Adding an External Organization

From time to time, you may have contact with a high school, college, university, or business that is not in SFIS. This procedure describes how to create an external organization. Note that these instructions were prepared after the introduction of Slate by the Admission Office to the recruiting/admission process (replacing SFIS). Since that time, the External Organizations in SFIS no longer require many of the features used by Admissions, e.g. Contacts, Departments, telephone numbers, email addresses, etc.

There are three main pages that <u>must be completed</u>:
- **Organization Table**
- **Location Detail**
- **School Data**

(As explained below, the **Location Detail** and **School Data** pages can be reached through the **Organization Table** page. In addition, each of them can be opened independently by navigating to *Create/Maintain Organizations* and selecting the *Organization Locations* or *Organization School Data* menu item.)

In addition, there is one page that is <u>optional for all offices except OIS</u>
- ***Organization Affiliation***

> ***IMPORTANT: Before proceeding, be sure to do a thorough search for the organization.***
> ***For instructions on how to search for an Organization in the PeopleSoft database, see the document entitled***
> ***Search_for_Organizations_v90.pdf.***

After you are satisfied that the Organization does not exist in the SFIS Database, begin by opening the **Organization Table** page by navigating as follows: ***Campus Community > Organization > Create/Maintain Organizations > Organization Table***

- When the page opens, click on the ***Add a New Value*** tab

- The **External Org ID** defaults to "NEW". Do <u>NOT</u> change this value. The system will automatically assign an ID number once the record has been saved.

- Click the [Add] button.

<div style="background:#8B0000; color:white; text-align:center;">**Organization Table**</div>

The New **Organization Table** page appears as follows:

Complete the fields as indicated below, entering at least the required data, and clicking Save.

Important: If you select **Save** before completing the required data, you must use the Correct History mode to continue entering or modifying the effective-dated data.

Organization Details

Effective Date (Required):
1. Defaults to today's date.
2. Unless there is a good reason not to, leave the date as is.
3. *Important regarding Effective Dates:* Be aware that the **Effective Date** under **Location** and under **Organization Type Related Information** (School Data) *must be either less than or equal to this Effective Date* in order for all information to be properly saved in the database.

Status (Required):
1. Defaults to "Active." Do not change.

Description (Required):
1. Insert the organization's name. This is the field that is associated with searching.
2. This field is limited to 30 characters, so abbreviations may be needed. For example, in this instance you might want to abbreviate "University" as "Univ." Another method is, as closely as possible, replicate the name found on the College Board web site.
3. When you press the Tab key, the next two fields will automatically be populated as shown here.

Long Description:
1. This field allows up to 50 characters.
2. If shortened from the above step to 30 characters, finish completing the organization's full name. In this example, there is enough room to type the entire name in this field.

Short Description:
1. This field is limited to 10 characters. Modify as needed. Note that it doesn't need to contain the exact wording of the institution as seen in the other two fields.

Here is a suggested set of descriptions for this sample organization.

Organization Type (Required):
1. Defaults to "SCHL" (School).
2. For all educational institutions – except those entered by the Office of International Studies - only select **COLL** or **SCHL** as indicated here:
    a. College or University – COLL (College)
    b. High School, Secondary School – SCHL (School)
    c. Other – SCHL (School)
3. *Important:* Only the Office of International Studies may enter:
    a. NRS (NRS Prgm)
4. Businesses:
    a. BUSN (Business)
5. Other organizations that don't fit above categories:
    a. BUSN (Business)
    b. GOVT (Gov't Agnc)
    c. INDP (Ind Couns)
    d. NONP (NonProfAgc)

6. Do not use KNCT

Proprietorship (Required):
1. Defaults to "Public".
2. Select from the following lists in conjunction with the Organization Type.

Educational Institutions	Org Type	Proprietorship
College/ University	COLL	Independent, Catholic Independent, Not Religious Independent, Other Religious Other Private Public Religious
High School/ Secondary	SCHL	Charter Home Independent, Catholic Independent, Not Religious Independent, Other Religious Other Private Public Religious
Elementary/ Middle	SCHL	Other
Other Schools	SCHL	Other

OIS – Study Abroad Only	Org Type	Proprietorship
NRS - Study Abroad College/ University	NRS	Approved International NRS Petitioned International NRS Sponsored NRS Program
NRS - Domestic	NRS	Approved Domestic NRS
NRS -Twelve- College Exchange	NRS	12-College Exchange NRS
NRS – 3-2 Engineering	NRS	3-2 Engineering NRS

Business and Other	Org Type	Proprietorship
Business	BUSN	Other
Organizations that don't fit any of the above descriptions	BUSN GOVT INDP NONP	Other

In this example, the organization is a university, so the **Organization Type** is **COLL** and the default (**Public**) can be selected for **Proprietorship**.

Click SAVE.

The **Organization Table** page now appears as follows:

So far the only completed section is under **Organization Details**. Note that the section at the bottom for **Last Update Date/Time** is populated once you hit **Save.**
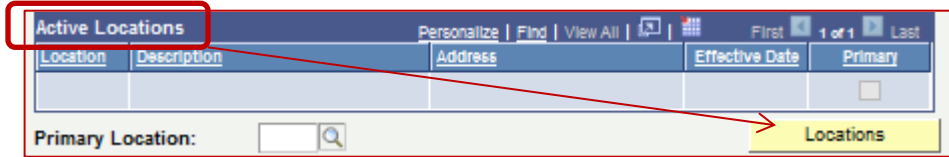
----- End of Organization Table Instructions -----
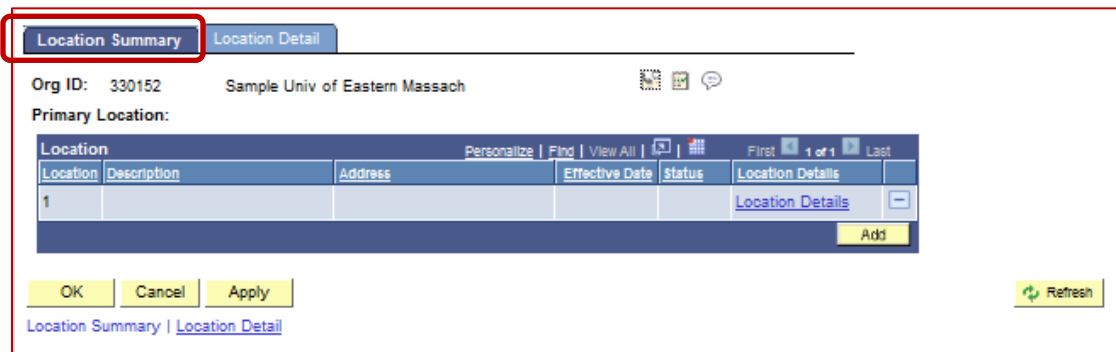

Location Details

Location Details are added from the **Organization Table** page as follows:

Active Locations:
1. Click on the **Locations** button.

2. The **Location Summary** page opens.

   a. Click on the **Location Detail** tab (or the **Location Details** link) to open **the Location Detail** page.

Location History

Effective Date:
1. The default is today's date
2. Enter either the same Effective Date as shown on the *Organization Table Page or a date less than that.*
3. *Important reminder about Effective Dates:* The **Effective Date** under **Location** and under **Organization Type Related Information** (School Data) *must be either less than or equal to the Organization Table Effective Date* in order for all information to be properly saved in the database.

Status:
1. Default is "Active." Do not change.

Description (Required):
1. Enter the Organization Description as shown on the **Organization Table** page

Short Desc:
1. Enter the Short Desc as shown on the **Organization Table** page

Country (Required):
1. Select the correct country code, include USA if applicable.
2. Notice at the top of the page under the section headed **Location**, it reads **Location: 1**.

Edit Address:
1. Click on the **Edit Address** link
    a. Enter the address, including at least **Address 1** and **City.**
    b. If the address is in the United States or Canada, enter **State**.

    c.   If the address is in the United States or Canada, enter the **Postal Code**.

    d.   Click the **OK** button.
    e.   Click the **Apply** button
    f.   When you click the Apply button, the **Last Update Date/Time** area is populated for the Location page.
    g.   Click **OK**.
         i.   *Important:*   If you have not entered an address, when you click **OK**, you may receive the Message:

                 Warning -- At least one address is required when adding a new organization. (14200,14)

         ii.   Click **OK**. *This message appears because only the Country is required.* If the **Country** is on the page, you are not required to enter the full address.

    h.   You are returned to the **Organization Table** page.

Active Locations (on the Organization Table page):

a. The location is now displayed. Note that at this point the **Primary** box is not checked and **the Primary Location** field is empty.
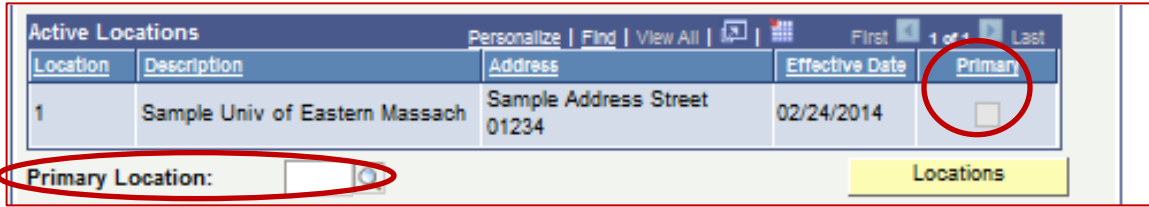
b. **Primary Location:** Select the **Primary Location** from the dropdown box
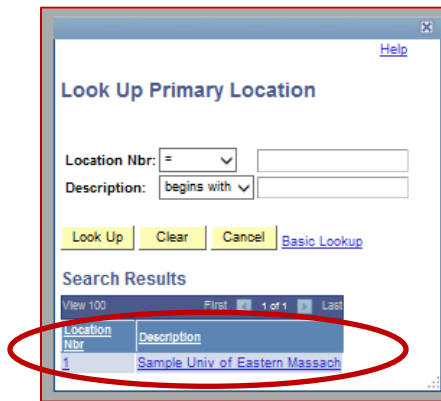
c. *Click SAVE*

d. The **Active Locations** section now appears as follows with the **Primary** box checked and the number 1 associated with the **Primary Location**:

----- End of Location Instructions -----

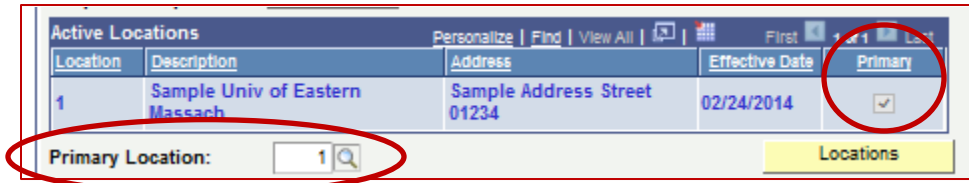<div style="background:red; color:white; text-align:center;">School Data</div>

The **School Data** page can be opened from the **Organization Table** page. There is a section headed **Organization Type Related Information** that is toward the bottom of the **Organization Table** page. The link in this section is created when the **Organization Type** is selected at the top of the page and the page is saved. At this point those fields look like this:

Organization Type Related Information:
1. Click on the link below this header at the bottom of the page, in this example, **College.**
2. The **School Data** page opens.

School Data

Org ID: 330152   Sample Univ of Eastern Massach

Primary Location: 1   Sample Univ of Eastern Massach

Organization Details   Find | View All   First ◀ 1 of 1 ▶ Last

*Effective Date: 02/24/2014 📅   *Status: Active ▼   + −

☐ Offers Courses

School Characteristics   **School Codes**   **System Default Values**

☐ Accredited   ATP: [   ]

☐ Transcript Translation   FICE: [   ]   Career: [▼]

School Type   ACT: [   ]   Term Type: [▼]

[▼]   IPEDS: [   ]   Unit Type: [▼]

                      NCES: [   ]

Catalog Information

School District: [   ]

                   ☐ Shared Catalog

Catalog Org: [🔍]

School Code: [🔍]

[OK]   [Cancel]   [Apply]

Complete the fields on this page as indicated below:

Effective Date (Required):
1. Enter the same or a lesser **Effective Date** as on the **Organization Table** page.

Status (Required):
1. Default is "Active." Do not change.

Offers Courses:
1. *Important:* If the organization is to be associated with an Applicant, the checkbox *"Offers Courses" MUST BE CHECKED.* Otherwise, the organization will not appear in the dropdown box for the Applicant's Education page

School Characteristics:
1. Check the boxes Accredited and Transcript Translation if needed
2. **School Type**
   i. *Important:* If the "**Offers Courses**" box is checked, the "**School Type**" box must be populated as well; otherwise, you will not be able to save the page.
   ii. For colleges or university, only use the **School Type** of **College**
   iii. For high schools, only use the **School Type** of **Secondary**
   iv. For any other type of educational institution, use **Other**.
   v. Non-educational organizations should not be on this page. If they are, they need to be reviewed and removed.
3. **School Codes:**
   i. *Important: The ATP Code is required for all high schools, colleges and universities added to the system.*
   ii. Enter ATP (or CEEB) code if available. Otherwise, look up this data and add digits using one of the following URLs:

   High School and College ATP Code Search:
       http://sat.collegeboard.org/SAT/public/pdf/sat-code-list-us.pdf

   High School ATP Code Search:
       http://apps.collegeboard.com/cbsearch_code/codeSearchHighschool.jsp

       http://www.suny.edu/Student/search_highschool/index.cfm

https://www.ugadmissions.rutgers.edu/forms/includes/hsCeebLookup.aspx?st=NJ&theForm=rsvpform&theFieldCeeb=ceeb

Colleges/Universities ATP Code Search:
http://apps.collegeboard.com/cbsearch_code/codeSearchCollege.jsp

http://www.suny.edu/student/search_colleges/college_search.cfm

http://inquiry.embark.com/SNHU/College_Search/fieldchooser.asp?FID=CollegeCEEB%5FCurrent&SEARCHTEXT=china#

4. All other fields are not applicable. Click **OK**.

You are returned to the **Organization Table** page.

Click SAVE.

----- End of School Data Instructions -----

Organization Affiliation – *optional for all offices Except OIS*

The **Organization Affiliation** page is always generated by the Office of International Studies for Study Abroad grading purposes. There are separate instructions for that office that are not a part of this documentation.

If your office does make use of the Organization Affiliation page, these are the basic instructions. The page is reached separately from the above pages and is used to store more detailed information about a particular school.   If you have been using the above pages, when you navigate as indicate, the Organization Affiliation page will open with the Organization you are adding. The navigation is:

Main Menu > Campus Community > Organization > Create/Maintain Organizations > Organization Affiliation

Enter the values for each field as indicated below. *(Note: If your office has different guidelines regarding the options to be selected, follow those directions as appropriate.)*

Affiliation Details – Affiliation with Institution (these fields are required):
1. **Academic Institution:** Accept default of "Wesleyan University"
2. **GPA Type:** Select "100P"
3. **Grading Scheme:** Accept default of "UGD" (Undergrad)
4. **Grading Basis:** Accept default of "GRD" (Graded)

Transfer Credit Transcript Print (the Level of Detail field is required):
1. **Level of Detail:** Accept default of "Summary" (if "Detail" is selected, the last field must be filled in as well)
2. **Include Transfer Credit in GPA:** leave blank
3. **Details to Print:** leave blank unless **Level of Detail** is changed to "Detail"

Organization Groups:
1. **Group Type:** leave blank (if **Group Type** is populated, the next field must be filled in as well)
2. **Group Code:** leave blank unless **Group Type** has been populated.

----- End of Organization Affiliation Instructions -----