cont’d)

Process	Error Message	Cause	Resolution
EJSE	ERROR: EJ08 FTE is null or zero and cannot be calculated.	The load for this course section assignment is either 0 or null and cannot be used to determine the employee's FTE for this assignment.	Enter a load for the assignment on the FASC form in the Load field.
EJRT	ERROR: Null GI01 translation found on translate table CAHR.GI01.	The location of the person's position could not be translated from the CAHR.GI01 translate table.	1)Add or change the person’s location on POSD. 2)Add the location to the CAHR.GI01 translate table.
EJRT	ERROR: GI01 was not found on the translate table CAHR.GI01.	The location of the person's position being processed could not be found on the translate table CAHR.GI01.	1) This employee should not be processed and should be omitted from further reporting. Use a savedlist on the EJRT form to limit the employees reported. 2) If this employee was meant to be processed, add the person’s location to the CAHR.GI01 translate table.
EJRT	ERROR: Role \1 was not found on the translate table CAHR.EJ.ROLES.	The campus organization role for this assignment, as defined on FAOA and/or FCMD, was not found on the translate table CAHR.EJ.ROLES.	1) This employee should not be processed and should be omitted from further reporting. Use a savedlist on the EJRT form to limit the employees reported. 2) If this employee was meant to be processed, put an entry on the CAHR.EJ.ROLES translate table for this campus organization role.
EJRT	ERROR: No GL numbers associated with selected wage record \1.	The wage record used for this assignment had no associated GL numbers that were valid.	1) Make sure the date ranges being processed are correct. 2)Verify that the position associated to this wage record on PWAG has GL information defined on PPFI.

Table 11-26: Error Messages (cont’d)

Process	Error Message	Cause	Resolution
EJRT	No leave type found for this person on translate table CAHR.EJ.ROLES.	There was no leave type translation found on the translate table CAHR.EJ.ROLES.	The CAHR.EJ.ROLES table is a multipurpose table, both translating values for EJ01 and EJ02. In the New Code field should be the translation for EJ01 and in the Special Processing Field 1 should be the translation for EJ02. Make sure there is an entry in the Special Processing Field 1 for an EJ02 value.
EJRT	WARNING: Verify multiple GL numbers for person position \1.	Having combined teaching assignments and release assignments can report the wrong GL number.	This is a warning to verify that all of the GL numbers for the person's position record are correct. Use PPFI to review the position’s GL numbers
EJRT	ERROR: Null EJ03 Account Code for this record.	Either the custom Ej03 subroutine did not return an account code or the account code start position on CADE is wrong.	1) Correct your EJ03 custom subroutine to return an account code. 2)Change the account code start position on CADE.
EJRT	ERROR: Asgmt \1 is a CAMPUS.ORG.ADVISORS asgmt with incorrect asgmt type.	The assignment being processed should be for a campus organization advisor assignment, but the assignment type for the assignment is not a “V”.	Delete the assignment contract from PASC and create a new assignment contract with the correct information.
EJRT	ERROR: Asgmt \1 is a CAMPUS.ORG.MEMBERS asgmt with incorrect asgmt type.	The assignment being processed should be for a campus organization member assignment, but the assignment type for the assignment is not an “M”.	Delete the assignment contract information on PASC and create a new assignment contract with the correct information.
EJRT	ERROR: EJ04 Weekly hours is larger than 99.9.	The weekly hours, which is taken from the assignment contact hours on FAOA or FCMD, is larger than 99.9, which is defined by the Chancellor's Office as being the limit to the EJ04 weekly hours.	Go to FAOA or FCMD and reduce the amount of contact hours for the employee is below 99.9.
EJRT	ERROR: Pay rate cannot be hourly for a release time assignment.	For the assignment being processed for the employee, there was an active wage record found for the position which is hourly.	Verify that the person’s position associated to the contract on FAOA or FCMD is an hourly position. If not delete the assignment contact and reassign a contract with a salary position.

Table 11-26: Error Messages (cont’d)

Process	Error Message	Cause	Resolution
EJRT	ERROR: EJ08 FTE is null or zero and cannot be calculated.	The load for the campus organization assignment is either 0 or null and cannot be used to determine the employee's FTE for this assignment.	Enter a load for this assignment on the FAOA or FCMD form in the Load field.
EJNI	ERROR: Employee \1 has multiple active leave plans.	For the date range being reported, the employee has more than one active leave plan.	Check the employee’s leave plans on LEVS and delete any incorrect leave plans.
EJNI	Null GI01 translation found on translate table CAHR.GI01.	The location of the person's position being processed resulted in a null translation from the translate table CAHR.GI01.	1) Add or change the person’s location on POSD. 2) Add the location to the CAHR.GI01 translation table.
EJNI	No GI01 translation found on translate table CAHR.GI01	The location of the person's position being processed could not be found on the translate table CAHR.GI01.	1) This employee should not be processed and should be omitted from further reporting. Use a savedlist on the EJRT form to limit the employees reported. 2) If this employee was meant to be processed, add the person’s location to the CAHR.GI01 translation table.
EJNI	No GL numbers associated with HRPER ID \1.	There were no valid wage records found.	1) Make sure the date ranges being processed are correct. 2) Verify that the person’s position has GL number information defined on PPFI.
EJNI	ERROR: Null EJ03 Account Code for this record.	There were no valid wage records found.	1) Make sure the date ranges being processed are correct. 2) Verify that the person’s position has GL number information defined on PPFI.

Table 11-26: Error Messages (cont’d)

Process	Error Message	Cause	Resolution
EJNI	ERROR: EJ04 Weekly hours is larger than 99.9.	The weekly hours, which is taken from the employee's work schedule, is larger than 99.9, which is defined by the Chancellor's Office as being the limit to the EJ04 weekly hours.	Verify the persons position's assigned work schedule on PWSC.
EJNI	ERROR: EJ08 FTE is null or zero and cannot be calculated.	The person's position FTE is null or zero and cannot be used to calculate an FTE for this assignment.	Verify the persons position's FTE on PPOS.
EJSE EJRT	WARNING: Term Week Annualizer is not defined or is zero on the CADE form.	The Terms Week Annualizer field on the California MIS EB/EJ Defaults (CADE) form is incorrectly defined.	Enter a value greater then zero in the Terms Week Annualizer field on the CADE form that represents the number of weeks in a term at your institution.
All	Translate table \1 could not be found.	The translate table specified in the error message could not be found.	Create the translate table using the FLTT form in the appropriate application. Check the chapters about building the work files for information information about where to build the tables.

Table 11-26: Error Messages (cont'd)

Using CA State Reporting: MIS Reports

Appendices

Title V Probation & Dismissal

Overview

This appendix outlines how you can use Colleague to monitor students on progress and academic probation and dismissal as required by California's Title V program. Datatel provides a subroutine which can be used in conjunction with rules to identify affected students. This subroutine can be customized by your institution to accommodate your own probation and dismissal standards.

Before You Begin

Before you begin, you must have a basic understanding of how to set up codes and rules in Colleague. For more information on setting up Colleague, refer to *Getting Started with Colleague Student*. In addition, you can refer to *Using Academic Records* for detailed information about how Colleague calculates academic standings.

Understanding Probation Monitoring

You can track your students' academic progress for Title V by using the academic standing feature of Colleague's Academic Records module along with a Datatel-supplied subroutine developed specifically for California. The subroutine (which can be customized for your institution's probation standards) extracts the data it needs from Colleague to identify a student's academic standing as defined by the state (for example, Level 1 Progress Probation), and in accordance with your own probation standards. The subroutine can be accessed in a virtual field. Then, using Rules, you can reference that virtual field for a student and assign a corresponding academic standing code.

Components of Probation Monitoring

To identify those students affected by probation and dismissal, you need to define and/or utilize the following components in Colleague:

- academic standing codes used to identify each level of academic and progress probation and dismissal
- run-time virtual field (I-descriptor) used in rules
- rules used to assign the run-time virtual field value to a corresponding academic standing code
- subroutine called by the virtual field (S.CALC.CAST.STANDING) and customized for your institution's probation and dismissal standards
- academic standings calculations

Each of these components is discussed below.

Defining Academic Standing Codes

You must define the academic standing codes that identify the state-defined levels of academic probation and dismissal (for example, Level 1 Progress Probation). The academic standing code is stored on the STUDENT.STANDINGS record in the Student System.

Define a code for each of the possible values contained in the run-time virtual field (the output of the S.CALC.CAST.STANDING subroutine). Use the Validation Codes (VAL) form in the Student System to access the ACAD.STANDINGS file, and enter the following codes:

Code	Description
P1	Level 1 Progress Probation
P2	Level 2 Progress Probation
PD	Progress Dismissal
A1	Level 1 Academic Probation
A2	Level 2 Academic Probation
AD	Academic Dismissal
P1A1	Level 1 Progress Probation, Level 1 Academic Probation
P1A2	Level 1 Progress Probation, Level 2 Academic Probation
P1AD	Level 1 Progress Probation, Academic Dismissal
P2A1	Level 2 Progress Probation, Level 1 Academic Probation
P2A2	Level 2 Progress Probation, Level 2 Academic Probation
P2AD	Level 2 Progress Probation, Academic Dismissal
PDA1	Progress Dismissal, Level 1 Academic Probation
PDA2	Progress Dismissal, Level 2 Academic Probation
PDAD	Progress Dismissal, Academic Dismissal

Table A-1: Probation & Dismissal Academic Standing Codes

Note: A student on both academic and progress probation is assigned a combination code. For example, P1A1 indicates that the student is on both Level 1 Progress Probation as well as Level 1 Academic Probation.

Defining the Virtual Field (I-Descriptor)

You must define the virtual field (I-descriptor) that uses the S.CALC.CAST.STANDING subroutine. Then the virtual field is subsequently referenced by Rules to assign the academic standing codes.

From the Student System application, use the Virtual Fields (RDVF) form to define the virtual field as shown in figure A-1:

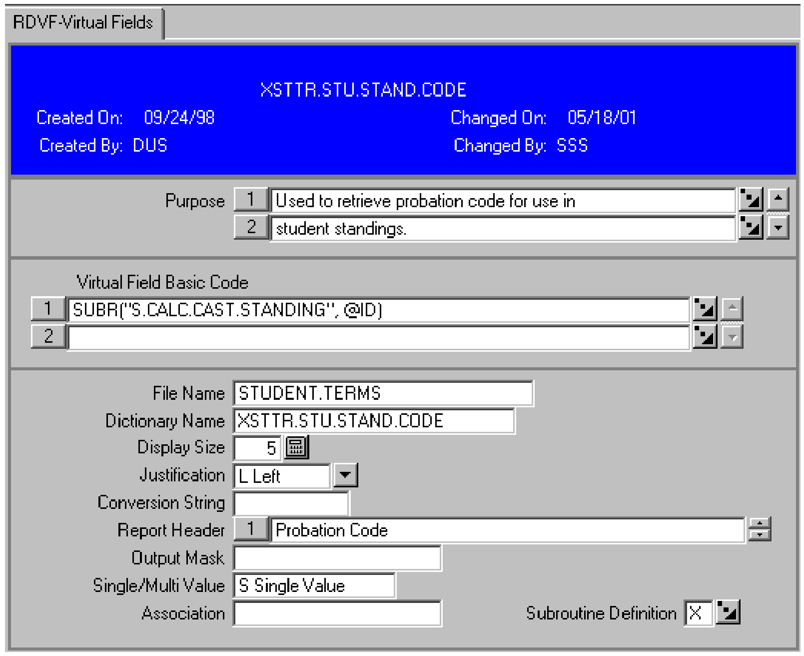


Figure A-1: Defining the Virtual Field

Note: As shown figure A-1 above, you may leave the Conversion String, Output Mask, and Association fields null.

Create and Add Academic Standing Rules

You must create rules to assign the academic standing codes, and add them to the academic level term standing rules. Create rules that evaluate to each of the possible values in the run-time virtual field (P1, P2, etc.), and associate the rules with their corresponding academic standing codes (P1, P2, etc.).

Use the Academic Level Standing Rules (ALST) form to add the necessary term standing rules for the appropriate academic level (such as UG). You can access the Rules Definition (RLDE) form from the Term Standing Rules field to define each rule you are adding. Use the criteria shown on the (RLDE) form in figure A-2 to aid you in defining your rules.

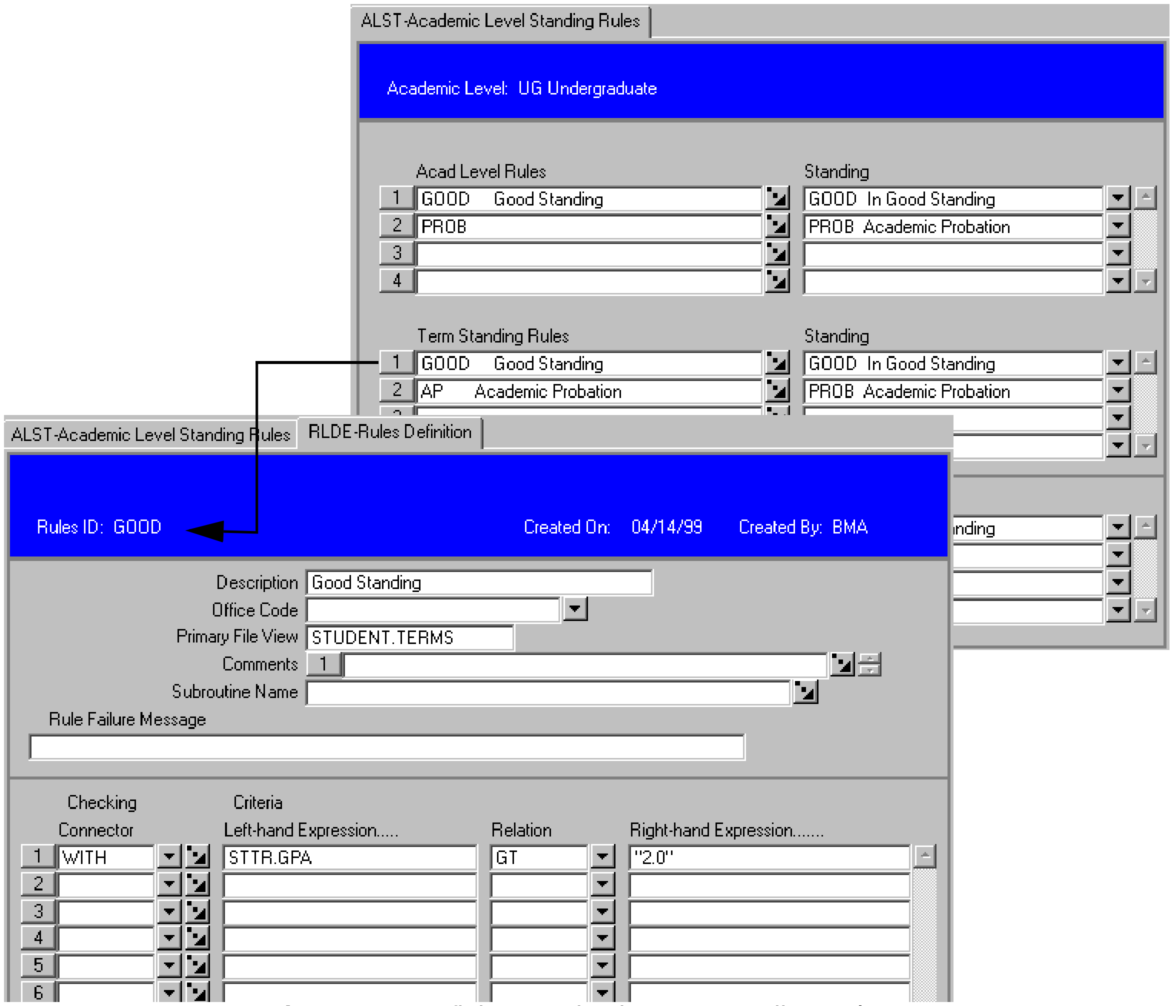


Figure A-2: Defining Academic Term Standing Rules

While figure A-2 shows examples of only four rules and codes, you must define a rule for each of the 15 academic probation code values to be returned by the subroutine (P1, P2, etc.). Refer to table A-1 for a complete list of codes for which you must define rules.

In addition, you may want to consider defining additional rules to:

- assign a default standing (such as “GOOD”) if the first 15 rules fail
- assign a separate standing for summer sessions

Customizing the Subroutine

The Datatel-provided subroutine (S.CALC.CAST.STANDING) called by the virtual field has two arguments: input (A.STTR.ID) and output (A.STU.STAND.CODE). You can customize the input argument to reflect the probation and dismissal standards used by your own institution. You do so by modifying the subroutine's internal subroutine, SET.PARAM, which contains the variables that can be changed as listed in table A-2.

Argument	Definition
X.ACAD.PROB.SEMESTERS	The number of consecutive semesters on Academic Probation that results in Academic Dismissal. This should never be greater than 3. The default is 3.
X.PROG.PROB.SEMESTERS	The number of consecutive semesters on Progress Probation that results in Progress Dismissal. This should never be greater than 3. The default is 3.
X.PROG.PROB.PCT.CHK	The percentage of courses with a grade of W, I, or NC which will result in Progress Probation. This should never be greater than 0.5. The default is 50%, stored as 0.5.
X.ACAD.PROB.GPA	The minimum cumulative GPA before Academic Probation. The default is 2.0. This should never be less than 2.0.
X.ACAD.DIS.GPA	The minimum cumulative GPA before Academic Dismissal. Any student who is on Academic Probation for X.ACAD.PROB.SEMESTERS and has a cumulative GPA less than this value will be dismissed. The default is 1.75. This should never be less than 1.75.
X.OVRD.GPA	The semester GPA that will override an Academic Dismissal. If a student was to be put on Academic Dismissal on a given semester (obtained from the input argument A.STTR.ID), but the student has a GPA for that semester greater than this value, the dismissal is waived. But dismissal is only waived if this variable has a value. The default is null.
XL.SUMMER.SESSIONS	The list of terms that are summers sessions. Courses taken in a summer session do not count towards progress or academic probation/dismissal. This is a multi-valued list of session codes. The default is "SU". Example: If your summers sessions are "S1" and "S2", the assignment statement should be: XL.SUMMERS.SESSIONS = "S1":@VM:"S2"
X.MIN.PROB.CREDITS	The number of credits needed before considering a student for progress or academic probation/withdrawal. The default is 12.
X.CUTOFF.DATE	Any courses ending before this date will be ignored for progress probation/ dismissal calculations. The default is 09/01/81.
X.INCL.NO.GRADES.FLAG	Indicates whether or not to include in the academic standing calculations those courses that do not require a grade.
X.INCL.UNGRADED.FLAG	Indicates whether or not to include in the academic standing calculation those courses which are meant to be graded, but which have no verified grade (default for this flag is No).

Table A-2: SET.PARAM Subroutine Arguments

The output (A.STU.STAND.CODE) of the subroutine provided by Datatel is listed in table A-3. You should not modify the output codes.

Output Code	Definition
P1	Level 1 Progress Probation
P2	Level 2 Progress Probation
PD	Progress Dismissal
A1	Level 1 Academic Probation
A2	Level 2 Academic Probation
AD	Academic Dismissal
P1A1	Level 1 Progress Probation, Level 1 Academic Probation
P1A2	Level 1 Progress Probation, Level 2 Academic Probation
P1AD	Level 1 Progress Probation, Academic Dismissal
P2A1	Level 2 Progress Probation, Level 1 Academic Probation
P2A2	Level 2 Progress Probation, Level 2 Academic Probation
P2AD	Level 2 Progress Probation, Academic Dismissal
PDA1	Progress Dismissal, Level 1 Academic Probation
PDA2	Progress Dismissal, Level 2 Academic Probation
PDAD	Progress Dismissal, Academic Dismissal

Table A-3: S.CALC.CAST.STANDING Output Codes

Calculating Academic Standings

Once you have defined your codes, virtual field, rules, and subroutine, you can use the Calculate Academic Standings (CACS) process to actually calculate the students’ academic standings. Refer to *Using Academic Records* for more information about this process.

Administering Board of Governor's Fee Waivers (BOGW)

In This Chapter

This appendix describes how to use the Board of Governors Fee Waiver (BOGW) form to track student data provided on the Board of Governors Fee Waiver (BOGW) Application.

You can award BOGW waivers by constructing your award packaging rules to award the waiver to those students who meet the appropriate criteria or by detailing from the AIDE field on the BOGW form to the Award Detail Entry (AIDE) form to make a manual award.

Before You Begin

Before you begin, you must have a basic understanding of how to set up codes and rules in Colleague. For more information on setting up Colleague, refer to *Getting Started with Colleague Student.*

Understanding the Board of Governors Fee Waiver Program (BOGW)

California Community Colleges offers a Board of Governors fee waiver (BOGW) grant for eligible students. The BOGW grant pays enrollment fees for credit classes for students who qualify.

Colleague provides the Board of Governors Fee Waiver (BOGW) data entry form for collecting BOGW student data. The BOGW form populates the BOGG.ACYR file. You can use the fields in the BOGG.ACYR file in your award packaging rules for awarding the BOGW grant.

The BOGW form enables you to detail to the Award Detail Entry (AIDE) form for manual entry of awards and to detail to the FA Student Comments (STCM) form to enter comments about the student's BOGW application or BOGW waiver.

Eligibility

To qualify for the BOGW program, students must complete the BOGW application, meet California residency requirements, and meet one of the following eligibility criteria, which are described below:

- Special Classification
- BOGW Method A
- BOGW Method B
- BOGW Method C

Special Classification

Students can qualify under the BOGW Special Classifications by providing specific documentation to indicate that one or more of the following classifications applies:

- Dependent of a veteran.
- Congressional Medal of Honor recipient or dependent of a recipient.
- Dependent of a victim of September 11, 2001.
- Dependent of police officer or fire fighter killed in the line of duty.

BOGW Method A

Students can qualify under the BOGW Method A by providing specific documentation to indicate that the student or the dependent student's family receives a listed benefit. Table B-1 lists the benefits and the documents required as proof of receipt of the benefit.

Benefit[a]	Required Document
AFDC/TANF/CalWorks	• A Notice of Action for the month of application for the BOGW or one month before • CA-7 • Photocopy of a check from the month of application for the BOGW • Agency certification completed by the Department of Public Social Services
Supplemental Security Income (SSI)	• Award letter from the Social Security Administration from the month of BOGW application or the month before • An SSI check from the month in which you apply for the BOGW or the month before • Agency certification completed by the Department of Public Social Services
General Assistance (GA), also called General Relief)	• A Notice of Action for the month of application for the BOGW or one month before • Agency certification completed by the Department of Public Social Services
Veteran's Administration (VA) Benefits	Photocopy of letter of authorization from the California Department of Military and Veteran's Affairs

Table B-1: BOGW Method A Required Documents

a. Note: Because eligible benefits may change yearly, review your FA office guidelines for qualifying benefits.

BOGW Method B

Students must meet qualifying yearly income standards based on the number in the household, including the student. If the student's income is below the published standard, the student is eligible for the waiver.

Note: Because the income standards change yearly, consult your FA office for current income standards.

BOGW Method C

Students must complete the FAFSA (Free Application for Federal Student Aid) to calculate the student's unmet need. Students with at least $1 of unmet need are eligible for the waiver.

Understanding BOGW Awarding in Colleague

The Board of Governors Fee Waiver (BOGW) form serves as a repository for the data collected by the Board of Governors Fee Waiver Application. The BOGW form creates records in the BOGG.ACYR file for the student. You award BOGW to students by writing award packaging rules that reference the appropriate BOGG.ACYR fields or by detailing from the BOGW form to the Award Detail Entry (AIDE) form to make a manual award.

Table B-2 provides the data elements of the BOGG.ACYR file along with corresponding field names from the BOGW form for your reference in writing rules to award BOGW aid.

BOGW Field Name	BOGG.ACYR Data Element
Born Before Date	BG.BORN.B4.DT
U.S. Veteran	BG.VETERAN
Student Married	BG.MARRIED
Orphan/Ward of the Court	BG.ORPHAN.WARD
Other Dependents	BG.OTHER.DEPEND
Exemption on Par Tax Rtn	BG.EX.PAR.TX
Live with Parents	BG.HOUSING.CODE
BOGW Dependency Status	BG.DEPENDENCY.STATUS
Dependent Std Hsld Size	BG.P.NBR.FAMILY
Independent Std Hsld Size	BG.S.NBR.FAMILY
Add Date	BOGG.ACYR.ADD.DATE
TANF/CalWORKS	BG.S.TANF
SSI.SSP	BG.SSI
Gen Asst	BG.GEN.ASST
Par TANF/SSI	BG.P.TANF
VA Dep Fee Wvr	BG.VA.DEP
Parent AGI	BG.P.AGI
Parent Othr Inc	BG.P.OTH.INC
Student AGI	BG.S.AGI
Student Othr Inc	BG.S.OTH.INC
Student	BG.STUDENT.ID

Table B-2: BOGG.ACYR and BOGW Field Name

BOGW Field Name	BOGG.ACYR Data Element
—	BOGG.ACYR.ADD.OPERATOR
—	BOGG.CHANGE.DATE
—	BOGG.CHANGE.OPERATOR
Total Income	calculated on form, not stored
Total Student Income	
VA Dep Fee Waiver CMOH Recipient or Dep	BG.CMOH.RECIP
Police/Fire Fighter LODD Dep	BG.LODD.EP
September 11 Dep of Victim	BG.SEPT11.DEP

Table B-2: BOGG.ACYR and BOGW Field Name (cont'd)

Form Used

Table B-3 shows the form used in this section and a description of the form.

Form	Purpose
Board of Governors Fee Waiver (BOGW)	Use to enter information contained on the Board of Governors Fee Waiver Application.

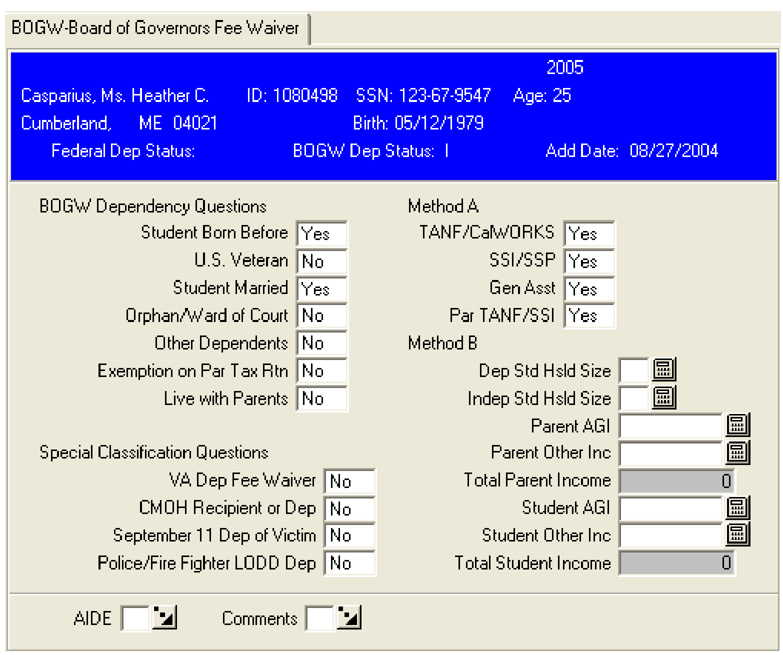
Table B-3: Form Used

The Board of Governors Fee Waiver (BOGW) Form

The Board of Governors Fee Waiver (BOGW) form performs the following functions:

- Collects data to calculate BOGW dependency and displays that calculated status, which may differ from the student's calculated federal dependency status.
- Collects number in household data from the BOGW application to determine eligibility based on income/number in household.
- Collects data from the BOGW application to determine eligibility based on public assistance income.
- Collects income data from the BOGW application to determine eligibility based on income/number in household.
- Creates a record for the student in the BOGG.ACYR file. You can use the BOGG.ACYR fields in your awarding rules to award BOGW to students.
- Enables you to detail from the AIDE field to the Award Detail Entry (AIDE) form to manually award BOGW to a student.
- Enables you to detail from the Comments field to the FA Student Comments (STCM) form to enter comments about the student's BOGW application or award.

Figure B-1 displays an example of the BOGW form.


BOGW-Board of Governors Fee Waiver

2005
Casparius, Ms. Heather C. ID: 1080498 SSN: 123-67-9547 Age: 25
Cumberland, ME 04021 Birth: 05/12/1979
Federal Dep Status: BOGW Dep Status: I Add Date: 08/27/2004

BOGW Dependency Questions
Student Born Before: Yes
U.S. Veteran: No
Student Married: Yes
Orphan/Ward of Court: No
Other Dependents: No
Exemption on Par Tax Rtn: No
Live with Parents: No

Special Classification Questions
VA Dep Fee Waiver: No
CMOH Recipient or Dep: No
September 11 Dep of Victim: No
Police/Fire Fighter LODD Dep: No

Method A
TANF/CalWORKS: Yes
SSI/SSP: Yes
Gen Asst: Yes
Par TANF/SSI: Yes

Method B
Dep Std Hsld Size
Indep Std Hsld Size
Parent AGI
Parent Other Inc
Total Parent Income: 0
Student AGI
Student Other Inc
Total Student Income: 0

AIDE Comments

Figure B-1: The Board of Governors Fee Waiver (BOGW) Form

Noteworthy Fields on the BOGW Form

The key fields on the BOGW form are explained below. For additional information about the BOGW form, see the online help.

Note: When completing the BOGW form, fields that are left blank are considered to be null. If you want to report a zero value, you must enter zero in the field.

BOGW Dependency Status

The BOGW form calculates the student's BOGW dependency based on five fields that default from the student's FAFSA and two additional fields in which you manually enter data from the student's BOGW application. The student's calculated dependency status plays a part in determining which additional fields are required to complete the form.

Note: FAFSA data is defaulted the first time you access a student's record on the BOGW form. When you save your changes on the BOGW form, Colleague creates a record for the student in the BOGG.ACYR file and uses the BOGG.ACYR data from that point on. Any changes to the student's FAFSA data must be manually updated on the BOGW form.

Entries in the following dependency fields are defaulted from the student's FAFSA:

- Student Born Before
- U.S. Veteran
- Student Married
- Orphan/Ward of the Court
- Other Dependents

In addition to the FAFSA defaulted fields listed above, the BOGW form evaluates the following fields to determine BOGW dependency.

- Exemption on Par Tax Rtrn
- Live With Parents

The calculated dependency status is displayed in the BOGW Dependency Status field. The dependency status is calculated in the following manner:

- The student's calculated dependency status is "Dependent," if the student has answered "No" to all five defaulted FAFSA dependency fields AND one or both of the BOGW dependency fields is a "Yes."
- The student's calculated dependency status is "Independent," if any of the defaulted FAFSA fields are "Yes," OR if all of the FAFSA dependency fields are "No" and both of the BOGW dependency fields are "No."

Once the dependency status has been determined, the following information is required based on the dependency status and eligibility method:

Dependent Students. An entry of 2 or more is required in the Dependent Std Hsld Size field regardless of the eligibility method used.

- If the answer is "Yes" to any of the fields in Method A, no further entries are required.
- If the answer is "No" to all of the fields in Method A, then the Parent AGI and Parent Othr Inc fields are required. The Parent AGI field defaults from the FAFSA and so may not require an entry.

Independent Students. An entry of 1 or more is required in the Independent Dtd Hsld Size field regardless of the eligibility method used.

- If the answer is "Yes" to any of the fields in Method A, no further entries are required.
- If the answer is "No" to all Method A fields, then the Student AGI and Student Othr Inc fields are required. The Student AGI field defaults from the FAFSA and so may not require an entry.

Procedures for Awarding BOGW Aid

Complete the following procedures to award BOGW aid to students.

Step 1. Ensure that your awarding rules reference fields in the BOGG.ACYR file to award BOG aid.

- **Special Consideration.** Rules look for a "Yes" in the special consideration fields and awards the waiver when it finds a "Yes."
- **Method A.** Rule looks for a "Yes" in the method A public assistance fields and awards the waiver when it finds a "Yes."
- **Method B.** Rule compares the student's (or dependent student's parents') total income and number of household figures with the yearly published standards provided by the state of California. If the student's income is below the published standard for the number in household, the rule should award the waiver.
- **Method C.** Rule determines the student's unmet need from the FAFSA and awards the waiver if the student's unmet need is greater than or equal to $1.

Step 2. Complete "Procedure for Entering BOGW Data on the BOGW Form" on page B-10.

Step 3. Package student awards. For more information on awarding aid to students, see *Using Financial Aid: Awarding*.

Procedure for Entering BOGW Data on the BOGW Form

Follow the steps below to enter data from the student's BOGW application.

Step 1. Access the Board of Governors Fee Waiver (BOGW) form.

Step 2. Enter the student's General Information from the BOGW application.

a. Enter the processing year.

b. Enter the student's name or ID number.

c. Select the appropriate record from the resolution form.

If FAFSA data exists for the student, it is defaulted in the following fields:

- Student Born Before
- U.S. Veteran
- Student Married
- Orphan/Ward of the Court
- Other Dependents
- Parent AGI (Dependent students)
- Student AGI (Independent students)

Step 3. If FAFSA data is defaulted for the student's dependency fields, go to Step 5.

Step 4. If no FAFSA data exists for the student, enter the student's Dependency Status data from the BOGW application in the following fields:

- Student Born Before
- U.S. Veteran
- Student Married
- Orphan/Ward of the Court
- Other Dependents

Step 5. In the Exemption on Par Tax Rtn field, enter the appropriate data from the student BOGW application.

Step 6. In the Live with Parents field, enter the appropriate data from the student BOGW application.

Step 7. If the BOGW Dependency Status field displays "dependent," enter from the BOGW application the number of persons in the dependent student's household.

Step 8. If the BOGW Dependency Status field displays "independent," enter from the BOGW application the number of persons in the independent student's household.

Step 9. Enter the student's Special Consideration information from the BOGW application.

a. If you enter "Yes" in any of the Special Consideration fields, go to Step 13.

b. If you enter "No" in all of the Special Consideration fields, continue with Step 10.

Step 10. Enter the student's Method A information from the BOGW application.

a. If you enter "Yes" in any of the Method A fields, go to Step 13.

b. If you enter "No" in all of the Method A fields, continue with Step 11.

Step 11. Enter the student's Method B information from the BOGW application.

a. If the student's displayed BOGW Dependency Status is "D," the following fields are required:

- Parent AGI
- Parent Othr Inc

The dependent student's total income is displayed in the Total Income field.

b. If the student's displayed BOGW Dependency Status is "I," the following fields are required:

- Student AGI
- Student Othr Inc

The independent student's total income is displayed in the Total Student Income field.

Step 12. You have the option to detail on the AIDE field to the Award Detail Entry (AIDE) form to view the student's unmet need (for Method C Eligibility) and to manually award a BOGW waiver.

Step 13. You have the option to detail on the Comments field to the FA Student Comments (STCM) form. From the STCM form, you can detail to task-specific forms to enter comments about the student's BOGW application or award.

Step 14. Finish from the BOGW form.

The student's BOGW application data is stored in the BOGG.ACYR file and is available for use in awarding and California MIS reporting.

Using CA State Reporting: MIS Reports

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