Course Exchange 2.0 for College Administrators

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About Course Exchange

What is Course Exchange?

Course Exchange, facilitated by the California Community College Chancellor Online Education Initiative (OEI), provides a seamless pathway for California community college students to register for online classes within the system. Course Exchange uses a streamlined online registration process developed between colleges that are members of the OEI Exchange Consortium.

All courses in Course Exchange are provided by an accredited California Community College. Through Course Exchange, students who have difficulty accessing courses at their Home College now have the opportunity to enroll in additional courses offered by another Teaching College (a consortium member college). These courses have equivalent articulation to those at the Home College.

How does Course Exchange work?

Course Exchange is a web application that handles enrollments for Online Education Initiative (OEI) courses. Colleges submit their online courses using Course Exchange. CCC students from participating OEI consortium colleges can enroll in these online courses using Course Exchange. While seats in each course are allocated by the system, colleges can reserve seats as needed. Student fees for the course(s) are paid to the Teaching College and credit for the course is stored with the student's Home College.

The focus of this guide is on the CCC Administrator and the tasks to submit online courses using Course Exchange.

The Student Course Exchange Experience

1. The student clicks a link from within their college's course registration system to go to the Course Exchange web application.
2. The student logs into Course Exchange, selects a term and then their eligibility is determined. If a student is eligible, a message displays informing them of Course Exchange policy and they are allowed to continue upon agreement.
3. The student searches for the course(s) they need. Search results display a list of upcoming course sections by course (C-ID) along with their earliest registration dates.

   Note: The online course may be taught by either the student's Home College or faculty from another college (Teaching College).
4. The student selects an open course section.

   - If the student has never applied to the Teaching College before, they will be prompted to complete a pre-filled CCCApply application for that college via a link. When they complete the CCCApply application, the student can view the status of their course enrollment on their *My Dashboard* screen.
   - The student is prompted during the enrollment process to elect to share their BOG Fee Waiver status at the Home College with the Teaching College. They are also prompted to elect to share the course units from the Teaching College with their Home College so that Financial Aid may be applied.
5. Once the student has completed their open course selection and a CCCApply application for the college, their enrollment is confirmed.

   Note: The course/section registration for the student is stored in the Teaching College's SIS for the student.
6. The student is directed to the Teaching College to pay fees. Upon fee payment, the student's registration is complete and the course appears in the student's Canvas account.
7. The student takes the online course and completes it. Upon course completion, credit for the course is stored at the Home College's SIS.
8. The student will need to request a transcript from the Teaching College, following their Home College's transcript request procedures, and have it evaluated for credit to be awarded at the Home College.

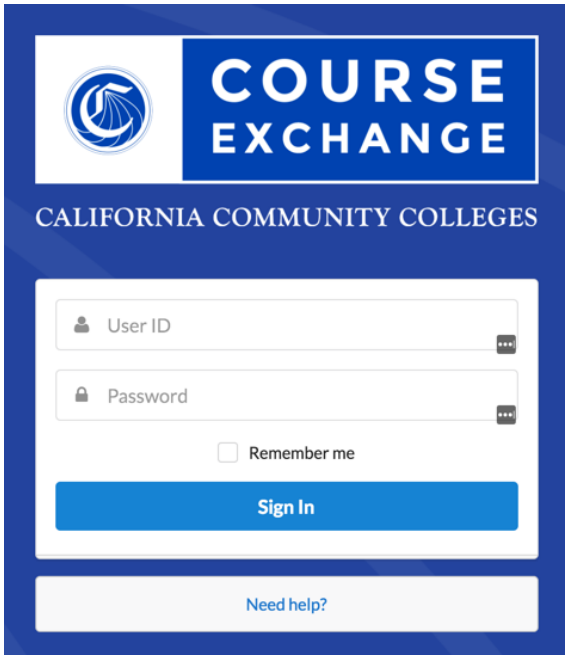
Logging In to Course Exchange

The remaining sections of this guide provide information on how to submit your college's courses to Course Exchange and are intended for CCC Administrators.

Note: The steps below apply to two different environments: PILOT and PRODUCTION.

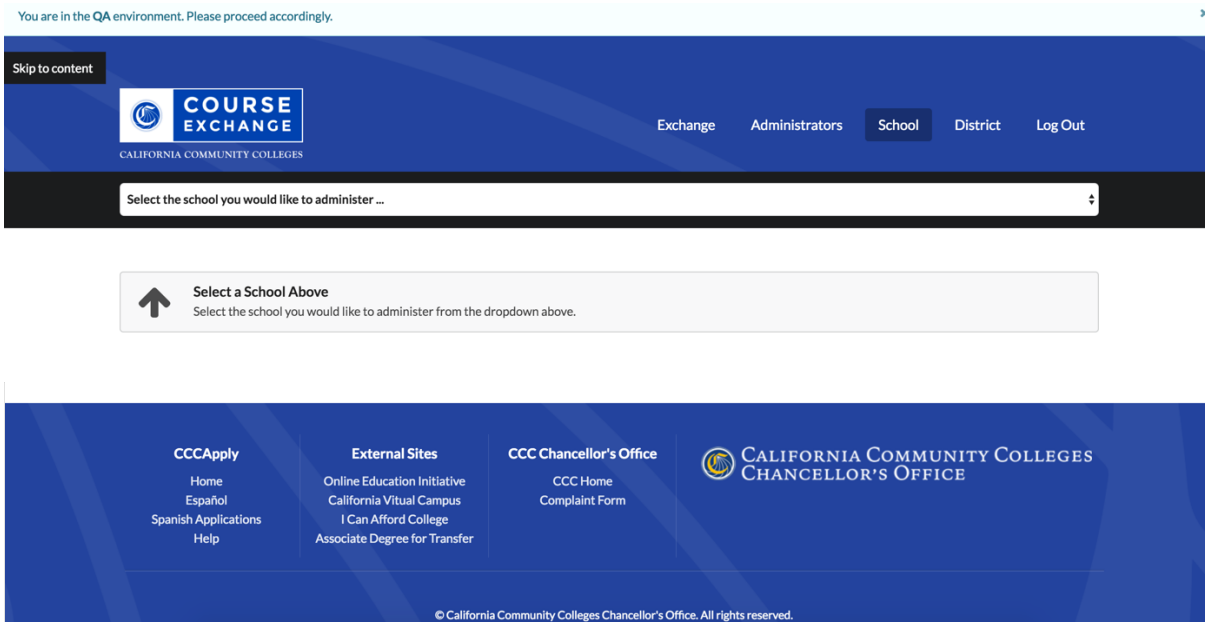
- The PILOT environment is your college sandbox, where you can set up your Course Exchange courses to see how they'll appear, out of the public view.
- Once you're satisfied with the step above, you'll repeat those same set up steps for public view by logging into the PRODUCTION environment, where your courses will then be visible to college students.

1. In your web browser, navigate to either:
   - PILOT: *https://course-exchange-admin-pilot.ccctechcenter.org*
   - PRODUCTION: *https://course-exchange-admin.ccctechcenter.org*
2. Enter your Course Exchange administrator user name and password in the *User ID* and *Password* fields. See *Course Exchange Admin Credentials* for information about the different type of administrator roles available in Course Exchange and which screens display for each one.



Note: If you have trouble with your login, click the *Need help?* link beneath the **Sign In** button and follow the links to get password or user ID help or contact information for other login issues.

3. Click **Sign In** to open the home page in Course Exchange.

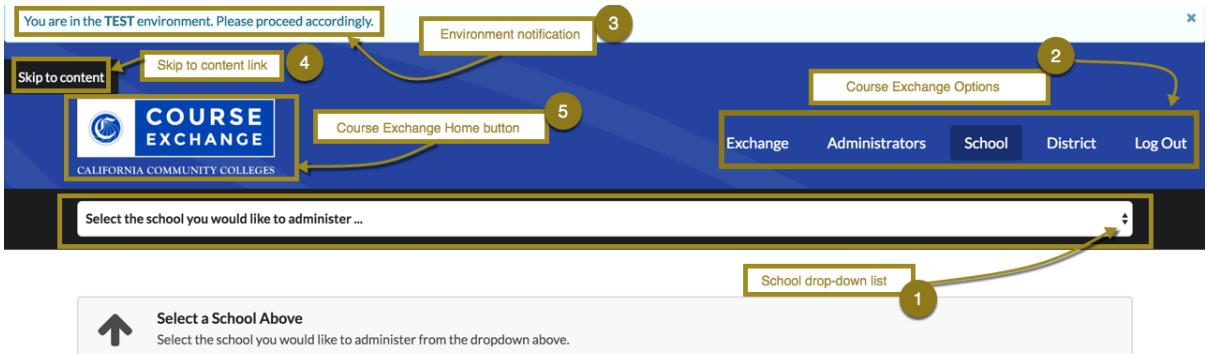


The menu options that display will depend upon your assigned Course Exchange Admin user role. See *Adding a New Course Exchange Admin User* on page 10 to see the different roles and the options and screens they access.

4. Click *Log Out* at any time to log out of the Course Exchange Admin application.

Getting Started Using Course Exchange

When you first log in to Course Exchange you always arrive at the home page, with the *School* option in focus. Your school's name automatically displays in the *School* drop-down list. If you are part of a multi-school district you may need to click the *School* drop-down list to select your school before you can access the administration screens.



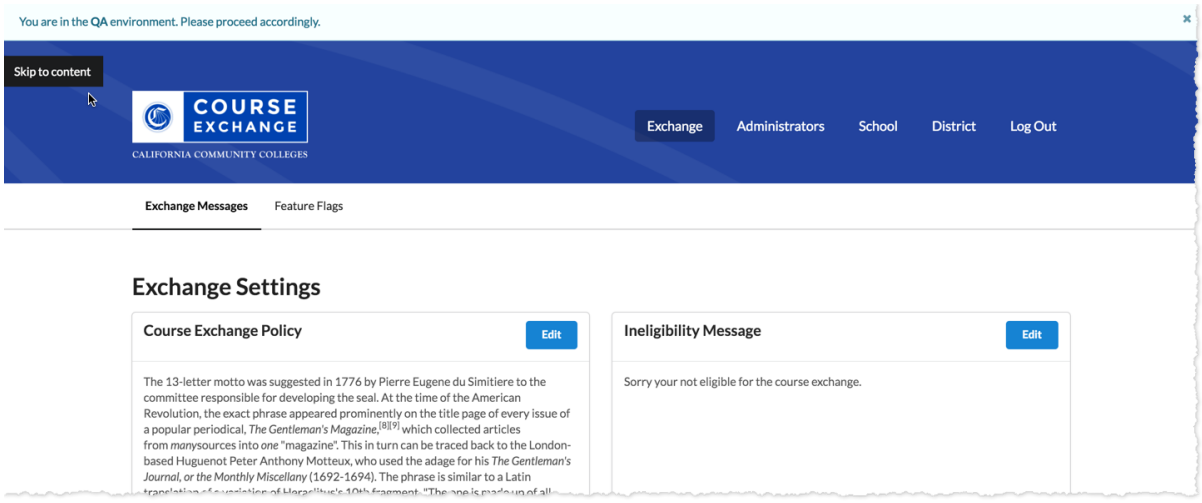
The table below provides details about Course Exchange Home page elements.

Course Exchange Home Page Element	Function
1: *School* drop-down list	The *School* drop-down list is where your school name displays. If you're part of a multi-school district, you will need to select your school from the drop-down list in order to manage administrative tasks in Course Exchange for your school.

Course Exchange Home Page Element	Function
2: Course Exchange Options	The Course Exchange Options are links that take you to the different administration tasks you can manage for your school's Course Exchange information and classes. See: • *Exchange Screen* on page 7 • *Administrators Screen* on page 8 • *School Screen* on page 13 • *District Screen* on page 38 • *Preferences Screen* on page 40 • Log Out: Click the *Log Out* link to log out of Course Exchange. A *Sign In* link displays afterward so you can choose to log in again as needed.
3: Environment Notification	The Environment Notification displays in the top left corner of the Home screen as a reminder to let you know if you are in the Pilot or Production environment. You can close the notification by clicking the Close (X) icon in the far-upper right of the screen.
4: *Skip to content* link	The *Skip to content* link displays for keyboard users who would like to skip the navigational elements on the Course Exchange Home page and put the main page content in focus. the *Skip to content* link displays on all Course Exchange screens.
5: **Course Exchange** home button	The **Course Exchange** home button displays on every Course Exchange screen and returns focus to the Home page when clicked.

Exchange Screen

The *Exchange* screen is used by the Exchange Administrator (CCC Tech Center) to configure Exchange Messages and Feature Flags. The Exchange screen only displays for users with the role of Exchange Administrator.



Exchange messages display to all users of the Course Exchange Student application and are considered system-level messages.

Feature flags are made available to Course Exchange Admin application users at the school, district, and/or role level.

Related information

Feature Flags Subscreen on page 21
District Screen on page 38

Administrators Screen

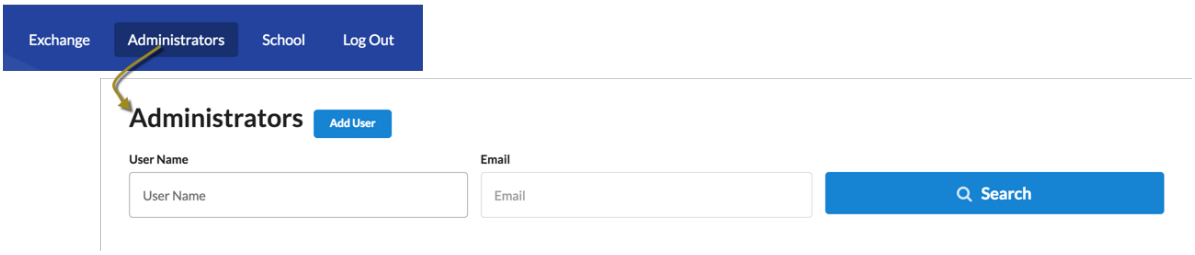
The *Administrators* screen is used by the Exchange Administrator and/or the School System Administrator to view and add Course Exchange Admin users.

Use the following steps to view and add users on the *Administrators* screen.

1. Log in to Course Exchange Admin as an Exchange Administrator or a School System Administrator.

   Note: You can only access the *Administrators* screen if you are an Exchange Administrator or School System Administrator. All other roles will not have access.

2. Click the *Administrators* option to display the *Administrators* screen details.



From the *Administrators* screen you can search for current administrators or add a new Course Exchange Admin user.

For more information, see: *Searching Course Exchange for Admin Users* on page 8 and *Adding a New Course Exchange Admin User* on page 10.

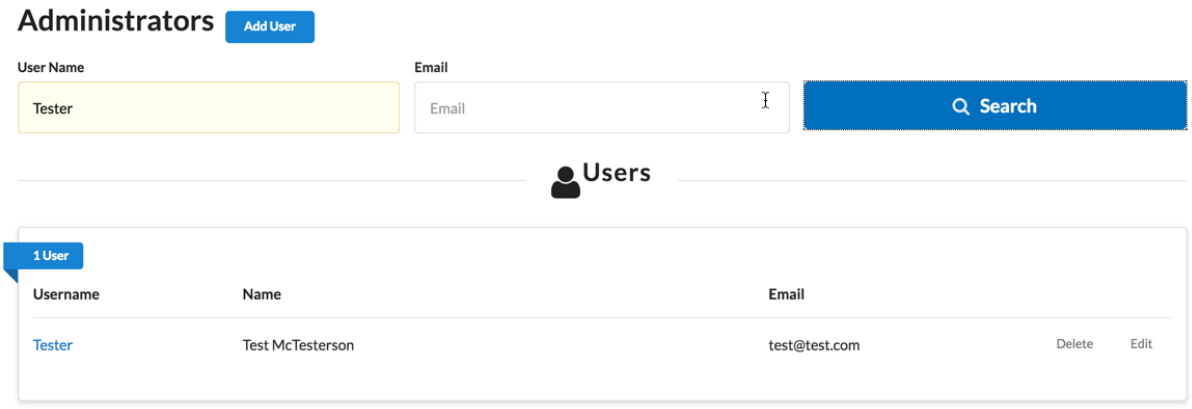
Searching Course Exchange for Admin Users

Use the following steps to search for a Course Exchange Admin user from the *Administrators* screen.

1. Enter a user name or email in the *User Name* or *Email* fields, respectively.

   Note: Wild card characters are not allowed. You must enter only alpha-numeric characters.

2. Click **Search** to display search results based on the values you entered.

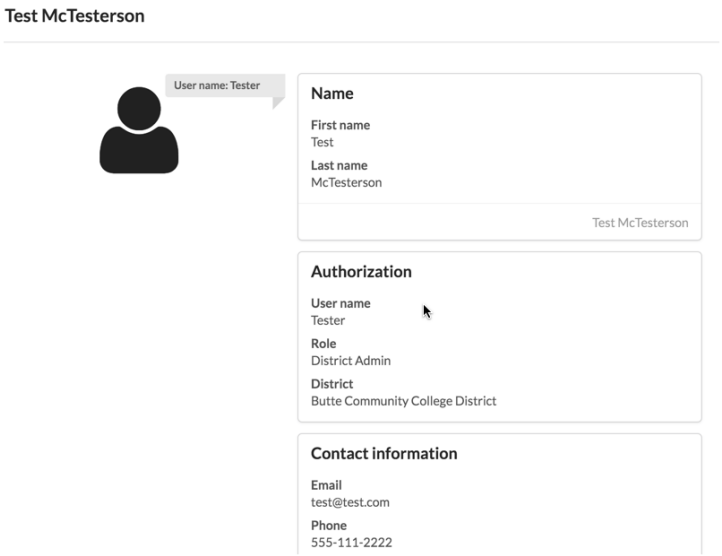


From the *Users* search results, you can view, edit, or delete the existing Administrator user account.

Viewing Administrator User Details

To view Administrator user details:

1. Click the linked *Username* to display user details in a pop-up box.

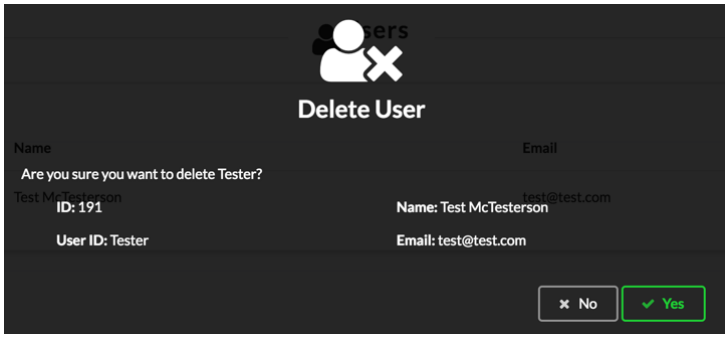


2. When you're done viewing the details, click the *X* icon to close the details view.

Deleting an Administrator User

To delete an Administrator user:

1. Click the *Delete* link to display a *Delete User* prompt asking you to confirm your deletion.

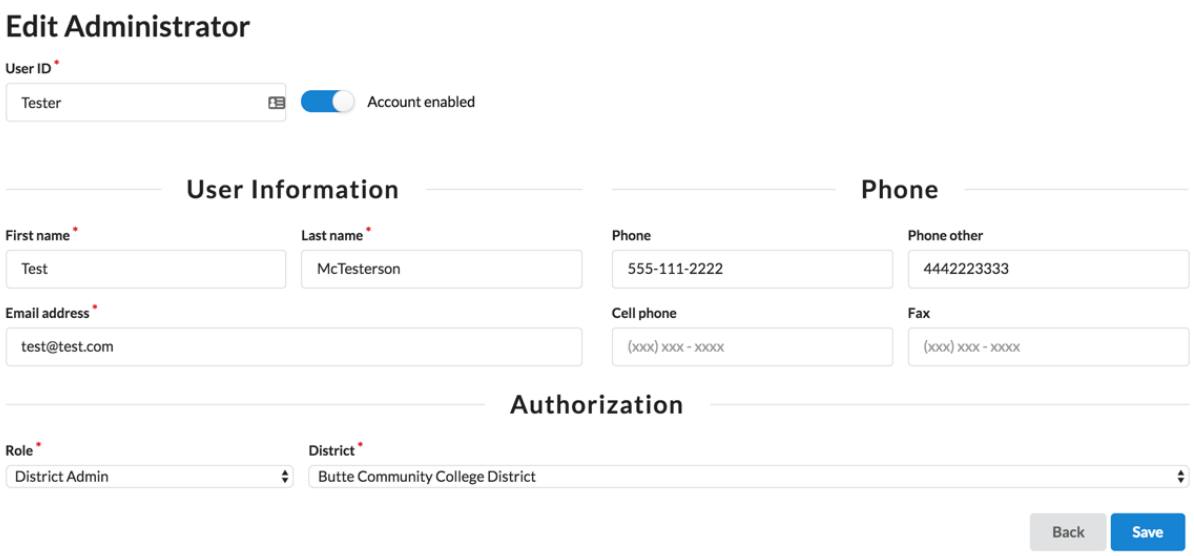


2. Click **Yes** to delete the user and return to the *Administrators* screen.

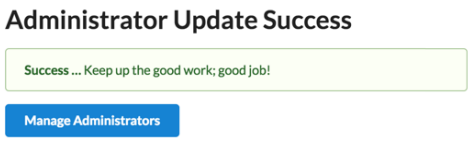
Editing an Administrator User

To edit an Administrator user:

1. Click the *Edit* link to display the *Edit Administrator* screen, which displays the user's details.



2. Make changes to the user record and then click **Save** to display the success message.

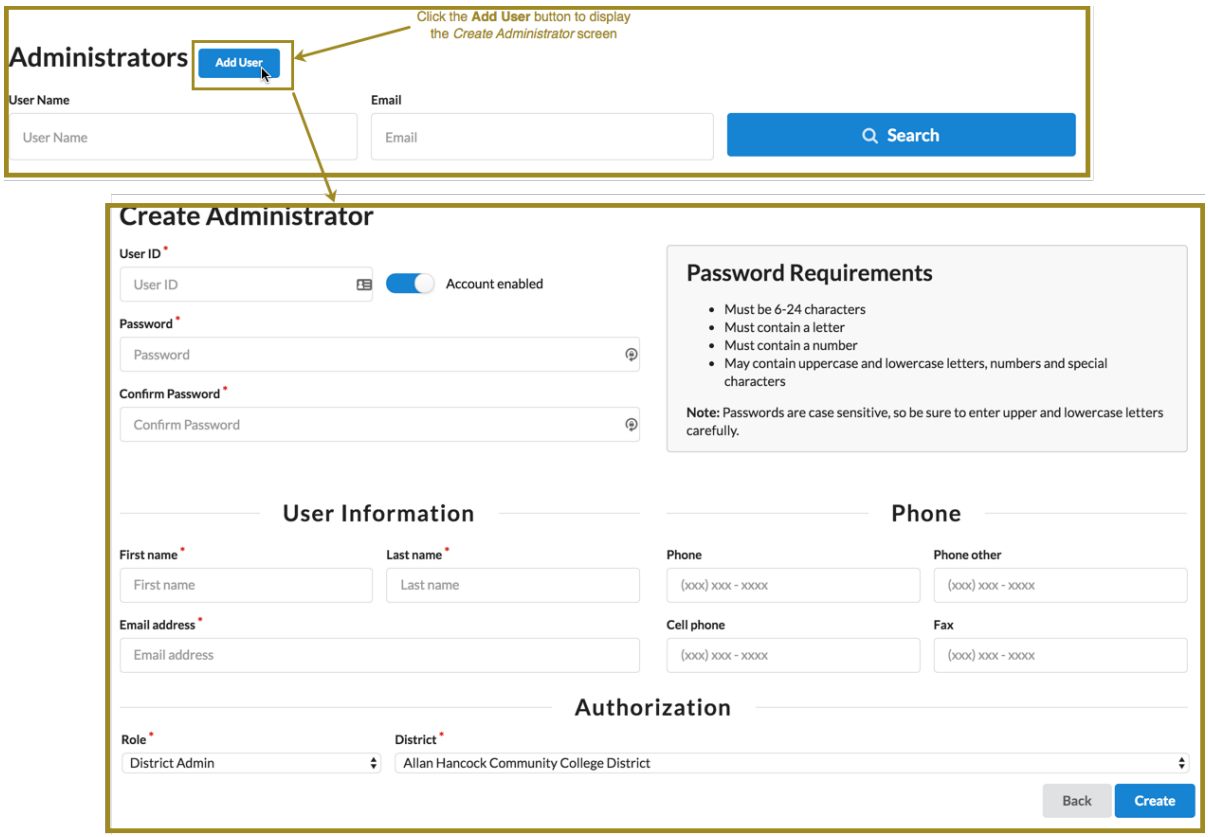


3. Cick **Manage Administrators** to return to the *Administrators* screen.

Adding a New Course Exchange Admin User

Use the following steps to add a Course Exchange Admin user from the *Administrators* screen.

1. Click the **Add User** button to display the *Create Administrator* screen.



2. Enter values in the required fields (indicated with a red asterisk). Fields are grouped by *User ID/Password*, *User Information*, *Phone*, and *Authorization*.

   Note: The *Create Administrator* screen's *Account enabled* slider button is set to an enabled state by default.

3. In the *Authorization* section, select the admin role from the *Role* drop-down list. The table below provides information about the Course Exchange Admin roles and the varying access in the application.

   Note: School System Administrators can create new users for their assigned school with the roles of *School Admin*, *Reports Admin*, or *School Systems Administrator*.

Role	Purpose and Access

District Admin	Administers all the colleges in their district and has access to:
	• *School screen*
	  • School Profile subscreen
	  • Feature Flags subscreen
	  • Terms subscreen
	  • Courses subscreen
	  • Enrollments subscreen
	  • Reports subscreen
	• *District screen*
	• *Preferences screen*

Role	Purpose and Access

Exchange Admin
 	
Note: The Exchange Admin role is only assigned to CCC Tech Center and OEI staff.
	Administers the Course Exchange web site for all schools and has access to:
	• *Exchange screen*
	• *Administrators screen* (create new users)
	• *School screen*
	  • School Profile subscreen
	  • Feature Flags subscreen
	  • Terms subscreen
	  • Courses subscreen
	  • Enrollments subscreen
	  • Reports subscreen
	• *District screen*

School Admin	Administers only their college and has access to:
	• *School screen*
	  • School Profile subscreen
	  • Feature Flags subscreen
	  • Terms subscreen
	  • Courses subscreen
	  • Enrollments subscreen
	  • Reports subscreen
	• *Preferences screen*

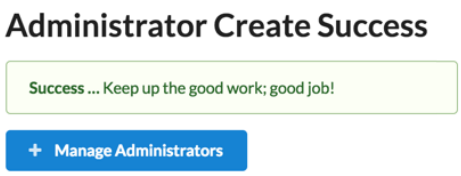
Reports Admin	Administers reporting for all Course Exchange schools and has access to: • *Enrollments* • *Reports*

School System Administrator	Administers only their college and has access to:
	• *Administrators screen* (create new users)
	• *School screen*
	  • School Profile subscreen
	  • Feature Flags subscreen
	  • Terms subscreen
	  • Courses subscreen
	  • Enrollments subscreen
	  • Reports subscreen
	• *Preferences screen*

4. Select the college or district from the *District*/*School* drop-down list. The *District/School* drop-down list only displays for the Exchange Admin and does not display for School System Administrator users.

   Note: The *District* drop-down lists displays when the selected *Role* is *District Admin*. For all other admin roles, the *School* drop-down list displays, with the exception of the *Exchange Admin* role (in which case neither drop-down list displays).

5. Click **Create** to create the new admin user and display the *Administrator Create Success* message.

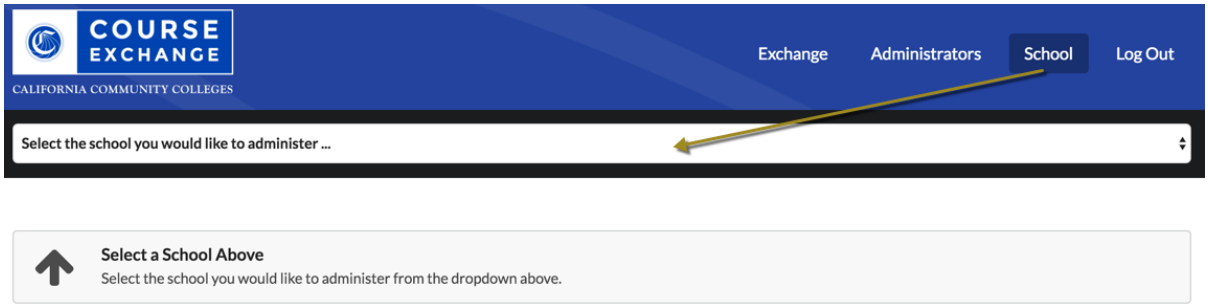


6. Click **Manage Administrators** to return to the *Administrators* screen.

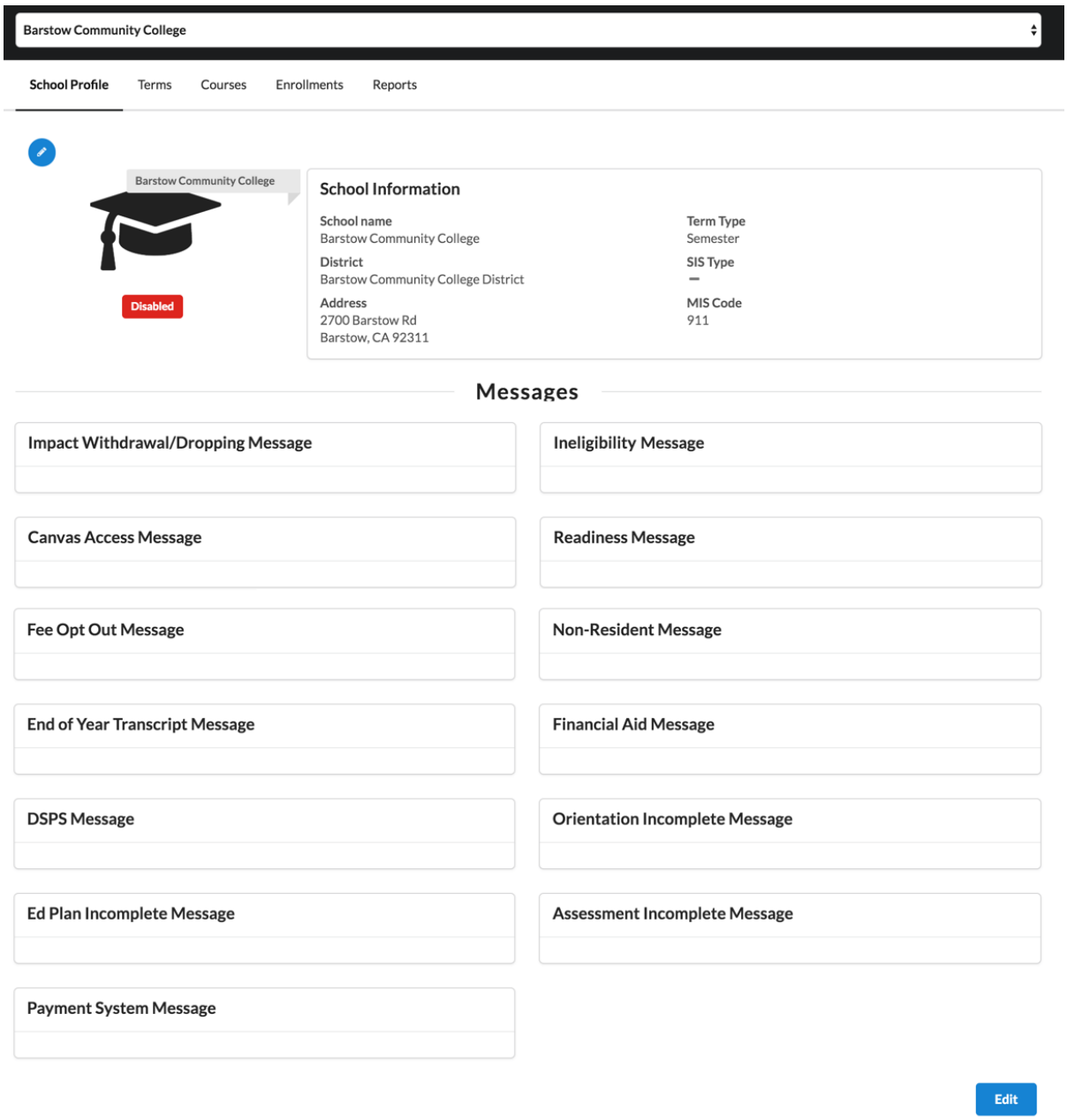
School Screen

The *School* screen is used to configure your school's profile, terms, courses, enrollments, and report. Use the following steps to access the *School* screen.

1. Click the *School* option to display the *Select the School* drop-down list.



2. Select a school from the *Select the School* drop-down list to display the *School Profile* for the selected school.



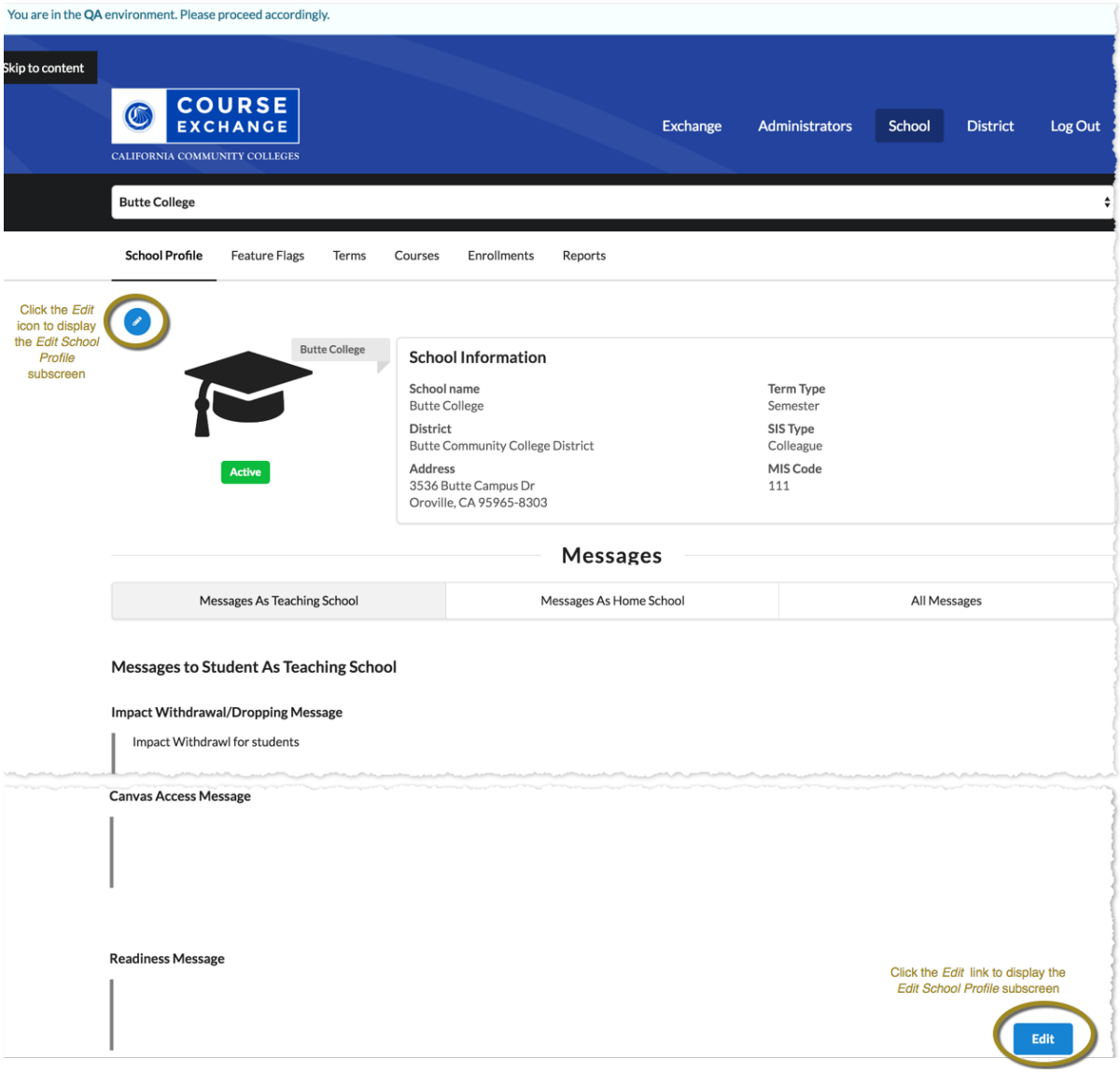
In addition to the *School Profile*, four other school configuration subscreens display based on your credentials. All five subscreens are outlined in the table below.

Subscreen	Purpose
School Profile	The *School Profile* subscreen is where you configure messaging that you want to display to students who sign up for Course Exchange courses offered by your school.
Terms	The *Terms* subscreen is where you configure term settings for the Course Exchange courses that your school offers. There is an option to pre-populate term information from your SIS.

Subscreen	Purpose
Courses	The *Courses* subscreen is where you add courses that your school offers through Course Exchange. There is an option to pre-populate course information from your SIS.
Enrollments	The *Enrollments* subscreen is where you can view enrollments in your college's Course Exchange courses. Students who are dropped or are enrolled display.
Reports	The *Reports* subscreen is where you can find pre-defined reports that provide details for your school's Course Exchange activity.

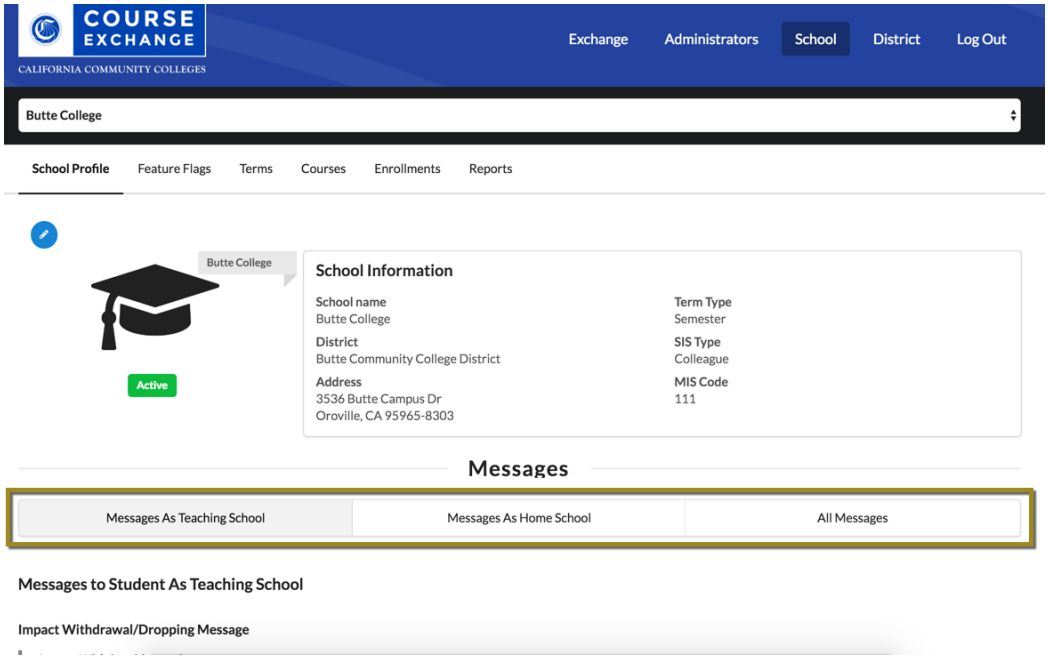
School Profile Subscreen

The *School Profile* subscreen displays your school's current information (school name, district, address, term and SIS type, and MIS code) as well as your Course Exchange message settings.



The messages you've configured to display to your college's Home College and Teaching College students appear below your school information. These are the messages that are triggered under certain conditions.

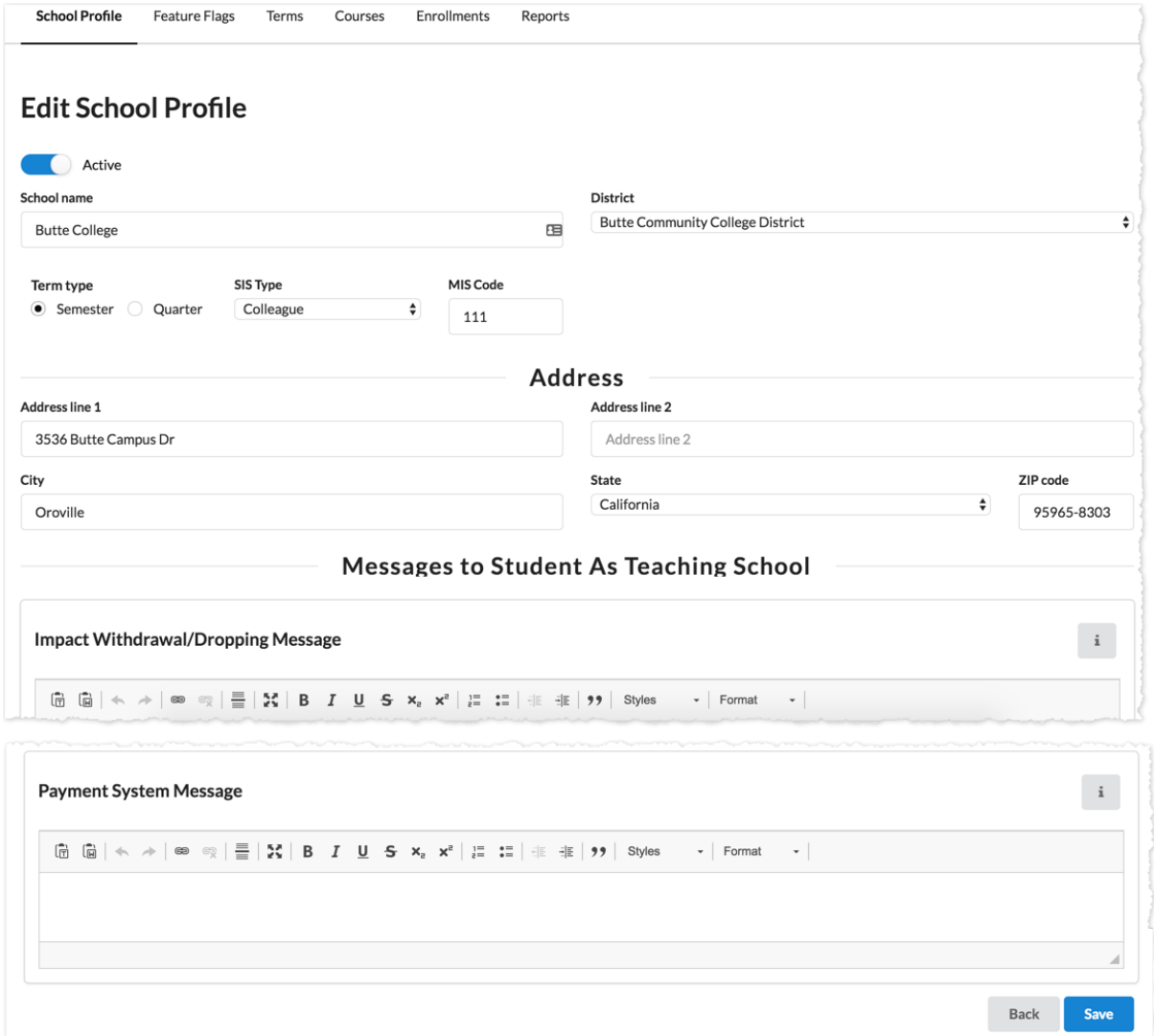
Click the message type to view just the Teaching College messages, the Home College messages, or both.



Editing Your School Profile and/or Messaging

Use the following steps to edit your school profile and/or messaging on the *School Profile* subscreen. Messaging displays in two sections, for Teaching College messaging and Home College messaging, to keep messaging for each separate and clear.

1. From the *School Profile* subscreen click either the *Edit* icon or scroll down and click the **Edit** button to display the *Edit School Profile* view.



2. Edit your school profile information as needed.
3. Create or edit any messaging you want to display to students who take Course Exchange courses your school offers in the *Messages to Student As Teaching School* section. Use the table below as a guide.

Field	Value
Impact Withdrawal/Dropping Message (Teaching College)	Edit the template to customize the message that displays to students about potential impact of dropping or withdrawing from classes on their financial aid eligibility. **Note:** Withdraw/drop messages are based on *Section* dates, if available, which take precedence over *Term* dates.
Fee Opt Out Message	Edit the template to customize the message that displays to students about your college's process to opt out of fees they have already paid at their home college.
Non-Resident Message	Edit the template to customize the message that displays to students who are non-residents.

Field	Value
End of Year Transcript Message	Edit the template to customize the message that displays to students about their end-of-year transcript.
Accessing DSPS Services Message	Edit the template to customize the message that displays to students about Disabled Student Programs and Services.
Canvas Access Message	Edit the template to customize the message that displays to students about how to access course materials in Canvas and communicate with the instructor.
Readiness Message	Edit the template to customize the message that displays to students about the online readiness modules for OEI courses at the time of registration so that students can begin working on the modules prior to the start of class. Your customized message might include a link to another web page or to Canvas; wherever your readiness module resides. The link may take the student to a self-enroll link for the readiness module and communicate information to the student about taking them and why they are being asked to do so.
Ineligibility Message (Home College)	Edit the template to customize the message that displays to students about whether or not they are eligible to register for a Course Exchange course. Students are not eligible for a Course Exchange course if they have a status of one of the following at their home college: • International F1 Visa • Students with an address outside of California • Incarcerated • Vacation or Visitor Visas (B Visas) • AB540 with out of state addresses • High school dual enrollment
Fee Opt Out Message (Teaching College)	Edit the template to customize the message that displays to students about your college's process to opt out of fees they have already paid at their home college.
Non-Resident Message (Teaching College)	Edit the template to customize the message that displays to students who are non-residents.
End of Year Transcript Message (Teaching College)	Edit the template to customize the message that displays to students about their end-of-year transcript.
Financial Aid Message (Home College)	Edit the template to customize the message that displays to students about financial aid at their home college.

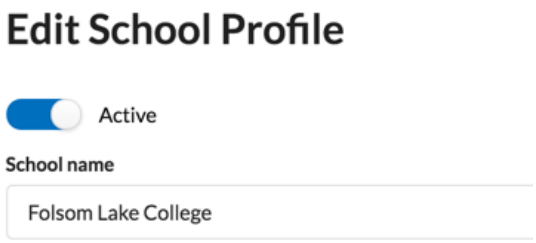
Field	Value
Accessing DSPS Services Message (Teaching College)	Edit the template to customize the message that displays to students about Disabled Student Programs and Services.
Orientation Incomplete Message (Home College)	Edit the template to customize the message that displays to students about their inability to participate in Course Exchange until they have completed orientation.
Ed Plan Incomplete Message (Home College)	Edit the template to customize the message that displays to students about their inability to participate in Course Exchange until they have completed an Ed Plan.
Assessment Incomplete Message (Home College)	Edit the template to customize the message that displays to students about their inability to participate in Course Exchange until they have completed an assessment.
Payment System Message	Edit the template to customize the message that displays to students communicating that they are responsible for paying fees for their Course Exchange course. The student will be redirected to the Teaching College payment system and messaging here should inform them of payment terms.

4. Create or edit any messaging you want to display to students who meet the requirements to consider your college their Home College and are taking Course Exchange courses from other schools (or yours) in the *Messages to Student As Home School* section. Use the table below as a guide.

Field	Value
Ineligibility Message	Edit the template to customize the message that displays to students about whether or note they are eligible to register for a Course Exchange course. Students are not eligible for a Course Exchange course if they have a status of one of the following at their home college: • International F1 Visa • Students with an address outside of California • Incarcerated • Vacation or Visitor Visas (B Visas) • AB540 with out of state addresses • High school dual enrollment
Financial Aid Message	Edit the template to customize the message that displays to students about financial aid at their home college.
Orientation Incomplete Message	Edit the template to customize the message that displays to students about their inability to participate in Course Exchange until they have completed orientation.

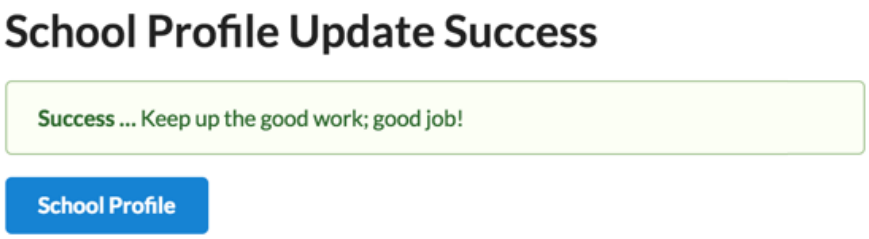
Field	Value
Ed Plan Incomplete Message	Edit the template to customize the message that displays to students about their inability to participate in Course Exchange until they have completed an Ed Plan.
Assessment Incomplete Message	Edit the template to customize the message that displays to students about their inability to participate in Course Exchange until they have completed an assessment.
Payment System Message	Edit the template to customize the message that displays to students communicating that they are responsible for paying fees for their Course Exchange course. The student will be redirected to the Teaching College payment system and messaging here should inform them of payment terms.

5. When your school profile information and/or messaging is correct and ready to display publicly in Course Exchange, click the **Active** button to activate it.



Note: Colleges participating in Course Exchange are set to Active. Those not participating are set to Inactive. If a district has colleges participating in Course Exchange and others that are not, the district admin has the ability to set schools to Inactive.

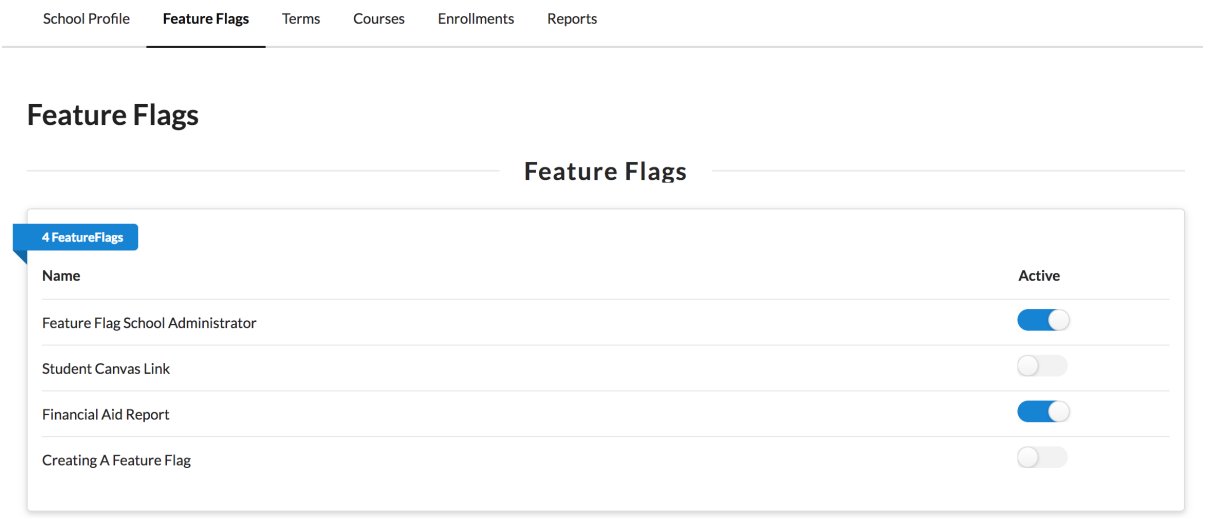
6. Click **Save** to save your changes. A message displays indicating your changes were successfully saved.



7. When you have saved all information, click **School Profile** to return to the *School Profile* subscreen.

Feature Flags Subscreen

The *Feature Flags* subscreen is used to enable new Course Exchange features for your school. Feature flags are created by Exchange Administrators at the CCC Tech Center and are made available to either your school or your school's district. District Admins, School Admins, or School System Admins can activate new Course Exchange features that have been made available to their school on the *Feature Flags* subscreen.



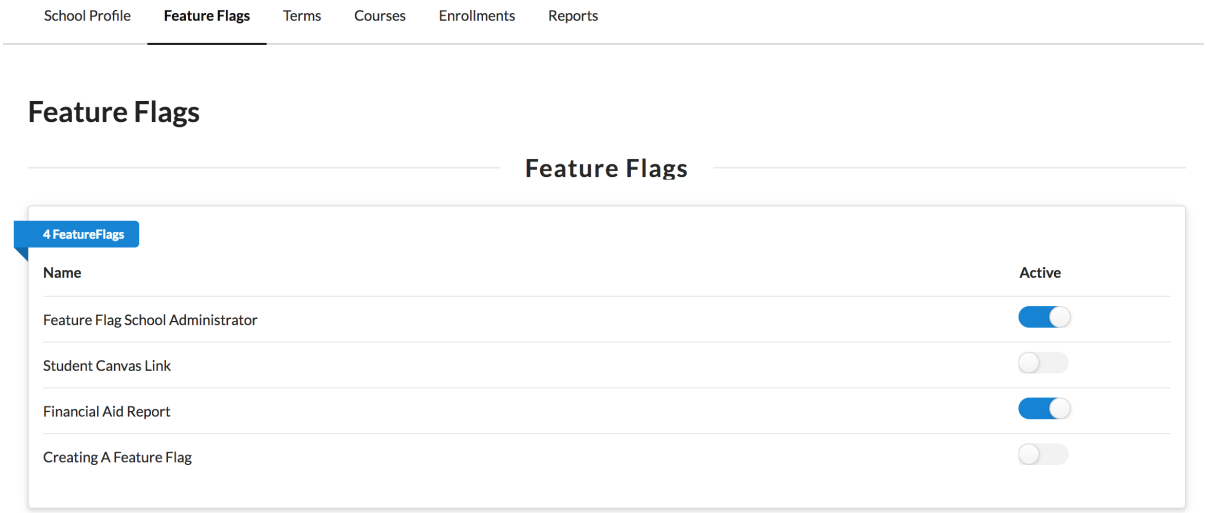
Feature flags make the following possible:

- for schools to implement new features as they are ready, independent of any features any other school implements
- for the CCC Tech Center to deliver specific features to target schools, districts, and/or roles in Course Exchange

Enabling Feature Flags at the School Level

Use the following steps to review feature flag details and then enable a Course Exchange feature for your school.

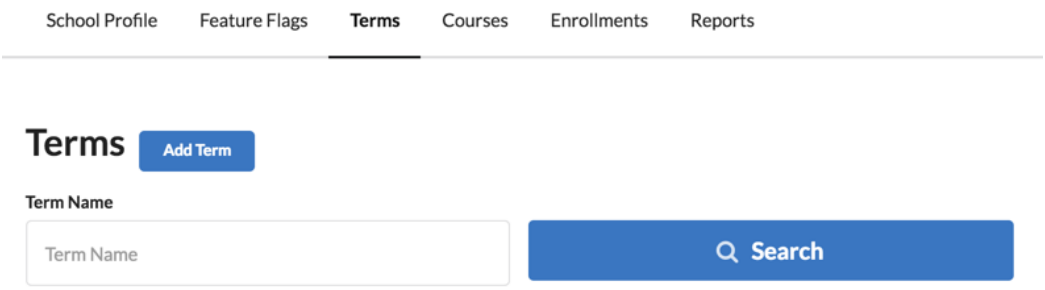
1. Log in to Course Exchange as a School Admin or School Systems Admin (or District Admin) and navigate to the *School* screen → *Feature Flags* subscreen to see the list of available feature flags for your school. Feature flags that appear here may have been supplied by either an Exchange Admin or your school's District Admin and are intended for schools to enable as they are ready.



2. Learn feature details to help you decide if your school is ready to activate it by reviewing Course Exchange release notes that correspond to the new feature here: *https://cccnext.jira.com/wiki/display/CEPD/Release+Notes*.
3. Determine if the feature is something you want to enable for your school.
4. Once you determine you want to turn on a Course Exchange feature for your school, click the *Active* slider-bar for that feature on the *School* screen's *Feature Flags* subscreen (as in the image, above). The new Course Exchange feature will now be available for either the Course Exchange Student application or the Course Exchange Admin application, depending on the feature.

Terms Subscreen

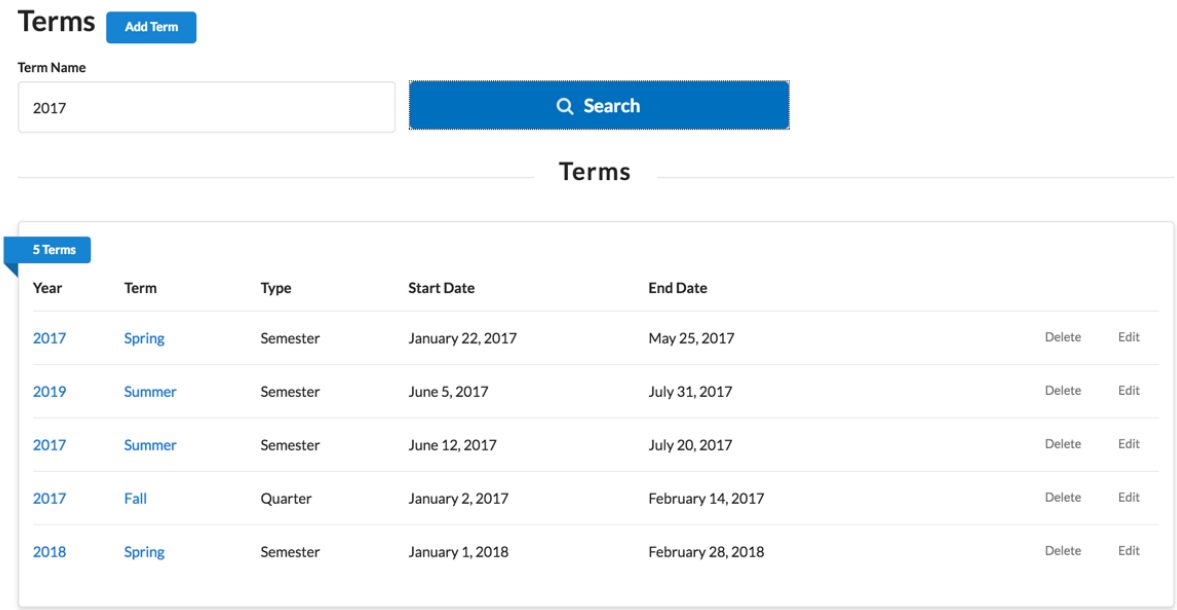
The *Terms* subscreen is used for adding and/or updating term information for your online courses.



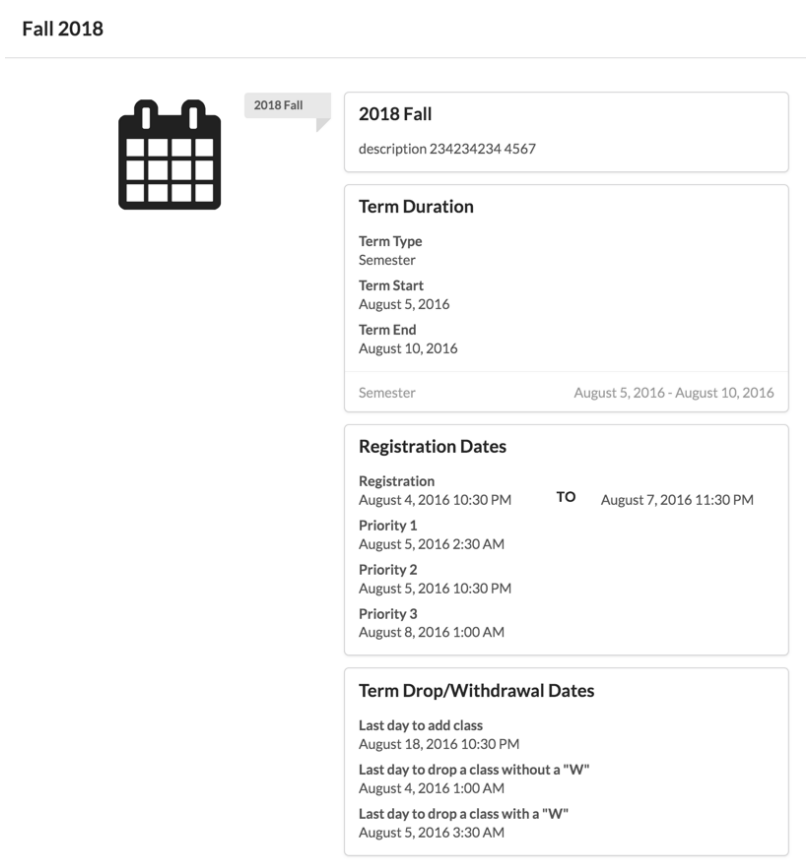
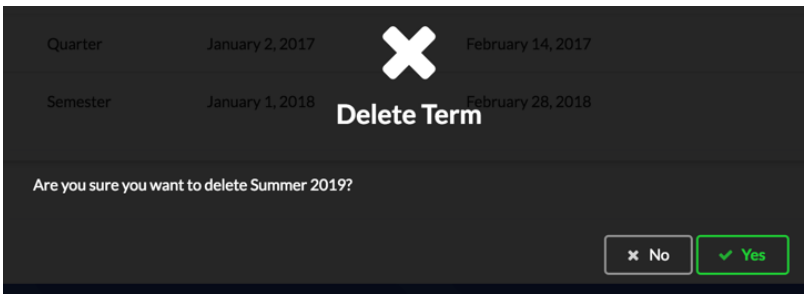
Searching for Terms

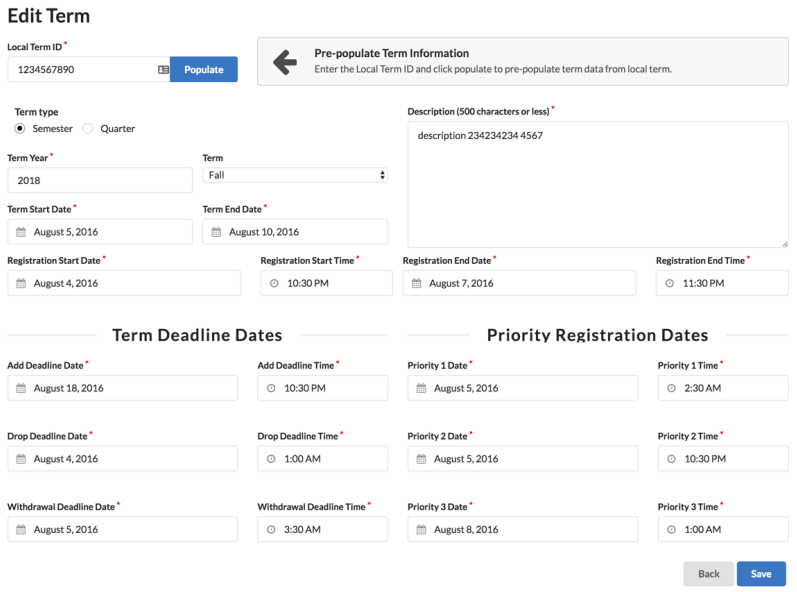
Use the following steps to search for terms.

1. Click the **Search** button to display all existing terms for your school. Or, enter a term name and click **Search** to narrow your results.



2. Several clickable links in the *Terms* list allow you to display summary term information, delete a term, and edit a term.

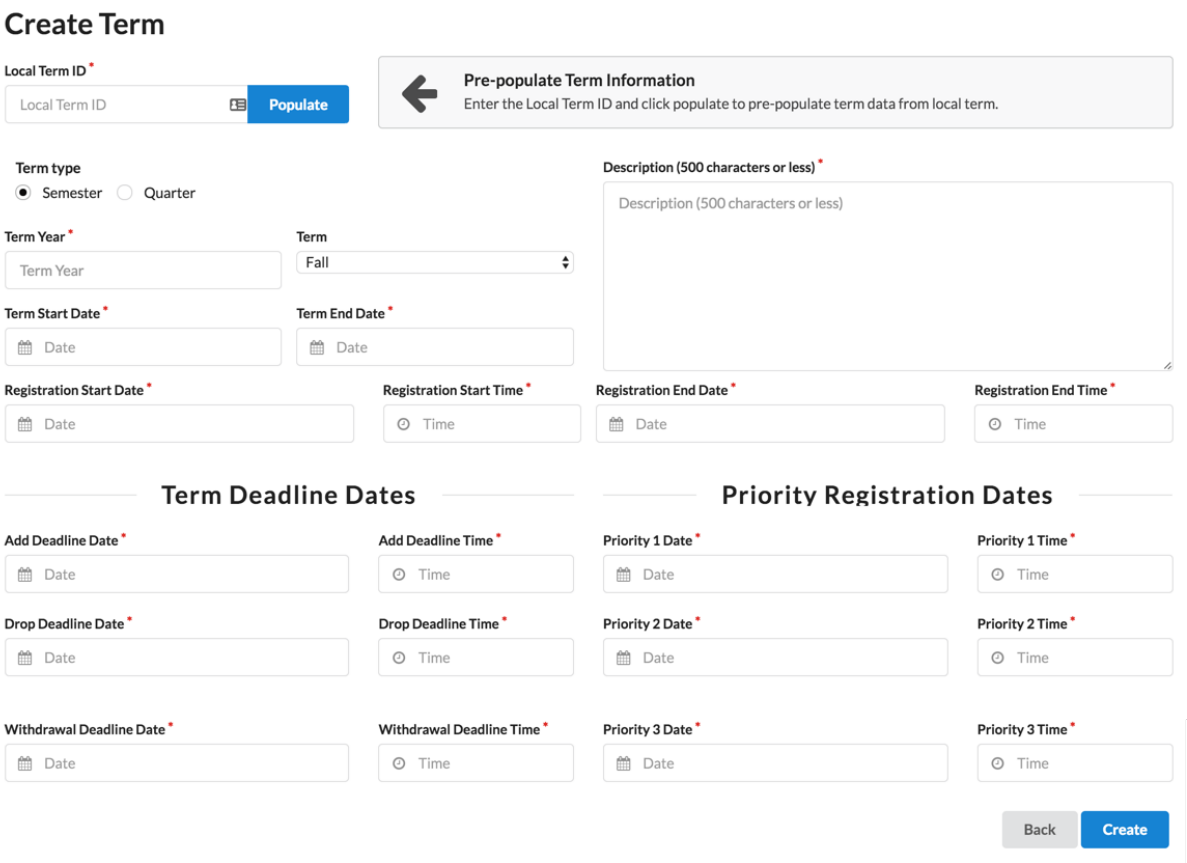
Click the...	**To...**
Year or *Term* link	display a pop-up summary of the term information. 
Delete link	delete the term. A confirmation message displays asking you to confirm the term deletion. 

Click the...	To...
Edit link	open the *Edit Term* screen where you can make changes to the term information. The *Edit Term* screen is the same as the *Create Term* screen.  Once your changes are complete, click **Save → Manage Terms** to return to the *Terms* subscreen.

Creating a New Term

Use the following steps to create a new term.

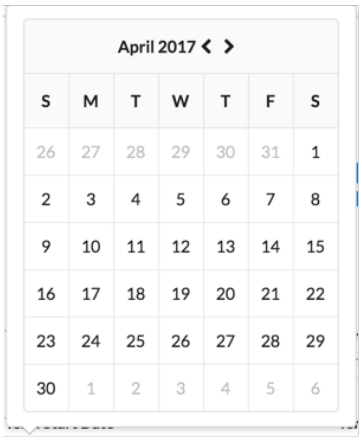
1. From the *Terms* subscreen, click **Add Term** to display the *Create Term* screen. Required fields display a red asterisk next to them.



2. You can populate the *Create Term* fields manually or by populating them more programmatically from your SIS. Use one of the following two options below to create the term.

If you have <u>already defined</u> the term ID in your SIS:	**If you have <u>not yet defined</u> the term ID in your SIS:**
1. Enter the term ID for the term you want in the *Local Term ID* field. **2.** Click **Populate** to auto-populate all the rest of the fields on this screen with information from your SIS. **3.** Enter any remaining field values, as needed. **Note:** *Priority Registration Dates* information must be manually entered, even if you populate the rest of the term information from your SIS.	**1.** Enter the new term ID in the *Local Term ID* field. **2.** Proceed to step 3, below.

3. Select and/or enter values in all the required fields to configure the term information for the online course, including *Term Year* field, *Term* drop-down list, *Term Start Date* field, *Term End Date* field, and the *Term Deadline Dates* field group and *Priority Registration Dates* field group. Clicking on any date or time field displays a *Date* pop-up box or *Time* pop-up box that allows you to select the date/time.



Note: In order to make Course Exchange available to students based on their assigned priority registration dates, Home Colleges participating in Course Exchange must assign students a registration date pursuant to the three enrollment priority levels identified in Section 58108 of article 1 of subchapter 2 of chapter 9 of division 6 of title 5 of the California Code of Regulations.

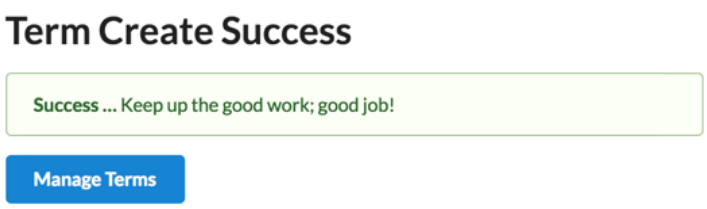
The three enrollment registration priority levels, under Section 58108, are defined as:

Enrollment Registration Priority Level Definitions
students who have completed orientation, assessment, and developed student education plans and are eligible as a member of the armed forces or a veteran pursuant to Education Code section 66025.8 or as a foster youth or former foster youth pursuant to Education Code section 66025.9
students who have completed orientation, assessment, and developed student education plans and are eligible and receiving services through Disabled Student Programs and Services or Extended Opportunity Programs and Services
students who are continuing students not on academic or progress probation for two consecutive terms as defined in section 55031 and first time students who have completed orientation, assessment, and developed student education plans

Districts or colleges may establish the relative order of priority for additional subcategories of students within each of the three state registration priority levels.

Source: *http://extranet.cccco.edu/Portals/1/Legal/Regs/FINAL_AS_FILED_Enrollment%20priorities_regs.pdf*

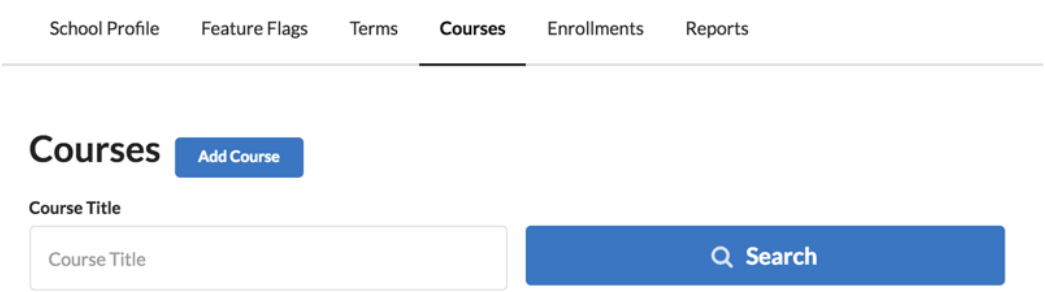
4. Click **Create** to save your term. A success message displays indicating that your changes have been saved.



5. Click **Manage Terms** to return to the *Terms* subscreen.

Courses Subscreen

The *Courses* subscreen is used for adding and/or updating course information for your online courses.



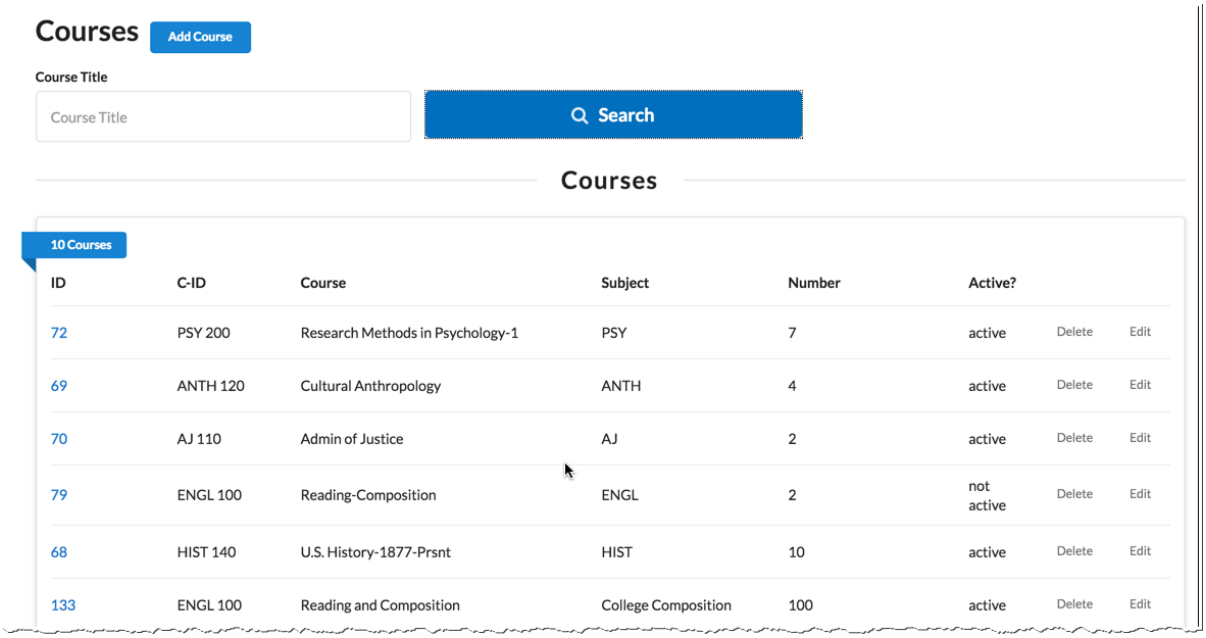
Courses are created by District Admins, Exchange Admin, School Admins, or School System Admins for either your school or your school's district.

See *Adding a New Course Exchange Admin User* on page 10 for details about which Course Exchange user roles can access specific Course Exchange Admin screens.

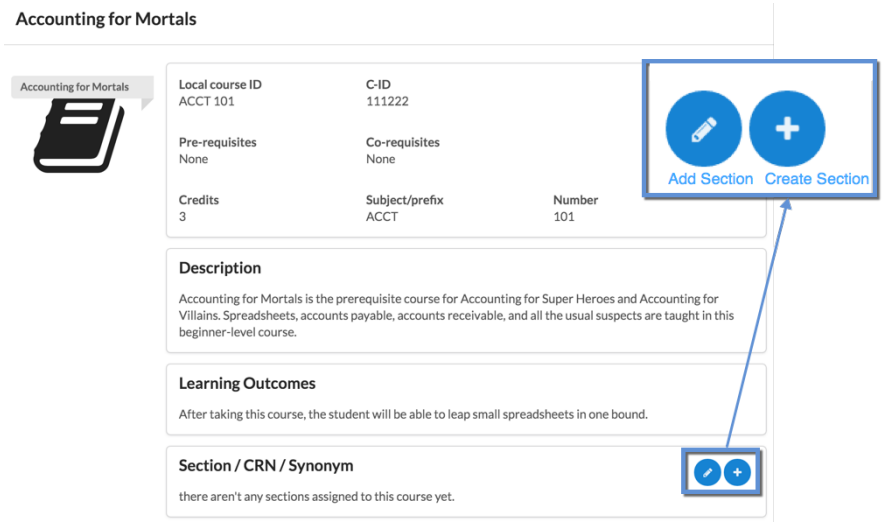
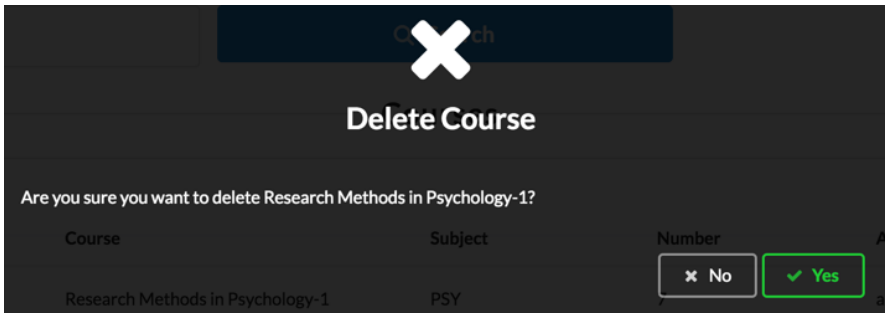
Searching for Courses

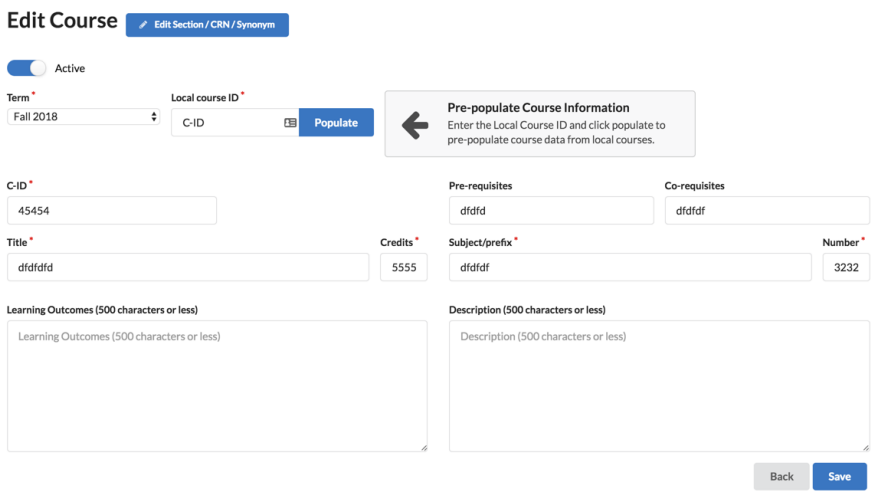
Use the following steps to search for courses.

1. From the *Courses* subscreen, click the **Search** button to display all existing courses for your school. Or, enter a course title and click **Search** to narrow your results.



2. Several clickable links in the *Courses* list allow you to display summary course information, delete a course, and edit a course.

Click the...	To...
ID link	display a pop-up summary of the course information:  **Note:** The course pop-up summary includes *View Section and Create Section* icons.
Delete link	delete the course. A confirmation message displays asking you to confirm the course deletion. 

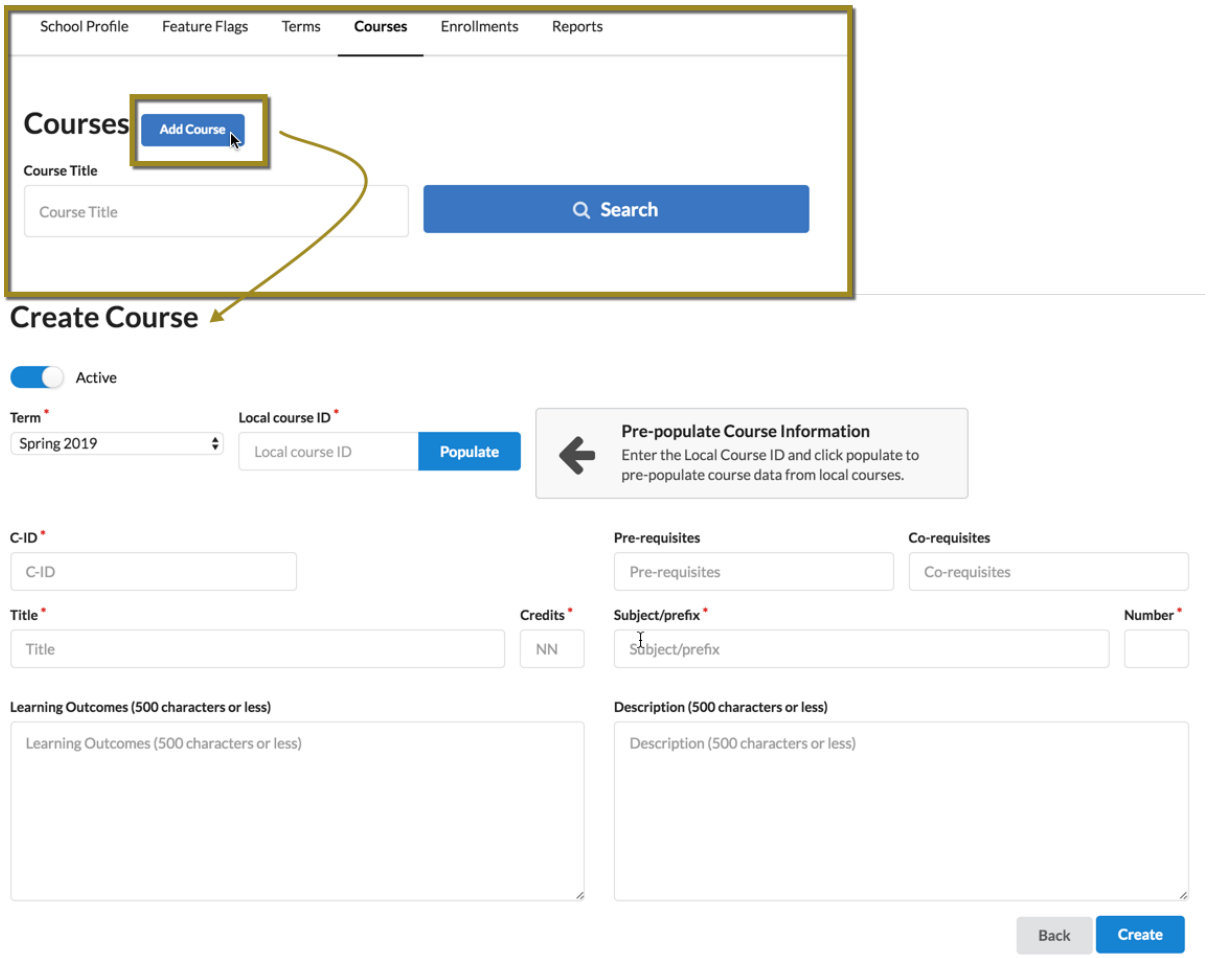
Click the...	To...
Edit link	open the *Edit Course* screen where you can make changes to the course information. The *Edit Course* screen is the same as the *Create Course* screen.  Once your changes are complete, click **Save → Manage Courses** to return to the *Courses* subscreen.

3. Once your changes are complete, click **Save** and then the **Back** button to return to the *Courses* screen.

Creating a New Course

Use the following steps to create a new course.

1. Click **Add Course** to display the *Create Course* screen. Required fields display a red asterisk next to them.

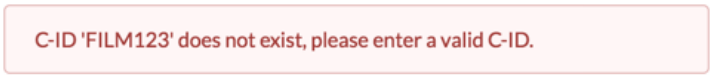


2. You can populate the *Create Course* fields manually or by populating them more programmatically from your SIS. Use one of the following two options below to create the course.

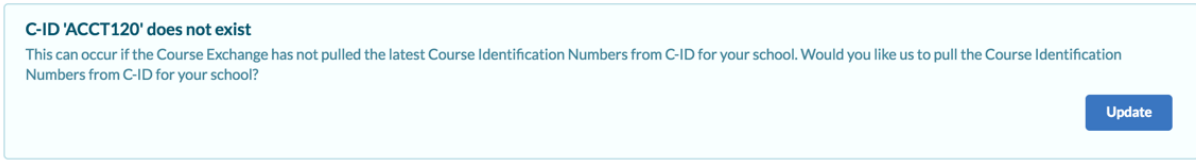
If you have <u>already defined</u> the course in your SIS:	**If you have <u>not yet defined</u> the course ID in your SIS:**
1. Enter the course ID for the course you want in the *Local course ID* field. 2. Click **Populate** to auto-populate all the rest of the fields on this screen with information from your SIS. 3. Proceed to step 3, below, and enter any remaining field values, as needed.	1. Enter the new course ID in the *Local course ID* field. 2. Proceed to step 3, below.

3. Click the **Active** button to toggle the course to an active or inactive status. As a general rule:
   - Make a course active once you are done making all changes for it and are ready to publish it to students so that they can see and enroll in the course in Course Exchange
   - Once the course's term is complete, remove the active status for the course before the next term begins
   - Districts can choose to not activate courses for colleges in their district that are not participating in Course Exchange
4. Select a term from the *Term* drop-down list. If you do not have any terms configured you must navigate to the *Terms* screen and create one.
5. In the *C-ID* field, enter the course identifier (C-ID).

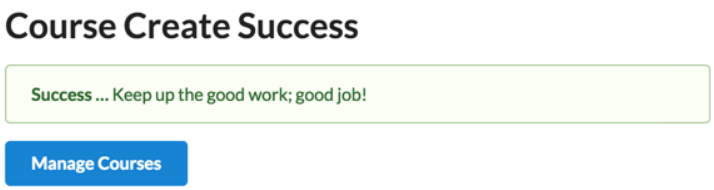
Note: The *C-ID* value is validated against the C-ID database and an error message displays if an invalid value is entered. Correct the value if this message displays.



You may also receive a message requesting you choose to pull the C-ID numbers for your school.



6. Enter values in the rest of the fields for the course (*Title, Credits, Learning Outcomes, Pre-requisites, Co-requisites, Subject/prefix, Number,* and *Description*).
7. Click **Create** to save your course. A success message displays indicating that your changes have been saved.



8. Click **Manage Courses** to return to the *Courses* subscreen.

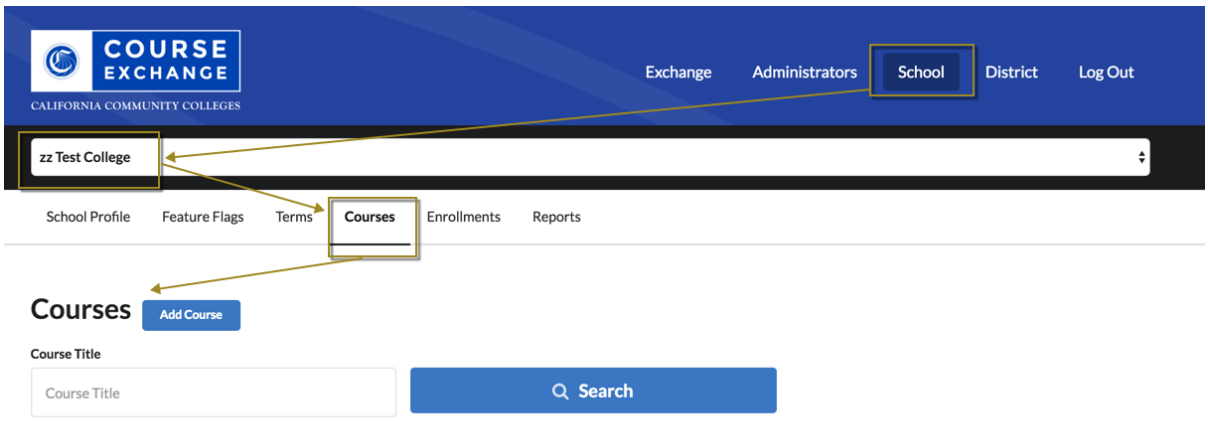
Related information

Adding/Creating Course Sections on page 32

Adding/Creating Course Sections

Once you've created a course in Course Exchange, you need to create a course section. Use the following steps to add or create course sections. It is assumed you have already created a course. See *Creating a New Course* on page 30 for details on how to create a course.

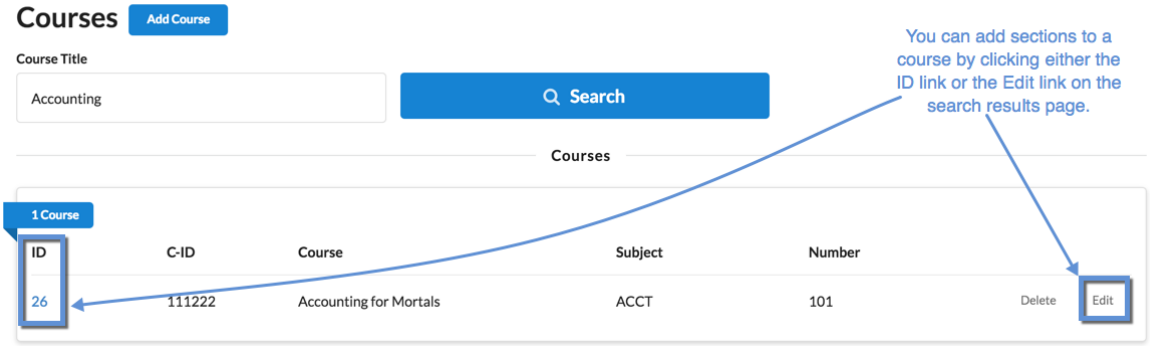
1. Log in to Course Exchange Admin as an Exchange, District, School, or School System Admin.
2. Navigate to *School* → *Select the School* drop-down list → *School Profile* screen → *Courses* link to display the *Courses* subscreen.



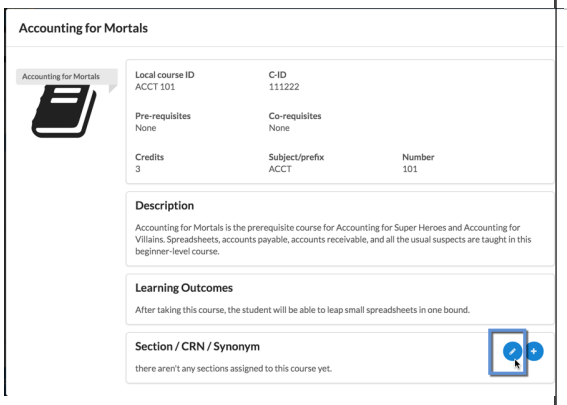
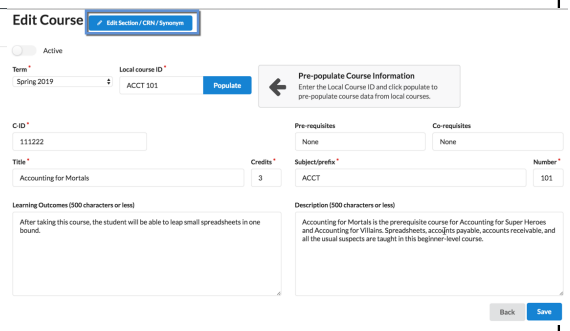
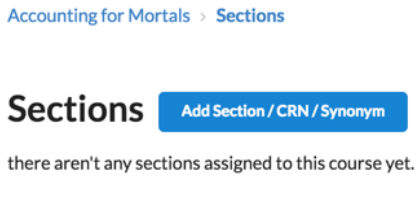
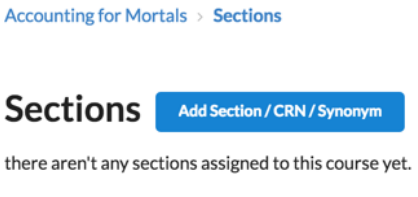
3. Search for the course to which you want to add a course section by entering the title in the *Course Title* screen and clicking **Search**.

Note: You can also simply click **Search** to display all existing courses.

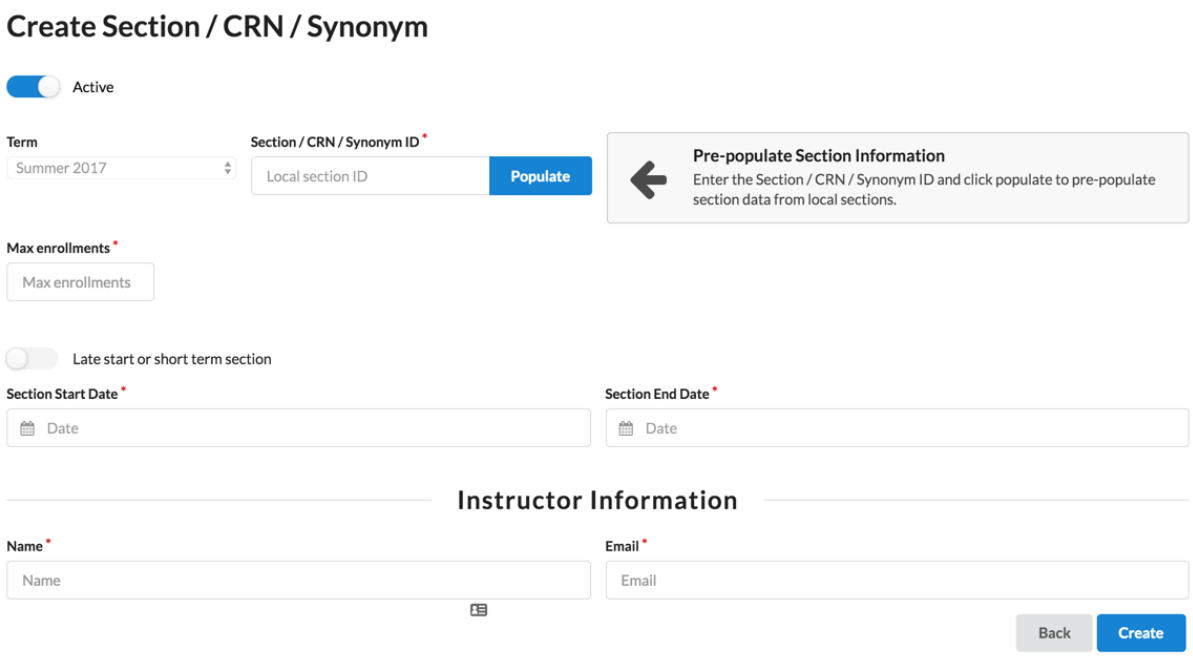
4. Locate the course in the *Courses* search results.



5. Access the *Course Section* screen for the course in one of the following two ways:

Access the *Course Section* screen from the *Course ID* link	**Access the *Course Section* screen from the *Edit* link**
Click the course's *ID* link in the search results to open the *Course Details* pop-up window.	Click the *Edit* link to display the *Edit Course* subscreen.
	
Click the *Add Section* icon to open the *Sections* screen. 	Click the **Edit Section/CRN/Synonym** button to display the *Sections* screen. 
Proceed to step 6, below.	Proceed to step 6, below.

6. On the *Sections* screen, click the **Add Section/CRN/Synonym** button to display the *Create Section/CRN/Synonym* screen.

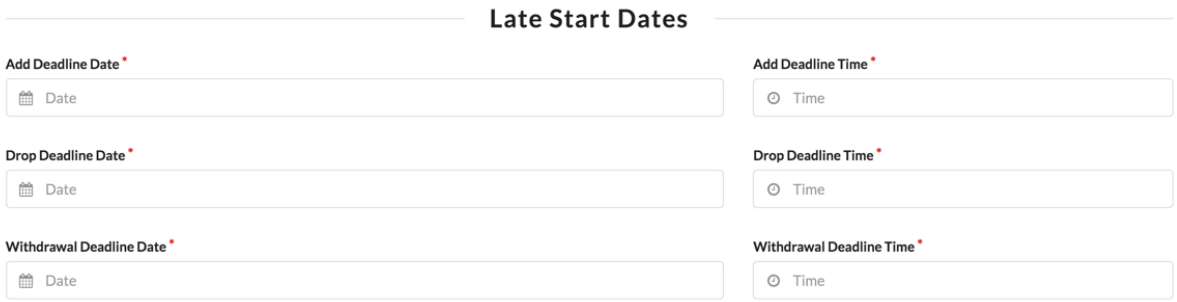


Note: CRN is the Course Record Number. In PeopleSoft, the CRN is referred to as the Synonym.

7. Select the term for the course section from the *Term* drop-down list. If you have not created any terms yet, you must create one on the *Terms* screen.
8. Enter a local section ID, if one is available, in the *Section/CRN/Synonym ID* field, and click **Populate** to pre-populate all the course section fields with values from another course.

   --OR--

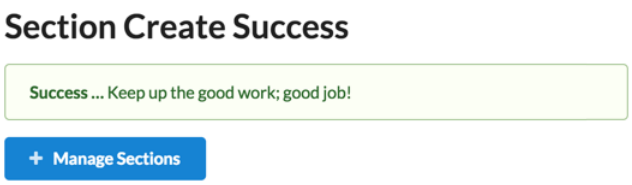
   If there is no section ID available, enter a unique section ID in the *Section/CRN/Synonym ID* field.
9. Enter the maximum number of students allowed in the section in the *Max enrollments* field.
10. Enter or select dates in the *Section Start Date* and *Section End Date* fields.
11. Click the *Late start or short term section* slider bar if this particular section will start later than the selected term or will have a shorter duration than the selected term. Additional *Late Start Dates* fields display. (defined on the *Terms subscreen*).



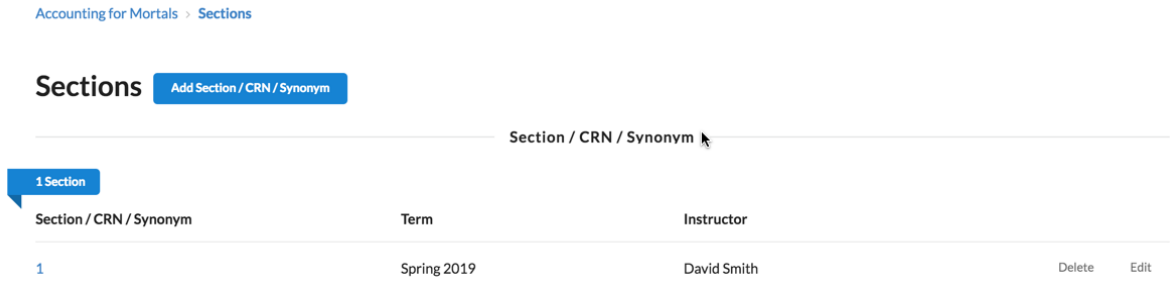
Note: Withdraw/drop messages are based on Section dates, if available, which take precedence over *Term* dates. Section start and end dates also take precedence over Term start and end dates.

- Enter the deadline date and time for adding, dropping, or withdrawing the course section in the date and time fields.

12. Enter the section's instructor name in the *Name* field and the instructor's email in the *Email* field.
13. Click **Create** to display the Section Create Success message.



14. Click **Manage Sections** to return to the *Sections* subscreen. The new section displays in the list of sections for the course.



Related information

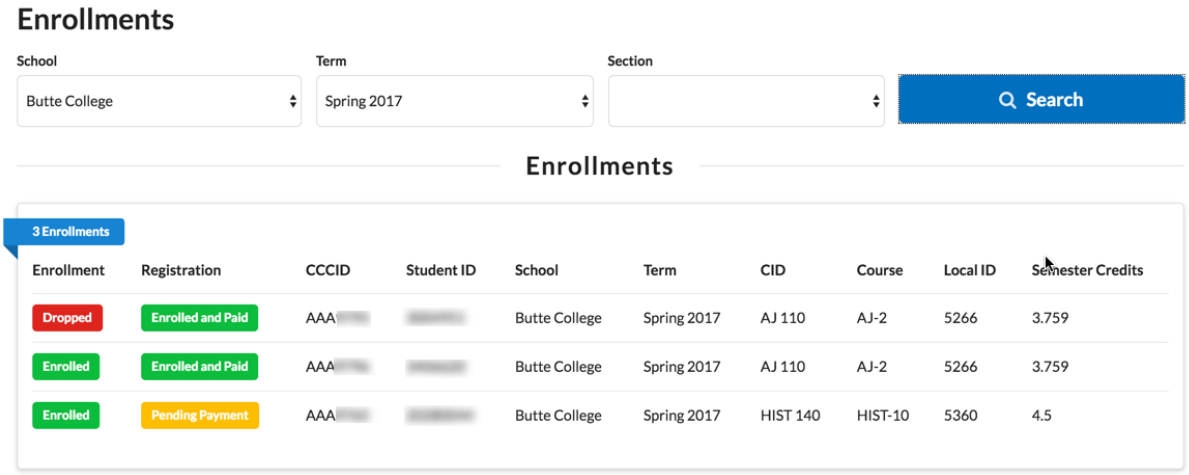
Courses Subscreen on page 27
Terms Subscreen on page 23

Enrollments Subscreen

The *Enrollments* subscreen is used for viewing the students enrolled in your school/district Course Exchange courses and their status. Use the following steps to use the *Enrollments* subscreen.

1. Click the *School* option → *Enrollments* to display the *Enrollments* subscreen.

2. Select values from the *School*, *Term*, and/or *Section* drop-down lists and click **Search** to display enrollments.



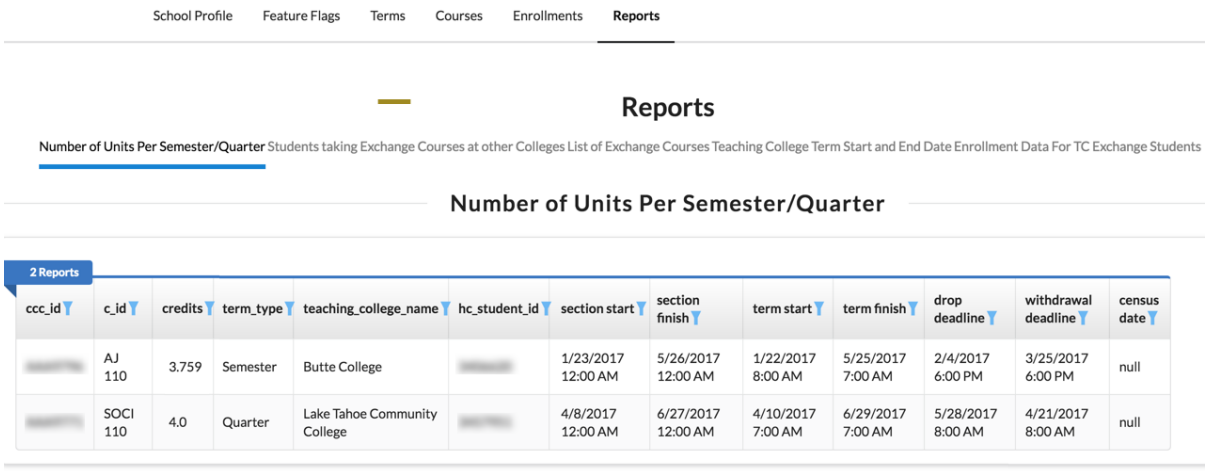
The *Registration* column can include the following values for the student's status:

- No Application
- Application Pending
- Application Accepted
- Application Denied
- Pending School Registration
- Pending Submitted Application
- Pending School Application
- Application Accepted
- Pending Payment
- Enrolled and Paid
- Payment Pending

3. Review the results and then select new values and click **Search** again to view other enrollments.

Reports Subscreen

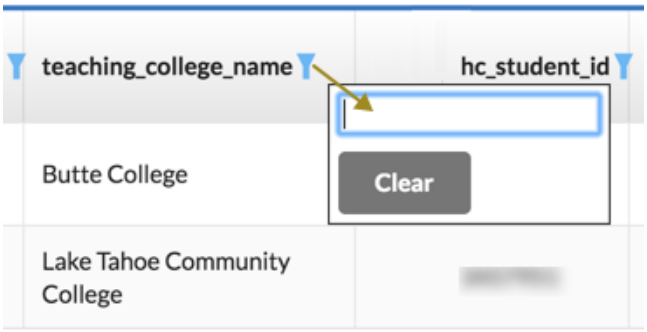
The *Reports* subscreen is where you access and run pre-defined reports for your school's Course Exchange activity.



Use the following steps to run any of the Course Exchange reports.

1. Click the *School* option → *Reports* to display the *Reports* subscreen.
2. Click any one of the report links to display the report directly below it. A blue bar displays beneath the selected report link and the report name displays centered above the report details.

Note: Click the blue Filter icons in any report column header to display a pop-up box where you can enter text to refine the results that display. In the example below, if you enter "Butte College," then the reports results will only show results where the teaching_college_name is Butte College.



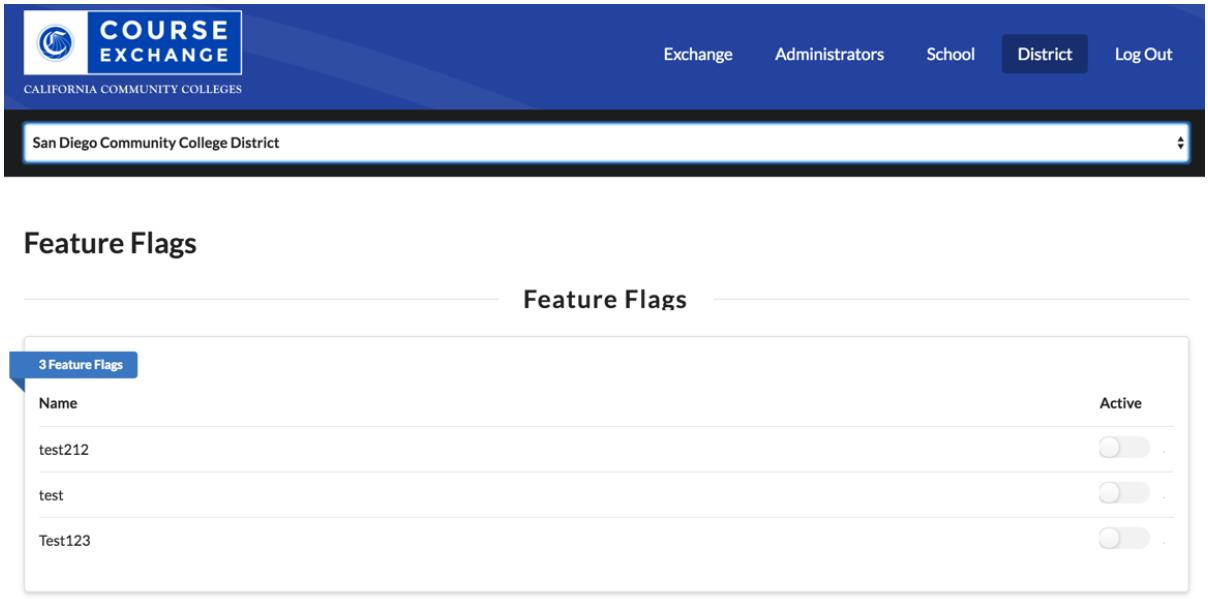
Use the table below as a reference for the information you get from each of the standard reports.

Report Title	Information Reported
Number of Units Per Semester/Quarter	This report displays the following information for your students taking Course Exchange courses: • CCCID • C-ID • Credits • Term Type • Teaching College name • Student ID for the student at the Home College • Course section start date • Course section finish date • Term start date • Term finish date • Course drop deadline • Course withdraw deadline • Census Date
Students taking Exchange Courses at other Colleges	This report displays the following information for your students taking Course Exchange courses: • CCCID • Student ID for the student at the Home College
List of Exchange Courses	This report displays the following information for your students taking Course Exchange courses: • C-ID • Course Title • Instructor's email address

Report Title	Information Reported
Teaching College Term Start and End Date	This report displays the following information for your students taking Course Exchange courses: • CCCID • C-ID • Credits • Term Type • Teaching College name • Student ID for the student at the Home College • Course section start date • Course section finish date • Term start date • Term finish date • Census Date
Enrollment Data For TC Exchange Students (i.e. Enrollment Data for Teaching College Exchange Students)	This report is used by Home College Financial Aid officers to help them process financial aid for home college students who are taking a Course Exchange class. This information allows you to meet the Federal Financial Aid Consortium agreement. This report displays the following information for your students who are enrolled in a Course Exchange class: • CCCID • Course's C-ID • Credits • Term Type • Teaching College name • Student ID for the student at the Home College • Course section start date • Course section finish date • Term start date • Term finish date • Drop deadline • Withdrawal deadline • Census Date of teaching college courses • Grade Date • the Last Date the student participated in a course at the teaching college • date of course enrollment

District Screen

The *District* screen is used to enable new Course Exchange features for your district. Feature flags are created by Exchange Administrators at the CCC Tech Center and are made available on the *District* screen for your Course Exchange District Admin.



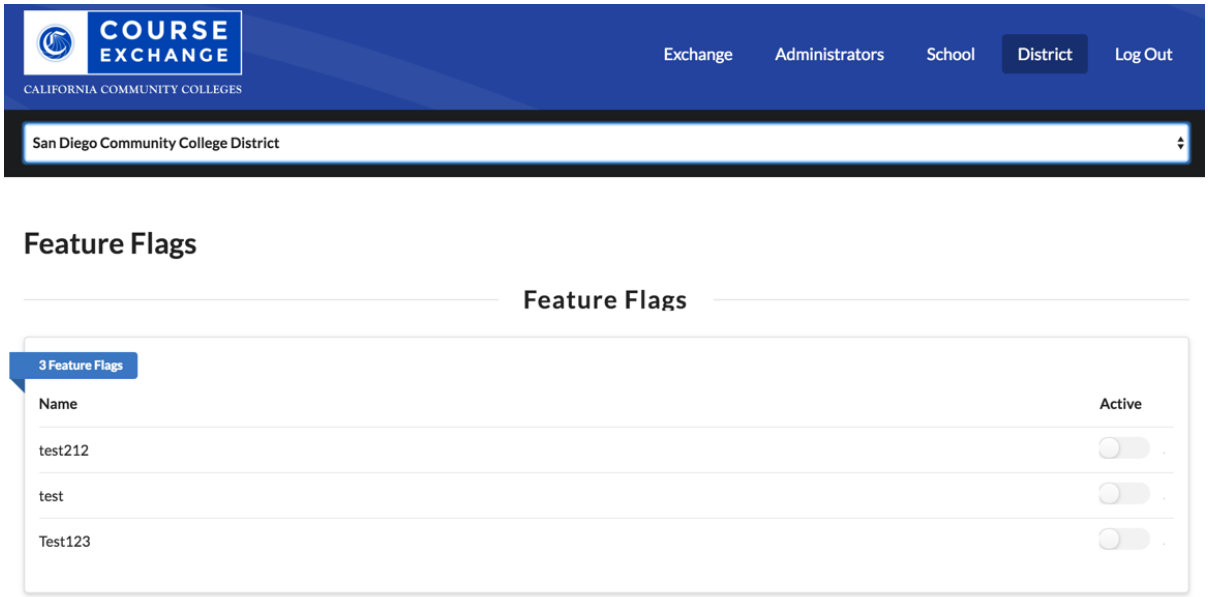
Feature flags make the following possible:

- for schools to implement new features as they are ready, independent of any features any other school implements
- for the CCC Tech Center to deliver specific features to target schools, districts, and/or roles in Course Exchange

Enabling Feature Flags at the District Level

Use the following steps to review feature flag details and then enable a Course Exchange feature for your district.

1. Log in to Course Exchange as a District Admin and navigate to the *District* screen to see the list of available feature flags for your district. Feature flags that appear here are intended for districts and to be applied district-wide.



2. Learn feature details to help you decide if your district is ready to activate it by reviewing Course Exchange release notes that correspond to the new feature here: *https://cccnext.jira.com/wiki/display/CEPD/Release+Notes*.
3. Determine if the feature is something you want to enable for your district.

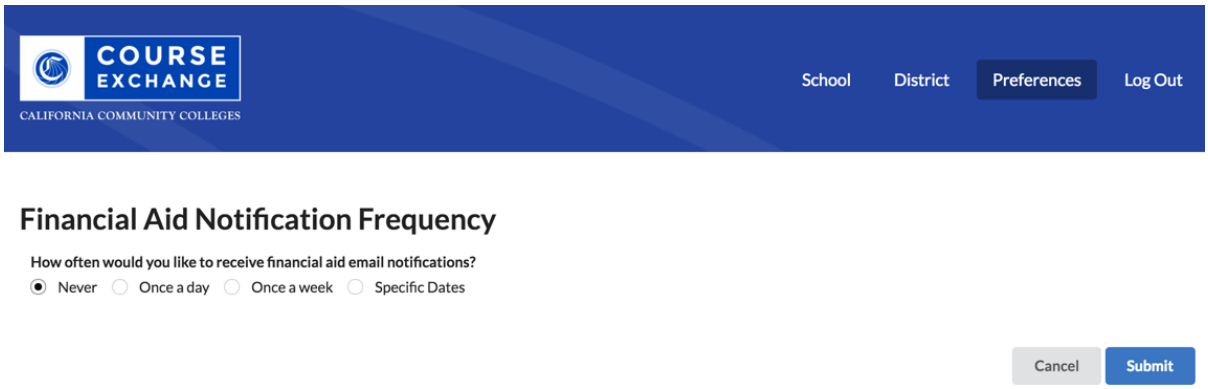
4. Once you determine you want to turn on a Course Exchange feature for your district, click the *Active* slider-bar for that feature on the *District* screen's *Feature Flags* table (as in the image, above). The feature flag you enabled for your district will display as available features for each school in your district on the *Schools* → *Feature Flags* screen. Either the District Admin or each schools' School Admin or School Systems Admin can implement the new feature on a school-by-school basis.

   Note: If your school district consists of just one school, you will follow the same steps as above for enabling feature flags for the school.

Preferences Screen

The *Preferences* screen is used by Financial Aid officers at a school using Course Exchange to set email notification frequency (never, daily, weekly, or three specific dates) for alerts that a Home College student has enrolled in or dropped a Course Exchange course.

Note: You must be assigned a Course Exchange Admin role of one of the following in order to access the *Preferences* screen: School Admin, School System Administrator, and/or District Admin.



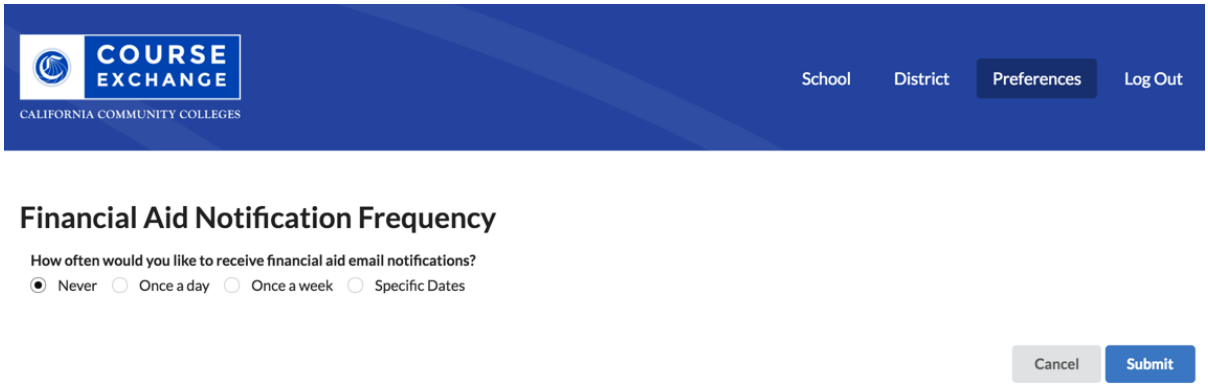
The emails:

- are sent to your email address registered with your Course Exchange Admin account
- allow you to make the appropriate changes to the student's financial aid records
- include a link to the Course Exchange Admin *Reports* screen where changes can be viewed

Use the following steps to set your email preferences.

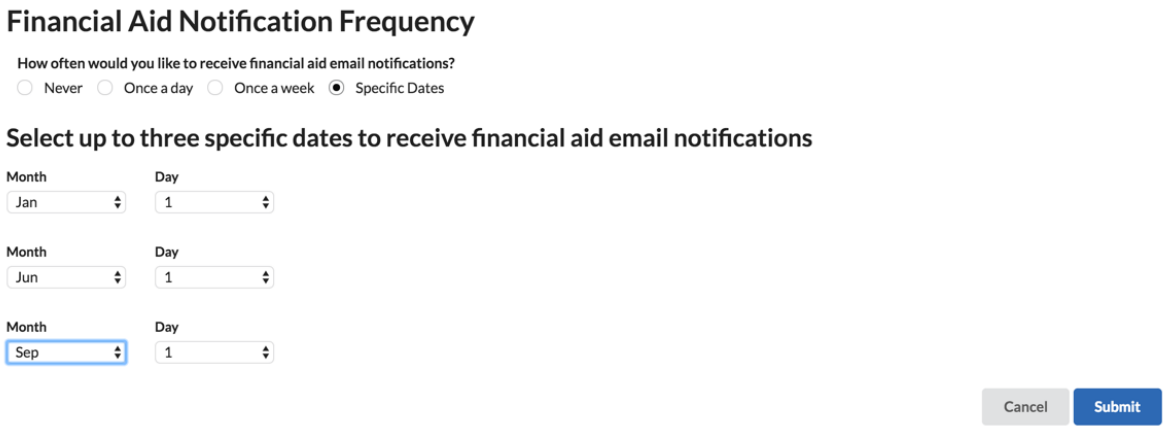
1. Log in to the Course Exchange Admin application as either a School Admin, School Systems Administrator, or District Admin.
2. Click the *Preferences* link to display the *Preferences* screen.

3. Click the *Financial Aid Notification Frequency* link to display the *Financial Aid Notification Frequency* screen.



4. Select one of the following radio buttons to set your email frequency:
   - *Never*
   - *Once a day*
   - *Once a week*
   - *Specific Dates*

   Note: When you select *Specific Dates*, three additional *Month* and *Day* drop-down list sets display so that you can select up to three specific dates.



5. Click **Submit** to save your email preferences. You will begin to receive email notifications for Course Exchange course enrollments/drops for your school's Home College students.

Appendix A: Financial Aid, BOG Fee Waiver, and Cohorts in Course Exchange

With Course Exchange V2.0, students with *financial aid* and/or *BOG Fee Waiver* eligibility are automatically identified by the Course Exchange student application and are prompted to share their information between their Home College and Teaching College.

By choosing to share financial aid and/or BOG Fee Waiver information, the student ensures that:

- any financial aid is applied to all of their course credits at the Home College, and
- any BOG Fee Waiver funding they may have received gets applied to their course credits at the Teaching College

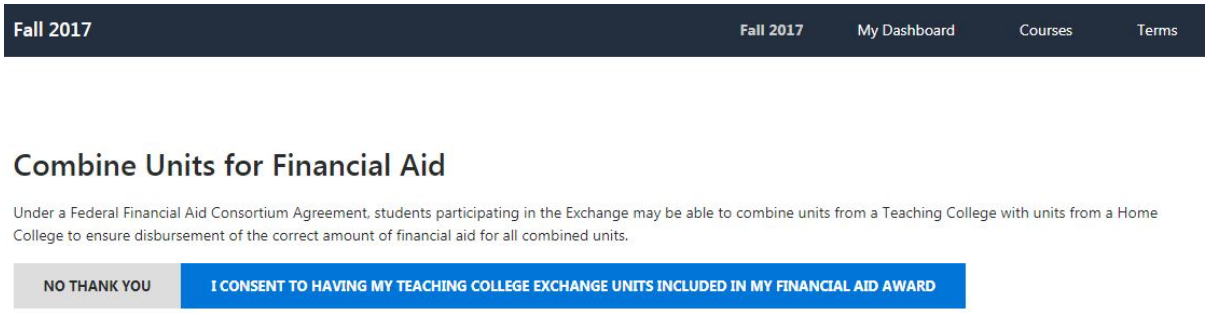
Another feature in Course Exchange V2.0 is using *cohorts* to group and track Course Exchange students in your school's SIS.

Cohorts allow you to run functions on the students taking Course Exchange courses from your school, such as configuring your SIS to not run a specific function, like checking for BOG Fee Waiver eligibility (since this is already identified by those students' Home College).

Financial Aid in Course Exchange

When a student adds a course in the Course Exchange student application:

1. The system checks to see if the student is eligible for Financial Aid at their Home College for the current term. If they are eligible, Course Exchange prompts the student to opt in to sharing their Teaching College units with their Home College so financial aid may be applied across their entire course units for the term.



2. When the student consents to share their Course Exchange units with the Home College, their Course Exchange units are copied to the Home College's SIS. The Home College can apply the student's financial aid across all courses for the student, including those courses the student takes through Course Exchange.

   Note: If a student accidentally opts out of sharing their Course Exchange units with their Home College for financial aid purposes, they may need to contact their Home College's Financial Aid office and ask to have the units combined.

3. If the student drops the Course Exchange course, those Teaching College units are automatically removed from the Home College's SIS, keeping the student's total units up to date.

   Note: Course Exchange administrators can configure automatic emails to be sent to their college's Financial Aid contact with update to student enrollments and drops. See the *Preferences screen* for more information. If a Course Exchange student does not opt in to sharing Teaching College units, then no messages when that students adds or drops a Course Exchange course.

For the technically-inclined

When a student opts in to share their Teaching College units with their Home College for Financial Aid purposes, the Course Exchange API (Application Programming Interface) makes an API call to the College Adaptor API to GET the student's Financial Aid information and the College Adaptor API then POSTS that information in the Teaching College's SIS.

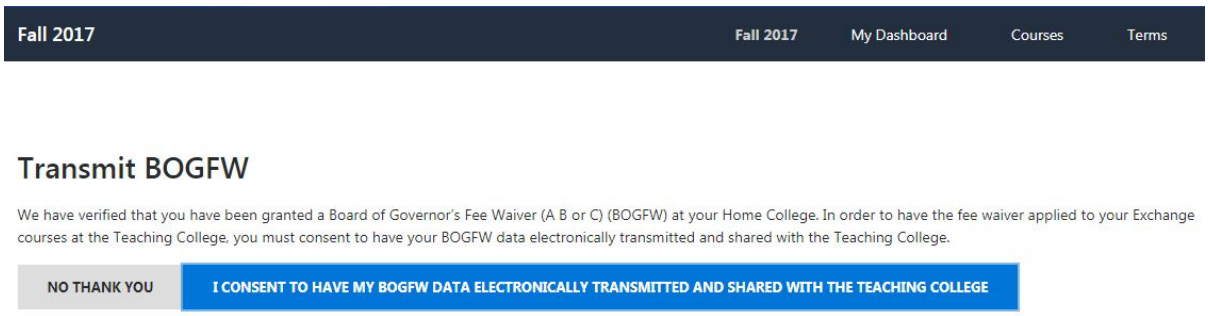
If the student then drops the Course Exchange course, the Course Exchange API makes an API call to the College Adaptor API to DELETE the student's Course Exchange units from their Home College's SIS.

For a list of the Financial Aid data elements in the college adaptor as well as a list of the data provided by SIS, see: *https://cccnext.jira.com/wiki/display/CEPD/Course+Exchange+Implementation+Guides*. Once the Course Exchange Implementation Guides page opens, navigate to the SIS for your school (Banner, Colleague, or PeopleSoft) → Financial Aid & BOG Fee Waiver Information.

BOG Fee Waiver in Course Exchange

When a student adds a course in the Course Exchange student application:

1. The system checks to see if the student is eligible for the BOG Fee Waiver at their Home College for the current term. If they are eligible, Course Exchange prompts the student to opt in to sharing their BOG Fee Waiver status with the Teaching College so that it may be applied to those course units.



2. When the student consents to share their BOG Fee Waiver status with the Teaching College, their BOG Fee Waiver information is copied to the Teaching College's SIS. The Teaching College can apply any BOG Fee Waiver to the student's Course Exchange courses.

> **Note:** If a student accidentally opts out of sharing their BOG Fee Waiver information by clicking **No Thank You**, they may need to ask the Teaching College for a BOG Fee Waiver application and complete and submit it for that college.

For the technically-inclined

When a student opts in to share their BOG Fee Waiver information with the Teaching College, the Course Exchange API (Application Programming Interface) makes an API call to the College Adaptor API to GET the student's BOG Fee Waiver information from the Home College's SIS. The College Adaptor API then POSTS the BOG Fee Waiver information into the Teaching College's SIS.

For a list of the BOG Fee Waiver data elements in the college adaptor as well as a list of the data provided by SIS, see: *https://cccnext.jira.com/wiki/display/CEPD/Course+Exchange+Implementation+Guides*. Once the Course Exchange Implementation Guides page opens, navigate to the SIS for your school (Banner, Colleague, or PeopleSoft) → Financial Aid & BOG Fee Waiver Information.

Cohorts: Flagging Course Exchange Students

When a student signs up to take a Course Exchange course, that student is automatically flagged in the student's Teaching College SIS using cohorts. Cohorts is a term applied to the group of students in your SIS that are flagged as Course Exchange students. This allows you to run functions such as configuring your SIS to not run a specific function, like checking for BOG Fee Waiver eligibility (since this is already identified by those students' Home Colleges).

See the images below for examples of how cohorts appear in the three major supported SISs (i.e. Banner, Colleague, and PeopleSoft).

Cohorts in Banner

To identify which students at a college are participating in Course Exchange and taking courses at other colleges, students are assigned to a "cohort" at their Home College.

In Banner, student cohort codes appear on the INB form SGASADD where more than one cohort code can be associated to a student.

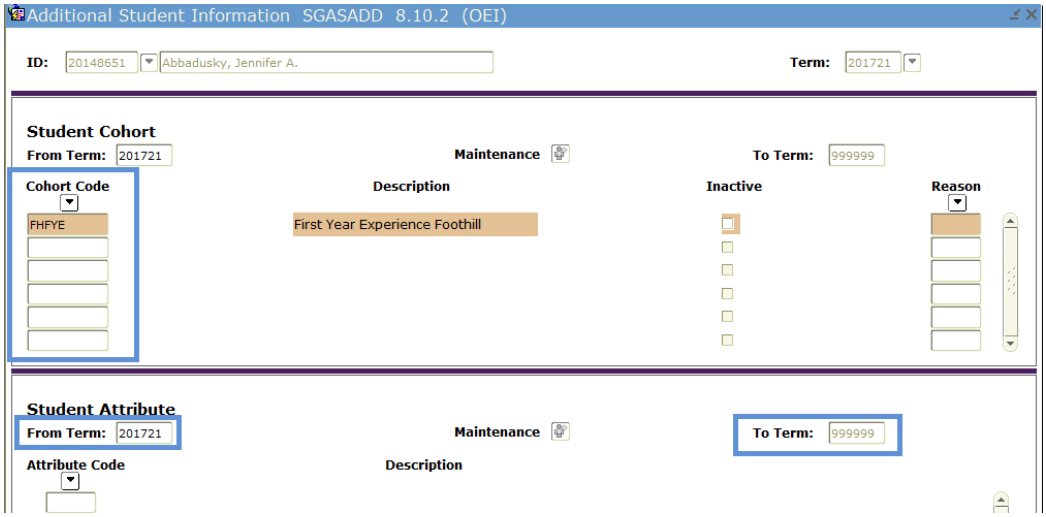


Figure 1: SGASADD - Associate Cohort Codes

A start date (*From Term* field value) is assigned to the cohort when it is created. The end date (*To Term* field value) can be '999999'.

Cohort codes are set up on the STVCHRT form that holds the look-up values.

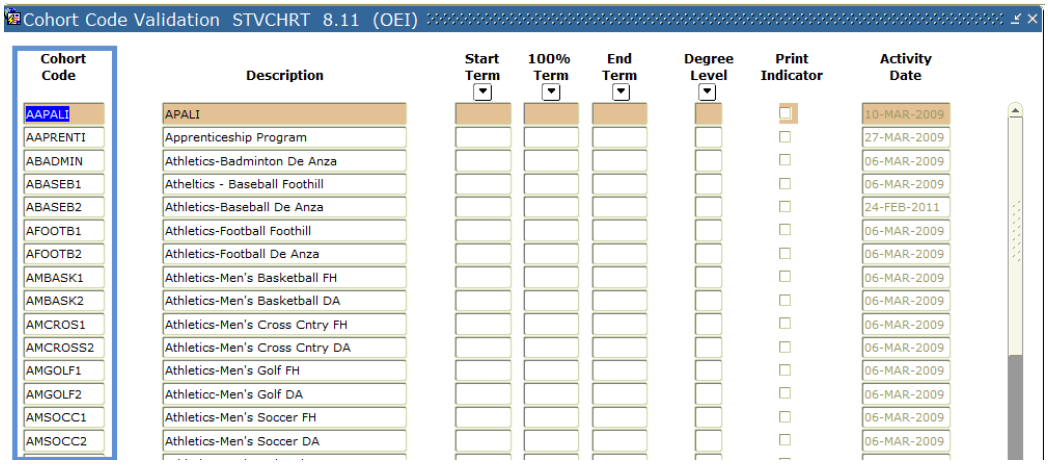


Figure 2: STVCHRT - Look up Values

The underlying Oracle database table is SGRCHRT and the cohort code column name is SGRCHRT_CHRT_CODE.

In order to identify cohorts, a new cohort code must be set up by your school on the STVCHRT form so that the cohort code can be used/defined in the application.properties file. For e.g.: Ventura has set up different cohort codes for each school within the district to identify which school the student belongs to depending on the misCode.

Cohorts in Colleague

To identify which students at a college are participating in Course Exchange and taking courses at other colleges, students are assigned to a "cohort" at their Home College.

In Colleague, cohorts are assigned using the *Other Cohorts* field on the STAL form.

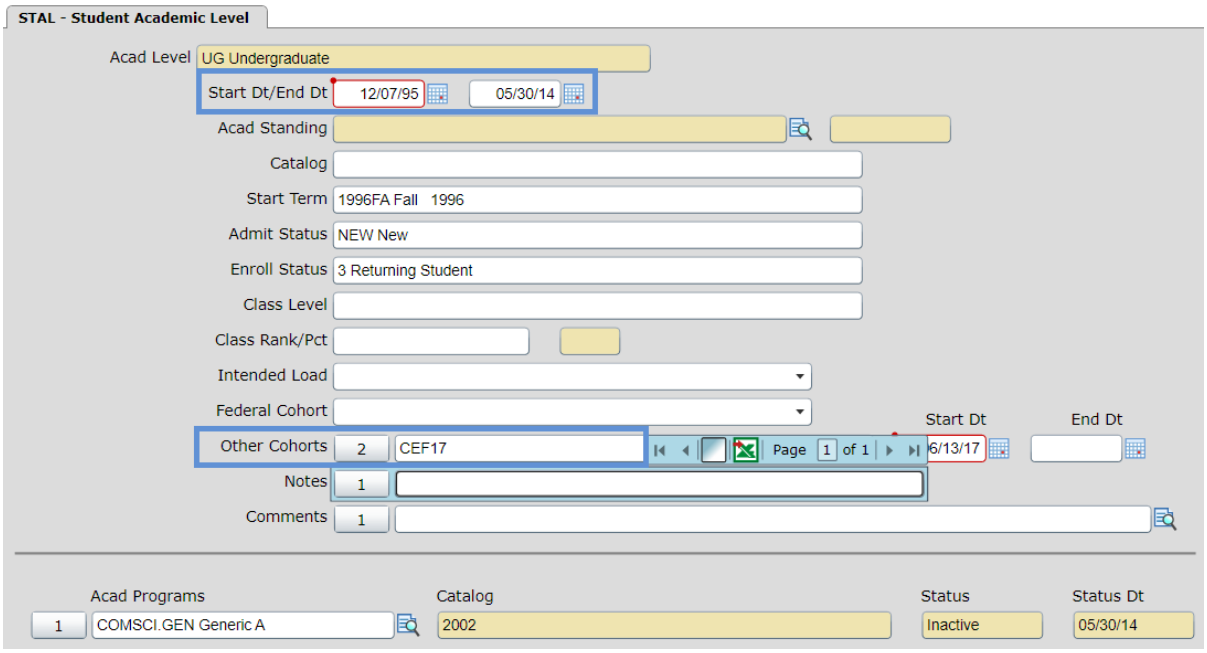


Figure 3: Colleague STAL Form

Cohorts are named using the following convention:

"CE" + T + YY

Where:

- T is Term (F = Fall, W = Winter, S = Spring, U = Summer), and
- YY is year

For example, CEF17 is Course Exchange Fall 2017. In addition to the cohort code name, a start date is assigned (in the *Start Dt* field) on the date that the cohort is assigned to the student. The end date (*End Dt* field) will always be blank.

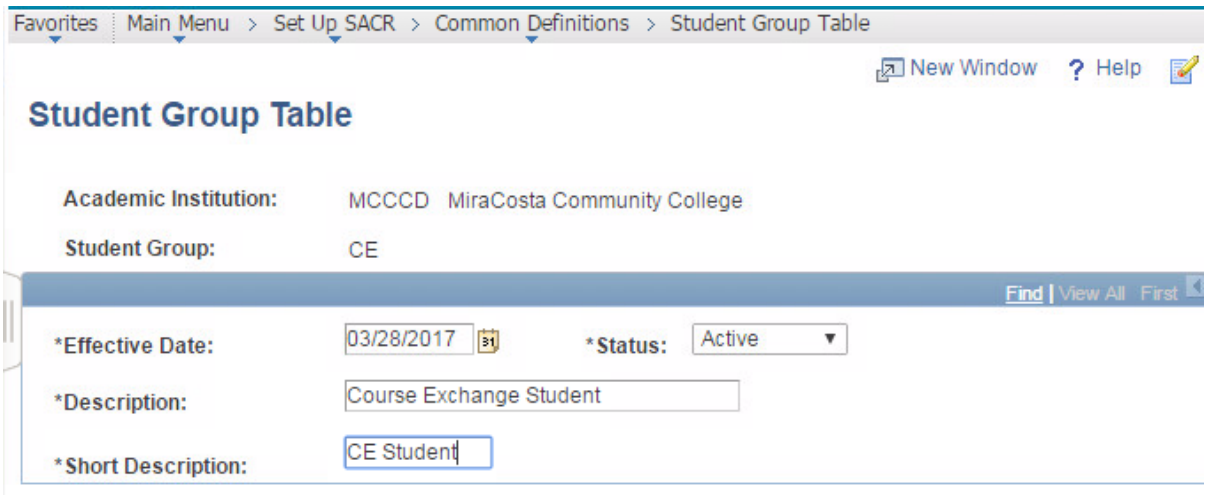
To use this field in rules and/or reporting:

- The Colleague field name is STA.OTHER.COHORT.GROUPS (in STUDENT.ACAD.LEVELS)
- In SQL Server the field name is STA_OTHER_COHORT_GROUPS (in STA_OTHER_COHORTS)

Cohorts in PeopleSoft

To identify which students at a college are participating in Course Exchange and taking courses at other colleges, students are assigned to a "cohort" at their Home College.

In a school that uses PeopleSoft, a *Student Group* 'CE' is created in the *Student Group Table*. A student is identified as a Course Exchange Student if the student is a member of *Student Group* 'CE'.



A group for Course Exchange needs to be created as in the above image and added to table PS_STDNT_GROUP_TBL.

The *View Student Groups by Student* form displays the PeopleSoft table where a student's groups are maintained.

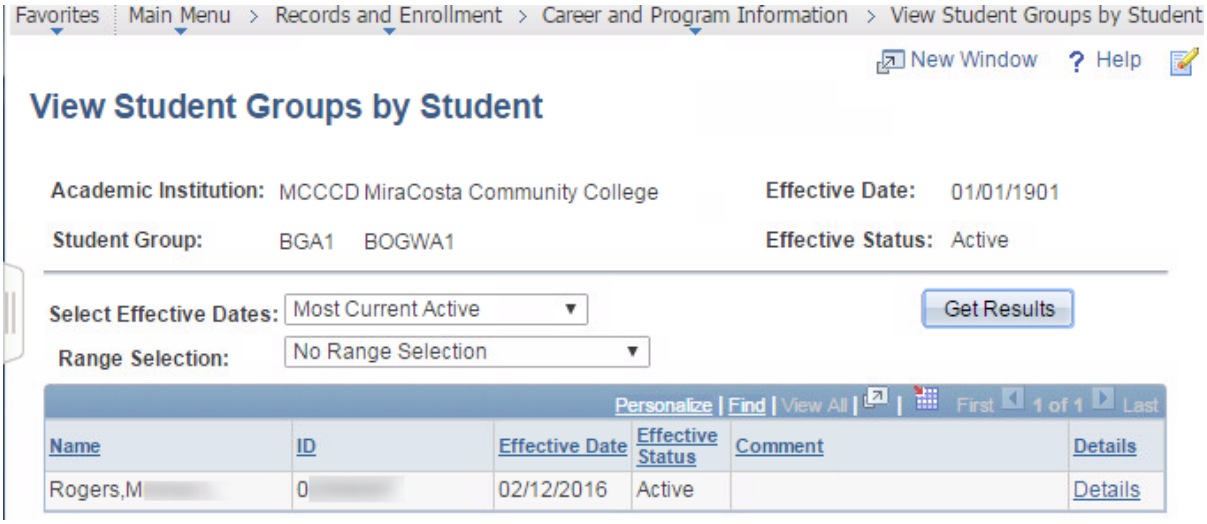


Table PS_STDNT_GRPS can be used to identify Course Exchange students. When a student is added or updated, PS_STDNT_GRPS will need to add this student to the Course Exchange group.

Glossary

CCC: California Community College.

CCCCO: California Community College Chancellor's Office.

C-ID: Course Identification Numbering System. *https://c-id.net/*

Common Course Management System ("CCMS"): The Common Course Management System and associated components that are required to implement the OEI Exchange. Instructure's Canvas course management system is the core platform for the CCMS.

CRN: Course Record Number. CRN is used by Ellucian and Colleague. PeopleSoft uses the term Synonym for the same meaning and some other systems use the term Section.

Home College: Any OEI consortium member college where the student is currently enrolled, intends to complete a degree or certificate program; and where the student first completed the following matriculation steps: New Student Orientation, English/Math placement, and an official education plan developed by a counselor. The Home College receives credit for the degree completion and/or transfer attained.

Ineligible Student: If a student is ineligible, a message displays informing them that they cannot participate in Course Exchange when they log in. Ineligible students are generally those who have not completed: orientation, assessments, or an EdPlan.

OEI Course Exchange: The component of the OEI that facilitates students registering for online courses offered by participating colleges, reduces and/or eliminates barriers and duplication in the application and matriculation processes, and automates associated business processes. Enabling students to enroll in courses that are critical to completing their educational goals but are not readily available at their Home College, the Course Exchange is intended to facilitate the timely completion of educational goals that students establish at their Home Colleges.

Online Education Initiative ("OEI"): The overarching California Community College (CCC) initiative, funded by the CCC Chancellor's Office, that provides support to college online teaching and learning programs and coordinates resources and services available to the entire CCC system. Resources include the CCMS and other components such as student resources, faculty resources, other technology resources, and research and policy documentation.

Synonym: A synonym is PeopleSoft's name for the Course Record Number or course Section.

Priority Registration Dates: The registration date assigned to the student by the Home College.

Teaching College: Any participating consortium member college with faculty teaching courses where students are enrolled using the CCC Course Exchange registration process. The Teaching College receives apportionment for enrollments. Fees for classes taught by faculty employed through the teaching college are paid to the Teaching College.

Note: The Teaching College can also be the same as the student's Home College if the online course they take is offered by the Home College in Course Exchange.