



Full Steam Ahead

LEVERAGING OUR WINS TO FUEL SYSTEM CHANGE

NISTS 2024 | St. Louis, Missouri • February 21-23

The following presentation was given at the 22nd Annual Conference for the National Institute for the Study of Transfer Students. Please cite responsibly and direct questions to the original presenter(s).

Solutions Showcase

3236 - Leveraging Your CRM to Fuel Transfer Success

Fostering Inclusion, Engagement, and Community, Maximizing Credits and Streamlining Pathways

Learn how a private, 4-year institution is using their CRM, Slate by Technolutions, to support transfer students, initiatives, and processes. Discover ways to use, implement, and improve transfer-specific Tags, Forms, Origin Sources, Reports, Reader and more! This session will share these initiatives at a high level, so no CRM experience is required to attend! Have a different CRM? That's okay! You will leave with ideas for your CRM system, too!

Austin McGrath, *Associate Director, Transfer Admissions*
Columbia College Chicago



Leveraging Your CRM to Fuel Transfer Success

Austin McGrath, they/them
Associate Director, Transfer Admissions

Columbia
COLLEGE CHICAGO



ABOUT ME

- Oversee Transfer and 2BA Admissions at Columbia College Chicago
- Started as a Transfer Admissions Officer
- Transitioned to Enrollment Operations
- Celebrated 5 years in Higher Ed last September
- Gemini ♊



DISCLAIMER: This presentation will...

Be FAST!

**Focus on The CRM Slate by
Technolutions**

Highlight Projects at a Surface-level.

PROJECTS & INITIATIVES

Reader-Based

Tags

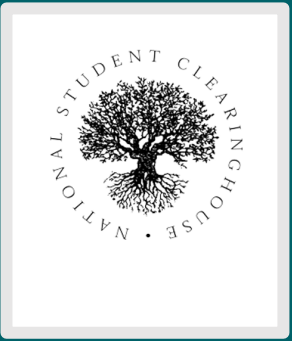
Official Credit
Evaluations

National Student
Clearinghouse

READER-BASED

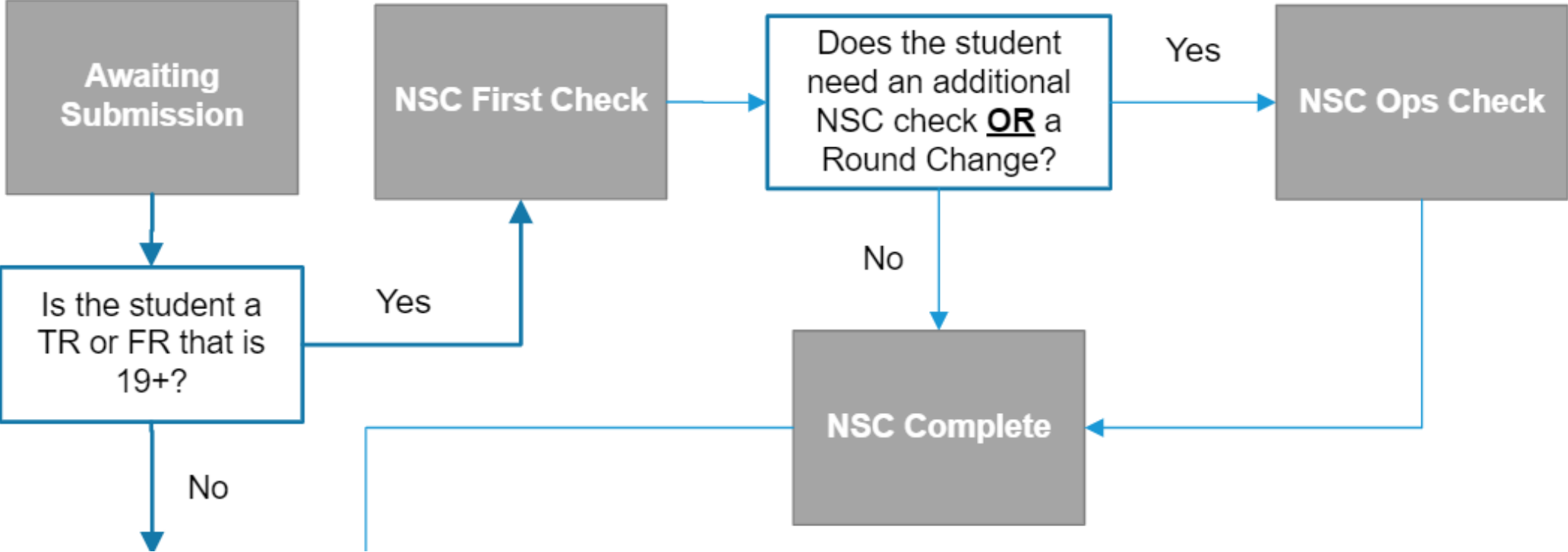
- What is Reader?
 - “All aspects of an institution's reading process, from managing reader queues to reviewing applications and determining admissions decisions, can be accomplished in the Reader.”
 - Reader is a robust tool that allows an institution to:
 - Organize applications into bins
 - Display documents
 - Submit review forms

NATIONAL STUDENT CLEARINGHOUSE



- A database that houses official student enrollment records reported by institutions.
- All Columbia staff have NSC access
- Formerly run by TR recruiters during review of completed applications
- Accurate enrollment records are needed for financial aid disbursement.

NSC WORKFLOW



ACCESS NATIONAL STUDENT CLEARINGHOUSE DATABASE

Student Info

First: Tina
Last: Transfer

Middle:
Other Last Name:

App Entry Term/Year: Fall 2023
MyColumbia ID:

Student Type: Transfer
Date of Birth: 04/01/2003

Age: 19

Address:
123 Columbia Ln.
Chicago, IL 60605

Schools On File

Rank 1. Illinois Valley Community College - 1397
Level: Undergraduate
From: 09/01/2021 - To: 05/01/2023
Grad Date:

Rank 2. Mendota Township High School - 142880
Level: High School
From: 08/01/2017 - To: 05/01/2021
Grad Date:

Dual Enrollment

Dual Enrollment?

Dual Enrollment School 1

NSC First Check

NSC Check Results

Round change needed?
 Yes
 No

NSC Check Notes

- Please add any notes that will help future reviewers understand the NSC results.
- Include your initials after all notes.

Notes

Student Not Found

Unclear Results

No Additional Schools Found

Schools Found

Only YOU can prevent bad data!

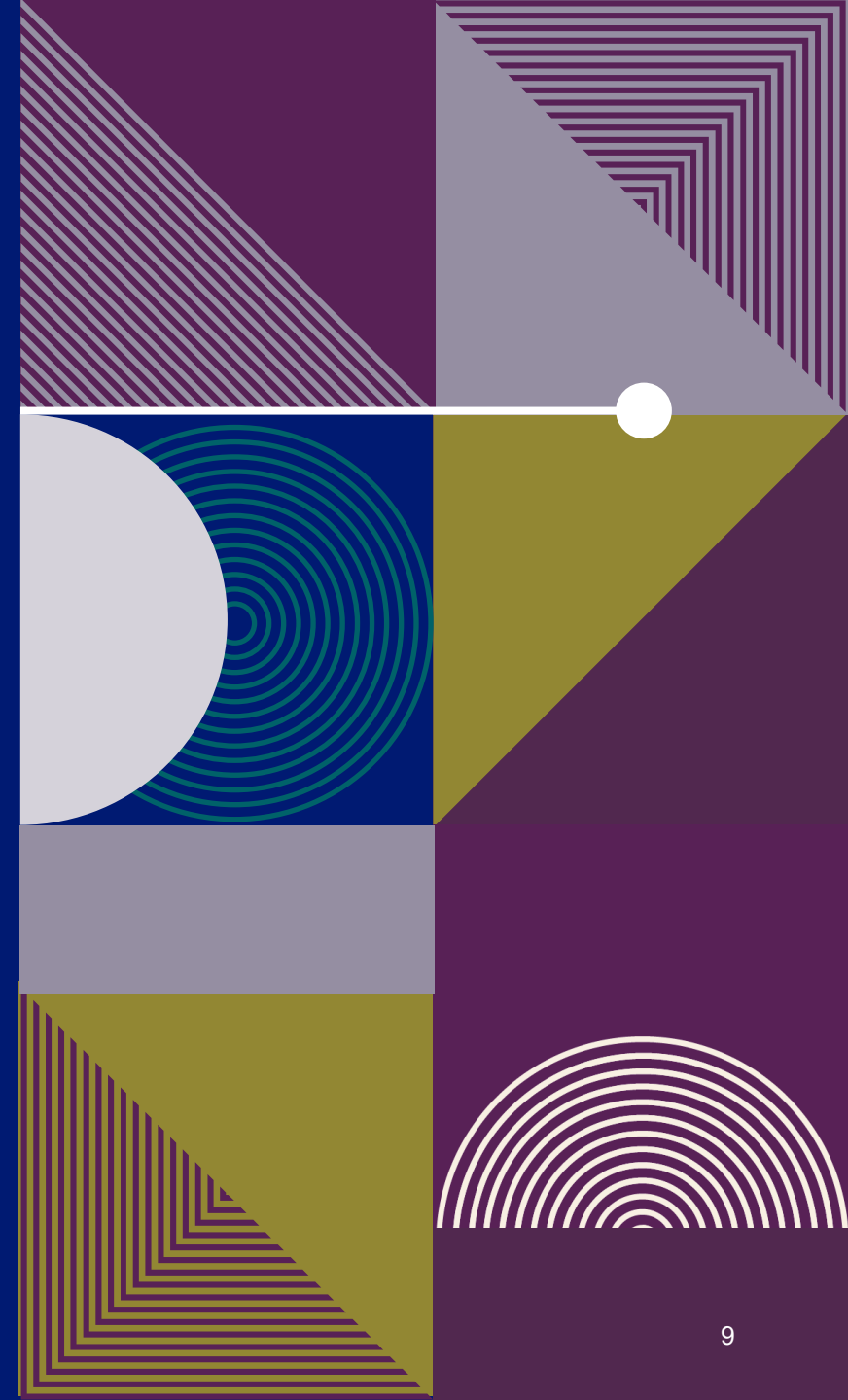


TAG – YOU'RE IT!

Many of our tags are used to group populations. Most of these tags are set at various points of the reader process

Transfer-Specific Tags:

- Guaranteed Admission (GA)
- Transfer Articulation (TR Articulation)
- Phi Theta Kappa (PTK)
- Star Scholars



QUESTIONS IN READER

Transfer Specific Questions

Is this student a member of PTK from any school?

- Yes
- No

Has the student earned over 75 total converted credit hours?

Please reference the converted earned credit hours in the College Transcript Processing form above

- Yes
- No

Guaranteed Admission

Did student earn a C or better in the Comp 1 and 2 sequence at any institution or earn the equivalent through AP/IB/CLEP credit?

- Yes
- No

Did student earn a C or better in college-level Math at any institution or earn the equivalent through AP/IB/CLEP credit?

- Yes
- No

Did student earn a transfer GPA of 2.5 or higher at the partner institution?

- Yes
- No

Star Scholars

Add Star Scholar tag?

- Yes
- No

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Star Scholars

Add Star Scholar tag?

- Yes
- No

Admitted PTK Members

Edit

Folder	Scholarships / PTK
User	Jasmyn Leapheart
Base	Applications
Execution Mode	Retrieve only the new records since query was last run
Filters	Tag IN PTK Round Key IN TR App Entry Year IN 2023 App Entry Term IN Fall, Spring Decision (Most Recent Released with dates) Decision IN Admit, Admit/Decline, Deposit Paid, Deposit Pending, Deposit/Decline; Start Date (op...
Matching Rows	1

Edit Query

Edit Notes

Check Logic

Scholarships - TR - Star Scholar

Edit

Folder	Scholarships / STAR Scholar
User	Austin McGrath
Base	Applications
Execution Mode	Retrieve only the new records since query was last run
Filters	Tag IN Star Scholars Round IN Transfer Verified College GPA (AA or equivalent) >= 3.0 Field Value Exists EXISTS Other - Verified College Graduation Date (AA or equivalent) Has Scholarship (Entity) NOT IN Star Scholar Award Tag NOT IN Opt Out, Test Record
Matching Rows	2

Edit Query

Edit Notes

Check Logic

Run Query

QUESTIONS IN READER

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- No

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- Yes
- No

Star Scholars

Add Star Scholar tag?

- Yes
- No

Student Information

Name: [REDACTED]
Oasis ID: [REDACTED]
Student Type: Transfer

Citizenship Status: US Citizen
Visa Code: CITZ

Tags:
Guaranteed Admission / CITZ

Bin History:

01/26/2023 - Other Merit Scholarship Review, 01/25/2023 - Admit, 01/19/2023 - First Read, 10/06/2022 - Awaiting Materials, 10/06/2022 - NSC Complete, 10/01/2022 - NSC First Check, 09/26/2022 - Awaiting Submission

Rank #1 High School Information

School: Home School
CEEB: 960028
Dates Attended: 09/01/2012 - 05/01/2016
Graduation Date: 05/13/2016
GPA: 3.821

Rank #1 College Information

School: Waubensee Community College
CEEB: 1938
Degree Type:
Dates Attended: 09/01/2014 - 05/15/2023
Graduation Date: 12/15/2022
GPA: 3.25

PTK Conversion Funnel

Metric	Funnel							Rate		
	Awaiting ...	Applied	Appcomp	Admit	Deposit P...	Net Deposit	Enrolled	Completion	Admit	Yield
Application Funnel										
Total										
2018	111	76	68	67	39	36	31	89%	99%	58%
2019	269	227	121	117	62	62	61	53%	97%	53%
2020	143	121	88	87	56	52	51	73%	99%	64%
2021	107	90	65	62	43	39	36	72%	95%	69%
2022	109	95	55	54	36	33	28	58%	98%	67%
2023	73	65	35	28	9	9		54%	80%	32%
	815	674	432	415	245	231	207	64%	96%	59%

TRANSFER ARTICULATION

Are you planning to earn an Associate's degree before enrolling at Columbia? *

- Yes
- No

Crafted with our partner institutions, Transfer Guides are four-year plans that demonstrate a pathway from a specific community college program to a corresponding Columbia program.

[VIEW TRANSFER GUIDES](#)

Are you planning to follow one of our approved transfer guides? *

- Yes, I am following one of the approved transfer guides
- No, I am not following one of the transfer guides
- I am not sure

TRANSFER ARTICULATION

Are you planning to earn an Associate's degree?

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- No

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- I am not sure

Transfer from a Partner School to Columbia

Crafted with our partner institutions, Transfer Guides are four-year plans that demonstrate a pathway from a specific community college program to a corresponding Columbia program. You can download a Transfer Guide for your school and program from the list below.

NOTE: The information below relates to agreements between Columbia and specific colleges, but **we will evaluate credits earned at any regionally accredited college**. If your college does not appear on the list below, please contact transfer@colum.edu for more information.

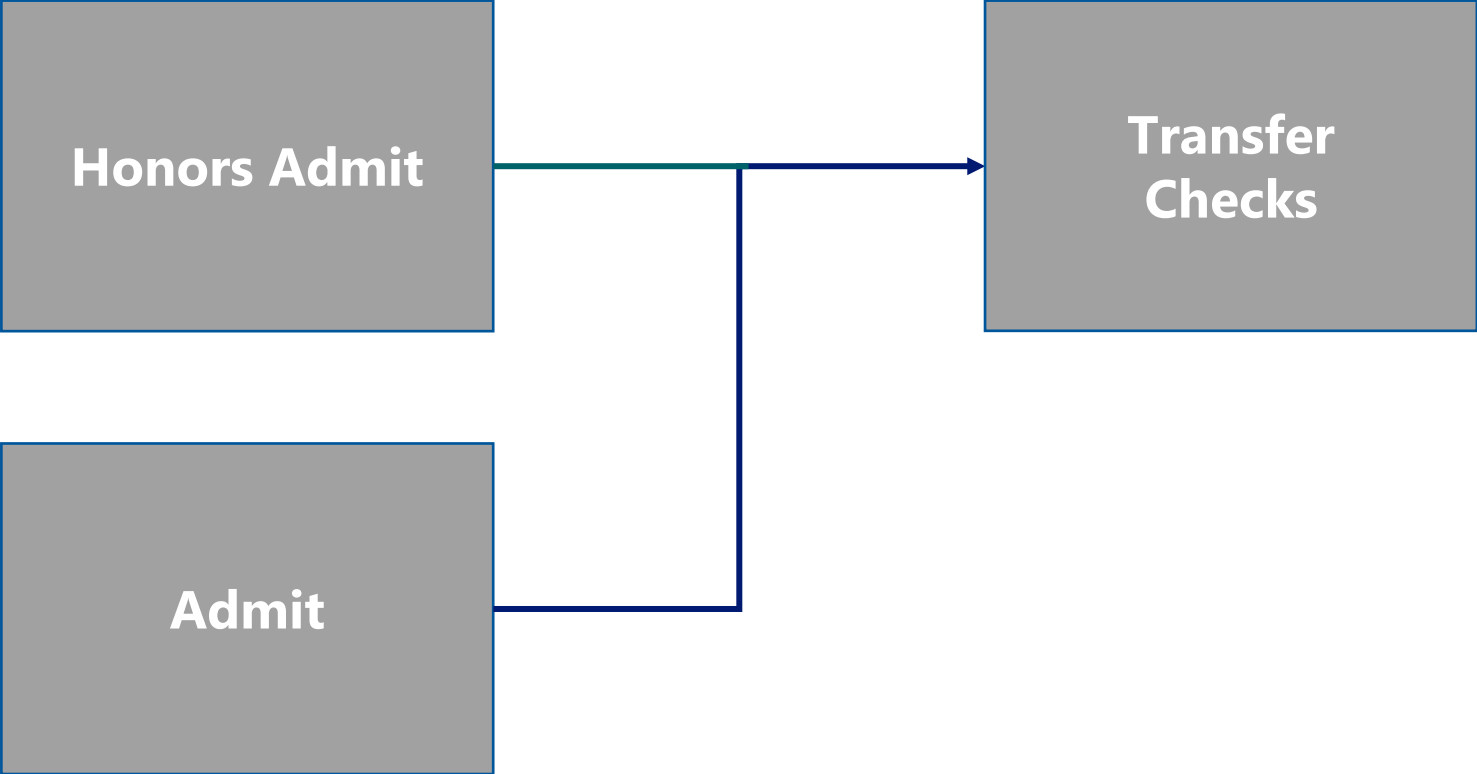
Black Hawk College	-
Fine Arts, BA from Art, AA	
Fine Arts, BFA from Fine Arts, AFA	
Guaranteed Admission Agreement	
City Colleges of Chicago	+
College of DuPage	+
College of Lake County	+

OFFICIAL CREDIT EVALUATIONS (OCE)









Queries:

- Grouped by:
 - Applicant
 - Enrolled
 - Returning
- Test Scores (Material and Digital)
- Transcripts
- uAchieve
- SharePoint & Batch Acquire
- Bins:
 - Transfer Check

NSC WORKFLOW

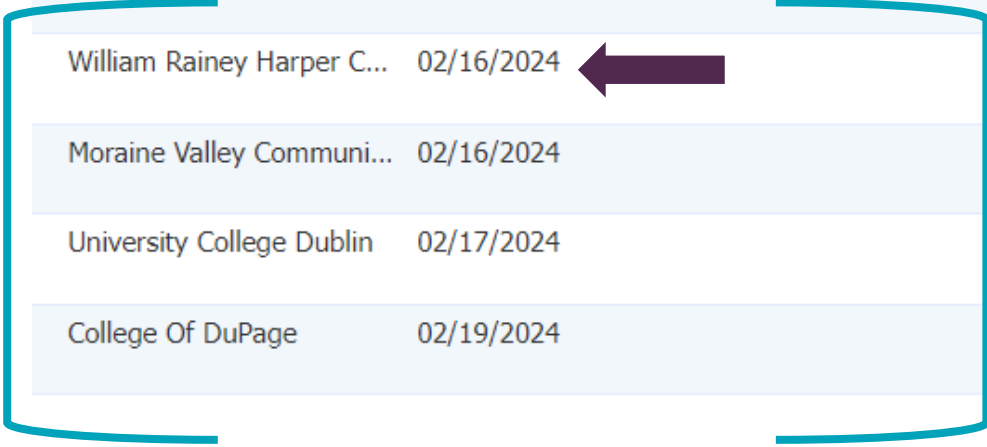


TRANSFER CHECK BIN

School 1	Bin Timestamp	Eval Date	Portfolio Submitted	Eval Incomplete?	Articulation?	
Eastern Michigan Univer...	02/14/2024	02/13/2024		Not Reviewed		
Harold Washington - Cit...	02/14/2024	02/13/2024	02/02/2024	Not Reviewed		
Virginia Polytech Inst St U	02/14/2024	02/13/2024		Not Reviewed		
Purdue Univ Northwest	02/16/2024	02/13/2024	01/17/2024	Not Reviewed		
William Rainey Harper C...	02/16/2024			Not Reviewed		
Moraine Valley Communi...	02/16/2024			Not Reviewed		
University College Dublin	02/17/2024			Not Reviewed		
College Of DuPage	02/19/2024			Not Reviewed	TR Articulation	

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College Of DuPage	02/19/2024			Not Reviewed	TR Articulation



TRANSFER CHECK BIN

TR Eval Bin - Awaiting Evaluation

Folder	_Territory Managers / Ixtel
User	Austin McGrath
Base	Applications
Execution Mode	Retrieve all records each time query is run
Filters	Has Application by Round, Bin = Yes; Round IN TR 2023; Bin IN Undergraduate - Decision - TR: Evaluation Check Material Material NOT IN Official Transfer Evaluation Period Year IN 2023
Matching Rows	34

TRANSFER CHECK BIN

School 1	Bin Timestamp	Eval Date	Portfolio Submitted	Eval Incomplete?	Articulation?
Eastern Michigan Univer...	02/14/2024	02/13/2024		Not Reviewed	
Harold Washington - Cit...	02/14/2024	02/13/2024	02/02/2024	Not Reviewed	
Virginia Polytech Inst St U	02/14/2024	02/13/2024		Not Reviewed	
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William Rainey Harper C...	02/16/2024			Not Reviewed	
Moraine Valley Communi...	02/16/2024			Not Reviewed	
University College Dublin	02/17/2024			Not Reviewed	
College Of DuPage	02/19/2024			Not Reviewed	TR Articulation

TRANSFER CHECK BIN

PREPARED: 01/27/21 - 04:42 PM
 Tania T. Transfer
 PROGRAM CODE: TREVAL
 Columbia College Chicago

75309
 GRADUATION DATE: SP 2025
 CATALOG YEAR: 2021FA

Official Transfer Course Evaluation

Start Term:
 Advisor:
 Major Declared Date: Major Not Declared
 Classification: Transfer Student
 Applied for Graduation:

A Total of 75 Transfer Credits May Apply to Degree

+ Please see your degree audit for information about how your transfer credits fulfill degree requirements.

IAI GECC Eligible

* You have been assigned the IAI GECC core.
 If you have questions about the GECC, please contact your academic advisor or transfer@colum.edu

EVALUATED TRANSFER COURSEWORK BY SCHOOL

EARNED: 53.0 CREDITS

* 1) Elgin Community College
 Abbreviated on Audit as ELGINCC

53.0 CREDITS ADDED 17 COURSES TAKEN

Term	Course	Credits	Grade	Title
17FA	ENGL 111	3.00	TB	Writing and Rhetoric I ELGINCC: ENGL101
17FA	HUMA 1XX	3.00	TA	Humanities GenEd Transfer ELGINCC: MUS105
18SP	ARTS 220	3.00	TA	Painting I ELGINCC: ART107
18SP	ENGL 112	3.00	TC	Writing and Rhetoric II ELGINCC: ENGL102
18SP	MATH 210	4.00	TC	College Algebra ELGINCC: MTH112
18SP	PSYC 101	3.00	TA	Introduction to Psychology ELGINCC: PSY100
18SU	ENGL 130	3.00	TA	Oral Expression ELGINCC: CMS101
18FA	MATH 1XX	4.00	TC	Math GenEd Transfer ELGINCC: MTH120

Evaluation Upload Complete?

- Yes
 No
 No Eval Expected









Credits satisfied for English?

- Yes
 No

Credits satisfied for Math?

- Yes
 No

TRANSFER CHECK BIN

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College Of DuPage	02/19/2024			Not Reviewed	TR Articulation 



TR Articulation

TRANSFER CHECK BIN

Evaluation Upload Complete?

- Yes
- No
- No Eval Expected

Credits satisfied for English?

- Yes
- No

Credits satisfied for Math?

- Yes
- No

Does this student meet the requirements of the appropriate Transfer Articulation agreement by following an approved Transfer Guide?

- Yes
- No
- In Progress

Does this student require a major change?

- Yes
- No

Please select a new BFA major.

Game Design, BA ▼

TRANSFER CHECK BIN

BFA/BMUS PORTFOLIO AND AUDITION REQUIREMENTS



 ASK US

 REQUEST INFO

 VISIT US

 APPLY NOW

Requirements & Deadlines:

Freshman

Graduate

Transfer

Second Bachelor's

Returning Students

Nondegree-Seeking

International

You must complete and submit your application to the college prior to uploading portfolio and audition materials.

With the exception of the Interior Architecture BFA, Columbia's BFA and BMus programs are only available to fall applicants.

Your submission will also be considered for the [Faculty Recognition Award](#).

On this page, you'll find details on the portfolio and audition submission guidelines for direct entry into Columbia's Bachelor of Fine Arts (BFA) and Bachelor of Music (BMus) programs. If you are interested in a Bachelor of Arts (BA) or Bachelor of Science (BS) program, [you can find those requirements here](#).

TRANSFER CHECK BIN

Evaluation Upload Complete?

- Yes
- No
- No Eval Expected

Credits satisfied for English?

- Yes
- No

Credits satisfied for Math?

- Yes
- No

Does this student meet the requirements of the appropriate Transfer Articulation agreement by following an approved Transfer Guide?

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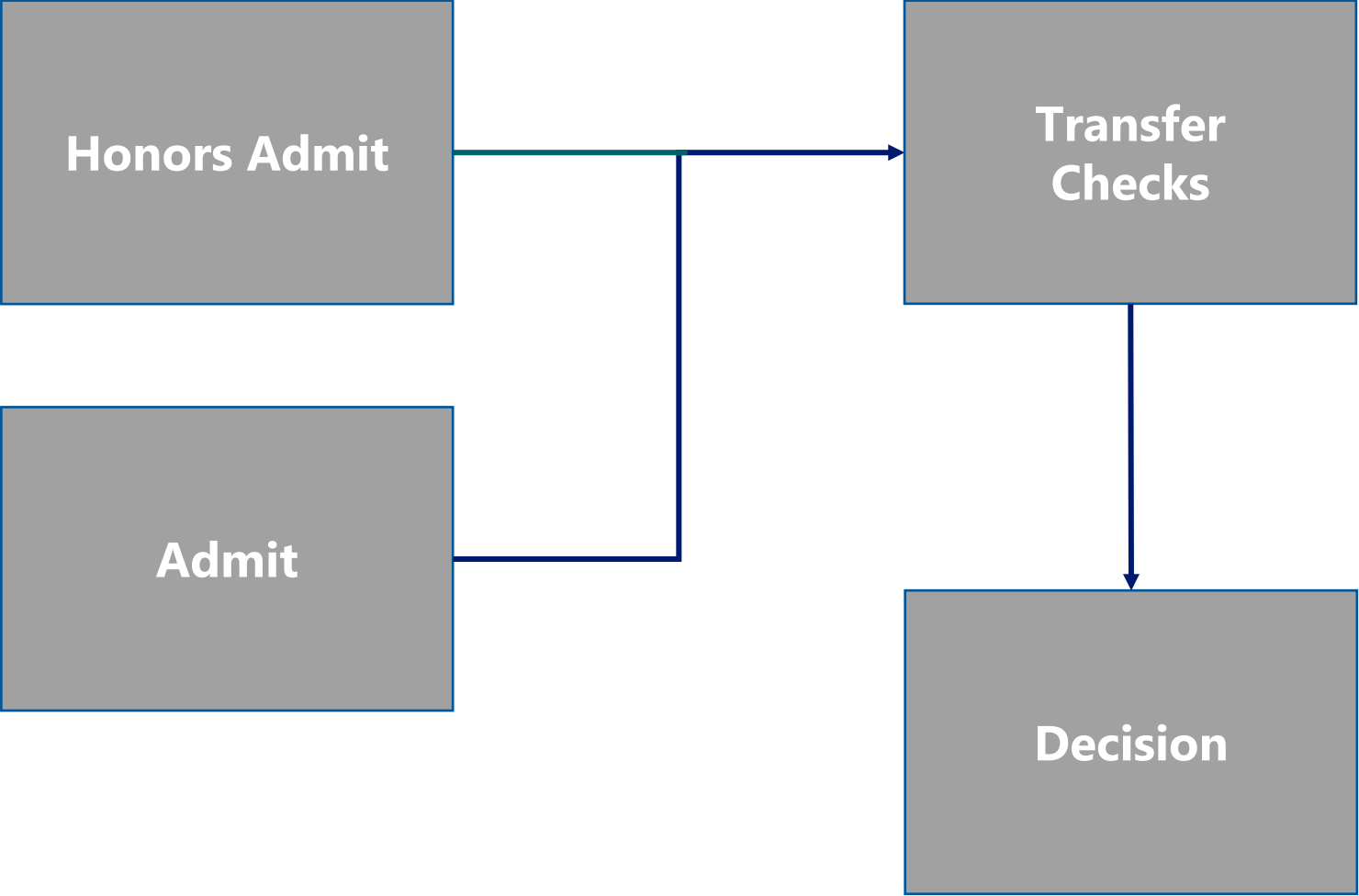
Please select a new BFA major.

Game Design, BA



- Advertising, BA from Mass Communication, AA
- Arts Management, BA from Business/Marketing, AA
- Communication, BA from Mass Communication, AA
- Computer Animation, BFA from Motion Picture/Television - Animation, AAS
- Contemporary, Urban, and Popular Music, BMus from Music, AFA
- Creative Writing, BA from English, AA
- English, BA from English, AA
- Fashion Studies – Merchandising, BA from Fashion Merchandising, AAS
- Fashion Studies – Product Development, BA from Fashion Design, AAS
- Fine Arts, BFA from Fine Arts, AFA
- Graphic Design, BFA from Graphic Design, AAS
- Interior Architecture, BFA from Interior Design, AAS

NSC WORKFLOW



Hello, Tina!

ACCOUNT TOOLS

More Info [X]

Please review your evaluation and make an appointment with your Columbia Representative to discuss any questions. The evaluation is the beginning of a process that may involve consultation with faculty in your intended major to help determine how your earned and/or in-progress credits will count toward your Columbia degree.

Home Decisions

Decisions

VIEW YOUR ADMISSION DECISION

Your Official Transfer Credit Evaluation ⓘ

VIEW OFFICIAL CREDIT EVALUATION

Your Representative

Austin McGrath
(They/Them/Theirs)
aumcgrath@colum.edu
Voice: +1 312-369-6866
Text: +1 312-779-0323

Sign up for a virtual appointment

U 24 Official Credit Evaluation

Method

Email

Folder

U 24 Post-Admit / Transfer Specific

A typical entry might look something like this:

SP21	ELEC 1XX	2.0	Collegewide Elective
BROADWAY COLL: ENG 111			

- In the lower line of this example, we see a course (ENG 111) that the student completed at Broadway College
- In the top line, reading left to right, we see that the course was completed in the Spring term of 2021 (**SP21**) and will be transferring to Columbia as a 100-level, two-credit course that counts as a "Collegewide Elective"

U 24 Official Credit Evaluation

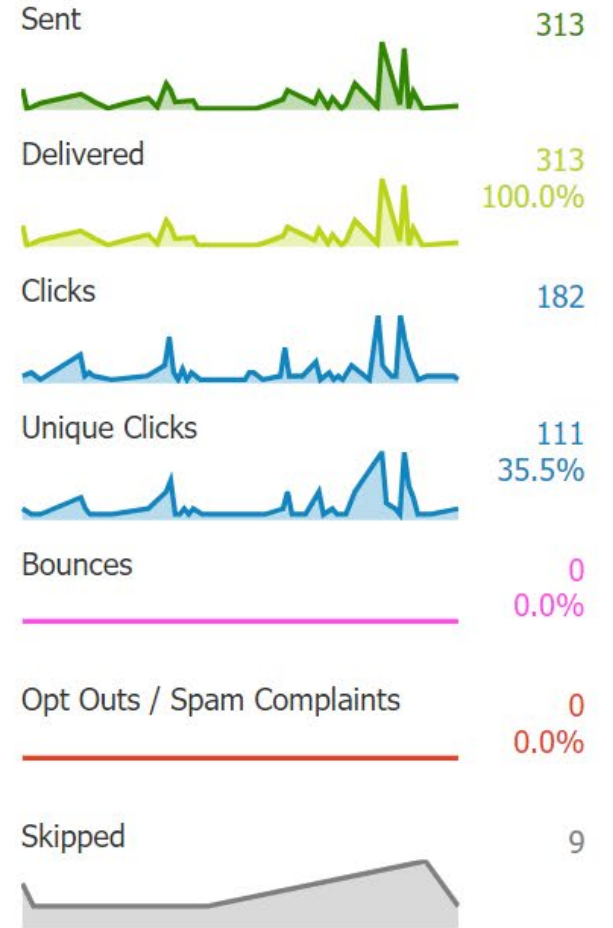
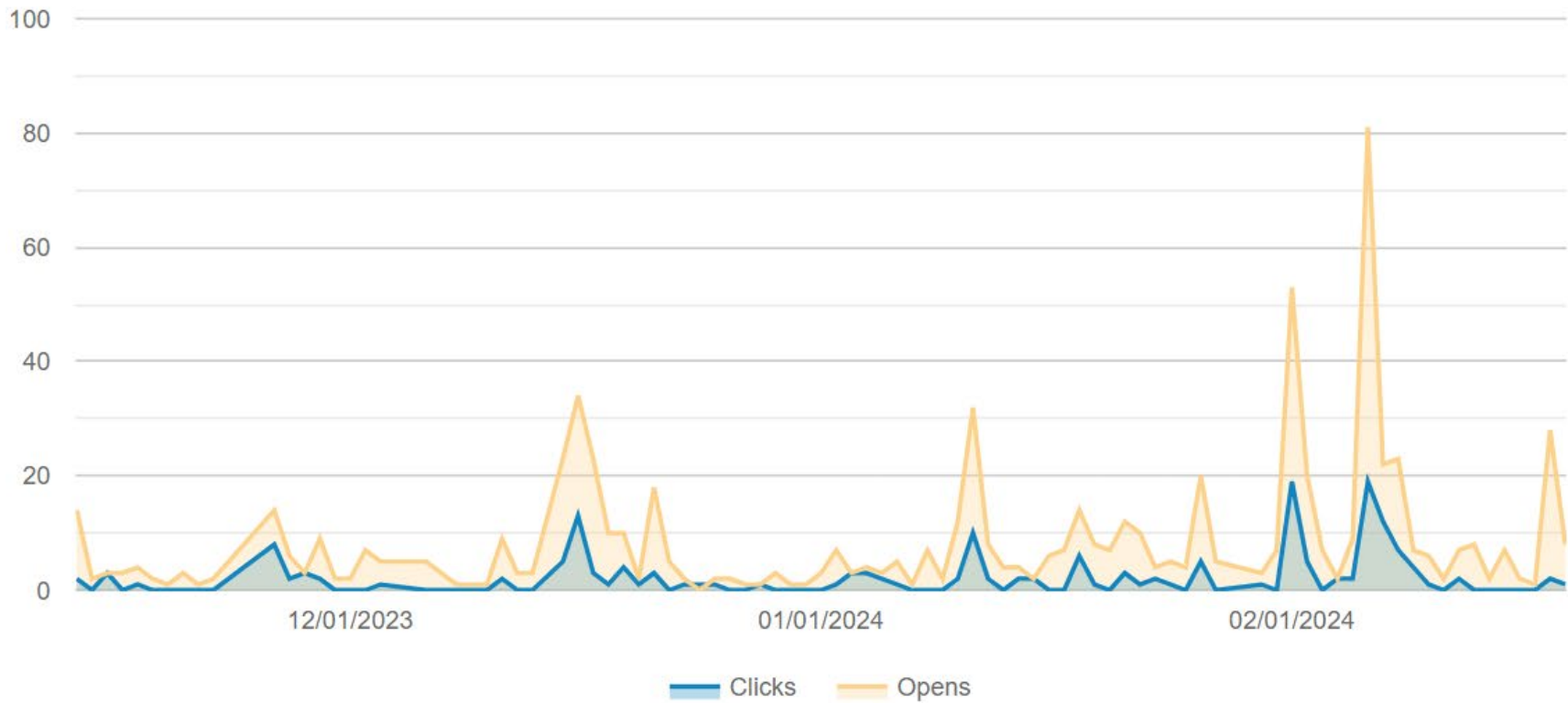
Method

Email

Folder

U 24 Post-Admit / Transfer Specific

Interactions **Devices**



FINDINGS & IMPACTS

National Student Clearinghouse

- Accurate Data (Funnel Statuses)
- Preventing Financial Holds (Unusual Enrollment History)

Tags

- Easier Specialty Scholarship Awarding
- Accurate and Robust Reporting
 - Are Agreements Working?
 - Advocacy (PTK)




Official Credit Eval & Transfer Check Bin

- Quality Control
- Honoring Transfer Guides & Agreements
- Preventing Conflicting Information (Placement)
- Getting Students Information Faster (Decision & Credits)

LOOKING AHEAD

Below are some of the projects we are working on next:

- Moving Official Credit Evaluation process to workflows in Reader
- Achieve Columbia (Tags and Reports)
- Making “Review Your OCE” a required checklist item and building comms and action queries around that.

 **Submit Your Immunization Records.**  



THANK YOU!

Austin McGrath, they/them

Associate Director, Transfer Admissions

aumcgrath@colum.edu

(+1) 312-369-6866