## Revision History

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1 Introduction

The Transient Student Admission Application (TSAA) program allows a student to request administrative approval from his/her Home Institution to take courses at another institution. The receiving institution, referred to as the Host Institution, must also approve the request. The student is referred to as a transient student.

The formal request for approval is referred to as the Transient Student Admission Application (TSAA); this application and the process through which it goes help ensure that the student will receive credit at his/her home institution for the coursework taken at the host institution.

This manual explains the functionality of the TSAA program for institutional users. These users are divided into three groups: institutional administrators, who set up the TSAA workflow and users (agents) for the institution, agents at an institution who process students’ transient student admission applications, and students, who use the TSAA program to create transient student admission applications to request permission to take courses at another institution.

This manual is divided into four sections. Section 1 Introduction provides an overview of the TSAA program. Section 2 Using the TSAA program – Administrators describes the activities that an administrator performs to set up and maintain the program for the institution. Section 3 Using the TSAA program – Agents describes how an agent uses the TSAA program to process transient student admission applications, and Section 4 Using the TSAA program – Students describes how a student uses the program to create a transient student admission application and follow its flow through the system.

Words or phrases defined in the Appendix A – Glossary of Terms are italicized the first time they are used in this document, unless they are first used as a heading. Text that the user types in the examples is shown in ‘quoted italics.’

Appendix B – Download File Specifications describes the file that an administrator can create of the institution’s transient student admission applications and provides an example file.

Appendix C – Admissions Application File Specifications provides an overview of the data that is submitted to the institution’s admissions information system.

1.1 Overview of TSAA program

The TSAA program is implemented by applications flowing through the system. An administrator designs the electronic workflow that an application follows within an institution, a student creates a transient student admission application, and agents process the application at the home and host institutions. Each user (a student or an agent) completes his/her section of the application and the program sends the application to an agent for processing. Only one agent can process an application at a time. Applications
continue through the system until the student edits or cancels the application, an agent at either the home or host institution denies the application, or the final agent at the host institution approves the application. When a student edits or cancels an application or an agent chooses to deny an application, the application is immediately removed from the workflow. A denied application or an application explicitly cancelled by the student cannot be reactivated; the student must create a new application. An edited application, however, is a new version of a previously submitted application that may have been partially processed by one or more agents but has been modified by the student and is starting at the beginning of the application process. Therefore, any previously completed sections must be processed again. When the final host institution agent approves the application, it is considered completed and removed from the workflow. However, if the host institution is accepting direct submission of Transient Student Admission Applications into the institution’s admissions information system, the application will remain active for the institution administrator, until the application is successfully submitted, or the institution administrator designates the application as not needing to be submitted, to the institution’s admissions information system.

Applications are made up of Sections, that define behaviors for agents assigned to Contexts, that determine which specific applications an agent receives, according to the agent’s Role. Applications are always initiated by a Student (the first role in the roles list) at the home institution. The application is then available for processing by the home institution agents and an email is sent to the first agent in the home institution roles list. When that agent processes the application, an email is sent to the second agent in the list, and so on. When the final agent in the list at the home institution processes the application, it is available for processing by the host institutions agents and an email is sent to the first agent in the host institution roles list. When the first host institution agent processes the application, an email is sent to the second host institution agent, and so on, until the final host institution agent is sent an email to process the application. Note that there may be multiple users assigned to a specific role/context in the workflow, all of whom will be receive agent email notifications simultaneously and any one of whom may process the application at that stage.

Composition of Transient student admission application:

<table>
<thead>
<tr>
<th>Section</th>
<th>Status</th>
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<tr>
<td>Student Information</td>
<td>Completed by Student</td>
</tr>
<tr>
<td>Role1 Section</td>
<td>Completed by Agent for Context1</td>
</tr>
<tr>
<td>Role2 Section</td>
<td>Completed by Agent for Context2</td>
</tr>
<tr>
<td>Role3 Section</td>
<td>Completed by Agent for Context3</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>Role n Section</td>
<td>Completed by Agent for Context n</td>
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1.1.1 Application routing

Transient student admission applications are available to appropriate individuals based upon the role and context defined in the workflow to which an agent is assigned and the values the student selected for the context when creating the transient student admission application. Roles define the order in which the application is available to agents for
processing. Any roles may be used and the roles may be defined in any order desired by an institution, except that the Financial Aid Officer is always the final role in the home institution workflow. An application will be available to each agent in the order of the roles in the list. After the final agent in the home institution list has processed the application, the application is available to the first agent in the host institution list.

Contexts define the level, or layer, in the Defined Organizational Structure at which a particular role is authorized to act. The more detailed the context, the fewer applications the agent is likely to be presented with. The less detailed the context, the more applications the agent is likely to be presented with. The example in Illustration 3 has two contexts: Institution and Institution/Department. An agent assigned to the Institution context will see all applications completed by students at that institution or who choose that institution as their host institution, if applicable. An agent assigned to the Institution/Department context will see all applications for which students have selected the specific Department to which that agent is assigned. Agents assigned to different Departments within the Institution will not see the same applications. The following table provides an example of how many applications a particular agent will have to process when the institution administrator has created the Defined Organizational Structure as Institution/School or College/Department:

<table>
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<th>Level</th>
<th>Context</th>
<th>Agent</th>
<th>Number of applications</th>
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<tr>
<td>Institution</td>
<td>Florida University</td>
<td>Agent1</td>
<td>20</td>
</tr>
<tr>
<td>Institution/School or College</td>
<td>Florida University/College of Arts and Sciences</td>
<td>Agent2</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Florida University/College of Engineering</td>
<td>Agent3</td>
<td>5</td>
</tr>
<tr>
<td>Institution/School or College/Department</td>
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<td>Agent4</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Florida University/College of Arts and Sciences/History</td>
<td>Agent5</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Florida University/College of Arts and Sciences/Mathematics</td>
<td>Agent6</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Florida University/College of Engineering/Computer Science</td>
<td>Agent7</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Florida University/College of Engineering/Civil Engineering</td>
<td>Agent8</td>
<td>2</td>
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Two of the 20 Florida University students selected College of Engineering, department of Civil Engineering when completing transient student admission applications, so Agent8 will have two applications to process. Agent3, however, will have five applications to process since five students selected College of Engineering when completing applications (two in the Civil Engineering department and three in the Computer Science department). Agent1 will have 20 applications to process since a total of 20 Florida University students have created applications.

1.1.2 Application processing

Transient student admission applications are processed by agents working with sections. The specific processing an agent performs is determined by the section assigned to the agent’s role. Some characteristics of sections are preset in the program and some characteristics may be customized by the institution. Although certain sections imply certain processing behaviors, these behaviors may be changed. It is the administrator’s
responsibility to ensure that required behaviors are available in the appropriate sections so that applications can be processed. Some sections must be included in the application and some sections are optional.

The program builds the transient student admission application by adding sections when needed for the current role. Until the final agent at the host institution has processed the application, there is always one editable section at the bottom of the application, following the sections that have been previously completed and can no longer be edited. The current agent can only edit the last section of the application, which is the section assigned to that specific agent. The application does not contain, and the agent does not see, any sections that will be processed by agents following this agent in the workflow. When a student creates a new application, only the Student Information section is displayed. After the student clicks Send, the section for the first role in the home institution list is appended to the application. The agent for the first role will see the Student Information section and the section for that role only. When the agent approves the section, then the section for the next role in the home institution list is appended to the application and so on. Each agent sees the Student Information section, all sections completed before this agent, and the agent’s own section, which the agent can edit. The student sees the same application as the current agent. The student cannot change anything on the application unless the student chooses to Edit the application, thus creating a modified application that will start at the beginning of the workflow process.
2 Using the TSAA program – Administrators

The TSAA program determines the flow that an application must follow based on a set of defined rules. This workflow decision logic (how the program decides the path that a transient student admission application must follow) is based on how the sections are ordered in the institution’s Defined Organizational Structure (workflow) and how agents are assigned to sections of the application.

The program determines the path the application must follow based on the next section in the workflow and by comparing the data on an application to two values: the role that an agent plays in the system and the context to which the agent has been assigned for a particular role.

Each institution is responsible for the definition of their own rules regarding the flow of transient student admission applications, which includes defining users, roles, and contexts. There is a special user at each institution who has the authority to define the institution’s rules for transient student admission application processing. These users are known in the program as institutional administrators. It is the responsibility of each institution’s administrator to set up and maintain the rules that govern the transient student admission application workflow.

2.1 Identifying institution administrator

Each institution must appoint one administrator to design the Transient Student Admission Application process for the institution. The Florida Virtual Campus (FLVC) will define a user name and password for the administrator at each institution. Each administrator must contact FLVC (email: help@flvc.org) stating the institution’s readiness to begin defining or modifying the workflow or desire to move a new workflow into production.

2.2 Submitting applications to institution admissions information system

If an institution wishes transient student applications to be submitted directly to the institution’s admissions information system, the institution’s TSAA administrator must contact FLVC (email: help@flvc.org) requesting that TSAA applications be submitted to the admissions information system. The institution must have the capability to accept transient student admission applications from www.floridashines.org directly into the admissions information system in order to use this feature. FLVC will enable the feature and all applications that have not yet been completed by the final agent at the institution will be transmitted directly to the institution’s admissions information system when the final agent authorizes/approves the application.

2.3 Logging into the TSAA Administration module

Administrators access the Transient Student Admission Application program through the Florida Virtual Campus Distance Learning and Student Services web site.
1. Navigate to the FLVC Distance Learning and Student Services web site (https://www.dlss.flvc.org/)

2. Click the Manage transient student admission applications (Administrators) link in the I want to... area on the right of the page to open the login screen (Illustration 1) in a new browser window. –OR– Click the Transient Student Admission Applications link in the College & University Staff area of the Services page.

3. Select the Institution from the drop-down list. Type the Username and Password that FLVC provided. Note that the Username and Password are case sensitive and must be typed with the exact upper- and lowercase letters FLVC provided.

<table>
<thead>
<tr>
<th>Transient Student Admissions Application - Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution: ---Please select an institution---</td>
</tr>
<tr>
<td>*Username</td>
</tr>
<tr>
<td>*Password</td>
</tr>
<tr>
<td>Login</td>
</tr>
</tbody>
</table>

* Required data is case sensitive !

Illustration 1 - Administrator login screen

4. Click Login.

- If the username and password are not correct, the text “<Agent with this username does not exist>” displays below the Login button. Select the Institution, type the Username and Password and click Login.
- If the username and password are correct, the program opens to the Summary of Applications page. NOTE: Some activities described in this manual may not be available in the production environment (contact Florida Virtual Campus Help desk for assistance).

If there is no workflow, the page is blank, as shown in Illustration 2.

Illustration 2 - Summary panel when workflow has not been created

If the workflow has been created, the Defined Organizational Structure is displayed (see example in Illustration 3).
Illustration 3 - Summary panel when workflow has been created

Clicking the question mark symbol to the right of the Summary of Applications heading opens a popup window that provides help for defining the workflow.

The Go to Wizard button at the bottom of the Summary page allows the administrator to define or change the transient student admission application workflow for the institution. The wizard is described in detail in the following sections.

The administrator uses the five tabs along the top of the page (Illustration 2 or 3) to navigate the TSAA program. The remainder of Section 2 Using the TSAA program — Administrators describes each tab in detail.
<table>
<thead>
<tr>
<th>Tab</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>View and modify the institution’s defined workflow</td>
</tr>
<tr>
<td>Context Data</td>
<td>View and modify the values that define the actual workflow</td>
</tr>
<tr>
<td>Users</td>
<td>View and modify the agents who process the institution’s applications</td>
</tr>
</tbody>
</table>
| Options     | 1. View and modify the times and values the administrator has selected for notifications about active applications  
|             | 2. View and modify the text displayed to a student creating a new application  
|             | 3. View and modify the text displayed to an agent processing an application  
|             | 4. Determine if all roles and contexts have assigned agents  
|             | 5. View individual transient student admission applications or a report listing specific transient student admission applications  
|             | 6. Download transient student admission applications in XML format  
|             | 7. View and modify the text displayed to a student who chooses the institution as the Host Institution  
|             | 8. View and modify questions displayed to a student who chooses the institution as the Host Institution  
|             | 9. View and modify Custom Terms displayed to a student who chooses the institution as the Host Institution  |
| Logout      | Log administrator out of TSAA program  |

### 2.4 Summary panel

The administrator uses the summary panel to define or modify the transient student admission application workflow. An administrator can only modify the definition of his or her own institution.

Illustration 4 shows how an institution might define its workflow. The screen is divided into three areas: ‘Defined Organizational Structure’, ‘Home Institution’ and ‘Host institution.’
‘Defined Organizational Structure’ displays the organizational structure that the home institution uses to route a transient student admission application. Instructions for defining this structure are included in 2.4.1.1 Wizard Step 1 of 4 – Structuring Levels below. The Defined Organizational Structure in Illustration 4 routes a transient student admission application based upon the student’s Institution and Department.

‘Home Institution’ describes the workflow that is used when a student enrolled at your institution creates a transient student admission application. Your institution is the Home Institution for the student who wants to take courses at a different institution. In Illustration 4, a Student at the Institution completes the Student Information section. Then an Academic Advisor for a Department at the Institution completes the Course Approval section. Next, a Registrar at the Institution completes the Student Status section. The administrator can change certain characteristics of the listed sections with the appropriate Edit button (see 2.4.2 Customizing the TSAA sections).

‘Host institution’ describes the workflow that is used when your institution receives an application from a student enrolled at another institution who wants to take courses at your institution. Your institution is the Host institution. Illustration 4 shows that an Admissions Officer for the Institution completes the Host Institution Acceptance section. The administrator can change certain characteristics of the listed sections with the appropriate Edit button (see 2.4.2 Customizing the TSAA sections).

The transient student admission application workflow is routed through an institution by matching the values the student selects for school or college, program, department, etc., to the path defined in the workflow and to the agents assigned to specific schools, programs, departments, etc. The program determines the appropriate agent for a section
of an application based on how the institution assigned agents to schools or colleges, programs, departments, etc. In the example shown in Illustration 4, the program distinguishes among Academic Advisors based on the particular Department to which they have been assigned. That is, the program looks for the Academic Advisor(s) specifically assigned to the particular Department the student chose when creating the transient student admission application. However, all applications will be routed to all agents assigned to the Registrar role independent of the Department the student chose.

The first column (Role) in the Home and Host institution areas defines who, as a role or title, needs to be involved in the process. The second column (Context) tells the program how to determine the specific agent. The third column (Section) identifies the section of a transient student admission application that the agent must complete.

The workflow logic is initially defined as an abstract. The factual workflow logic is implemented by entering specific values for the levels in the Defined Organizational Structure, including schools, departments, programs, and users. The abstract is linked to the factual portion by assigning roles and contexts to users.

2.4.1 TSAA Workflow Definition Wizard

The TSAA workflow definition wizard, or wizard, is used to design the transient student admission application workflow for an institution. NOTE: The wizard is not available in production. Contact Florida Virtual Campus Help desk for assistance with creating or changing your workflow.

The wizard includes four steps: Structuring Levels, Selecting Roles, Selecting Contexts, and Assigning Sections. Each of the steps’ screens includes a link to a help window, a ‘Cancel Wizard’ button to close the wizard, and ‘Previous’ and ‘Next’ or ‘Finish’ buttons, as appropriate, to navigate the wizard. See Illustrations 6, 11, 13, and 15 for each wizard step’s initial screen.

Help: Click the question mark symbol, ?, to open a window or box that displays additional information on the step you are using (see Illustration 5 for a sample).

Illustration 5 – Sample help screen for a wizard step

Navigation: Use the buttons at the bottom of each screen to navigate through the wizard.
• Previous button: This button is available on Steps 2, 3, and 4. Clicking this button saves changes made in the current step and returns you to the previous step of the wizard.

• Next button: This button is available on Steps 1, 2, and 3. Clicking this button saves changes made in the current step and takes you to the next step of the wizard.

• Finish button: This button is available on Step 4. Clicking this button closes the wizard, saving all your changes.

• Cancel Wizard button: This button is available on Steps 1, 2, 3, and 4. Clicking this button closes the wizard, saving all changes made in the previous steps, but not changes made in the current step. That is, if you Cancel on Step 4, then the changes made on Steps 1, 2, and 3 are saved, but not the changes made on Step 4.

To open the wizard:

1. Click the ‘Summary’ tab to open the Summary panel if it is not already open.

2. Click the ‘Go to Wizard’ button on the bottom of the Summary panel (see Illustration 2). The wizard opens on Step 1. You cannot go directly to a specific step.

The following sections describe the process of defining the workflow by using the wizard. Specific instructions to build a sample workflow are provided at the end of each section.

2.4.1.1 Wizard Step 1 of 4 - Structuring Levels

The first step of the wizard allows an administrator to define and view levels and their relationships. A hierarchy of levels defines the organizational structure an institution uses to route applications. The available levels for a Home Institution workflow are School or College, Campus, Department, and Program. The available level for a Host Institution workflow is Host Campus. The administrator defines which levels are used and how the levels are related to one another. Only levels listed in the Defined Organizational Structure can be used as contexts for agents in Wizard Step 3. A native student must select a value for all levels listed in the Defined Organizational Structure for Home Institution when creating a new transient student admission application. An incoming student must select a value for Host Campus if the Host Institution workflow has been enabled and context data values assigned.

If the workflow has not been defined, the Wizard Step 1 of 4 – Structuring Levels screen displays as shown in Illustration 6. Institution is automatically defined as the top level. All other levels must be defined below the Institution level. If the workflow has been defined, the Wizard Step 1 of 4 screen is similar to Illustration 10. If you have not enabled the Host Institution Campus workflow, the Wizard Step 1 of 4 screen will give
you the opportunity every time you open the wizard until you enable the Host Institution Campus workflow (Illustration 11).

The administrator structures the levels at an institution according to how decisions are made for transient student admission applications. For example, if an application is routed to an agent based on the School and Department to which he or she belongs, then the organizational structure must include the School or College and Department levels. This doesn’t mean, however, that every agent in the workflow needs to be defined at the department level. It means that the most detailed level for the workflow will be Department, but you can assign a role to the School or College level, for example. The Institution level is always available for use.

**Note:** Since the application will be routed based on the levels used in this structure, every new application must include this information. For example, given the structure in the sample in Illustration 4, every student at this institution must select a Department when creating a new transient student admission application. If the structure includes Program, students would be required to select that also. In addition, at least one agent needs to be assigned to every context (see **2.4.1.3 Wizard Step 3 of 4 – Selecting Contexts**) for every level so that applications can be processed. Therefore, use only the levels that determine the flow of the transient student admission application in your institution.

The workflow when the institution is acting as the Host Institution for an application from another institution’s student who wishes to take a course at your institution can be customized to include a Host Campus level. The Host Institution Campus workflow must be enabled and context data values for individual campuses must be assigned. Then every incoming student who selects your institution as the Host Institution will be presented with a drop-down list of the individual campuses and required to select one in order to submit the application.

**2.4.1.1.1 Add a level to the organizational structure**

1. Click the ‘Add’ button to the right of the level under which you wish to add a new level (see Illustrations 6 and 9).
• If you wish to add a level directly below the Institution level, click the ‘Add’ button to the right of the Institution level (Illustration 6).

• If you wish to add a level below another level, click the ‘Add’ button to the right of that level (Illustration 9).

The program displays the Adding a Level box (see Illustration 7). The title of the box shows the level below which the new level will be added (Illustration 7 shows the Institution level).

Illustration 7 – Wizard Step 1 Adding a level

2. Select the desired level from the drop-down list (Illustration 8).

Illustration 8 – Wizard Step 1 Select a level

3. Click the ‘Save’ button to add the level or ‘Cancel’ to return to the wizard without adding the level.

If you saved the level your screen will be similar to Illustration 9 with the level you added displayed under Institution. Illustration 9 shows ‘School or College.’

Illustration 9 – Wizard Step 1 screen with level added to workflow

4. To add additional levels, click the ‘Add’ button to the right of the level under which you wish to add the level and repeat steps 2 and 3.

5. Click ‘Next’ to proceed to Step 2 of the wizard.
2.4.1.1.2 Remove a level from the organizational structure

1. Click the ‘Remove’ button to the right of the level you wish to delete (Institution cannot be deleted so it does not have a ‘Remove’ button).
2. On the confirmation box, click ‘Yes’ to remove the level from the organizational structure or ‘No’ to keep the level.
   
   **Warning:** Deleting a level will delete all levels underneath it. This may prevent existing transient student admission applications from being processed if you have already used these levels to create context data and there are applications awaiting processing that use the existing levels structure.
3. To remove additional levels from the organizational structure, repeat steps 1 and 2.
4. Click ‘Next’ to proceed to Step 2 of the wizard.

2.4.1.1.3 Change the order of levels in the organizational structure

To change the position of a level in the organizational structure, you must remove the level (see 2.4.1.1.2 Remove a level from the organizational structure) and then add it beneath the appropriate level (see 2.4.1.1.1 Add a level to the organizational structure).

2.4.1.1.4 Example Home Institution Workflow

1. Click the ‘Add’ button to the right of the Institution level. The program displays a box to select the next level underneath Institution (see Illustration 7).
2. Select ‘Department’ from the drop-down list (Illustration 8).
3. Click the ‘Save’ button. The organizational structure should match Illustration 10.

4. Click ‘Next’ to proceed to the next step of the wizard.

2.4.1.1.5 Enable Host Institution workflow

You may add Campus as a Context to your workflow to specify the routing to individual campuses when your institution receives an application from a student enrolled at another institution. Your institution is the Host Institution for that application. You must enable
the Host Institution workflow option, though you do not have to add the Host Institution Campus level or specific Host Campus values to your Host Institution workflow. However, incoming students will not be required, nor allowed, to select specific campus values until you enable the Host Institution Campus workflow option, add the Host Institution Campus level to your workflow, and specify at least one Host Institution Campus Context Data value.

If you have not enabled the Host Institution Campus workflow, the Wizard Step 1 of 4 screen will give you the opportunity every time you open the wizard until you enable the Host Institution Campus workflow.

Illustration 11 – Wizard Step 1 screen – Enable Host Institution Campus Workflow

- To enable the Host Institution Campus workflow option, click in the box before ‘Enable Host Institution Campus workflow’ to check it and click the ‘Submit’ button. A confirmation message will replace the explanatory text on the page. Click the ‘Next -->’ button to open Wizard Step 2 of 4 – Selecting Roles.

- To proceed without enabling the workflow, click the ‘Next -->’ button to open Wizard Step 2 of 4 – Selecting Roles.

2.4.1.6 Add a level to the Host Institution workflow

When the Host Institution Campus workflow has been enabled, you can add the Host Campus level to your workflow. You may add a new role for the Host Campus processing and select the Host Campus context (see 2.4.1.2.1 Add a role and 2.4.1.3.1 Assign a context to a role below) or modify an existing role to include Host Campus (see 2.4.1.3.2 Change the context for a role below).
2.4.1.1.7 Remove a level from the Host Institution workflow

Once the Host Institution Campus workflow has been enabled, it cannot be disabled. If you no longer wish to include campus as part of your Host Institution workflow, you must remove the Host Campus Context for any Roles in your Host Institution workflow (see 2.4.1.3.3 Remove the context for a role below) and remove all Host Institution Campus Context Data values (see 2.5.3 Remove a context below). Though Host Institution Campus is still enabled, the student will not be required to select a campus value since there are no context data values specified.

2.4.1.2 Wizard Step 2 of 4 - Selecting Roles

The second step in the workflow wizard defines the roles that are used in the transient student admission application decision process. Examples of roles are ‘Academic Advisor’ and ‘Registrar’. The administrator defines which roles approve the Transient Student Admission Application when his/her institution is the home institution and also when the institution is the host institution. The administrator also defines the order in which they process an application.

The first time an administrator enters this step, the screen looks like Illustration 12.

![Illustration 12 – Wizard Step 2 initial screen](image)

The Home Institution box lists the roles involved in the transient student admission application process when your institution is acting as the home institution for the student. The Host institution box lists the roles involved in the transient student admission application process when your institution is acting as the host institution for the student.
Student will always be defined as the first role for the home institution. This cannot be changed. Available roles are listed in the Roles box on the right side of the screen. The role names are those most commonly used by institutions. The Financial Aid Officer role will only be listed in the Roles box if the institution has signed the Financial Aid Consortium Agreement. The right and left arrow buttons on the right side of the Home Institution and Host institution boxes are used to move roles (except the Student and Financial Aid Officer roles) between the Home and Host institution lists and the Roles list, thus adding or removing roles in the workflow. The up and down arrow buttons on the left side of the Home Institution and Host institution boxes are used to change the order of roles (except the Student and Financial Aid Officer roles) in that portion of the workflow.

At least three roles must be specified for the home institution workflow so that the required sections may be assigned to roles. If the institution has signed the Financial Aid Consortium Agreement, a fourth role must be specified for the home institution workflow. The Student role is mandatory and cannot be modified. One role must be specified for the Course Approval section and one role must be specified for the Student Status section. If the institution has signed the Financial Aid Consortium Agreement, the Financial Aid Officer role is mandatory and must be the last agent in the home institution workflow. At least one role must be specified for the host institution workflow for the Host Institution Acceptance section. It is important to note that any role, except the Financial Aid Officer, can be used, even if it has already been used. A role in the Roles list can be used once, multiple times, or not at all.

When a student submits a transient student admission application, the application is sent to the role listed immediately below the Student role in the Home Institution box. After each approval, the application is sent to the role listed next in the Home Institution box. When the last role for the home institution has approved the Transient Student Admission Application, the application is sent to the host institution the student selected.

The same process is followed when the institution is acting as the host institution. When an institution receives a transient student admission application for a student from another institution, the transient student admission application is sent to the first role defined on this screen in the Host institution box. After each approval, the application is sent to the next role in the Host institution box.

If the same role is used in both the Home Institution and Host institution boxes, the same context must be assigned to the role in each box in the next step of the wizard (Wizard Step 3 of 4 – Selecting Contexts). To allow institutions to assign different contexts to similar roles, the TSAA program provides variations of roles. The variations provided are

- Academic Advisor, Program Advisor, Prep Advisor
- Academic Dean, Sponsoring Dean
- Registrar, Registrar-Main
For example, an institution has several campuses, each with a separate Registrar. When acting as the host institution, the application should be routed to the specific campus registrar but when acting as the home institution, the Registrar role functions at the Institution level. To define this workflow, add Registrar-Main to the Home Institution box and Registrar to the Host institution box. In Wizard Step 3, assign Registrar to the Host Institution Institution/Host Campus context and Registrar-Main to the Home Institution context.

2.4.1.2.1 Add a role

1. Highlight a role in the Roles box.
2. Click the ← (left arrow) button in the Home Institution or Host institution box to add that role to the Transient Student Admission Application process.
3. To add additional roles, repeat steps 1 and 2.
4. Click ‘Next’ to proceed to Step 3 of the wizard.

2.4.1.2.2 Remove a role

1. Highlight a role in the Home Institution or Host institution box.
2. Click the → (right arrow) button to remove that role from the Transient Student Admission Application process. If you highlighted the Student role or the Financial Aid Officer role, a popup displays advising you that the role cannot be removed.
   - Note that if the deleted role is assigned to any agent(s), the assignment remains in effect. This does not affect the system, but you may want to delete the assignment also.
3. To remove additional roles, repeat steps 1 and 2.
4. Click ‘Next’ to proceed to Step 3 of the wizard.

2.4.1.2.3 Change the order of roles in the lists

1. Highlight a role in the Home Institution or Host institution box.
2. Click the ▲ (up arrow) to move the role higher in the list – OR – Click the ▼ (down arrow) to move the role lower in the list.
   - If you highlight the Student role and click the ▼ (down arrow) or highlight the first agent role in the Home Institution box and click the ▲ (up arrow), a popup displays advising you that the Student role cannot be moved.
   - If you highlight the Financial Aid Officer role and click the ▲ (up arrow) or highlight the next to last agent role in the Home Institution box and click the ▼ (down arrow), a popup displays advising you that the Financial Aid Officer role must be the last Role in the workflow.
• Roles only move within their own list. To move a role between the Home Institution and Host institution boxes, remove the role from its current box and add it to the other box.

3. To change the order of additional roles, repeat steps 1 and 2.

4. Click ‘Next’ to proceed to Step 3 of the wizard.

2.4.1.2.4 Example Home Institution Workflow

1. Select ‘Academic Advisor’ in the Roles box and click the ← (left arrow) button in the Home Institution box to add the Academic Advisor role to the Home Institution box.

2. Repeat step 1 for ‘Registrar’.

3. Select ‘Admissions Officer’ from the Roles box and click on the ← (left arrow) button in the Host institution box. The screen should look like Illustration 13.

4. Click the ‘Next’ button to move to Step 3 of the wizard.

2.4.1.3 Wizard Step 3 of 4 - Selecting Contexts

The third step in the wizard selects the contexts that determine the level in the defined organizational structure at which each role operates. The context assigned to a role determines the number of agents necessary to process applications. That is, any role assigned to a Department context requires at least one agent for every department defined on the Context Data panel. Any role assigned to a School or College context
requires at least one agent for every School or College defined on the Context Data panel. One agent can be assigned to more than one context and an agent can be assigned to “Every” value for a context. A context must be selected for each role in the workflow, except the Student and Financial Aid Officer roles that are automatically assigned to the Institution level.

The screen for Wizard Step 3 shows the roles and the order selected in the previous step for both the home and host institutions (Illustration 14). For each role, except Student and Financial Aid Officer, there is a drop-down box in which to select the appropriate context for that role.

![Illustration 14 – Wizard Step 3 initial screen](image)

### 2.4.1.3.1 Assign a context to a role

1. Click the ▼ (down arrow) on the Context box next to the role to open the drop-down list.
2. Select the context.
3. Repeat steps 1 and 2 until all roles have a context selected.
4. Click ‘Next’ to proceed to Step 4 of the wizard.

### 2.4.1.3.2 Change the context for a role

1. Click the ▼ (down arrow) on the Context box next to the role to open the drop-down list.
2. Select the new context.
3. To change the context for another role, repeat steps 1 and 2.
4. Click ‘Next’ to proceed to Step 4 of the wizard.

2.4.1.3.3 Remove the context for a role

All roles must be assigned a context before the wizard can proceed to Step 4. To change the context for a role, see 2.3.1.3.2 Change the context for a role.

2.4.1.3.4 Example Home Institution Workflow

1. Click the ▼ (down arrow) on the Context box next to the Academic Advisor role in the Home Institution box and select Institution/Department.
2. Select Institution for the Registrar in the Home Institution box.
3. Select Institution for Admissions Officer in the Host institution box. The screen should look like Illustration 15.

2.4.1.4 Wizard Step 4 of 4 - Assigning Sections

The fourth step of the wizard defines the responsibility associated with each role in the approval process of a transient student admission application by associating a section type with each role. Each section contains an authorization or acknowledgement statement and an area for Comments that can be customized by the institution (see 2.4.2 Customizing the TSAA Sections for details). Some sections require additional processing by the agent. The Sections box on the right of the panel displays the available sections (Illustration 16). The table below describes the characteristics of each section.
### Section | Behavior / Restrictions
--- | ---
Course Approval | Requires an agent to approve or disapprove each course on the transient student admission application and specify how the course will be applied to the student’s degree. The agent can specify an equivalent course for approved courses. The agent may send the application to the next agent without specifically approving all courses but the final agent processing a Course Approval section must have “Yes” or “No” selected for all courses (approval values from previous Course Approval section will be automatically entered in subsequent Course Approval section but may be changed). Section must be assigned to at least one role at the home institution.

Signature Only | Requires agent to sign the application. Section may be assigned to as many roles as desired, but does not have to be used in the workflow. May be assigned at either the home or host institution.

Student Status | Requires an agent to respond to specific questions about the student’s status at the home institution and to sign the application. Section must be assigned to one role only at the home institution.

Financial Aid | Requires an agent to specify if the student is eligible for financial aid and to specify if each approved course is also eligible for financial aid. Section is automatically assigned to the Financial Aid Officer role at the home institution when the home institution has signed the Financial Aid Consortium Agreement and provided FLVC.org with the Financial Aid Officer information.

Host institution Acceptance | Requires agent to sign the application. Section must be assigned to one role only at the host institution.

When the Financial Aid, Student Status, and Host institution Acceptance sections have been assigned to a role, they are removed from the Sections box and cannot be assigned to additional roles.

The screen for Wizard Step 4 shows the roles and contexts you selected in the previous steps for both the home and host institutions. For each role, except Student and Financial Aid Officer, there is a drop-down box in which you select the appropriate section for that role. The Information box displays help about the highlighted section in the Sections box.

The ‘Add’ and ‘Remove’ buttons (Illustration 16) to the right of each Role in the Home Institution and Host institution boxes are used to assign the appropriate section. Adding a section will display the section selected in the appropriate Section box. Removing a section will remove the section from the appropriate Section box. If the removed section is Student Status or Host institution Acceptance, it will be added to the Sections box.
2.4.1.4.1 Assign a section to a role

1. Select the section name in the Sections box.
2. Click the ‘Add’ button to the right of the desired role.
   The section name is displayed in the Section box for the role.
3. To assign sections to additional roles, repeat steps 1 and 2.
4. Click ‘Finish - - >’ to close the wizard.

2.4.1.4.2 Change the section for a role

1. Click the ‘Remove’ button to the right of the desired role.
2. Select the new section name in the Sections box.
3. Click the ‘Add’ button to the right of the desired role.
4. To change the section for additional roles, repeat steps 1-3.
5. Click ‘Finish - - >’ to close the wizard.

2.4.1.4.3 Remove the section for a role

Every role must have a section assigned to close the wizard. See 2.4.1.4.2 Change the section for a role to change the section for a role.

2.4.1.4.4 Example Home Institution Workflow

1. In the Home Institution area, assign the ‘Course Approval’ section to the ‘Academic Advisor’ and the ‘Student Status’ section to the ‘Registrar’.
2. In the Host institution area, assign the ‘Host institution Acceptance’ section to the ‘Admissions Officer’. The screen should look like Illustration 17.

![Illustration 17 – Wizard Step 4 screen with assigned Sections](image)

3. Click the ‘Finish - - >’ button at the bottom of the screen to close the wizard.

The program displays the Summary of Applications panel that lists the definition of the Transient Student Admission Application process for the institution (Illustration 4).

The transient student admission application workflow logic for the institution when it is acting as the home institution and when it is acting as the host institution has been defined.

### 2.4.2 Customizing the TSAA sections

The text for each section of the transient student admission application, except the Financial Aid section, can be customized. The Summary panel lists the currently defined workflow (see Illustration 4). The ‘Edit’ button to the right of each section, except the Financial Aid section, defined under the ‘Home Institution’ and ‘Host institution’ opens a box to accept new text for the section associated with each role in the Transient Student Admission Application workflow. The titles for each area of the section and the text that the agent accepts when signing the application may be modified. The text in an agent section can be further customized with values directly from the transient student admission application. A sample Editing Section screen is shown in Illustration 18.
All editable sections include boxes to accept customized text as follows:

<table>
<thead>
<tr>
<th>Editing Section Label</th>
<th>Text to be Displayed</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main</td>
<td>Title for the section For the Student Information section, this displays on the screen above the application.</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Title for the Comments box</td>
<td></td>
</tr>
<tr>
<td>Acknowledgement</td>
<td>Title for the paragraph above the signature area</td>
<td></td>
</tr>
<tr>
<td>Acknowledgement Paragraph</td>
<td>Text for the paragraph above the signature area</td>
<td>Cannot be modified for Student Information section.</td>
</tr>
</tbody>
</table>

The Main, Comments, and Acknowledgement boxes are used to change the text that is used to label information in this section when it is presented to the agents and students.

The Acknowledgement Paragraph box contains the text in the paragraph that displays just above the signature area in this section of the application. The box accepts a combination of regular text and plug-in tags. Plug-in tags are placeholders for information that varies among applications and is replaced by the real values when the application is created. For example, to use the student’s name in the Acknowledgement Paragraph, type the #StuName# tag. On the application, the actual student’s name is displayed.

Plug-in tags are replaced by values from the completed Student Information section to customize the Acknowledgement Paragraph text. The Acknowledgement Paragraph must include either the AuthorizedSel or ApprovedSel plug-in tag to enable the agent to disapprove an application. In the Host institution Acceptance section, the NoActionSel
plug-in tag can be used in place of the AuthorizedSel and ApprovedSel plug-in tags to provide the option to require the student to provide additional information before processing can be completed. If one of these plug-in tags is not included, the agent can only sign the application, tacitly approving it, before sending it to the next agent. You may only include one authorization plug-in tag (AuthorizedSel, ApprovedSel, or NoActionSel) in a single Acknowledgement Paragraph. Plug-in tags are available in all sections. The available plug-in tags are:

<table>
<thead>
<tr>
<th>Tag Name</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>#StuName#</td>
<td>Student’s Name</td>
<td></td>
</tr>
<tr>
<td>#StuId#</td>
<td>Student’s ID</td>
<td></td>
</tr>
<tr>
<td>#Term#</td>
<td>Term in which student wishes to take course(s)</td>
<td>If Custom Terms have been defined, this is the name of the term.</td>
</tr>
<tr>
<td>#Year#</td>
<td>Year in which student wishes to take course(s)</td>
<td>If Custom Terms have been defined, this is the Start Date year value.</td>
</tr>
<tr>
<td>#Major#</td>
<td>Student’s Major</td>
<td>If Defined Organizational Structure includes the Program level, #Major# is set to the Program value. Otherwise, #Major# is blank.</td>
</tr>
<tr>
<td>#HomeInst#</td>
<td>Institution where student is enrolled</td>
<td></td>
</tr>
<tr>
<td>#TransInst#</td>
<td>Institution where student wishes to take course(s)</td>
<td></td>
</tr>
<tr>
<td>#ApprovedSel#</td>
<td>Selection box with choices to approve or not approve the application.</td>
<td>Displays a drop-down list with values ‘---Select One ---’, ‘Approved,’ ‘Not Approved.’ Do not use in the same section as the #AuthorizedSel# or #NoActionSel# tags.</td>
</tr>
<tr>
<td>#AuthorizedSel#</td>
<td>Selection box with choices to authorize or not authorize the application.</td>
<td>Displays a drop-down list with values ‘---Select One ---’, ‘Authorized,’ ‘Not Authorized.’ Do not use in the same section as the #ApprovedSel# or #NoActionSel# tags.</td>
</tr>
<tr>
<td>#NoActionSel#</td>
<td>Selection box with choices to approve, not approve, or require additional information from student before final processing.</td>
<td>Displays a drop-down list with values ‘---Select One ---’, ‘Approved,’ ‘Not Approved,’ ‘No Action – See Comments.’ Do not use in the same section as the #AuthorizedSel# or #ApprovedSel# tags. Only available in Host institution Acceptance section.</td>
</tr>
</tbody>
</table>

**NOTE:** The name for the plug-in tags must be typed, including the beginning and ending ‘#’, and cannot be selected from the list.

The #NoActionSel# plug-in tag in the Host institution Acceptance section requires the agent to provide a comment to the student specifying the additional information needed before the transient student admission application can be completely processed. This is generally used when additional paperwork must be presented to the host institution before the transient student is allowed to attend.

The Student Status and Student Information sections have additional boxes that provide further customization for those sections of the application.

The Student Status section includes the Certifications box to specify a title for the area of the section that displays questions about the student’s status at the home institution.
The Student Information section includes the following boxes to label additional areas of the application:

<table>
<thead>
<tr>
<th>Editing Section Label</th>
<th>Text to be displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Title for the Personal Information area</td>
</tr>
<tr>
<td>Address Home</td>
<td>Title for the left side address boxes NOTE: This is set to “Address while attending home institution” and cannot be changed</td>
</tr>
<tr>
<td>Address Transient</td>
<td>Title for the right side address boxes NOTE: This is set to “Address during term of attendance as a transient student” and cannot be changed</td>
</tr>
<tr>
<td>Institutions</td>
<td>Title for the Institutions area</td>
</tr>
<tr>
<td>Term</td>
<td>Title for the Term and Year area</td>
</tr>
<tr>
<td>Courses</td>
<td>Title for the Courses area</td>
</tr>
</tbody>
</table>

To customize a section:

1. Click the ‘Summary’ tab to open the Summary panel if it is not already open.
2. Click the ‘Edit’ button to the right of a section.
3. Type desired titles in the Main, Comments, and Acknowledgement boxes.
4. If this is a Student Information section, type desired titles in the Information, Institutions, Term, and Courses boxes.
   NOTE: The values for Address Home and Address Transient are set to “Address while attending home institution” and “Address during term of attendance as a transient student” respectively and cannot be changed.
5. If this is a Student Status section, type desired title for the status questions area in the Certifications box.
6. If this is not a Student Information section, type desired text in the Acknowledgement Paragraph box, including appropriate plug-in tags.
   - Click on the ‘Validate’ button to display an example of the result of combining the text with plug-in tag values. Illustration 19 shows an Acknowledgement Paragraph using the #AuthorizedSel# (authorization drop-down box), #Term# (Summer A), and #Year# (2002) plug-in tags.

Illustration 19 – Validation of customized section text

7. Click ‘Save’ to keep the changes – OR – ‘Cancel’ to discard the changes and return to the Summary panel.
2.5 **Context Data panel**

The Context Data tab allows the institution’s administrator to define the actual values of the levels specified in the Defined Organizational Structure. NOTE: Context values cannot be changed in production. Contact Florida Virtual Campus Help desk for assistance.

Context data defines actual values for the levels used in the workflow logic and is used to route applications created by students. For example, if a student selects Engineering as the School or College and the next role to process the application is Academic Dean, the TSAA program will route the application to an agent who is assigned to the Engineering School as an Academic Dean, provided there is an active agent assigned to that role and School or College. **If either the context does not exist or there is no active agent assigned to that context, the application cannot be processed.**

Agents can only be assigned to contexts that have been added on the Context Data panel. Students can only select context values that have been added on the Context Data panel. If a level in the Defined Organizational Structure does not have at least one context data value, then a transient student admission application cannot be created for the institution. The Next button is not available on the Optional Information Selection Screen (Illustration 72) until the student selects a value for each level. If there is no value to select, the student cannot proceed to the transient student admission application itself. Similarly, there must be at least one context data value for Host Institution Campus in order for a student to select a specific campus after selecting your institution as the Host Institution.

The first time an administrator clicks this tab, the Institution context data value is displayed, since that level is already set by the program, with an area for Home (Outgoing) Context Data. If the administrator has enabled the Host Institution Campus workflow, an area for Host (Incoming) Context Data is also displayed (see Illustration 20).

![Illustration 20 – Context Data initial screen](image)

Context Data values can be added manually (see 2.5.1 Add a context) or uploaded from a comma-separated value external file (see 2.5.5 Upload context data from an external file). Since the Institution context data cannot be modified or deleted, only the ‘Add’
button is available. For context data below the Institution level, the administrator can add additional levels of context data, edit existing context data values, and remove existing context data values, using the ‘Add’, ‘Edit’, and ‘Remove’ buttons to the right of each context value. However, the lowest level in the Defined Organizational Structure does not include the ‘Add’ button since there is no level below it. Illustration 21 shows five School or College context data values.

![Click to Add levels below this level or to Edit or Remove this level.]

**Illustration 21 – Defined context values below the Institution level**

If the Host Institution Campus workflow has been enabled (see **2.4.1.1.5 Enable Host Institution workflow** above), then you add specific Host Campus values using the procedure as for the Home Institution workflow Context Data values, except that you cannot add a level below the Host Campus level. Therefore, only the ‘Edit’ and ‘Remove’ buttons are displayed.

Click the ‘Legend’ button on the top of the panel to display a key to the abbreviations used on the Context Data panel as shown in the table below.

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Institution</td>
</tr>
<tr>
<td>SC</td>
<td>School or College</td>
</tr>
<tr>
<td>C</td>
<td>Campus</td>
</tr>
<tr>
<td>HC</td>
<td>Host Campus</td>
</tr>
<tr>
<td>D</td>
<td>Department</td>
</tr>
<tr>
<td>P</td>
<td>Program</td>
</tr>
</tbody>
</table>

### 2.5.1 Add a context

1. Click the ‘Context Data’ tab to open the Context Data panel if it is not already open.
2. Click the ‘Add’ button to the right of the level below which you wish to add the new context data value. This opens the ‘Adding Context Data’ box as shown in Illustration 22.
3. Select the level type in the ‘Level Type’ drop-down list. The drop-down list only contains the level that is immediately below the current level in the Defined Organizational Structure. For example, if the Defined Organizational Structure is Institution/School or College/Department/Program, then the drop-down list for a School or College context contains “Department.”

4. Type a name for the level in the ‘Level Value’ box. This value will be displayed in the drop-down list to students creating a new transient student admission application.

5. Click the ‘Save’ button to keep the context data or the ‘Cancel’ button to discard the value.

6. To add more context data values, repeat steps 2-5.

To recreate the example in Illustration 23, using the steps above:

1. Add five School or College values: ‘Engineering School,’ ‘Marine Sciences School,’ ‘School of Arts,’ ‘School of Business,’ and ‘School of Medicine.’

2. Add two Departments to the Engineering School: ‘Civil Engineering’ and ‘Mechanical Engineering.’

3. Add three Departments to the School of Business: ‘Finance,’ ‘Management Information Systems,’ and ‘Management Sciences.’
Because the lowest level in the example Defined Organizational Structure is Department, the Department rows (labeled ‘D’) in Illustration 23 do not have ‘Add’ buttons.

2.5.2 Edit a context

The name for all contexts below the Institution level can be modified. However, the new name will only be included on transient student admission applications created after the name is modified. In addition, changing a context name may prevent any existing In Progress applications from being completed, since the program will not be able to find a context that exactly matches the context on the existing transient student admission applications. If the remaining agents who need to process the application are not assigned to a context with that name, then the transient student admission application cannot be completed.

To edit a context name:

1. Click the ‘Context Data’ tab to open the Context Data panel if it is not already open.
2. Click the ‘Edit’ button next to a context to open the Editing Context Data box.
3. Type the new name in the ‘New Value’ text box.
4. Click the ‘Save’ button to keep the new name or the ‘Cancel’ button to discard your changes.

2.5.3 Remove a context

Any context data value below Institution can be deleted. However, removing a context data value may prevent existing In Progress transient student admission applications from being completed if the program cannot find an exact match for the context listed on the application. If the context being removed has context values below it in the structure, the lower level values will be deleted at the same time.

To remove context data:

1. Click the ‘Context Data’ tab to open the Context Data panel if it is not already open.
2. Click the ‘Remove’ button next to the name you wish to delete.
3. In the Deleting Context Data box, click ‘Yes’ to confirm deletion of the level value and any level values below it, or click ‘No’ to keep the context data.

2.5.4 Move a context

A context cannot be moved from one part of the Defined Organizational Structure to another part of the structure. To move a value, remove the context, and then add it below
the appropriate level. See **2.5.3 Remove a context** and **2.5.1 Add a context** for detailed instructions.

### 2.5.5 Upload context data from an external file

You can upload the Context Data values for your workflow from an external file. Once they have been uploaded, you can edit or remove context data values manually as described above. You can also replace your existing context data values by uploading a new context data file.

The external file must be in comma-separated value format with a header row and a .csv file extension. The easiest way to get a properly formatted file is to download your existing context data and edit the downloaded file. You can download a file with the header row to edit even if you have not yet defined any context data values for your institution.

#### Illustration 24 – Upload Institution Context Data

**Upload Institution Context Data**

You can upload the Context Data values for your workflow. If you have enabled the Host Institution Campus workflow, you will need to upload the context data for the Home and Host Institution workflows separately.

Uploaded data will replace ALL existing Context Data for your workflow. You can only upload data if there are no pending applications for your institution. Uploaded data must contain values for the complete workflow.

For example, if you have defined your workflow as Institution/School or College/Department, then each row in the uploaded file must contain values for Institution, School or College, and Department, or that row will not be recognized. In addition, if you have incomplete levels in your current Context Data, those levels will not be included in the downloaded file of existing Context Data.

Uploaded data must be in comma-separated value format file with a header row, and the filename must have a .csv extension. If you download your current Context Data and edit it, the file will be in the proper format for uploading.

<table>
<thead>
<tr>
<th>Select Workflow:</th>
<th>--- Select a Workflow ---</th>
</tr>
</thead>
</table>

Download Existing Context Data:  

Upload Context Data:  

Upload

#### 2.5.5.1 Generate file of current Context Data Values

To create a properly formatted file with the required header row, even if you have not yet defined any context data values:

1. Click the ‘Context Data’ tab to open the Context Data panel if it is not already open.
2. Click the ‘Upload’ button to open the Upload Institution Context Data screen.
3. Select the applicable value in the ‘Select Workflow’ drop-down list. Note that the ‘Download’ button will not be active until you select a workflow.

4. Click the ‘Download’ button. Depending upon your browser settings, the file will be saved to your preferred location or you will be prompted to select a location. The default filename is <institution name>-Contexts-Institution-<list of all lower levels in workflow>.csv, for example, Florida_University-Contexts-Institution-School or College-Department.csv.

2.5.5.2 Upload Institution Context Data

You can upload your institution’s context data at any time, as long as you do not have outstanding transient student applications that require processing. Uploaded data will replace ALL existing Context Data for your institution so be sure to include all context data in your uploaded file. The easiest way to do that is to download your existing context data (see 2.5.5.1 Generate file of current Context Data values), make and save desired changes to the downloaded file, then upload that file. The wizard will walk you through the process to upload a file. Each screen allows you to continue to the next step, go back to the initial Upload Institution Context Data screen, or cancel the upload process.

1. Click the ‘Context Data’ tab to open the Context Data panel if it is not already open.

2. Click the ‘Upload’ button to open the Upload Institution Context Data screen (see Illustration 24).

3. Select the applicable value in the ‘Select Workflow’ drop-down list. Note that the ‘Upload’ button will not be active until you select a workflow.

4. Click the ‘Upload’ button to open a File/Open dialog box.

5. Select the desired file and click ‘Open.’

6. If the file has different values than the existing Context Data, the Step 2. Confirmation screen shows a list of the value(s) that will be loaded from the file. Click the ‘Next Step’ button to proceed.

7. If there are existing Context Data values that are not included in the upload file, the Step 3. Confirm Deletion of Context Data screen lists those values that will be removed if you proceed with the upload. Click the ‘Next Step’ button to proceed.

8. The Step 4. Confirm Context Data Changes screen asks for a final confirmation to upload the Context Data values. Click the ‘Save Changes’ button to save the uploaded Context Data values and delete existing values.

2.6 Users panel

The Users tab allows the administrator to create, view, and edit users and agents for the institution. Illustration 25 shows the User Management panel before agents are added to the workflow (the administrator user is always included). Illustration 26 shows the User Management panel after agents are added to the workflow.
The User Management panel displays all defined users in alphabetical order by Last Name and, for each, the username for log on, the full name, an indication of whether the user is an administrator, an indication of whether the user is allowed to log on (Active column), the last date the agent logged in, an indication of whether the agent will receive an email notification when a transient student admission application is forwarded to the agent for processing, and the email address. A button to ‘Edit’ the user is available and, for non-administrative users, a ‘Remove’ button is also available.

Clicking the ‘Show Roles-Context’ button at the top of the panel redraws the list of users to include the assigned roles and contexts for all users, as shown in Illustration 27. This allows the administrator to confirm that all users have been assigned a role and context. (A button on the Options tab generates a report for the administrator showing unassigned roles and contexts also. See 2.7 Options panel for details). Clicking ‘Hide Roles-Context’ returns the user list to the default format shown in Illustration 26.
To complete the institution workflow, agents are created to process the transient student admission applications. In order for the workflow to move properly, the program must find agents assigned to all the roles and contexts defined in the workflow. When creating a new transient student admission application, a student selects values for each level in the defined organizational structure. If the institution has 10 schools and each school has 5 departments, then there must be fifty (50) academic advisors to deal with all the combinations a student may select. However, an agent can be assigned to more than one department which would decrease the total number of users required.

### 2.6.1 Add a user

The first step in creating agents is to add users. Users are then assigned to roles in context to become agents (see **2.6.2 Assigned Roles in Context**).

To add a user:

1. Click the ‘Users’ tab to open the Users panel if it is not already open.
2. Click the ‘Add’ button to the right of the User Management title (Illustration 26 above) to open the New User Information panel as shown in Illustration 28.
3. Enter data for the new user. All fields must be completed unless you selected ‘No’ for Email Notification (in that case, Email Address does not have to be completed):

   a. Type a name that the user will enter to log in to the TSAA program in the Username box.
   
   b. Type the same password in the Password and Password (verify) boxes. For security reasons, the password will be displayed as bullets.
   
   c. Type the user’s First Name, Middle Name (if desired), and Last Name in the appropriate boxes. Students will be able to see the agent’s name on the transient student admission application.
   
   d. Type the user’s Email Address if desired. Students and all processing agents at the home and host institutions will be able to see the agent’s email address from the transient student admission application so you may wish to use a generic address for the user. However, this email address will also be used to notify the agent that a transient student admission application is awaiting processing so the agent must be able to retrieve email from the listed address.
   
   e. Type the user’s email address again in the Confirm Email box. This must match the entry in the Email Address box or you will not be able to Save the information.
   
   f. Choose whether the user will receive Email Notifications. The default is ‘Yes.’ If you choose ‘Yes,’ the Email Address box must be completed also. If you choose ‘No,’ the agent will not receive email notifications and ‘NONE’ will be inserted in the Email Address box if it is empty.
   
   g. Enter the agent’s Phone Number, including the area code, in the boxes provided. The Area code cannot begin with “0” or “1.” Enter the extension, if desired.
   
   h. Choose the user’s Active status from the drop-down list. The default status is ‘Yes.’ If you change the Active status to ‘No,’ the agent will not be able to log in and process applications. If this is the only agent for a particular role.

### New User Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>A name that the user will enter to log in to the TSAA program.</td>
</tr>
<tr>
<td>Password</td>
<td>A password that the user will use to log in to the TSAA program.</td>
</tr>
<tr>
<td>Password (verify)</td>
<td>A verification of the password entered in the Password field.</td>
</tr>
<tr>
<td>First Name</td>
<td>The user’s first name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>The user’s middle name (if desired).</td>
</tr>
<tr>
<td>Last Name</td>
<td>The user’s last name.</td>
</tr>
<tr>
<td>Email Address</td>
<td>The user’s email address.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The user’s phone number, including the area code and extension (if desired).</td>
</tr>
<tr>
<td>Active</td>
<td>The user’s status, which determines whether they can log in and process applications.</td>
</tr>
</tbody>
</table>
and/or context, applications cannot progress through the system until an active agent is assigned.

The agents can modify some of their personal information through the TSAA Agent module. An agent can change the First, Middle, and Last Name, the Password, the Email Address, whether to receive Email Notifications, and the Phone Number.

4. Click the ‘Save’ button when you have entered all the data for the user, or the Cancel button if you do not wish to add the user.

The program adds the user to the system and displays the Editing User Information panel (Illustration 29 below) with the user’s data filled in. There is a new Assigned Roles in Context area below the user information. This area displays the roles and contexts to which the user has been assigned and allows the administrator to add or modify this information.

Illustration 29 – Editing User Information panel

- To change this user to an agent, follow the instructions in 2.6.2 Assigned Roles in Context.

- To view the User Management panel where the new user has been added, click the ‘Go back’ button. The new user is usually added to the bottom of the list; however, the list will resort alphabetically by user’s Last Name when the administrator logs out of the program.

5. To add additional users, repeat steps 2 through 4.
2.6.2 Assigned Roles in Context

To convert a user to an agent, the administrator assigns one or more roles and context levels to the user. The administrator may assign more than one combination of role and context to any user. For example, an agent may be assigned as an advisor in two departments or as an academic dean and an advisor for a single department. The administrator may not, however, assign a single role and context combination twice to a single user.

2.6.2.1 Add an Assigned Role in Context

1. If the Editing User Information panel is not displayed, click the ‘Edit’ button to the right of the user’s name on the User Management panel.

2. Click the ‘Add’ button to the right of the Assigned Roles in Context title. The Building Roles in Context box opens with the Roles that have been included in the institution’s Defined Organizational Structure.

Illustration 30 – Building Roles in Context initial view

3. Click the ▼ (down arrow) to display the roles list and select a Role for the user. The Building Roles in Context box redraws and displays drop-down lists for the contexts associated with the Role selected.

Illustration 31 – Building Roles in Context with Role selected

The Institution context automatically displays the institution name. Select the value(s) of the context that applies to this user. The drop-down list for every context includes the specific context data values you defined, as well as an option to assign the user to all context values for that level. You must assign at least one agent directly to each Role in Context to ensure that all applications can be processed. You can assign agents to all
context values for a level to establish back-up agents for processing applications by choosing the “Every” value for a level. Agents assigned to the “Every” value for a context will not be listed as “Contacts” for the students, shown on the Workflow Validation Status or Agents Validation Status reports, nor receive emails notifying them that applications require processing, except that Host Institution Campus agents assigned to “Every Host Campus” will receive email notifications.

**Note:** If you have established a Host Institution Campus workflow, you must select the “Every Host Campus” value for at least one user who will then be able to process applications created from the Online Course Catalog. A message to remind you will be displayed on the Select the Context Data area if you select a role for which “Host Campus” has been defined in the workflow. Applications where the Host Campus selected is “Distance Learning” cannot be processed except by agents who have been assigned to the “Every Host Campus” value.

Following the example, a user who is assigned the Academic Advisor role is assigned a context for both School or College and Department. You must select a value for all listed contexts to activate the Apply button.

4. Click the ‘Apply’ button to save the assignment (see Illustration 32). Alternately, click ‘Cancel’ if you do not wish to keep the assignment.

Illustration 32 – Building Roles in Context with Role and Context selected

5. Repeat steps 2 through 5 to assign additional roles and contexts to the user.

6. When you have completed your changes, click ‘Go back’ in the user information area to return to the User Management panel.

### 2.6.2.2 Remove an Assigned Role in Context

1. If the Editing User Information panel is not displayed, click the ‘Edit’ button to the right of the user’s name on the User Management panel.

2. Click the ‘Remove’ button to the right of the Context you wish to delete (Illustration 33).
3. Click ‘OK’ in the dialog box to confirm the deletion. Alternately, click ‘Cancel’ in the dialog box if you wish to keep the Assigned Role in Context.

4. Repeat steps 2 and 3 to delete other Assigned Roles in Context for this agent.

5. When you have completed your changes, click ‘Go Back’ in the user information area to return to the User Management panel. The changes to Assigned Roles in Context are automatically saved.

2.6.3 Edit user information

User information can be edited at any time. However, the username cannot be changed except by removing the user (see 2.6.4 Remove a user) and adding the user with a different username (see 2.6.1 Add a user). User information that can be modified includes the password, name, email address, whether the agent receives an email notification when a new transient student admission application is forwarded to the agent for processing, phone number, whether the user is allowed to login to the TSAA program, and the agent’s assigned roles in context. The administrator can also modify his/her own information, including the password, name, email address, phone number, and assigned roles.

To change user information:

1. If the User Management panel is not displayed, open it by clicking the ‘Users’ tab.

2. Click the ‘Edit’ button to the right of the user’s name. The Editing User Information panel displays (see Illustration 33 above).
3. Type the information you wish to change.

- To change the password, type new values in the New Password and New Password (verify) boxes. For security reasons, the password will be displayed as bullets. Although the password boxes initially display as empty, the password will not be changed unless you type new values and Save the changes.

- To change the agent’s name as displayed on applications and in reports, type new values in the First Name, Middle Name, and Last Name boxes.

- To change the agent’s email address, type a new value in the Email Address box and the same new value in the Confirm Email box.

- To change whether the agent receives email notifications, choose a new value in the Email Notifications drop-down. If the Email Notification is set to ‘Yes,’ the Email Address must be completed. The value for email notifications cannot be changed for institution administrators.

- To change the agent’s phone number, type new values in the Phone Number, and, if desired, Ext boxes.

- To change the Active status, choose the appropriate value in the drop-down list. If you change an agent’s Active status to ‘No,’ the agent will not be able to log in and process applications. (If the administrator needs to be deactivated, contact Florida Virtual Campus Help desk for assistance.)

   The agents can modify some of their personal information through the TSAA Agent module. An agent can change the First, Middle, and Last Name, the Password, the Email Address, whether to receive Email Notifications, and the Phone Number.

4. Click ‘Save’ to keep the changes.

5. If you wish to make changes to the Assigned Roles in Context, follow the instructions in 2.6.2 Assigned Roles in Context.

6. When you have completed your changes, click ‘Go back’ to return to the User Management panel.

2.6.4 Remove a user

Any user may be deleted except the administrator (If the administrator needs to be deleted, contact Florida Virtual Campus Help desk for assistance.). If an active agent is deleted, any applications that agent needed to process cannot progress through the system unless an active user is assigned to the same role and context as the deleted agent. The Remove operation cannot be undone. If the user was deleted in error, add the user and assign the appropriate role(s) and context(s).
To delete a user:

1. If the User Management panel is not displayed, open it by clicking the ‘Users’ tab.
2. Click the ‘Remove’ button to the right of the user’s name you wish to delete. The program displays a message requiring you to verify the deletion.
3. Click ‘OK’ to delete the user from the system. Alternately, click ‘Cancel’ to keep the user.

2.7 Options panel

The Options tab provides other tools to help the administrator monitor document processes. These include scheduling email notifications to help prevent bottlenecks and/or slow processing of applications, access to reporting functions on the quality of the workflow definition and the actual flow of applications through the system, viewing transient student admission applications, downloading transient student admission applications into a file, defining text that will be displayed to the student when creating a new transient student admission application, defining text that an agent can view in the Agent module, and specifying custom terms and admissions-related information and/or questions that will be displayed to the student if the student selects your institution as the Host Institution. Click the ‘Options’ tab on top of the panel to open this panel.

![Workflow Validation](image)

This option will produce a listing of all defined roles for all defined contexts. The Workflow Validation report allows administrators to verify that an active user has been assigned to all defined roles for all defined contexts. If a user has been assigned to a
role and context but has an Active status of ‘No,’ then the user cannot log into the program and cannot process applications. Only active users can process applications. This report helps an administrator ensure that all transient student admission applications can be processed.

The first area of the Options panel is labeled ‘Workflow Validation’ (Illustration 34 – Top portion of the Options panel).

To generate a Workflow Validation report:

1. Click the ‘Options’ tab to open the Options panel if it is not already open.
2. Click the ‘Validate’ button to the right of the Workflow Validation title. By default, this generates an exception report that shows roles and contexts in the definition of the workflow for which there are no active agents assigned. However, all abstract roles and contexts are listed even if there are active agents assigned to them. If there is no message in red below the actual role and context, then there is at least one active agent assigned to that role and context. The report, as shown in Illustration 35, opens in a new browser window. It may take several moments to open the report if your institution has a large number of assigned roles and contexts.

The report header displays the institution name, the date/time the report was generated, and the type of report (exceptions or full report). The top of the report body displays a legend explaining the format of the report.

**Workflow Validation Status**

<table>
<thead>
<tr>
<th>Role</th>
<th>Context (Abstract)</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of East Florida</td>
<td>User’s Last, First Name (Firstname) (Active)</td>
</tr>
</tbody>
</table>

The role and context is listed with text in red if there are no agents assigned. If an agent is assigned but is currently not active, the user’s name and Active status is displayed with text in red that there are no active users assigned.
3. To show a list of all defined roles and contexts and the assigned user, if any, click the Display Option ‘(Click here to show ALL).’ As shown in Illustration 36, all roles and contexts are listed with the name and status of users assigned to each. Text in red highlights roles and contexts where there is no assigned user.

Workflow Validation Status

<table>
<thead>
<tr>
<th>Role</th>
<th>Context (Real)</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of East Florida/Advisor</td>
<td>User’s Last, First Name (Username) (Active)</td>
</tr>
<tr>
<td>University of East Florida/Freshman</td>
<td>Agent, UEF (uf-agent) (Active)</td>
</tr>
<tr>
<td>University of East Florida/Graduate</td>
<td>There are no users assigned.</td>
</tr>
<tr>
<td>University of East Florida/Junior</td>
<td>Agent, UEF (uf-agent) (Active)</td>
</tr>
<tr>
<td>University of East Florida/Senior</td>
<td>Agent, UEF (uf-agent) (Active)</td>
</tr>
<tr>
<td>University of East Florida/Sophomore</td>
<td>Agent, UEF (uf-agent) (Active)</td>
</tr>
<tr>
<td>Registrar</td>
<td>Institution</td>
</tr>
<tr>
<td>University of East Florida</td>
<td>Agent, UEF (uf-agent) (Active)</td>
</tr>
<tr>
<td>Financial Aid Officer</td>
<td>Institution</td>
</tr>
<tr>
<td>University of East Florida</td>
<td>Agent, UEF (uf-agent) (Active)</td>
</tr>
</tbody>
</table>

Illustration 36 – Portion of Workflow Validation Status full report

To return to the exception report, click the Display Option ‘(Click here to show ONLY exceptions).’

4. To return to the Options panel, close the browser window.

2.7.2 Workflow Agent Validation

The Workflow Agent Validation report allows administrators to verify that an every agent has been assigned to at least one valid role and context. The report displays all users who have not been assigned to a role and context. Users with an Active status of ‘No,’ who cannot log into the program and cannot process applications, will be included in the report if they do not have a role and context assigned. This report helps an administrator ensure that all agents can process transient student admission applications.
To generate a Workflow Agent Validation report:

1. Click the ‘Options’ tab to open the Options panel if it is not already open.

2. Click the ‘Validate’ button to the right of the Workflow Agent Validation title (Illustration 34). This generates a report that shows agents without valid roles and contexts in the definition of the workflow, with an Edit button for each agent that allows you to assign a role in context to the agent. The report, as shown in Illustration 37, opens in a new browser window. It may take several moments to open the report if your institution has a large number of assigned roles and contexts.

The report header displays the institution name and the date/time the report was generated. The top of the report body displays guidelines for using the report.

**Agent Validation Status**

Institution: Training 2  
Date / Time: 01/05/2016 10:30:04

Click the Edit button at the right of the agent’s information to add Assigned Roles in Context. This opens the Editing User Information screen in a new window. When you have completed the assignment(s) for an agent, close the window to return to the validation report. DO NOT click the Logout button as this will log you out of the administrator’s module in all windows.

This report does not refresh automatically. To regenerate the report after you have created new assignments for agents, use the refresh function of your browser or close this report and click the “Validate” button on the Options panel.

<table>
<thead>
<tr>
<th>Agent Without Valid Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
</tr>
<tr>
<td>agent1</td>
</tr>
</tbody>
</table>

Illustration 37 – Agent Validation Status report

3. The report follows the format of the User Management panel and shows the username, full name, whether the user is an administrator, whether the user has can log in, the last date the user logged in to the Transient Student Admission Application, whether the user receives email, the email address, and an Edit button for each user.

4. To assign a role in context to a specific user, click the “Edit” button to the right of the user’s information. This opens the Editing User Information panel in a new browser window. See 2.6.2 Assigned Roles in Context for instructions.

5. To return to the Agent Validation Status report, close the browser window.

6. Repeat steps 3 and 4 for each user to which you need to assign roles in contexts.

7. To return to the Options panel, close the browser window.

### 2.7.3 Document Notification Parameters

The TSAA program provides tools that allow institutional administrators to ensure that applications are being processed in a timely fashion. The email notification feature generates messages to administrators based on options for number (document volume) of unprocessed applications or amount of time (document maturity) applications have been waiting to be processed by an agent.
The value for ‘Document Volume’ (Illustration 34) defines the maximum number of applications with a status of “Waiting” that can accumulate at an institution before the administrator is notified. Applications are considered to be “Waiting” if they do not have a status of “Cancelled,” “Completed” (includes Approved – Failed Admissions), “Not Approved,” or “No Action Comments,” and the next agent required to process the application is from the home institution (applications waiting for host institution agents are not included when counting waiting applications). For example, if the administrator selects a value of 20, then the administrator will receive an email when 20 or more applications have a status of “Waiting” for the institution.

The value for ‘Document Maturity’ (Illustration 34) defines the number of hours/days since the Last Action for a “Waiting” application. The Last Action date is updated when an agent processes the application by completing the required section and clicking the ‘Forward’ button. Applications with a Last Action date beyond the specified number of hours/days and whose next agent to process the application is from the home institution will be reported (applications waiting for host institution agents are not included when determining which applications are matured). For example, if the administrator selects a value of 1 day, then the administrator will receive an email if any applications have not been acted upon in more than 24 hours.

The TSAA program compares an institution’s applications against the threshold values for ‘Document Volume’ and ‘Document Maturity’ at the ‘Scheduled Times’ the administrator has checked. Scheduled Times are displayed in 24-hour format. For example, if the administrator checks 0900 (9:00 a.m.) and 1500 (3:00 p.m.), then the process will run twice a day and send email if there are more than the specified number of “Waiting” applications and/or the last action on a “Waiting” application was before the specified number of hours/days.

An administrator can select any available values for these parameters. If the values are too low and the scheduled times too frequent, the administrator may receive more emails than are necessary. If the values are too high and the scheduled times too infrequent, then the administrator may not be able to monitor the process in a timely manner and applications may remain in the system too long. The values you choose depend upon the number of applications your institution processes in a given period of time, the number of agents required to process each application, and how quickly the institution wishes applications to be completed. For example, if the institution expects applications to be completed in 5 days, then an application should not be left “Waiting” for a single agent for 4 days since there will probably not be sufficient time for the other agents to act upon the application within the desired 5 days.

Document notification parameters are set to a default value by FLVC. Valid ranges are also controlled to maintain a level of service that benefits every institution using the program. Please contact Florida Virtual Campus Help desk if you have questions about these levels.
To set Document Notification Parameters:

1. Click the ‘Options’ tab to open the Options panel if it is not already open.
2. Select a value in the Document Volume drop-down list (Illustration 34) for the maximum number of applications waiting to be processed by agents at your institution. The default value is 5. Click in the desired Scheduled Times box(es) to select when you would like to receive an email notification about these applications. By default no times are selected.
3. Select a value in the Document Maturity drop-down list (Illustration 34) for the maximum time an application is not acted upon before you wish to be notified. The default value is 1 day. Click in the desired Scheduled Times box(es) to select when you would like to receive an email notification about these applications. By default no times are selected.
4. Click the ‘Save’ button below the Document Maturity drop-down box to keep your changes.

2.7.4 View an Individual Student’s Applications

An administrator can view individual transient student admission applications for his/her institution. A transient student admission application can be tracked to see where it is in the workflow.

To view an individual student’s transient student admission applications:

1. Click the ‘Options’ tab to open the Options panel if it is not already open.
2. Type a student’s identification number in the Student ID box in the View an Individual Student’s Applications area (Illustration 38).
   Note: The Student ID is case sensitive. If the Student ID you typed with a capital letter did not match, try again with a lower-case letter (or vice versa). The Student ID is the ID used by the student to log in to your institution student system. It is not displayed on the transient student admission application.
3. Click the ‘View’ button.
   A new browser window opens, displaying the application in a screen similar to the screen the student sees. Illustration 80 shows the screen display except that the New Application link and the links to edit or cancel the application are not visible. The most recently created application is displayed along with a list of all applications for the student titled My Applications. Transient student admission applications can only be viewed one application at a time. If the student has more
than one application, other applications can be viewed by clicking a specific application in the My Applications list.

For In Progress applications, you can click the Contact button on the last section to see the name(s) of the agent(s) who need(s) to process the application next (Illustration 81). For completed or cancelled applications, there is no Contact button available.

4. To return to the administrator Options panel, close the browser window.

2.7.5 View a Listing of Matured Applications

In addition to the automatically generated email notifications of matured applications, the administrator can view a listing of matured applications at any time, using any available ‘Document Maturity’ value. Matured applications are applications that have not been processed by an agent at the institution for a specified amount of time. For example, the administrator might want to see a report of those documents that have not been acted upon in the last 36 hours.

To view a listing of matured applications:

1. Click the ‘Options’ tab to open the Options panel if it is not already open.
2. Select the Document Maturity value in the drop-down list in the View a Listing of Matured Applications area.

   Illustration 39 – Options panel View a Listing of Matured Applications area

3. Click the ‘View’ button. The Administrator Matured Applications Status report opens in a new browser window.

**Administrator Matured Applications Status**

   Illustration 40 – Administrator Matured Applications Status report

For each active application, the report shows the student’s ID and name, the role for the agent who needs to process the application next, the date of the last action
on the application, and the number of hours since the last action. An incoming student is indicated by ‘(I)’ following the Student Name.

- To view an individual application, click on the Student ID for the application. A new browser window opens, displaying the application in a screen similar to the screen the student sees. The most recently created application is displayed along with a list of all applications for the student titled My Applications. Illustration 80 shows the screen except that the New Application link and the links to edit or cancel the application are not available. Transient student admission applications can only be viewed one application at a time. If a native student has more than one application, other applications can be viewed by clicking a specific application in the My Applications list. If an incoming student has more than one application, you must return to the Administrator Matured Applications Status report to select another application to view. Close the browser window to return to the Administrator Matured Applications Status report.

- To view the agent(s) who need(s) to process the application next in a popup box (Illustration 81), click on the Role for the application.

4. To return to the administrator Options panel, close the report browser window.

To view a report with a different maturity value, repeat steps 2 and 3.

2.7.6 Unsubmitted Applications

An administrator for a host institution that accepts direct submission of applications into the institution’s admissions information system can view a report of all applications that were completed (processed by all agents at the home and host institutions) but not successfully submitted. This report is also used to submit the applications to the institution’s admissions information system or designate that applications will not be submitted. Administrators for institutions that do not accept direct submission of applications will not see this area on the Options panel.

To view a listing of unsubmitted applications:

1. Click the ‘Options’ tab to open the Options panel if it is not already open.

   ![Unsubmitted Applications](image)

   *Illustration 41 – Options panel Unsubmitted Applications area*

2. Click the ‘View’ button in the Unsubmitted Applications area. The Unsubmitted Applications report opens in a new browser window.
For each application, the report shows the student’s ID and name, the term and year applied for, the date the last agent approved the application, and links to view the error message from the previous unsuccessful submission and to submit the application or to designate that it will not be submitted. An incoming student is indicated by ‘(I)’ following the Student Name.

- To view an individual application, click on the Student ID for the application. A new browser window opens, displaying the application in a screen similar to the screen the student sees. The selected application is displayed along with a list of all applications for the student titled My Applications. Illustration 80 shows the screen except that the New Application link and the links to edit or cancel the application are not available. Transient student admission applications can only be viewed one application at a time. If an incoming student has more than one application, you must return to the Unsubmitted Applications report to select another application to view. Close the browser window to return to the Unsubmitted Applications report.

- To view the error message from the previous unsuccessful submission for an application, click the View error link. The error message is displayed in a popup box. Click the Close Window link to close the error message box.

- To submit the application to your institution’s admissions information system, click the Submit link. The Admissions Action column displays “Application being transmitted.” If the submission is successful, the application will be removed from the report the next time you click the Refresh report link in the report header.
• To designate that the application will not be submitted to your institution’s admissions information system, click the **Do not submit** link. The application is removed from the report.

• To update the contents of the report, click the **Refresh report** link in the report header.
  
  o Applications currently being submitted display “Application being transmitted” in the Admissions Action column.

  o Applications that have not been successfully submitted display the **Submit** and **Do not submit** links in the Admissions Action column and may display the View error link in the Error Message column.

3. To return to the administrator Options panel, close the report browser window.

### 2.7.7 View a Listing of Applications

Administrators can view a list of all applications or specific applications for their institutions. The program generates the list based upon values the administrator selects for ‘Students,’ ‘Student Last Name,’ ‘Context,’ ‘Term,’ ‘Year,’ ‘Status,’ ‘Role,’ ‘From,’ ‘To,’ and ‘Sort by’.

<table>
<thead>
<tr>
<th>View a Listing of Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide the following search parameters:</td>
</tr>
<tr>
<td>Students: <strong>--- All Student Applications ---</strong></td>
</tr>
<tr>
<td>Student Last Name: (starts with)</td>
</tr>
<tr>
<td>Context: <strong>Select Context</strong></td>
</tr>
<tr>
<td>Term: <strong>--- All Terms ---</strong> quarter/semester</td>
</tr>
<tr>
<td>Year: <strong>--- All Years ---</strong></td>
</tr>
<tr>
<td>Status: <strong>--- All Statuses ---</strong></td>
</tr>
<tr>
<td>Role: <strong>Role selection only valid for Waiting Status</strong></td>
</tr>
<tr>
<td>From: Month ▼ Day ▼ Year ▼</td>
</tr>
<tr>
<td>To: Month ▼ Day ▼ Year ▼</td>
</tr>
<tr>
<td>Sort By: Student Id ▼</td>
</tr>
<tr>
<td>View Listing</td>
</tr>
</tbody>
</table>

**Illustration 43 – Options panel View a Listing of Applications area**

To generate a report:

1. Click the ‘Options’ tab to open the Options panel if it is not already open.
2. Select which transient student admission applications to display from the Students drop-down list in the View a Listing of Applications area (Illustration 43). ‘Native Students’ are enrolled at your institution and wish to take a course at another institution. ‘Incoming Students’ are enrolled at another institution and wish to take a course at your institution. The ‘--- All Student Applications ---’ default value displays any transient student admission application that meets the other criteria. The available options for Students are

<table>
<thead>
<tr>
<th>--- All Student Applications ---</th>
<th>Applications for Native and Incoming Students completed at or awaiting processing at either your or the host institution. This is the default.</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Student Applications at Home Institution</td>
<td>Applications for Native and Incoming Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Native Student Applications at Home Institution</td>
<td>Applications for Native Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Native Student Applications at Host institution</td>
<td>Applications for Native Students completed at or awaiting processing at a host institution</td>
</tr>
<tr>
<td>Incoming Student Applications at Home Institution</td>
<td>Applications for Incoming Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Incoming Student Applications at Host institution</td>
<td>Applications for Incoming Students completed at or awaiting processing at another institution</td>
</tr>
</tbody>
</table>

3. To search for a specific student, enter at least the first character of the student’s last name in the Student Last Name box. The matching will be based on the beginning characters of the student’s last name and the more characters you enter, the smaller the list of results.

4. To select a specific context, click the ‘Select Context’ button. This opens a dialog box that prompts you to select the institution desired, and, if applicable, values for levels in the selected institution’s workflow. Drop-down lists will be displayed until you have made a selection for all levels in the workflow. All institutions for which there are applications with your institution as either the Home or Host Institution will be included in the All Institutions drop-down list. Because listed context data values will be based on existing applications, not all context data values for a given institution’s workflow will be available in the drop-down lists.
Select Search Context

Please select the specific institution and context data values you wish to search for. After you select an institution, further choices will be based on that institution’s workflow and existing student applications, and may not reflect changes an administrator has made to the institution’s workflow. When you have made all selections for the selected institution’s complete workflow, no new selection options will be displayed.

- Click the "OK" button to add the selection(s) to the search criteria.
- Click the "Clear" button to remove all selected values and return to the Options panel.
- Click the "Cancel" button to return to the Options panel without changing Context Data selections, if any.

Illustration 44 – Options panel View a Listing of Applications Select Context dialog box

5. Select a Term to display from the drop-down list. The selected value will be matched against the Term selected by the student on each transient student admission application. The option ‘Summer (All)’ will select all applications with a term of Summer A, Summer B, or Summer C. If you leave the default value ‘--- All Terms ---’ then any transient student admission application that meets the other criteria will be displayed.

6. Select a Year to display from the drop-down list. The selected value will be matched against the Year selected by the student on each transient student admission application. If you leave the default value ‘--- All Years ---’ then any transient student admission application that meets the other criteria will be displayed. The Year for a custom term is the year of its defined start date.
7. Select a Status for the applications from the drop-down list. The available options for Status are

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>--- All Statuses ---</td>
<td>Returns all applications for the institution (this is the default).</td>
</tr>
<tr>
<td>Waiting</td>
<td>The application is waiting for the next agent to process the application.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The student has removed the application from the workflow.</td>
</tr>
<tr>
<td>Completed</td>
<td>The last agent at the host institution has authorized the application.</td>
</tr>
<tr>
<td>Not Approved</td>
<td>An agent at either the home or host institution has selected “Not Authorized” or “Not Approved” for the application.</td>
</tr>
<tr>
<td>No Action Comments</td>
<td>An agent at the host institution has selected “No Action--See Comments” for the application.</td>
</tr>
<tr>
<td>Approved – Failed Admission</td>
<td>The last agent at the host institution has authorized the application but the application has not been successfully submitted to the host institution’s admissions information system. When the application is successfully submitted to the institution’s admissions information system, the status is changed to “Completed.”</td>
</tr>
</tbody>
</table>

8. If you select Waiting in the Status list, you will be able to restrict your results to a specific Role. Select the appropriate value in the drop-down list for Role.

9. Select the appropriate values in the drop-down lists for Month, Day, and Year to the right of the From: and To: labels to limit the applications selected based upon the date the application was most recently processed. These values define a range that will be matched against the date the application was last processed by a student or agent. If you select a Month, Day, or Year, then you must select a value for all three, but you do not have to select values for both the From: and To: areas. If you do not select a From: date, then the program will use 1-1-2000 for the beginning date of the range. If you do not select a To: date, then the program will not limit the ending date of the range. If you leave the default values, Month, Day, Year, for both areas, then any transient student admission application that meets the other criteria will be displayed.

10. Select the sort order for the list by choosing a value in the Sort By drop-down list. The report may be ordered by ‘Student Id’ (the default), ‘Student Name,’ ‘Last Action Date’ (when the application was last acted upon), or ‘Submitted Date’ (when the student created the application).

11. Click the ‘View Listing’ button to open a new browser window displaying the Administrator Applications Status report as shown in Illustration 45.

The report header shows the institution, the date/time the report was generated, and the values chosen for the search criteria (Students, Term, Year, Status). If values are selected in the From: and To: boxes, the date range is also shown in the header. The report in Illustration 45 is sorted by Student ID.
**Administrator Applications Status**

<table>
<thead>
<tr>
<th>Student ID</th>
<th>Student Name</th>
<th>Status</th>
<th>Role</th>
<th>Last Agent Action</th>
<th>Email</th>
<th>Confirmation</th>
<th>Application Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>011042016</td>
<td>MacDonald, Lugar (I)</td>
<td>Waiting</td>
<td>Academic Advisor</td>
<td>2016/01/04 02:41 PM</td>
<td></td>
<td></td>
<td>2016/01/04 02:39 PM</td>
</tr>
<tr>
<td>011042016</td>
<td>MacDonald, Lugar (I)</td>
<td>Waiting</td>
<td>Academic Advisor</td>
<td>2016/01/04 02:36 PM</td>
<td></td>
<td></td>
<td>2016/01/04 02:36 PM</td>
</tr>
<tr>
<td>04072013</td>
<td>Test, Test</td>
<td>Completed by</td>
<td>Registrar-Dean</td>
<td>2015/04/07 11:53 AM</td>
<td></td>
<td></td>
<td>2015/04/07 11:52 AM</td>
</tr>
<tr>
<td>04072013</td>
<td>Test, Test</td>
<td>Completed by</td>
<td>Registrar-Dean</td>
<td>2015/04/07 11:49 AM</td>
<td></td>
<td></td>
<td>2015/04/07 11:49 AM</td>
</tr>
<tr>
<td>08312015</td>
<td>Vanden, Alan</td>
<td>Waiting</td>
<td>Registrar</td>
<td>2015/08/31 01:31 PM</td>
<td></td>
<td></td>
<td>2015/08/31 01:29 PM</td>
</tr>
<tr>
<td>08312015</td>
<td>Vanden, Alan</td>
<td>Waiting</td>
<td>Registrar</td>
<td>2015/08/31 01:27 PM</td>
<td></td>
<td></td>
<td>2015/08/31 01:27 PM</td>
</tr>
<tr>
<td>08312015</td>
<td>Vanden, Alan</td>
<td>Waiting</td>
<td>Registrar</td>
<td>2015/08/31 01:25 PM</td>
<td></td>
<td></td>
<td>2015/08/31 01:25 PM</td>
</tr>
<tr>
<td>09052014</td>
<td>d’Hunter, Zahariah (I)</td>
<td>Cancellation</td>
<td>Registrar</td>
<td>2015/10/21 02:25 PM</td>
<td></td>
<td></td>
<td>2014/09/18 12:49 PM</td>
</tr>
<tr>
<td>09052014</td>
<td>d’Hunter, Zahariah (I)</td>
<td>Cancellation</td>
<td>Registrar</td>
<td>2015/10/21 02:15 PM</td>
<td></td>
<td></td>
<td>2014/09/18 12:49 PM</td>
</tr>
<tr>
<td>09052014</td>
<td>d’Hunter, Zahariah (I)</td>
<td>Cancellation</td>
<td>Registrar</td>
<td>2015/10/21 02:13 PM</td>
<td></td>
<td></td>
<td>2014/09/18 12:49 PM</td>
</tr>
<tr>
<td>09182013</td>
<td>Adler, Bryon</td>
<td>Completed by</td>
<td>Registrar-Dean</td>
<td>2015/09/21 09:07 AM</td>
<td></td>
<td></td>
<td>2015/09/21 09:33 AM</td>
</tr>
<tr>
<td>09182013</td>
<td>Adler, Bryon</td>
<td>Completed by</td>
<td>Registrar-Dean</td>
<td>2015/09/21 09:07 AM</td>
<td></td>
<td></td>
<td>2015/09/21 09:33 AM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Waiting</td>
<td>Academic Advisor</td>
<td>2015/10/04 04:36 PM</td>
<td></td>
<td></td>
<td>2015/10/04 04:36 PM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Waiting</td>
<td>Academic Advisor</td>
<td>2015/10/04 04:36 PM</td>
<td></td>
<td></td>
<td>2015/10/04 04:36 PM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Cancellation</td>
<td>Student (T)</td>
<td>2015/09/30 10:54 AM</td>
<td></td>
<td></td>
<td>2015/09/30 10:54 AM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Cancellation</td>
<td>Student (T)</td>
<td>2015/09/30 10:54 AM</td>
<td></td>
<td></td>
<td>2015/09/30 10:54 AM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Cancellation</td>
<td>Student (T)</td>
<td>2015/09/30 10:54 AM</td>
<td></td>
<td></td>
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<td>09302015</td>
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<td>2015/09/30 10:54 AM</td>
<td></td>
<td></td>
<td>2015/09/30 10:54 AM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Waiting</td>
<td>Admissions Officer</td>
<td>2015/11/20 08:40 AM</td>
<td></td>
<td></td>
<td>2015/11/20 08:40 AM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Waiting</td>
<td>Admissions Officer</td>
<td>2015/11/20 08:40 AM</td>
<td></td>
<td></td>
<td>2015/11/20 08:40 AM</td>
</tr>
<tr>
<td>09302015</td>
<td>Osborne, Joanna (I)</td>
<td>Waiting</td>
<td>Admissions Officer</td>
<td>2015/11/20 08:40 AM</td>
<td></td>
<td></td>
<td>2015/11/20 08:40 AM</td>
</tr>
</tbody>
</table>

**Illustration 45 – Administrator Applications Status report**

The report shows the student’s ID and Name, the application’s Status, the Role for the agent who needs to process the application next shown in boldface for In Progress applications or the Role for the user who last processed the application for completed applications, the date of the last action on the application, the date the application was created, and the confirmation number and date for applications successfully submitted to the host institution’s admission information system. Incoming students are indicated by ‘(I)’ following the Student Name. Roles at the host institution are indicated by ‘(T)’ following the Role name.

- To view an individual application, click on the Student ID for the application. A new browser window opens, displaying the application in a screen similar to the screen the student sees. The most recently created application is displayed along with a list of all applications for the student titled My Applications. Transient student admission applications can only be viewed one application at a time. If the student is a native student and has more than one application, other applications can be viewed by clicking a specific application in the My Applications list. Only the selected application can be viewed for an incoming student, even if the student has more than one application. To view other applications for the incoming student, select another application from the Administrator Applications Status report. Close the browser window to return to the Administrator Applications Status report.

- To view the agent(s) who need(s) to process an In Progress application next, click on a boldfaced Role for the application. This opens a popup box (see Illustration 81) listing the role, context, name, and email address for the
appropriate agent(s). Roles listed in normal font do not open a popup box since the application does not require processing and there is no agent to view.

12. Close the report browser window to return to the Options panel.

To generate a different view of your institution’s applications, repeat steps 2 through 8, selecting different search criteria.

2.7.8 Download Student Applications

The TSAA program allows an administrator to download all transient student admission applications at an institution to an electronic file. The applications are available in XML format. The file can be saved as an ASCII text file and/or opened for immediate viewing. The program creates the file based upon values the administrator selects for ‘Students,’ ‘Student Last Name,’ ‘Context,’ ‘Term,’ ‘Year,’ ‘Status,’ ‘Role,’ ‘From,’ ‘To,’ and ‘Sort by’.

To download a file to view and/or save:

1. Click the “Options” tab to open the Options panel if it is not already open.

2. Select which transient student admission applications to download from the Students drop-down list in the Download Student Applications area (Illustration 46). ‘Native Students’ are enrolled at your institution and wish to take a course at another institution. ‘Incoming Students’ are enrolled at another institution and wish to take a course at your institution. The ‘--- All Student Applications ---’
default value downloads any transient student admission application that meets the other criteria. The available options for Students are

<table>
<thead>
<tr>
<th>--- All Student Applications ---</th>
<th>Applications for Native and Incoming Students completed at or awaiting processing at either your or the host institution. This is the default</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Student Applications at Home Institution</td>
<td>Applications for Native and Incoming Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Native Student Applications at Home Institution</td>
<td>Applications for Native Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Native Student Applications at Host institution</td>
<td>Applications for Native Students completed at or awaiting processing at a host institution</td>
</tr>
<tr>
<td>Incoming Student Applications at Home Institution</td>
<td>Applications for Incoming Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Incoming Student Applications at Host institution</td>
<td>Applications for Incoming Students completed at or awaiting processing at a host institution</td>
</tr>
</tbody>
</table>

3. To search for a specific student, enter at least the first character of the student’s last name in the Student Last Name box. The matching will be based on the beginning characters of the student’s last name and the more characters you enter, the smaller the list of results.

4. To select a specific context, click the ‘Select Context’ button. This opens a dialog box that prompts you to select the institution desired, and, if applicable, values for levels in the selected institution’s workflow. Drop-down lists will be displayed until you have made a selection for all levels in the workflow. All institutions for which there are applications with your institution as either the Home or Host Institution will be included in the All Institutions drop-down list. Because listed context data values will be based on existing applications, not all context data values for a given institution’s workflow will be available in the drop-down lists.
5. Select a Term to display from the drop-down list. The selected value will be matched against the Term selected by the student on each transient student admission application. The option ‘Summer (All)’ will select all applications with a term of Summer A, Summer B, or Summer C. If you leave the default value ‘--- All Terms ---’ then any transient student admission application that meets the other criteria will be displayed.

6. Select a Year to display from the drop-down list. The selected value will be matched against the Year selected by the student on each transient student admission application. If you leave the default value ‘--- All Years ---’ then any transient student admission application that meets the other criteria will be displayed. The Year for a custom term is the year of its defined start date.

7. Select a Status for the applications from the drop-down list. The available options for Status are:
### Status and Meaning

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>--- All_statuses ---</td>
<td>Returns all applications for the institution (this is the default).</td>
</tr>
<tr>
<td>Waiting</td>
<td>The application is waiting for the next agent to process the application.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The student has removed the application from the workflow.</td>
</tr>
<tr>
<td>Completed</td>
<td>The last agent at the host institution has authorized the application.</td>
</tr>
<tr>
<td>Not Approved</td>
<td>An agent at either the home or host institution has selected “Not Authorized” or “Not Approved” for the application.</td>
</tr>
<tr>
<td>No Action Comments</td>
<td>An agent at the host institution has selected “No Action--See Comments” for the application.</td>
</tr>
<tr>
<td>Approved – Failed Admission</td>
<td>The last agent at the host institution has authorized the application but the application has not been successfully submitted to the host institution’s admissions information system.</td>
</tr>
</tbody>
</table>

8. If you select Waiting in the Status list, you will be able to restrict your results to a specific Role. Select the appropriate value in the drop-down list for Role.

9. Select the appropriate values in the drop-down lists for Month, Day, and Year to the right of the From: and To: labels to limit the applications selected based upon the date the application was most recently processed. These values define a range that will be matched against the date the application was last processed by a student or agent. If you select a Month, Day, or Year, then you must select a value for all three, but you do not have to select values for both the From: and To: areas. If you do not select a From: date, then the program will use 1-1-2000 for the beginning date of the range. If you do not select a To: date, then the program will not limit the ending date of the range. If you leave the default values, Month, Day, Year, for both areas, then any transient student admission application that meets the other criteria will be downloaded.

10. Select the sort order for the file by choosing a value in the Sort By drop-down list. The file may be ordered by ‘Student Id’ (the default), ‘Student Name,’ ‘Last Action Date’ (when the application was last acted upon), or ‘Submitted Date’ (when the student created the application).

11. Click the ‘Download Applications’ button to create the file. You will be prompted to Open the file in a text editor or Save it to your hard disk. If you choose to save the file, you will be prompted to open the file after it has been saved to your disk.

The download file has a one-line header followed by $-delimited records with 17 fields per record. See Appendix B – Download File Specifications for details on the contents of the file.
2.7.9 Student Special Information

The TSAA program allows administrators to create a message that is displayed when a student creates a new transient student admission application. The box labeled ‘Student Special Information’ accepts plain text and/or HTML code (Illustration 48). Any important information the institution wishes native students creating a new application to view regarding the transient student admission applications process can be typed in this area. The student clicks ‘Continue’ to begin the new transient student admission application process. If this box is left blank, the student immediately begins the new transient student admission application process.

![Illustration 48 – Options panel Student Special Information area](image)

2.7.9.1 Create Student Special Information

1. Type desired message in the text box, including HTML code if desired. Do not include the HTML paragraph code (<p></p>). Only include HTML code appropriate to the body of an HTML page.

2. Click ‘Save’ to keep the message.

2.7.9.2 Change Student Special Information

1. Type changes or additions to the message in the text box.

2. Click ‘Save’ to keep the changes.

2.7.9.3 Delete Student Special Information

1. Highlight all the text in the box.

2. Click the ‘Delete’ key on your keyboard.

3. Click ‘Save’ to keep the change.

Illustration 71 shows the text in Illustration 48 as it is displayed to a student creating a new application.
2.7.10 Agent Special Information

The TSAA program allows administrators to create a message that can be viewed by the institution’s agents when they login to process applications. The box labeled ‘Agent Special Information’ accepts plain text and/or HTML code (Illustration 49). Any important information the administrator wishes agents to view regarding the Transient Student Admission Applications process can be typed in this area. If the administrator enters special information, a ‘Special Information’ link is added to the agent’s Forms panel. When the agent clicks the Special Information link, the text is displayed in a popup window.

Illustration 49 – Options panel Agent Special Information area

2.7.10.1 Create Agent Special Information

1. Type desired message in the text box, including HTML code if desired. Do not include the HTML paragraph code (<p></p>). Only include HTML code appropriate to the body of an HTML page.

2. Click ‘Save’ to keep the message.

2.7.10.2 Change Agent Special Information

1. Type changes or additions to the message in the text box.

2. Click ‘Save’ to keep the message.

2.7.10.3 Delete Agent Special Information

1. Highlight all the text in the box.

2. Click the ‘Delete’ key on the keyboard.

3. Click ‘Save’ to keep the change.

Illustration 50 shows the text in Illustration 49 as it is displayed when an agent clicks the Special Information link on the Forms panel.
2.7.11 Host Institution Admission Information

The TSAA program allows administrators to provide admissions-related information that is displayed when a student selects the institution as the Host Institution on a new transient student admission application. The box labeled ‘Host Institution Admission Information’ (Illustration 51) accepts plain text and/or HTML code. Any important information the institution wishes students to view regarding the transient student admission process can be typed in this area. Text entered in this box will be displayed on a new application between the Host Institution selection box and the Term and Year selection boxes. If this box is left blank and no Host Institution Admission Questions (see 2.7.11 Host Institution Admission Questions below) are provided, the text “Selected Host Institution does not require additional information” is displayed.

2.7.11.1 Create Host Institution Admission Information

1. Type desired message in the text box, including HTML code if desired. Do not include the HTML paragraph code (<p></p>). Only include HTML code appropriate to the body of an HTML page.

2. Click ‘Save’ to keep the message.

2.7.11.2 Change Host Institution Admission Information

1. Type changes or additions to the message in the text box.

2. Click ‘Save’ to keep the message.

2.7.11.3 Delete Host Institution Admission Information

1. Highlight all the text in the box.

2. Click the ‘Delete’ key on the keyboard.

3. Click ‘Save’ to keep the change.
2.7.12 Host Institution Admission Questions

The TSAA program allows administrators to provide admissions-related questions that are displayed when a student selects the institution as the Host Institution on a new transient student admission application. The area labeled ‘Host Institution Admission Questions’ (Illustration 52) accepts up to 5 questions in plain text and/or HTML code. Text entered in this area will be displayed on a new application between the Host Institution selection box and the Term and Year selection boxes. If this area is left blank and no Host Institution Admission Information (see 2.7.10 Host Institution Admission Information above) is provided, the text “Selected Host Institution does not require additional information” is displayed.

Illustration 52 – Options panel Host Institution Admission Questions

2.7.12.1 Create Host Institution Admission Questions

1. For each question, type desired question in the text box, phrasing the question so that the student can select “Yes” or “No” to answer the question, and ending with a question mark (?). You may include HTML code if desired. Do not include the HTML paragraph code (<p></p>). Only include HTML code appropriate to the <body> of an HTML page.

2. Click ‘Save’ to keep the questions.

2.7.12.2 Change Host Institution Admission Questions

1. Type changes or additions to the question(s) in the applicable text box(es).

2. Click ‘Save’ to keep the questions.

2.7.12.3 Delete Host Institution Admission Questions

1. Highlight all the text in the applicable question box.

2. Click the ‘Delete’ key on the keyboard.

3. Click ‘Save’ to keep the change.

2.7.13 Host Institution Custom Academic Terms

The TSAA program allows administrators to provide customized terms that are displayed instead of the pre-defined terms and years when a student selects the institution as the
Host Institution on a new transient student admission application. If you choose to provide a custom term, you must enter all terms you wish students to choose from since only the enabled custom terms will be listed. Individual terms can be enabled so that they will be available for selection by students, or disabled so that they will not be shown to students. Individual terms whose end date is past will be automatically disabled. Custom terms will not be displayed to students who begin their transient student admission applications from the Online Course Catalog.

![Illustration 53 – Options panel Host Institution Custom Academic Terms Disabled](image)

### 2.7.13.1 Create Host Institution Custom Academic Terms

1. Select “Enabled” in the Enable Custom Terms drop-down list (Illustration 53), if not already selected. If you had previously saved a description for students and/or custom terms, they will be displayed again. An area to enter information for students, instructions for adding new terms, and an area to define new terms displays in the Host Institution Custom Academic Terms area.

![Illustration 54 – Options panel Host Institution Custom Academic Terms Enabled](image)
2. Enter or modify text in the Description for Students box to provide additional information about your custom terms on the transient student admission application. Do not enter HTML code as it will be displayed to the student as plain text.

3. Click the “Add New Term” button to display an area in which to enter your custom term information. The term value in the drop-down list on a student’s application will show the Term Name followed by the start and end dates in parentheses.

Illustration 55 – Options panel Host Institution Custom Academic Terms Add New Term

i. Enter a Term Name.

ii. Enter the start date for the term, using MM/DD/YYYY format. If desired, click on the calendar icon to the right of the start date box and select the date from the interactive calendar.

iii. Enter the end date for the term, using MM/DD/YYYY format. If desired, click on the calendar icon to the right of the end date box and select the date from the interactive calendar. If you enter an ending date that is today’s date or earlier, the Enabled checkmark will be removed and the custom term will not be displayed to the student.

4. Repeat step 3 to enter all desired terms.

5. Click ‘Save’ to save the custom terms information.

2.7.13.2 Change Host Institution Custom Academic Terms

1. Select ‘Enabled’ in the Enable Custom Terms drop-down list, if not already selected. If you had previously saved a description for students and/or custom terms, they will be displayed again.

2. Type changes or additions to the term(s) in the applicable text box.

3. Click ‘Save’ to keep the change(s).

2.7.13.3 Delete or Disable Host Institution Custom Academic Terms

Host Institution Custom Academic Terms can be disabled and/or deleted. If you disable the feature, only the default terms and years will be available for students to select on a transient student admission application. If you disable the feature and later enable it, previously entered custom terms will be enabled automatically if their end date is in the future. If you disable or delete individual terms, then only the enabled terms will be available for students to select on an application. If you disable terms,
you can enable them at a future date without having to enter the information again, provided the end date is in the future. If you delete terms, you will have to enter all the information again.

2.7.13.3.1 Disable Host Institution Custom Academic Terms
1. Select ‘Disabled’ in the Enable Custom Terms drop-down list.
2. Click ‘Save’ to keep the change.

2.7.13.3.2 To disable specific custom terms:
1. Click in the Enabled box before the term(s) you wish to disable to uncheck it.
2. Click ‘Save’ to keep the change(s).

2.7.13.3.3 To delete specific custom terms:
1. Click the Delete Term button at the right of the term(s) you wish to delete.
2. Click ‘OK’ on the confirmation dialog box to delete the term –OR– click ‘Cancel’ to keep the term.
3. Click ‘Save’ to keep the change(s).

2.8 Logout
Click the ‘Logout’ tab on top to log out of the TSAA program. Close the login browser window to return to the FLVC Distance Learning and Student Services web site.

2.9 Additional Automated Email
In addition to the emails you receive daily about applications that are awaiting processing at your institution (see 2.72 Document Notification Parameters above), you will receive a weekly email with a list of those agents who have not logged in to the TSAA in the past 90 days. The email provides each agent’s username, real name, and the date the agent last logged in. This will help you avoid bottlenecks in application processing and remind you of agents who should be deleted because they are no longer with your institution or part of the processing workflow.
3 Using the TSAA program – Agents

Agents move applications through the TSAA system by indicating approval, disapproval, or no action for each application that is assigned to them. The TSAA program provides the ability to decide on each request in an area of the application called a ‘section’. Each agent in the authorization queue processes one section per application for each role to which the agent is assigned. Each section gives the agent the power to move the application forward.

Some agents are authorized to decide on each course that the student requests (courses may be approved or denied individually). Some agents are authorized to verify a student’s status at the home institution. Some agents are authorized to verify the student’s and each individual approved course’s eligibility for financial aid. Other agents authorize or deny the application in its entirety.

3.1 Logging into the TSAA Agent module

Agents access the Transient Student Admission Applications program through the Florida Virtual Campus web site.

1. Navigate to the FLVC Distance Learning and Student Services web site (http://www.dlss.flvc.org/)

2. Click the Process transient student admission applications (Agents) link in the list on the right of the page to open the login screen in a new browser window.

3. Select the Institution from the drop-down list (see Illustration 56). Type the Username and Password that the administrator provided and click Login.

   NOTE: If you do not have or do not recall your Username and/or Password, use the click here if you need help with a login link to open a page that allows you to pick your institution (Illustration 57), and then displays the TSAA Administrator’s name with a link to the TSAA Administrator’s email that you may use to contact the administrator for assistance.
4. Florida Virtual Campus verifies the Agent’s username and password.

- If the username and password are not correct, the text “<Agent with this username does not exist>” displays below the Login button. Select the Institution, type the Username and Password and click Login.

- If the username and password are correct, the agent’s page opens.

If there are applications for the agent to process, the screen displays the agent’s role(s) and a list of student names below each role. The first student name in the list is highlighted with the student’s ID below the name and the application for that student is displayed on the right.

Illustration 58 – Agent view when applications require processing

If there are no applications for this agent to process, the page is blank.

Illustration 59 – Agent view when no applications require processing
The three tabs across the top of the screen allow an agent to process applications, to change personal information, to view the application(s) of any student at the institution, and to log out of the Agent module.

### 3.2 Forms panel

The default or main panel for the agent is accessed with the Forms tab. The Forms panel lists the role(s) to which the agent has been assigned and any applications the agent needs to process for each role. Applications are added to an agent’s queue based on a match between the values the student chose for the context when creating the application and the agent’s assigned context in the workflow, and a match between the role to which the agent is assigned and the next role in the workflow for the application. An application is removed from this panel, or moved to a different role area, when the agent forwards it.

If the agent has no applications to process, the screen will be blank except for the agent’s role(s) listed on the left (Illustration 59). If applications require processing, student names and submit dates are listed below the role name, the first student’s Student ID is displayed below the Student Name, and that student’s application is displayed on the right of the screen (Illustration 58). The native students are shown in a list titled ‘<Institution> Students’ under each role to which the agent is assigned. If the agent processes applications for non-native students, the incoming students are shown in a list titled ‘Incoming Students’ under each role to which the agent is assigned. An agent who processes both native and incoming transient student admission applications will see both lists when appropriate applications are in the agent’s queue. Illustration 58 shows an Academic Advisor with one application from a Florida University student and two applications from students at other institutions to process. The applications are in this part of the agent’s queue because the Academic Advisor is the next role that needs to process the applications.

Under a Role heading, the applications that need to be processed are initially listed alphabetically by Student’s last name. The agent can reorder the list(s) by submitted date by clicking the Submitted heading. The heading that is highlighted indicates the current sort criterion. Clicking a Students or Submitted heading sorts the list for each role in ascending order. In Illustration 58, the Academic Advisor list is ordered alphabetically by Student name.

Guidance for using the links in the Role(s) list to view Student IDs and applications is displayed above the Role(s) list. Additional help is provided via links above the list of roles on the left (Illustrations 58 and 59). Clicking the Overview link opens a window that describes the TSAA process and the Agent module. Clicking the Processing Application Help link opens a window that provides the steps to complete an application. If the administrator has created special information for agents, the Special Information link is displayed above the Overview link (Illustration 59). If the administrator has not created special information for agents, there is no Special Information link (Illustration 58). Clicking the Special Information link opens a window displaying the text entered by the administrator (see Illustration 50 for a sample special information window).
3.2.1 Applications

A Transient Student Admission Application is comprised of several sections that are completed by different users. A student always completes the first section. The workflow designed by the institution administrator determines the agents who will complete the remaining sections and in what order. Processing an application requires an agent to complete areas of a section, sign the application, and forward the application. Applications that require processing by an individual agent are listed on the agent’s Forms panel. The first name in the list is highlighted and that application is displayed on the right side of the panel.

In Illustration 58, an agent assigned to an Academic Advisor role has three applications waiting in the queue. The agent can click on any of the names to display that application. Once the agent has either approved or denied the application, the application will be removed from the agent’s queue, and the student’s name is removed from the list. If the agent has been assigned to multiple roles, the application may be listed in a different area of the agent’s queue. If that was the last application in the agent’s queue, then the screen will show only the agent’s role(s) as shown in Illustration 59.

3.2.1.1 Application Status

If a student has edited a previously submitted application, an Application Status area is displayed at the top of the student’s application. An agent can review the previous version of the application before processing the current version, if desired. The previous version will display the Student Information section and any sections already completed by agents. The previous version cannot be processed by the agent.

Application Status

There is a previous version of this application.

View previous application
(open in new tab or window)

Illustration 60 – Application Status area

To review the previous version of the current application, click the View previous application link in the Application Status section. The previous application will open in a new tab or window with This application was CANCELLED by the student displayed in the Application Status area.

3.2.1.2 Message Center

If an agent wishes to communicate with a student about the transient student admission application without processing it and forwarding it to the next agent, the Message Center allows the agent to exchange messages with the student. The Message Center displays
previous messages from and to the student and agents. When the agent sends a message, an email is sent to the student advising him/her that a message has been added to the application. If a student sends a message to the agent, the agent receives an email advising him/her that a message has been added to the application. The text of all messages will be shown on the application and can be seen by the student and all agents who view the application.

3.2.1.2.1 To compose a message for a student:

1. Click the Refresh button at the top right of the Message Center heading or the link to display the Compose Message box.

2. Enter message text in the Compose Message box. The maximum number of characters accepted is 2000 and the available number will be updated as the message is entered.

3. Click the Send button to display the confirmation box showing the message.

4. Click OK on the confirmation dialog to send an email to the student or Cancel to close the confirmation dialog.

3.2.1.2.2 To view a message from a student:

1. Click the Refresh button at the top right of the Message Center heading or the link to display all messages.

2. Messages are displayed in reverse date order, from the newest to the oldest. The Date of the message, the Sender of the message, and the Message text are displayed for each message. In addition, a Compose Message box is available to send an additional message to the student. If the desired message is not visible, use the scroll bar at the right side to reveal additional messages.
3.2.1.3 Sections

Once the structure of the workflow has been designed by the institution administrator, and a student has created an application, the workflow is controlled by how the agents complete the sections for the applications in their queues. Illustration 63 shows the areas that are common to all sections.

![Illustration 63 – Areas common to all sections](image)

The common areas are:

1. **Comments**: An agent can type comments in the Comments box to clarify any issue pertaining to the application. Comments become part of the application and are visible to anyone viewing the application. Comments are also included in the email a student receives when a section is processed if the student provided a valid email address.

2. **Acknowledgement Paragraph**: The Acknowledgement Paragraph contains text provided by the administrator that the agent is confirming when signing the application. The Acknowledgement Paragraph generally contains a drop-down box allowing the agent to send the application forward through the system or stop the application at this point in the process. The drop-down box shows the default text ‘--- Select One ---’ with options ‘Authorized/NOT Authorized’ or ‘Approved/NOT Approved’ depending on how the institution administrator customized the section. In the Host Institution Acceptance section, the drop-down box may have options ‘Approved/NOT Approved/No Action – See Comments.’ ‘No Action – See Comments’ is used when the application cannot be fully processed until the student provides additional information, such as paper documentation. The Comments section must be completed also in this case. Selecting this option will send the application directly to the student.

3. **Signature**: All sections include a ‘Click to Sign’ button that must be clicked before the ‘Forward’ button is activated. The date and time the agent opened the application is displayed next to the signature box. When the agent clicks the ‘Click to Sign’ button, the agent’s name is entered into the signature box automatically and the ‘Forward’ button is activated.
4. **Forward button**: Agents must click the ‘Forward’ button to complete the application and send it to the next stop in the workflow. The button only activates after the ‘Click to Sign’ button is clicked.

Three of the sections an agent might be assigned have special characteristics. These require additional actions by the agent in order to complete the application.

1. **Course Approval**: This section includes an area listing the course(s) requested by the student (see Illustration 64). Each course is preceded by an approval box and followed by a usage box. In addition, for each course there is a text box to enter a course equivalent at the home institution, if desired. Each course can be individually approved (select value of ‘Yes’) or not approved (select value of ‘No’) or, if the workflow includes multiple Course Approval sections, designated “N/A” to indicate a subsequent agent will make the course approval decision. Any course designated approved must also have a Use assigned. If at least one course is designated “Yes” or “N/A” (for workflows that include multiple Course Approval sections), the application can be authorized/approved as a whole. If no courses are designated “Yes” or “N/A” (for workflows that include multiple Course Approval sections), the agent must select ‘Not Authorized’ (or ‘Not Approved’) for the entire application. If there are multiple Course Approval sections, the course approval value(s) selected by the previous agent(s) will be automatically displayed in subsequent Course Approval sections. The agent(s) processing subsequent Course Approval sections may accept the previous agent’s decision(s), including leaving course(s) designated “N/A,” or may select a different approval value. The agent who processes the final Course Approval section, however, must ensure that all courses are designated “Yes” or “No” before the application can be forwarded.

![Illustration 64 – Transient student admission application Course Approval section](image)
The following conditions must be met to activate the ‘Forward’ button:

- If the agent clicks the ‘Click to Sign’ button and the authorization is set to ‘Authorized,’ at least one course must be set to ‘Yes’
- If the agent clicks the ‘Click to Sign’ button and the authorization is set to ‘Not Authorized,’ no courses can be set to ‘Yes’

2. **Student Status:** This section includes questions that the agent uses to indicate the status of the student at the home institution (Illustration 65). The agent specifies whether the student is regularly enrolled in a degree program, eligible to re-enroll, has a Student Health form on file confirming Measles and Rubella vaccinations, and the residency status for the student. The agent specifies the student’s status by selecting the appropriate value from each item’s drop-down list.

The **Explanation of Classifications** link in question 4 opens a popup box that provides definitions of the values in the drop-down box for the question. This link is available to all users once the Student Status section has been added to the transient student admission application. These definitions are:

**Florida Resident:** Student is coded by the Home Institution as a Florida resident and is paying in-state tuition at the Home Institution.

**Non Florida:** Student is coded by the Home Institution as a non-Florida resident and is paying out-of-state tuition at the Home Institution. This includes International Students and non-Florida Resident Aliens who are paying out-of-state tuition at the Home Institution.
Resident Alien: Student has a Resident Alien Card and is paying in-state tuition at the Home Institution.

Documented Alien: Student has a non-eligible visa and is paying out-of-state tuition at the Home Institution.

Temporary Florida Resident: Student is coded by the Home Institution as a Temporary Florida resident and is paying in-state tuition at the Home Institution. This includes Florida Prepaid students whose actual legal residence is not Florida.

Not specified: Residency is undetermined and student is paying out-of-state tuition until the residency is finalized.

3. **Financial Aid:** This section includes drop-down boxes to specify the student’s eligibility for financial aid and the eligibility for financial aid for each previously approved course (Illustration 66). The agent specifies the student’s and each course’s eligibility by selecting the appropriate value from each item’s drop-down list.

Illustration 66 – Transient student admission application Financial Aid section

3.2.2 **Process an application**

1. Under the appropriate role, click the name of the student on the left of the panel whose application you wish to process (Illustration 58) to open the application.

2. If this application has been edited by the student, there is a link allowing you to review the previous version of the application, including any previous processing comments and/or decisions by other agents. To open the previous version, click the View previous application link at the top of the application (Illustration 60). You cannot process the previous version of the application and must close it to return to the current application.
3. Scroll, if necessary, to the bottom of the application to access the section you need to complete.

4. If the section includes a special area, proceed as described below. If there is no special area, go to step 5.
   - If the section includes the Course Approval area (Illustration 64), select the appropriate approval and use values for each course from the drop-down list. Enter a course equivalent or description for approved courses, if desired. Go to step 5.
   - If the section includes the Student Status questions (Illustration 65), select the appropriate value for each question from the drop-down list. Go to step 5.
   - If the section includes the Financial Aid area (Illustration 66), select the appropriate approval value for the student and for each course from the drop-down lists. The student can be approved for financial aid with no courses approved for financial aid but if the student is not approved for financial aid, no course can be approved for financial aid. Go to step 5.

5. Type any message you would like the student to see in the Comments box. Comments become part of the application and are visible to anyone viewing the application. Comments are also included in the email a student receives when a section is processed if the student provided a valid email address. If you select ‘No Action – See Comments’ in the Authorization drop-down list (see item 6 below), you will be required to provide a comment for the student before you can forward the application.

6. If this is not a Financial Aid section, select the appropriate value in the Authorization drop-down list in the Acknowledgement Paragraph (the Financial Aid section does not include an Authorization drop-down list). If you are processing the Host Institution Acceptance section and the Authorization drop-down list includes the option ‘No Action – See Comments’ and you require additional information or paperwork from the student before you can approve the transient course(s), select ‘No Action – See Comments’ and provide an explanation for the student in the Comments box.

7. Click the ‘Click to Sign’ button to activate the ‘Forward’ button.

8. If you are the final agent at a host institution that accepts direct submission of the application into the institution’s admissions information system, additional text will be displayed between the ‘Click to Sign’ button and the ‘Forward’ button: This student's information will be automatically sent to your institution's admissions information system when you approve/authorize this application.

9. Click the ‘Forward’ button to send the application to the next agent in the workflow, or to the student if the application is not authorized, you are the last agent in the workflow, or you selected ‘No Action – See Comments’ in the Host Institution Acceptance section. If there are unread messages applicable to the current agent’s role, the agent will be prompted to view the message before sending the application forward. If you are the final agent at a host institution that accepts direct submission of the application into the institution’s admissions
information system, the program will transmit the information when you click the ‘Forward’ button. The screen redraws, showing the next application that requires processing if there is one. Otherwise, the screen shows only the help links and the agent’s role(s) (Illustration 59).

3.3 Options panel

The Options tab allows the agent to modify personal information and to view applications for all students at the institution.

3.3.1 Modify personal information

The Options panel opens with the agent’s personal information displayed (Illustration 67). Clicking the Help link on the upper right opens a window showing instructions for modifying personal information. The Username, Administrator and Active values listed cannot be changed except by the administrator. The agent can enter a new password, or change the name, email address, and phone number information. The agent can also change whether an email notification is sent when a transient student admission application is forwarded to the agent for processing. Students will be able to view the agent’s name and email address if they have an application that the agent needs to process. Additionally, the agent’s name and email address will be permanently added to the application when the agent forwards it and the student and all subsequent agents will be able to view them.

Illustration 67 – Agent Options panel My Information

To modify personal information:

1. If the My Information panel (Illustration 67) is not visible, click the Options tab.
2. Type or choose new values:
   - To change your password, type the same value in the New Password and New Password (verify) boxes. For security reasons, the password will be
displayed as bullets. Although the password boxes initially display as empty, the password will not be changed unless you type new values and Save the changes.

- To change your First, Middle, and/or Last Name, type in the appropriate box.
- To change your Email Address, type in the box. Enter the same value in the Confirm Email box.
- If you want to receive an email whenever a transient student admission application is sent to you for processing, choose ‘Yes’ in the Email Notification drop-down list. You must also complete the Email Address box. If you do not want to receive an email whenever a transient student admission application is sent to you for processing, choose ‘No’ in the Email Notification list.
- To change your Phone Number, enter new values in the boxes.

3. Click the Save button to keep your changes or the Cancel button to discard changes.

3.3.2 View a student’s applications

Agents may view the application(s) of any student at their institution, whether they processed the application or not and regardless of the status of the particular application. Clicking the Help link on the upper right opens a window describing how to use this panel.

To view an individual student’s application(s):

1. If the My Information panel (Illustration 67) is not visible, click the Options tab.

2. Click in the text area below the heading ‘Student’s Applications’ on the left side of the panel to open the ‘View an Individual Student’s Applications’ panel (Illustration 68).

3. Type a student’s ID in the Student ID box.

Note: The Student ID is case sensitive. If the Student ID you typed with a capital letter did not match, try again with a lower-case letter (or vice versa). The Student ID is the ID the student uses to log in to your institution’s student system and is not displayed on the transient student admission application. The Student ID is displayed in the Forms panel for the application that is displayed on the right of the screen. The Student ID is also displayed on the Applications Status Report (see 3.3.3 View a Listing of Applications below).
4. Click ‘View.’

A new browser window opens, displaying the application in a screen similar to the screen the student sees. Illustration 80 shows the screen except that the New Application link and the links to edit or cancel the application are not visible. The most recently created application is displayed along with a list of all applications for the student titled My Applications. Transient student admission applications can only be viewed one application at a time. If the student has more than one application, other applications can be viewed by clicking a specific application in the My Applications list.

For In Progress applications, you can click the Contact button on the last section to see the name(s) of the agent(s) who need(s) to process the application next. For completed or cancelled applications, there is no Contact button available.

To return to the agent Options panel, close the browser window.

To view another student’s application(s), repeat steps 3 and 4.

### 3.3.3 View a Listing of Applications

Agents can view a list of all applications or specific applications for their institution. The program generates the list based upon values the agent selects for ‘Students,’ ‘Student Last Name,’ ‘Context,’ ‘Term,’ ‘Year,’ ‘Status,’ ‘Role,’ ‘From,’ ‘To,’ and ‘Sort by’.

![Illustration 69 – Agent Options panel View a Listing of Applications](image)

To generate a report:

1. If the My Information panel (Illustration 67) is not visible, click the Options tab.
2. Click in the text area below the heading ‘View a Listing of Applications’ on the left side of the panel to open the ‘View a Listing of Applications’ panel (Illustration 69).

3. Select which transient student admission applications to display from the Students drop-down list. ‘Native Students’ are enrolled at your institution and wish to take a course at another institution. ‘Incoming Students’ are enrolled at another institution and wish to take a course at your institution. If you leave the default value ‘--- All Student Applications ---’ then any transient student admission application that meets the other criteria will be displayed. The available options for Students are

<table>
<thead>
<tr>
<th>--- All Student Applications ---</th>
<th>Applications for Native and Incoming Students completed at or awaiting processing at either your or the host institution. This is the default.</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Student Applications at Home Institution</td>
<td>Applications for Native and Incoming Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Native Student Applications at Home Institution</td>
<td>Applications for Native Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Native Student Applications at Host institution</td>
<td>Applications for Native Students completed at or awaiting processing at a host institution</td>
</tr>
<tr>
<td>Incoming Student Applications at Home Institution</td>
<td>Applications for Incoming Students completed at or awaiting processing at your institution</td>
</tr>
<tr>
<td>Incoming Student Applications at Host institution</td>
<td>Applications for Incoming Students completed at or awaiting processing at another institution</td>
</tr>
</tbody>
</table>

4. To select a specific context, click the ‘Select Context’ button. This opens a dialog box that prompts you to select the institution desired, and, if applicable, values for levels in the selected institution’s workflow (see Illustration 44). Drop-down lists will be displayed until you have made a selection for all levels in the workflow. All institutions for which there are applications with your institution as either the Home or Host Institution will be included in the All Institutions drop-down list. Because listed context data values will be based on existing applications, not all context data values for a given institution’s workflow will be available in the drop-down lists.

5. To search for a specific student, enter at least the first character of the student’s last name in the Student Last Name box. The matching will be based on the beginning characters of the student’s last name and the more characters you enter, the smaller the list of results.

6. Select a Term to display from the drop-down list. The selected value will be matched against the Term selected by the student on each transient student admission application. The option ‘Summer (All)’ will select all applications with a term of Summer A, Summer B, or Summer C. If you leave the default value ‘--- All Terms ---’ then any transient student admission application that meets the other criteria will be displayed.

13. Select a Year to display from the drop-down list. The selected value will be matched against the Year selected by the student on each transient student application.
admission application. If you leave the default value ‘--- All Years ---’ then any transient student admission application that meets the other criteria will be displayed. The Year for a custom term is the year of its defined start date.

7. Select a Status for the applications from the drop-down list. The available options for Status are

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>--- All Statuses ---</td>
<td>Returns all applications for the institution (this is the default).</td>
</tr>
<tr>
<td>Waiting</td>
<td>The application is waiting for the next agent to process the application.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The student has removed the application from the workflow.</td>
</tr>
<tr>
<td>Completed</td>
<td>The last agent at the host institution has authorized the application.</td>
</tr>
<tr>
<td>Not Approved</td>
<td>An agent at either the home or host institution has selected “Not Approved” for the application.</td>
</tr>
<tr>
<td>No Action Comments</td>
<td>An agent at the host institution has selected “No Action–See Comments” for the application.</td>
</tr>
<tr>
<td>Approved – Failed Admission</td>
<td>The last agent at the host institution has authorized the application but the application has not been successfully submitted to the host institution’s admissions information system. When the application is successfully submitted to the institution’s admissions information system, the status is changed to “Completed.”</td>
</tr>
</tbody>
</table>

8. If you select Waiting in the Status list, you will be able to restrict your results to a specific Role. Select the appropriate value in the drop-down list for Role.

9. Select the appropriate values in the drop-down lists for Month, Day, and Year to the right of the From: and To: labels to limit the applications selected based upon the date the application was most recently processed. These values define a range that will be matched against the date the application was last processed by a student or agent. If you select a Month, Day, or Year, then you must select a value for all three, but you do not have to select values for both the From: and To: areas. If you do not select a From: date, then the program will use 1-1-2000 for the beginning date of the range. If you do not select a To: date, then the program will not limit the ending date of the range. If you leave the default values, Month, Day, Year, for both areas, then any transient student admission application that meets the other criteria will be displayed.

10. Select the sort order for the list by choosing a value in the Sort By drop-down list. The report may be ordered by ‘Student Id’ (the default), ‘Student Name,’ ‘Last Action Date’ (when the application was last acted upon), or ‘Submitted Date’ (when the student created the application).

11. Click the ‘View Listing’ button to open a new browser window displaying the Administrator Applications Status report as shown in Illustration 45.
The report header shows the institution, the date/time the report was generated, and the values chosen for the search criteria (Students, Term, Year, Status). If values are selected in the From: and To: boxes, the date range is also shown in the header. The report in Illustration 45 is sorted by Student ID.

The report shows the student’s ID and Name, the application’s Status, the Role for the agent who needs to process the application next shown in boldface for In Progress applications or the Role for the user who last processed the application for completed applications, the date of the last action on the application, the date the application was created, the confirmation number, and the date the application was successfully submitted to the institution’s admissions information system. Incoming students are indicated by ‘(I)’ following the Student Name. Roles at the host institution are indicated by ‘(T)’ following the Role name.

- To view an individual application, click on the Student ID for the application. A new browser window opens, displaying the application in a screen similar to the screen the student sees. The most recently created application is displayed along with a list of all applications for the student titled My Applications. Transient student admission applications can only be viewed one application at a time. If the student is a native student and has more than one application, other applications can be viewed by clicking a specific application in the My Applications list. Only the selected application can be viewed for an incoming student, even if the student has more than one application. To view other applications for the incoming student, select another application from the Administrator Applications Status report. Close the browser window to return to the Administrator Applications Status report.

- To view the agent(s) who need(s) to process an In Progress application next, click on a boldfaced Role for the application. This opens a popup box (see Illustration 81) listing the role, context, name, and email address for the appropriate agent(s). Roles listed in normal font do not open a popup box since the application does not require processing and there is no agent to view.

12. Close the browser window to return to the Options panel.

To generate a different view of your institution’s applications, repeat steps 3 through 9, selecting different search criteria.

### 3.4 Logout

Click the ‘Logout’ tab on top to log out of the TSAA program. Close the login browser window to return to the FLVC Distance Learning and Student Services web site.
4 Using the TSAA program – Students

The Transient Student Admission Application program provides a web-based interface that allows students to request authorization to take courses at other institutions and to monitor the progress of transient student admission applications that have been created. The student can electronically submit applications and check on the status of their applications at any time. In addition, by providing a valid email address, the student can receive email notifications when the application is submitted, when an agent processes the application, and when the application is completed and, if applicable, successfully submitted to the host institution’s admissions information system.

4.1 Logging into the TSAA Student module

Students access the Transient Student Admission Application program through the FloridaShines web site.

2. To open the introduction page, click the Take a Course at Another School option on the Succeed in College menu.
3. Click the Start or check the status of your Transient Student Admission Application now link on the introduction page.
   • If you are already logged in to your institution for this session (such as by requesting a Transcript or Progress to Graduation), you will go directly to the Transient Student Admission Application program.
     o If you have not created any transient student admission applications, the program prompts you to begin creating an application (see 4.2 Completing a transient student admission application).
     o If you have already created transient student admission applications, the program opens to the student panel (see 4.3 The student panel).
   • If you are not already logged in to your institution for this session (either you have not logged in yet or you previously logged in and then logged out), the Institution Login page is displayed in a new browser window.
4. Select your school from the drop-down list. Type the Student Identification Number and PIN/Password and click Submit.

5. FloridaShines requests verification of the Student Identification Number and password from the institution selected.

- If the institution verifies the Student Identification Number and password and the student has not created any transient student admission applications, the program prompts the student to begin creating a transient student admission application. See 4.2 Completing a transient student admission application.

- If the institution verifies the Student Identification and password and the student has previously created transient student admission applications, a list of the existing applications displays on the left side of the screen and the first application in the list displays on the right side of the screen. See 4.3 The student panel.

- If the institution cannot verify the Student Identification Number and password, an error message displays. Select your school, type the Student Identification Number and PIN/Password and click Submit.

4.2 Completing a transient student admission application

The examples and descriptions in this manual use the standard terminology for the TSAA program. The institutions may have changed the labels shown in specific areas of the application. For example, ‘Schools’ may be labeled ‘Institutions.’ In addition, this manual presumes that all fields are required. In fact, only those fields marked by an asterisk (*) on the application are required, except that a student who does not have an
email address may check the “I do not have an email address” box at the bottom of the Personal Information area.

The student will see at least one screen before the new blank transient student admission application is displayed, depending upon how the institution’s administrator defined the workflow.

- If a student has not created any transient student admission applications and the institution’s administrator has created a special message to be displayed when a new application is created, then the student will see a window displaying the message when the student logs in (see 4.2.1. Student Special Information).

- If a student has not created any transient student admission applications and the institution’s administrator has not created a special message, then the student will see the screen prompting for a value for each of the levels in the institution’s Defined Organizational Structure when the student logs in (see 4.2.2 Optional Information Selection Screen).

- If a student has created at least one transient student admission application, the student will see the student panel when the student logs in (see 4.3 The student panel).

4.2.1 Student Special Information

If the institution administrator has created a special message for new transient student admission applications, the message is displayed when a new application is created. If the student has never created a transient student admission application, this is the first screen the student sees after logging in to the TSAA program. If the student has previously created transient student admission applications, this screen is only displayed when the student clicks the ‘New Application’ link on the student panel. Illustration 71 shows an example of an institution’s special information.

![Illustration 71 – Student Special Information](image)

After reading the information, the student clicks ‘Next’ to proceed.
4.2.2 Optional Information Selection Screen

The new transient student admission application process begins with the Optional Information Selection Screen. The contents of the screen, and the actions required of the student, depend on the Defined Organizational Structure for the Home Institution created by the institution administrator. The student is required to select a value for each level defined below the Institution level. The Institution value is chosen on the student Institution Login screen (Illustration 70). If the institution’s Defined Organizational Structure does not use any levels below Institution, then the screen shows the ‘Cancel’ and ‘Next’ buttons but no drop-down boxes.

4.2.2.1 Completing the Optional Information Selection Screen

If the institution has defined levels below Institution, this screen shows the name for each of the levels in the Defined Organizational Structure for the Home Institution with a drop-down box to allow the student to select a specific value for each level (see Illustration 72). A note below the drop-down boxes tells the student how many selections must still be made in order to display the ‘Next’ button.

1. If there are no selection boxes on the screen, click ‘Next’ to continue to the new transient student admission application or ‘Cancel’ if you do not want to submit a transient student admission application. If you clicked ‘Next,’ go to 4.2.3 General Information.

2. Select a value in the drop-down list displaying ‘--- Select a level ---’ where level is the type of level. Possible levels are ‘School or College,’ ‘Campus,’ ‘Department,’ and ‘Program.’

   • If there is another drop-down box, the screen redraws and the drop-down list for the next level is filled in with appropriate values. In addition, the text below the drop-down boxes is updated to reflect the number of remaining selections to be made.

Illustration 72 – Sample Optional Information Selection Screen initial view

3. If there are additional drop-down boxes, repeat step 2. When the final drop-down box has been completed, the screen redraws and the ‘Next’ button appears to the
right of the ‘Cancel’ button. Click the ‘Next’ button to continue to the new transient student admission application or the ‘Cancel’ button if you do not want to submit a transient student admission application.

- If you click ‘Cancel’ and have not previously completed a transient student admission application, the browser window closes. If you click ‘Cancel’ and have previously completed a transient student admission application, the program returns to the student panel (see 4.3 The student panel).

The Defined Organizational Structure used throughout this manual includes ‘School or College’ and ‘Department’. Illustration 72 shows the Optional Information Selection Screen for the sample institution. Students choose the ‘School or College’ from the first drop-down list; the program then retrieves the list of available departments for that ‘School or College’ for the second drop-down list. Then, the student picks the Department from the second drop-down list. After all selections are made, the ‘Next’ button is added when the screen redraws, as shown in Illustration 73.

4.2.3 General information

The New Application screen has several areas: header; personal information and address; institutions, term, and course; comments and signature. Most of the fields are required by the program, as noted in the top of the application (Illustration 74).

If a student tries to send an application without completing one of the required fields, the program displays a message informing the student about missing data. The student must complete the required data to submit the application.

In addition, the TSAA program ensures the value entered in the boxes is the appropriate type of value. For example, if a student types a letter in the ‘SSN’ box, a popup box informs the student that only digits are accepted. The student cannot proceed to the next area unless the correct type of value is entered.
4.2.4 Header area

The header area of the student panel for a new application includes a note indicating the asterisk symbol is used for required fields, and the application itself displays asterisks (the symbol indicating a required field) besides each required box.

**Illustration 74 – New transient student admission application header**

The top of the new application includes a link labeled ‘Help’ that opens a popup window with instructions for how to complete the Transient Student Admission Application. Additional information may be provided by the institution in the area above the ‘Help’ link (Illustration 74 shows the text “Student Section” in that area).

The header area of the student panel when there are existing applications includes a link to create a new application and, if the displayed application has not been completely processed, links to edit or cancel the displayed application.

**Illustration 75 – Existing transient student admission application header**

4.2.5 Personal Information and Address areas

The top area of the application is used for the student’s personal information and address (see Illustration 76). The name of the institution the student is attending (‘Institution’) and the values the student chose at the beginning of the process (4.2.2 Optional Information Selection Screen) are displayed automatically. If you have previously created applications, the information from the most recent application will be automatically entered in the new application. In the illustration, the application shows ‘Chipola College’ for Institution.
To complete the personal information and address areas:

1. Type your First, Middle, and Last Names, and Suffix, if applicable, in the labeled boxes if these boxes are blank or the displayed information has changed.

2. Type your Social Security Number in the SSN box if the box is blank or the displayed information is incorrect. If you do not have a Social Security Number, enter ‘000000000’ (nine zeroes).

3. Enter your Date of Birth by selecting the month, day, and year from the three drop-down lists if the boxes are blank or the information is incorrect.

4. Select your Gender from the drop-down list.

5. Click a button to select your Ethnicity if it has not been selected or the information is incorrect.

6. Click all applicable boxes to select your Race if it has not been selected or the information is incorrect.

7. Select your Nation of Citizenship and Immigration Status from the drop-down lists if it has not been selected or the information is incorrect.

8. Type the appropriate address in the left set of address boxes if it has not been entered or the information is incorrect. Only U.S. addresses are accepted.
9. Type a different address in the right set of address boxes if it has not been entered or the information is incorrect (only U.S. addresses are accepted) -OR-
   Click the checkbox above the right set of boxes to have the program automatically fill in the same address as you entered in the left set of boxes.

10. Type your phone number if it has not been completed or the information is incorrect.

11. Type your email address if it has not been completed or the information is incorrect. When you enter a new email address, a Confirm Email box will be displayed. You must enter the same value as in the Email address box in order to Send the application.

   The status of your Transient Student Admission Application will be posted to your email or can be viewed by returning to your application on FloridaShines.org.

   Contact Information:

   Email: student@fu.edu
   Confirm Email: [!!!!!!]
   ☐ I do not have an email address

Illustration 77 – Student Email area

If a valid email address is provided, you will receive email notifications at each stage as the transient student admission application is being processed. You will also receive an email notification if the host institution receives application information directly into the institution’s admissions information system, advising you of the success or failure of that submission. If the first submission does not succeed, you will receive an email notification when the host institution submits the application successfully or otherwise processes it.

4.2.6 Message Center area

The TSAA allows you to view and respond to messages that an agent at either the Home or Host Institution has sent to you. You will receive an email advising you of the presence of a new message from any agent processing your application. If there are any messages, the Message Center will display the total number of messages and allow you to view and/or send a response to the agent (Illustration 61). The text of all messages will be shown on the application and can be seen by you and all agents who view the application.

4.2.6.1 To view a message from an agent:

1. Click the Refresh button at the top right of the Message Center heading or the Click here to expand and read or compose additional messages link to display all messages.

2. Messages are displayed in reverse date order, from the newest to the oldest. The Date of the message, the Sender of the message, and the Message text are displayed for each message. In addition, a Compose Message box is available to send a message to the agent. If the desired message is not visible, use the scroll bar at the right side to reveal additional messages.
To respond to a message from an agent:

1. Click the Refresh button at the top right of the Message Center heading or the Click here to expand and read or compose additional messages link to display the Compose Message box.

2. Enter message text in the Compose Message box. The maximum number of characters accepted is 2000 and the available number will be updated as the message is entered.

3. Click the Send button to display the confirmation box showing the message.

4. Click OK on the confirmation dialog to send an email to the agent or Cancel to close the confirmation dialog.

Institutions, Host Institution Admission Information and Questions, Term, and Course areas

In this area, you select the institution you want to attend as a transient student (the host institution), the term and year in which you want to take the course(s), and the course(s) you want to take (see Illustration 78). If you opened the Transient Student Admission Application from the Online Course Catalog, the information you selected there will be automatically displayed. If the host institution you select has provided Host Institution Admissions Questions, you will need to select “Yes” or “No” for each question.

You will need to enter at least one course. For each course you must complete all fields. The maximum number of courses on a transient student admission application is four. If you need to request more than four courses for a single term and year, you will need to complete another transient student admission application. If you opened the Transient Student Admission Application from the Online Course Catalog, you will only be able to request additional courses up to the maximum of four courses.
To complete the Institutions, Host Institution Admission Information and Questions, Term, and Course areas:

1. Select the institution you want to attend from the Host institution drop-down list if the box is blank or is incorrect. The Home Institution is automatically filled in.

2. If the Host Institution you selected offers courses on separate campuses, a Campus drop-down list is displayed from which you must select the desired campus. If you initiated the application from the Online Course Catalog, “Distance Learning” is automatically selected as the campus.

3. If the Host Institution you selected has provided Admissions Information, it will be displayed in the Host Institution Admission Information and Questions area. If the Host Institution you selected has provided Admissions Questions, they will be displayed in the Host Institution Admission Information and Questions area. Select “Yes” or “No” to answer each question.

4. Select the Term and the Year you want to take the course(s) from the appropriate drop-down lists if the boxes are blank or are incorrect. If your institution has defined Custom Terms, there may be a description displayed and you will select the applicable Term/Year combination from the Term drop-down list. There is no separate Year drop-down list in this case.

NOTE: If you initiated your application from the Online Course Catalog, the term and year you selected there will be automatically entered in this area.
5. For each course you want to take (up to four total), type the Prefix, Number, Hours, and Course Title if the boxes are blank or are incorrect. This information is prefilled for all online courses selected from the Online Course Catalog and cannot be changed. Click in one or more boxes for the appropriate Use of the Course. If you wish to take more than four courses, you must complete a separate application for each set of four.

4.2.8 Comments, Financial Aid, and Signature areas

This is the last area of a new transient student admission application a student must complete (See Illustration 79). In this area, the student may enter comments that will be included with the application and can be seen by everyone who processes or views the application (TSAA administrators at the student’s home and host institutions and agents at the student’s home institution can view the application even if they did not personally process it). There may be a Financial Aid area to complete. The application also includes the student ‘Acknowledgement Paragraph’ statement about the application and the process. Clicking the ‘Click to Sign’ button acknowledges receipt of this notification:

I understand that if I register for courses not approved herein, they may not be accepted by my home institution. I also understand that this application is for the term selected above and that a new application must be submitted for each subsequent term or for any courses taken as a transient student. I also authorize the Host Institution to release an official transcript to the Home Institution upon completion of the academic semester.

To complete the Comments, Financial Aid, and Signature areas:

1. If desired, type comments in the box labeled ‘Student Comments.’ Everyone who processes or views the application will be able to view the Comments.

2. If your Home and selected Host Institutions are sharing financial aid information for your transient course(s), the Financial Aid section with two financial aid questions will be displayed (see Illustration 79). You must select “Yes” or “No” for each question before you can submit the application.

3. Click the ‘Click to Sign’ button.

Your name is copied into the box to the right of the ‘Click to Sign’ button.

4. If you have selected a host institution that accepts submissions directly from the Transient Student Admission Application, you will see an additional notification between the Click to Sign area and the ‘Send’ button to inform you that your information will be automatically submitted to the host institution’s admissions information system. Clicking the ‘Send’ button acknowledges receipt of this notification:

I understand that this application is for transient admission to a Florida institution and is valid only for the term indicated. I understand I am responsible for meeting applicable application deadlines for the host institution. I also understand that the information above will be automatically
sent to the host institution’s admissions information system when the Transient Student Admission Application has been approved.

5. Click the ‘Send’ button to submit the application.

If any of the required data is missing, an alert box warns you of the missing data that must be filled in. (If you checked the check box for the right side address boxes and required data is missing from the left side address boxes, the alert box will also report the data missing from the right side boxes.)

– OR –

Click the ‘Reset’ button to erase all the entered values so that you can enter new values. If you click Reset, you need to fill out the entire application again before submitting it.

– OR –

Click the ‘Cancel’ button, and the ‘OK’ button on the confirmation dialog box, to close the application and return to the My Information panel (if you have previously created applications) or to the Take a Course at Another School web page (if you have not previously created an application).

Illustration 79 – Student Comments and Signature areas with Financial Aid questions

**4.3 The student panel**

The student panel is available after the student submits an application and when the student logs in to the TSAA program and already has submitted applications.
This panel is used by students to view and track the progress of their applications, to edit or cancel applications, and to create new applications. The list labeled ‘My Applications’ shows the date/time the application was created and the current status of all existing applications (see Illustration 80). The right side of the screen displays the application that is highlighted in the ‘My Applications’ list. The ‘New Application’ link is used to create a new transient student admission application. In Illustration 80, the student has one transient student admission application that is waiting to be processed by an Academic Advisor.

### 4.3.1 View an application

To view an application, click its Submitted On date in the ‘My Applications’ list. The application will display on the right side of the screen.

Existing applications include all completed sections. Each section shows the agent who processed the application, any comments the agent entered, and the action the agent took. If the application is not completed, then the final section displayed is the section currently awaiting processing by an agent. The student can click the ‘Contact’ button on that section to see the name(s) and email address(es) (if available) of the agent(s) who need(s) to process the application. Illustration 81 shows a sample Contact information box.
If you have received messages from any institution agents, these will be displayed in the Message Center. You cannot create a message unless an agent has sent you at least one message.

If you selected a host institution that accepts direct submission of information into the institution’s admissions information system, your completed applications will end with the “Host institution Admissions section” that will provide details about the submission.

- If the submission was successful, the area will include a Confirmation number from the host institution, the date the application was submitted, and optional Additional Information from the host institution.

- If the submission was unsuccessful, the area will notify you that the host institution will submit your application at a later time.

- If the host institution chooses not to transmit your data directly into the institution’s admissions information system, the area will notify you that the host institution has processed your application, with the date the institution made that designation.

### 4.3.2 Check status of applications

The ‘My Applications’ list displays the status of each application the student has created. The possible statuses and their meanings are

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td>The application is waiting for the next agent to process the application.</td>
</tr>
</tbody>
</table>
### Transient Student Admission Application

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cancelled</strong></td>
<td>The student has removed the application from the workflow by clicking the Cancel link or by editing an In Progress application.</td>
</tr>
<tr>
<td><strong>Approved</strong></td>
<td>The last agent at the host institution has authorized the application. The application is removed from the workflow. The application may still be waiting to be submitted to the host institution’s admissions information system.</td>
</tr>
<tr>
<td><strong>Not Approved</strong></td>
<td>An agent at either the home or host institution has selected “NOT Authorized” or “NOT Approved” for the application. The application is removed from the workflow.</td>
</tr>
<tr>
<td><strong>No Action Comments</strong></td>
<td>An agent at the host institution has selected “No Action--See Comments” for the application. The application is removed from the workflow. The student must comply with the provided Comments to complete the Transient student admission application process.</td>
</tr>
</tbody>
</table>

### 4.3.3 Cancel an application

A student can cancel an application to deactivate it and remove it from the transient student admission application process. An application can be cancelled until the final agent at the host institution has approved, or an agent at either the home or host institution has disapproved, the application. Once an application is cancelled, it cannot be reactivated. The student must create a new transient student admission application.

To cancel an application:

1. In the My Applications list, click the Submitted On date of the In Progress application you wish to cancel to open the application.
2. Click the ‘CANCEL this application’ link at the top of the displayed application (see Illustration 80).
3. Click ‘OK’ in the confirmation dialog box to deactivate the application or ‘Cancel’ to keep the application active. If you click ‘OK’ the application will show ‘Cancelled’ status in the ‘My Applications’ list and the top of the application displays ‘(This application was CANCELLED by the student.)’ in red.
4. If you have provided an email address, you will receive a notice of cancellation.

### 4.3.4 Edit an application

A student can edit an application to make corrections and restart the transient student admission application process with the new version of the application. The previous version of the application will be cancelled automatically when the edited version is submitted. An application can be edited until the final agent at the host institution has approved, or an agent at either the home or host institution has disapproved, the application. Once an application is edited and cancelled, it cannot be reactivated. The edited version of the application will be active in the process.
To edit an application:

1. In the My Applications list, click the Submitted On date of the In Progress application you wish to edit to open the application.
2. Click the ‘EDIT this application’ link at the top of the displayed application (see Illustration 80).
3. Click ‘OK’ in the confirmation dialog box to confirm that you wish to make changes to the application. Click ‘Cancel’ to close the dialog box and remain on the student panel.
4. You will see the Student Special Information screen if applicable for your Home Institution and will proceed as if you were creating a new application. However, all of the information that you had previously entered in the existing application will be prefilled, except that you must answer any Host Institution Admission Questions and Financial Aid Questions again. See 4.2 Completing a transient student admission application above for detailed instructions.
5. Make desired changes to the application. You can change everything on an application, except your Home Institution and course information for courses that were selected with the Online Course Catalog. You can change the Use of the Course for courses from the Online Course Catalog.
6. Click ‘Send’ to submit the edited application.
   − OR −
   Click ‘Cancel’ to cancel the editing process and keep your current application active.
7. Click ‘OK’ in the confirmation dialog box to deactivate the existing application and submit the edited application or ‘Cancel’ to continue editing the application.
   - If you click ‘OK’ the existing application will show ‘Cancelled’ status in the ‘My Applications’ list and the top of the application displays ‘(This application was CANCELLED by the student.)’ in red.
8. If you click ‘OK’ and you have provided an email address, you will receive notices of the cancellation of the existing application and submission of the edited application, as well as notifications as each agent processes the application.

4.3.5 Create a new application

Click the ‘New Application’ link at the top right of the displayed application to create a new application. See 4.2 Completing a transient student admission application above for detailed instructions.
Appendix A – Glossary of Terms

Acknowledgement Paragraph – A statement that the student or agent accepts by clicking the Click to Sign and Send or Forward buttons. For agent sections, the statement is provided by the institution.

Administrator – A user with authority to define an institution’s workflow and assign other users to roles and contexts.

Agent – A user who has been assigned a role and context that provides authority to process transient student admission applications.

Agent Special Information – A screen that displays when an agent clicks the Special Information link on the Forms panel. The administrator defines the screen’s contents in plain text and/or HTML formatted text.

Approved – Failed Admissions application – A transient student admission application that has been approved by all agents at the home and host institutions, but was not successfully submitted to the host institution’s admissions information system. The administrator can Submit the application later.

Cancelled application – A transient student admission application that has been cancelled by the student before it has been denied by any agent or approved by the final agent at the host institution.

Completed application – A transient student admission application that has been approved by all agents at the home and host institutions.

Context – A level in the Defined Organizational Structure at which an agent is allowed to act. Contexts are associated with Roles in the workflow. For example, the Defined Organizational Structure has four levels as follows:

- Institution
  - School or College
    - Department
      - Program

Then the four abstract contexts are:

- Institution
- Institution/School or College
- Institution/School or College/Department
- Institution/School or College/Department/Program

An actual context for the third level could be

- University/College of Engineering/Department of Computer Science

Course Approval section – Section that contains a means to approve or disapprove of each course that the student has requested, to indicate the Use for approved courses, and
to indicate the equivalent course at the home institution. This section must be used at least once in the Home Institution workflow of a transient student admission application.

**Defined Organizational Structure** – An ordered set of levels that form a hierarchy that is the basis of the TSAA workflow. The top of the hierarchy is a single value (Institution) but other layers in the hierarchy may have multiple values. The Defined Organizational Structure provides a Context in which each Role functions. It is used to implement a workflow with institution-specific data values for levels, contexts, roles, and sections.

**Document Maturity** – Amount of time since an agent at the home institution has acted on the transient student admission application.

**Document Volume** – Number of transient student admission applications awaiting processing by an agent at the home institution.

**Financial Aid Section** – Section that contains a means to approve or disapprove of financial aid for the student and each approved course that the student has requested. This section is used exactly once, is the last section in a transient student admission application Home Institution workflow, and is automatically associated with the Financial Aid Officer role in the workflow of a transient student admission application.

**Home Institution** – The institution the student is currently enrolled to attend, where the student intends to get a degree.

**Host Institution** – The institution at which a student, currently enrolled at another institution, is seeking approval to take courses.

**Host Institution Acceptance section** – Section that contains a statement from the host institution to acknowledge receipt of the Transient Student Admission Application and accept the student under conditions stated by the host institution. This section must be used exactly once in the Host institution workflow of a transient student admission application.

**Host Institution Admission Information and Questions area** – Area of an application that may contain a statement from the host institution about the institution’s admissions process and/or up to five (5) admissions-related questions that the student must answer. The information and/or questions are only included if the host institution selected by the student on the application provided admissions information and/or questions.

**Host Institution Admissions section** – Final section of completed application that contains a statement from the host institution about the success of the direct submission of the application into the institution’s admissions information system. This section is only included if the host institution selected by the student on the application accepts direct submission of applications into the institution’s admissions information system.

**In Progress application** – A transient student admission application that is still in the workflow, awaiting processing by one or more agents.
**Incoming Student** – A student enrolled at another institution who wishes to take courses at your institution.

**Level** – Layer in the ordered hierarchy of the Defined Organizational Structure. Except for Institution, a particular level may be in the same layer as other levels or may be above or below other layers (Institution is always alone as the top layer of the hierarchy). The levels are Institution, School or College, Campus, Department, and Program. For example, if the Defined Organizational Structure of the institution includes Campus, a Registrar might be assigned at the level of a Campus or might be assigned at the level of an Institution. Roles at the home or host institution can only be assigned to levels in the institution’s Defined Organizational Structure.

**Matured application** – A transient student admission application that has not been acted upon by any agent for a specified period of time.

**Native Student** – A student enrolled at your institution who wishes to take courses at another institution.

**No Action – See Comments application** – A transient student admission application that has been conditionally approved by the final agent at the host institution. The student’s application is not approved until the student complies with the instructions from the agent but the application is removed from the workflow.

**Not Approved application** – A transient student admission application that has been denied by an agent at either the home or host institution.

**Optional Information Selection Screen** – Screen(s) on which a student provides specific values for school, department, program, etc. as required by the institution. There is a selection required for each level in the Defined Organizational Structure. If the Defined Organizational Structure only uses the Institution level, the student does not have to make any selections before proceeding to the new transient student admission application.

**Pending** – Status used in the XML file of downloaded transient student admission applications. Same as status of Waiting in the administrator or agent interface or In Progress in the student interface.

**Plug-in tag** – Placeholder for information that varies among applications and is replaced in the agent’s Acknowledgement Paragraph by the real value(s) when an individual transient student admission application is created. Plug-in tags are identified by leading and following ‘#’ in the text.

**Role** – A name that indicates the general responsibility of an agent in the workflow process. The roles are Student, Academic Advisor, Academic Dean, Admissions Officer, Department Head, International Student Officer, Prep Advisor, Program Advisor, Registrar, Registrar-Main, Sponsoring Dean, and Transcript Evaluator. A role’s position in the workflow determines the order in which that agent receives and processes the application. For example, the agent for the third role in the workflow would receive the
application after the first 2 users (the Student and the first agent) process the application and would forward the application to the agent for the fourth role in the workflow.

**Section** – An area of a transient student admission application that provides a means to forward the application to the next agent in the workflow. A section is predefined in terms of the data that is entered, and also in terms of the number of sub-sections into which it is divided. One section requires an agent to authorize or not authorize individual courses as well as the application itself or to forward the application without specifically authorizing/not authorizing courses and the application. One section requires the agent to answer specific questions about the student’s status. Other sections only require an agent to sign the application and forward it to the next agent in the workflow.

**Signature Only section** – Section that contains only an institution-determined authorization or acknowledgement statement and a comments area. An agent who is assigned to this section can only sign and forward the application to the next agent in the workflow. This section may be used any number of times in the workflow of a transient student admission application.

**Student** – An individual currently enrolled at an institution who is expecting to receive a degree at that institution.

**Student Information section** – Section that contains identifying information about the student completing the application and term, year, and institution information for the course(s) the student wishes to take. This section is used exactly once, is the first section in a transient student admission application, and is automatically associated with the Student role in the workflow of a transient student admission application.

**Student Special Information** – A screen that displays when a student creates a new transient student admission application. The administrator defines the screen’s contents in plain text and/or HTML formatted text.

**Student Status section** – Section that contains information about the status of the student at the home institution, such as eligibility to re-enroll and information on required immunizations. This section must be used exactly once in the Home Institution workflow of a transient student admission application.

**Transient student admission application** – The form, either electronic or paper, submitted by a student at his/her current institution to seek approval to take courses at another institution that will apply toward the student’s degree requirements.

**Transient Student** – A student enrolled at one institution who wishes to take, or is taking, courses at another institution.

**Transient Student Admission Application** – A transient student admission application that is created and completed, and may be submitted to an institution’s admissions information system, electronically.
User – A person who logs in to the TSAA program in order to complete one or more components of the TSAA process. The three types of users are administrator, agent, and student.

Waiting – Applications that do not have a status of Cancelled, Completed, or Not Approved, when the next agent required to process the application is from the home institution.

Wizard – Set of panels in the administrator module that an administrator uses to define the institution’s workflow.

Workflow – The path a Transient Student Admission Application must follow through the system for processing. The workflow is defined as an ordered set of Roles associated with Contexts, based on the institution’s Defined Organizational Structure. The transient student admission application is comprised of Sections that are associated with Roles that are associated with Contexts. An application must proceed from the first role through to the final role in the home institution workflow and then from the first role through to the final role in the host institution workflow. The Student Information section is always the first section and is completed by the Student role in the context of the Institution. Other sections, roles, and contexts can be defined by the institution administrator as desired, except that certain sections must always be present.
Appendix B – Download File Specifications

Each field, including the last field in the record, is followed by ‘$’. The header is “Number of Students: n” where n is the number of records in the file. Fields for each record are as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Student ID</td>
<td>Student ID</td>
<td>Student ID</td>
</tr>
<tr>
<td>2. Student Name</td>
<td>Student Name as Last name, First name [Middle name][, Suffix]</td>
<td>Indicates if student is requesting to take a course at your institution (incoming) or is a native student; ‘(I)’ Else: blank</td>
</tr>
<tr>
<td>3. Incoming Student Indicator</td>
<td>Indicates if student is requesting to take a course at your institution (incoming) or is a native student</td>
<td>If incoming student: ‘(I)’ Else: blank</td>
</tr>
<tr>
<td>4. TF ID</td>
<td>internal ID number</td>
<td>FICE code for student’s home institution</td>
</tr>
<tr>
<td>5. Home Institution FICE code</td>
<td>FICE code for institution at which student is requesting to take course(s)</td>
<td>FICE code for institution at which student is requesting to take course(s)</td>
</tr>
<tr>
<td>6. Host Institution FICE code</td>
<td>FICE code for institution at which student is requesting to take course(s)</td>
<td>FICE code for institution at which student is requesting to take course(s)</td>
</tr>
<tr>
<td>7. Term</td>
<td>Term in which student is requesting to take course(s)</td>
<td>Term in which student is requesting to take course(s)</td>
</tr>
<tr>
<td>8. Year</td>
<td>Year in which student is requesting to take course(s)</td>
<td>Year in which student is requesting to take course(s)</td>
</tr>
<tr>
<td>9. Date Submitted</td>
<td>Date application submitted by student as CCYY/MM/DD HH:MM AM</td>
<td>Date application submitted by student as CCYY/MM/DD HH:MM AM</td>
</tr>
<tr>
<td>10. Date Last Action</td>
<td>Date student or last agent completed a section of the application as CCYY/MM/DD HH:MM AM</td>
<td>Date student or last agent completed a section of the application as CCYY/MM/DD HH:MM AM</td>
</tr>
<tr>
<td>11. Application Status</td>
<td>Status of application in the workflow. Values are Waiting for, Completed by, Cancelled by, Not Approved by</td>
<td>Status of application in the workflow. Values are Waiting for, Completed by, Cancelled by, Not Approved by</td>
</tr>
<tr>
<td>12. Role</td>
<td>The role of the next agent who needs to process the application, or the last agent or Student if the application is completed (this includes Approved, Cancelled, and Not Approved forms)</td>
<td>The role of the next agent who needs to process the application, or the last agent or Student if the application is completed (this includes Approved, Cancelled, and Not Approved forms)</td>
</tr>
<tr>
<td></td>
<td>If TF Status=Waiting: Role of next agent who needs to process application</td>
<td>If TF Status=Waiting: Role of next agent who needs to process application</td>
</tr>
<tr>
<td></td>
<td>Else If TF Status=Cancelled by: ‘Student’</td>
<td>Else If TF Status=Cancelled by: ‘Student’</td>
</tr>
<tr>
<td></td>
<td>Else: Role of last agent who processed application</td>
<td>Else: Role of last agent who processed application</td>
</tr>
<tr>
<td>13. Context Next Agent</td>
<td>Values for levels in an institution workflow (i.e., University of East Florida/College of Arts and Sciences/Department of Mathematics)</td>
<td>Values for levels in an institution workflow (i.e., University of East Florida/College of Arts and Sciences/Department of Mathematics)</td>
</tr>
<tr>
<td></td>
<td>If TF Status=Waiting: Context for next agent who needs to process form</td>
<td>If TF Status=Waiting: Context for next agent who needs to process form</td>
</tr>
<tr>
<td></td>
<td>Else: blank</td>
<td>Else: blank</td>
</tr>
<tr>
<td>14. Host Institution Agent Indicator</td>
<td>Indicates if the agent who needs to process the application is at the host institution or your institution</td>
<td>Indicates if the agent who needs to process the application is at the host institution or your institution</td>
</tr>
<tr>
<td></td>
<td>If host institution agent: ‘(T)’</td>
<td>If host institution agent: ‘(T)’</td>
</tr>
<tr>
<td></td>
<td>Else: blank</td>
<td>Else: blank</td>
</tr>
</tbody>
</table>
15. Host Institution Admissions Status
   Indicates if the host institution has processed the application for admissions
   If application successfully submitted to admissions system: Confirmation number
   Else: blank

16. Host Institution Admissions submitted date
   Date the host institution processed the application for admissions
   If application successfully submitted: date application was processed as CCYY/MM/DD HH:MM AM | PM
   Else: blank

17. Application in XML format
   Actual Transient Student Admission Application. For Data Elements and Document Type Definition (DTD), contact the FLVC Help desk.

The DTD declaration included in the download file will be specific to your institution’s Defined Organizational Structure for the ParentSchool and TransientSchool elements.

**Sample download file:**

Number of Students: 1
012345678$Blackwood, Gawain, Jr.$$722$9003950$001481$Fall$2012$2012/05/12 09:06 AM$2012/05/12 09:07 AM$Waiting for$Academic Advisor$University of East Florida/College of Arts and Sciences/Department of Mathematics$$<?xml version='1.0' encoding='UTF-8'?><!DOCTYPE TFDocument [<!ELEMENT TFDocument (ParentSchool, TransientSchool )><!ATTLIST TFDocument ParentSchool, TransientSchool )><!ATTLIST TFDocument State #IMPLIED><!ELEMENT TFDocument ParentSchool ( Student, Advisor, Optional, Registrar, FinancialAid? )><!ATTLIST ParentSchool Version #IMPLIED FiceCode CDATA #IMPLIED FiceName CDATA #IMPLIED><!ELEMENT Student ( SSN, FirstName, LastName, MiddleName, Suffix, DateOfBirth, Gender, Race, Citizenship, ImmigrationStatus, EmailAddress, Ethnicity, Major, Term, Year, SchoolParent, SchoolTransient, AppliedFinAid?, ContinueNoFinAid?, AdmissionInfo?, Question1?, Answer1?, Question2?, Answer2?, Question3?, Answer3?, Question4?, Answer4?, Question5?, Answer5?, TitleInfo, TitleAddressHome, TitleAddressTransient, TitleSchools, TitleTerm, TitleCourses, Context+, Address+, TFPsection )><!ELEMENT SSN (#PCDATA)><!ELEMENT FirstName (#PCDATA)><!ELEMENT LastName (#PCDATA)><!ELEMENT MiddleName (#PCDATA)><!ELEMENT Suffix (#PCDATA)><!ELEMENT DateOfBirth (#PCDATA)><!ELEMENT Gender (#PCDATA)><!ELEMENT Race (#PCDATA)><!ELEMENT Citizenship (#PCDATA)><!ELEMENT ImmigrationStatus (#PCDATA)><!ELEMENT EmailAddress (#PCDATA)><!ELEMENT Ethnicity (#PCDATA)><!ELEMENT Major (#PCDATA)><!ELEMENT Term (#PCDATA)><!ELEMENT Year (#PCDATA)><!ELEMENT SchoolParent (#PCDATA)><!ELEMENT SchoolTransient (#PCDATA)><!ELEMENT AppliedFinAid (#PCDATA)><!ELEMENT ContinueNoFinAid (#PCDATA)><!ELEMENT AdmissionInfo (#PCDATA)><!ELEMENT Question1 (#PCDATA)><!ELEMENT Answer1 (#PCDATA)><!ELEMENT Question2 (#PCDATA)><!ELEMENT Answer2 (#PCDATA)><!ELEMENT Question3 (#PCDATA)><!ELEMENT Answer3 (#PCDATA)><!ELEMENT Question4 (#PCDATA)><!ELEMENT Answer4 (#PCDATA)><!ELEMENT Question5 (#PCDATA)><!ELEMENT Answer5 (#PCDATA)><!ELEMENT TitleInfo (#PCDATA)><!ELEMENT TitleAddressHome (#PCDATA)><!ELEMENT TitleAddressTransient (#PCDATA)><!ELEMENT TitleSchools
Institution/School or College/Department: University of East Florida/College of Arts and Sciences/Department of Mathematics

I understand that if I register for courses not approved in this form, I assume the full risk of transferability. I also understand that this application is for the term selected above and that a new form with approved courses must be submitted if I wish to take other courses at a school other than my enrollment school. I also authorize the Host Institution to release an official transcript to my Home Institution upon completion of the academic term.

Acknowledgement

SignedName: Gawain Blackwood, Jr.
SignedUsername: 012345678
SignedDate: 05/12/2012 9:06 AM

SignedUsername: 012345678
SignedDate: 05/12/2012 9:06 AM

Course: AN1111
CourseID: AN1111
CourseApproval: N

DistanceLearning: N

Course: AN1111
CourseID: AN1111
CourseApproval: N

DistanceLearning: N
1003</Id><Display>Signature</Display><Name>Optional</Name><Order>2</Order><Role>Department Head</Role><Context>Institution/School or College/Department</Context><ContextReal><![CDATA[University of East Florida/College of Arts and Sciences/Department of Mathematics]]></ContextReal><AcknowledgementAction><Acknowledgement><![CDATA[The above named student is #AuthorizedSel# to take the approved listed course(s) during term: #Term# #Year#. Transfer credit for these courses will be acceptable upon the receipt of an official transcript from #TransInst# as per the regulation of #HomeInst#.]]></Acknowledgement><SignedUsername><SignedUsername><SignedUsername><SignedUsername><TitleMain><![CDATA[Department Head]]></TitleMain><TitleComment><![CDATA[Department Head Comments]]></TitleComment><TitleAcknowledgement><![CDATA[Department Head Authorization]]></TitleAcknowledgement></TFSection></Optional><Registrar><IsEnrolledInDegreeProgram><IsEligibleToReEnroll><HasRequiredVaccinations><LegalClassification><TitleCertifications><![CDATA[Registrar Certification]]></TitleCertifications><TFSection><Id>20020912-020655531-1005</Id><Display>Student Status</Display><Name>Registrar</Name><Order>3</Order><Role>Registrar</Role><Context>Institution</Context><ContextReal><![CDATA[University of East Florida]]></ContextReal><Comment><AcknowledgementAction></AcknowledgementAction><Acknowledgement><![CDATA[#StuName#, #StuID#, is #AuthorizedSel# to take the approved listed course(s) during term: #Term# #Year#. Transfer credit for these courses will be acceptable upon the receipt of an official transcript as per the regulation of #HomeInst#.]]></Acknowledgement><SignedUsername><SignedUsername><SignedUsername><SignedUsername><TitleMain><![CDATA[Registrar]]></TitleMain><TitleComment><![CDATA[Home Institution Registrar Comments]]></TitleComment><TitleAcknowledgement><![CDATA[Home Institution Registrar Authorization]]></TitleAcknowledgement></TFSection></Registrar><ParentSchool><TransientSchool Version='' FiceCode='0001481' FiceName='Florida Atlantic University'><AdmissionsOfficer><TFSection><Id>20021105-025112359-1004</Id><Display>Host Institution Acceptance</Display><Name>Admissions Officer</Name><Order>0</Order><Role>Registrar</Role><Context>Institution</Context><ContextReal><![CDATA[Florida Atlantic University]]></ContextReal><Comment><AcknowledgementAction></AcknowledgementAction><Acknowledgement><![CDATA[The above named student is hereby #AuthorizedSel# to take the approved listed course(s) during the #Term# #Year# term. Transfer credit for these courses will be acceptable upon the receipt of an official transcript as per the regulation of the Home Institution.]]></Acknowledgement><SignedUsername><SignedUsername><SignedUsername><SignedUsername><TitleMain><![CDATA[Registrar]]></TitleMain><TitleComment><![CDATA[Registrar Comments]]></TitleComment><TitleAcknowledgement><![CDATA[Registrar Authorization]]></TitleAcknowledgement></TFSection></AdmissionsOfficer></TransientSchool></ParentSchool></Registrar></Context></Context></TFSection></Optional><Context>
Authorization]]></TitleAcknowledgement></TFSection></AdmissionsOfficer>
</TransientSchool></TFDocument>
Appendix C – Admissions Application File Specifications

The Transient Student Admission Application information is provided in XML format to institutions’ admissions information systems. It is provided to the host institution and upon request to the home institution. Detailed descriptions of data elements are available from the FLVC Help desk. If the <HOST_SCHOOL_FICE_CODE> element is present in the XML, as shown in the example below, then this is the Home Copy of the admissions information.

Sample XML file:

```xml
<?xml version="1.0"?>
<FACTS_MESSAGE Process="ADMISSION" Request="Y" Wait="N">
  <STANDARD_BLK>
    <STATEKEY>T0000273M0000001</STATEKEY>
    <IPADDRESS>111.111.11.111</IPADDRESS>
    <PORT>03006</PORT>
    <RETNDATA>WA00,</RETNDATA>
  </STANDARD_BLK>
  <ADMISSION_REQ FACTS_ID="TF000000105" Track="000000105">
    <APPLICANT_MASTER AppCat="T" AppType="01" YR="2013" MON="Fall">
      <SSN>555555555</SSN>
      <NAME Relationship="18">
        <LAST_NAME>Griffith</LAST_NAME>
        <FIRST_NAME>Dennis</FIRST_NAME>
        <MIDDLE_NAME>Dale</MIDDLE_NAME>
      </NAME>
      <ADDRESS AddrType="P">
        <ADDRESS1>777 Glades Road</ADDRESS1>
        <ADDRESS2>Box 323</ADDRESS2>
        <CITY>Boca Raton</CITY>
        <STATE>FL</STATE>
        <ZIP>33431</ZIP>
        <DAY_PHONE>5555555555</DAY_PHONE>
        <EMAIL_ADDRESS>name@fau.edu</EMAIL_ADDRESS>
      </ADDRESS>
      <ADDRESS AddrType="F">
        <ADDRESS1>111 East Las Olas Boulevard</ADDRESS1>
        <ADDRESS2></ADDRESS2>
        <CITY>Fort Lauderdale</CITY>
        <STATE>FL</STATE>
        <ZIP>33301</ZIP>
        <DAY_PHONE>5555555555</DAY_PHONE>
        <EMAIL_ADDRESS>name@broward.edu</EMAIL_ADDRESS>
      </ADDRESS>
      <CITIZENSHIP Code="US" />
      <IMMIGRANT_STATUS Code="T" />
      <GENDER Code="M" />
      <BIRTHDATE YR="1994" MON="05" DAY="12" />
      <RACE_ETHNICITY>[A H]</RACE_ETHNICITY>
    </APPLICANT_MASTER>
  </ADMISSION_REQ>
</FACTS_MESSAGE>
```
<PARENT_SCHOOL_FICE_CODE>0001481</PARENT_SCHOOL_FICE_CODE>
<HOST_SCHOOL_FICE_CODE>0001500</HOST_SCHOOL_FICE_CODE>

<COMMENT>I want to take this course for my major</COMMENT>

<APPLICANT_MASTER>

<COURSE CrsNbr="ENG1101" CredHrs="3" Approved="Y">
  <COURSE_TITLE>English I</COURSE_TITLE>
  <COURSE_USE>M</COURSE_USE>
  <COURSE_EQUIVALENT>Any English course</COURSE_EQUIVALENT>
  <COURSE_DISTANCE_LEARNING>Y</COURSE_DISTANCE_LEARNING>
  <FINANCIAL_AID_ELIGIBLE>Y</FINANCIAL_AID_ELIGIBLE>
</COURSE>

<COURSE CrsNbr="MAT1101" CredHrs="3" Approved="Y">
  <COURSE_TITLE>Algebra I</COURSE_TITLE>
  <COURSE_USE>E</COURSE_USE>
  <COURSE_EQUIVALENT></COURSE_EQUIVALENT>
  <COURSE_DISTANCE_LEARNING>N</COURSE_DISTANCE_LEARNING>
  <FINANCIAL_AID_ELIGIBLE>Y</FINANCIAL_AID_ELIGIBLE>
</COURSE>

<REGISTRAR_CERTIFICATION>
  <IS_ENROLLED_IN_DEGREEPROGRAM YN="Y" />
  <IS_ELIGIBLE_TO_REENROLL YN="Y" />
  <HAS_REQUIRED_VACCINATIONS YN="Y" />
  <LEGAL_CLASSIFICATION Code="R" />
</REGISTRAR_CERTIFICATION>

<TF_SECTION Institution="H">
  <SECTION_TITLE>Program Advisor</SECTION_TITLE>
  <SECTION_ROLE>Advisor</SECTION_ROLE>
  <CONTEXT_REAL>Florida Atlantic University</CONTEXT_REAL>
  <COMMENT>This student should do well in this course</COMMENT>
  <USER_NAME>advisor</USER_NAME>
  <FULLNAME>John Smith</FULLNAME>
  <SIGNED_TIMESTAMP>11/01/2012 9:24 AM</SIGNED_TIMESTAMP>
  <SIGNED_STATE>Approved</SIGNED_STATE>
</TF_SECTION>

<TF_SECTION Institution="H">
  <SECTION_TITLE>Registrar</SECTION_TITLE>
  <SECTION_ROLE>Registrar</SECTION_ROLE>
  <CONTEXT_REAL>Florida Atlantic University</CONTEXT_REAL>
  <COMMENT></COMMENT>
  <USER_NAME>fauregistrar</USER_NAME>
  <FULLNAME>Ellen Leesburg</FULLNAME>
  <SIGNED_TIMESTAMP>11/06/2012 10:50 AM</SIGNED_TIMESTAMP>
  <SIGNED_STATE>Approved</SIGNED_STATE>
</TF_SECTION>

<TF_SECTION Institution="H">
  <SECTION_TITLE>Financial Aid Officer</SECTION_TITLE>
  <SECTION_ROLE>Financial Aid Officer</SECTION_ROLE>
  <CONTEXT_REAL>Florida Atlantic University</CONTEXT_REAL>
  <COMMENT></COMMENT>
  <USER_NAME>financialaid</USER_NAME>
  <FULLNAME>Mary Davis</FULLNAME>
  <SIGNED_TIMESTAMP>11/07/2012 8:50 AM</SIGNED_TIMESTAMP>
  <SIGNED_STATE>Approved</SIGNED_STATE>
</TF_SECTION>

<TF_SECTION Institution="T">
  <SECTION_TITLE>Registrar</SECTION_TITLE>
</TF_SECTION>
<SECTION_ROLE>Registrar</SECTION_ROLE>
<CONTEXT_REAL>Broward College</CONTEXT_REAL>
<COMMENT></COMMENT>
<User_Name>registrar</User_Name>
<Fullname>Jane Doe</Fullname>
<Signed_TIMESTAMP>11/07/2012 3:10 PM</Signed_TIMESTAMP>
<Signed_STATE>Approved</Signed_STATE>
</TP_SECTION>
</ADMISSION_REQ>
</FACTS_MESSAGE>