



PLANNING GUIDE FOR CTCLINK POST GO-LIVE

Washington State Board for Community and Technical Colleges

Revision date: May 4, 2022

Table of Contents

Introduction	4
Preparing for ctclink Go-Live	4
The Plans: Resource and Budget, Communication, Training, Support, and Security.....	5
Resource and Budget Plan	5
Communication Plan.....	6
Training Plan.....	6
Local Triage Support and Management Plan.....	7
Security Plan.....	9
Plan Alternative Support Due to Closed Services Prior and After Go-Live.....	10
Communication	10
Go-Live Plan.....	11
Special Attention in Preparing to Go-Live in the Finance Pillar.....	13
Go-Live Weekend Plan.....	14
Go-Live Readiness Decision Process.....	14
Month One.....	15
First Two-Weeks: SBCTC Support Sessions.....	15
Activities by Pillar	15
Account Activation.....	16
Security	16
Support: Triaging Issues	17
Creating Budget, Recognition, Patience, and Compassion for Learning New Business Processes	18
Assessing and Stabilizing ctclink at the College	19
Training Resources	20
Workshops and Open Help Labs.....	21
Account Activation Open Labs and/or Workshops	21
Time and Leave Reporting Workshops.....	22
Advising and Faculty Center Workshops	22
Student Enrollment Workshops	22
Grading and Permission Codes Workshops	23
Purchase Requisition and Travel Workshops.....	23
Communication	23
Paying Tuition	28
Self-Service.....	28
Query Development and Reporting.....	29

Supplemental Systems (Third Party or Homegrown Systems).....	29
Months Two and Three	30
Assessing and Stabilizing ctcLink at the College	30
Staying Connected	30
Building Internal College Coalitions	30
Communication	30
Ongoing Workshops	31
Security	31
Financial Aid Check-In and Support.....	32
Institutionalizing ctcLink Project Management.....	33
Appendix A: Bellevue College Transition Punch Plan (Draft).....	34
Appendix B: ctcLink College Samples Frequently Asked Questions and Website Content for Students	40
Appendix C: Grays Harbor Post Go-Live Training Plan (Draft)	47
Appendix D: Grays Harbor College Business Process and Links to ctcLink Reference Center.....	59
Appendix E: Bellevue College ctcLink Go-Live Support & Triage Plan: Staff & Students (Draft).....	65
Appendix F: Bellevue College High-Level Student Support Plan for ctcLink (Draft).....	67
Appendix G: Samples of Videos and Resources to Help People Get Started in ctcLink.....	72
Student Videos and Resources.....	72
Employee Videos and Resources.....	72
Appendix H: DG4-A Go-Live Communications & Crisis Management Plan.....	74
Appendix I: Clark College Tracking, Assessing and Stabilizing ctcLink Document	81
Appendix J: Wenatchee Valley College Pre- & Post Go-Live Things to Consider	83
Before Go-Live	83
At Go-Live.....	83
Stabilization.....	85



Introduction

As more colleges implement ctcLink, there has been a collective realization that while ctcLink Go-Live Weekend is a critical milestone, it is not the main event; it is not the “finish line.” Instead, it’s the first day of doing business a brand-new way.

Many ctcLink colleges reported they wished they had better-prepared for post go-live, such as having a plan in place to lead the college community through the stabilization phase of the ctcLink implementation. This resource guide is intended to be that resource – to help colleges plan in advance for post go-live activities and provide each college’s ctcLink leadership the information needed to make sure the right college resources are aligned with the necessary activities.

Preparing for ctcLink Go-Live

Careful and thorough preparation in advance of ctcLink go-live is the best way to minimize issues at go-live and beyond. The Washington State Board for Community and Technical Colleges (SBCTC) ctcLink Support and Project teams offer a variety of guidance and resources to colleges throughout the process. There are many planning and activity guides colleges may use in developing and implementing their own plans, especially for building local triage support systems (e.g., help desk for ctcLink) and managing security. Many of these resources are highlighted throughout this document.

Colleges on ctcLink have often described preparing to implement ctcLink as a dash to the go-live finish line, having put all of their energy into that one moment. They advise colleges deploying ctcLink to think broader and take full advantage of the learning opportunities within the User Acceptance Testing (UAT) and Data Validation work packages that lead up to go-live. ctcLink project leaders from previously deployed college consistently advise colleges to do the following:

- Do due-diligence to complete the data clean-up. Go-live is only as successful as the data that converts.
- Use UAT to practice business processes and not do the bare minimum to test the data.
- Use UAT to practice and document cross-pillar business processes in ctcLink that involve multiple departments. They note that until go-live, cross pillar work is theoretical and many felt unprepared/unpracticed after go-live to do the ctcLink business processes that require multiple departments that have not work together previously.
- Develop an informal contingency plan: what would they need if the ctcLink functionality did not work immediately at go-live.

Following the advice listed above will help colleges predict what to expect when they go live and will help college pillar leads and ctcLink project teams determine what is going to work and what will need to be “fixed” at go-live.

Colleges have developed strong relationships with the SBCTC ctcLink Project team members throughout the planning phases for go-live. The SBCTC ctcLink Customer Support offers multiple Meet and Greet prior to go-live with ctcLink. To help college SMEs develop relationships with SBCTC ctcLink Support team members, DG5 and DG6 colleges are encouraged to take advantage and attend these meetings.

The Plans: Resource and Budget, Communication, Training, Support, and Security

Prior to ctcLink go-live, colleges need to have plans ready for immediate implementation at go-live: resource plan, communication plan, training plan, local triage support plan, and security plan. The development of each plan is a component of the go-live preparation activities. These plans can become the primary subject of identifying what needs to happen at the college prior to go-live. Bellevue College has drafted such a list; the draft is found in Appendix A.

Resource and Budget Plan

Resource and budget plans were developed at each college early in the process to prepare for go-live. Colleges should go back and review their plan. The college's resource and budget plan should be updated to include the resources needed for post go-live. In addition, to the items listed in the college's initial resource and budget plan, they should include the resources to fund and/or reallocate to do the following:

- Staffing for stabilization and optimization of ctcLink at the colleges, including but not limited to the following positions:
 - Project Manager or Primary point of contact between the SBCTC ctcLink Customer Support and college (note: each college must have a primary contact for ctcLink);
 - Security team, Local Security Administrators
 - Business Analysts;
 - Training leads and resources to develop/enhance training materials specific to the college;
 - College/local ctcLink Support model;
 - Testing lead (note: ctcLink will always have upgrades and these upgrades and enhancements will need to be tested);
 - Reporting lead;
 - Stipends and over-time hours for the significant amount of time it takes to learn and stabilize the college's business processes in ctcLink.
 - Faculty advocates to serve as points of contacts, liaisons, and lead-trainers for their faculty peers; (note: faculty advocates are also great resources to lead other faculty members to support students in the transition to ctcLink)
 - Investment in reinforcing the change in business processes to optimize ctcLink, these items may include:
 - Change job descriptions and responsibilities based on new ctcLink business processes and
 - Celebrations, recognition, awards for ctcLink adoption/change leaders.
- Strategy to catch up on the work processes that were on hold due to service closures immediately prior to go-live and two weeks post go-live.
- Bring back the supplemental technology systems, where necessary, to make sure all business processes are back in operation as quick as possible.
- Identify how/what the college will use for reports, especially budget reports.
- processes to train new employees and people transitioning to subject matter expert roles.

When revising the college's original Resource and Budget plan to continue throughout post go-live, review the [College Roles, Departmental Dependencies & Alignment: A model for ctcLink Transition and Sustainability](#) guide.

Communication Plan

Communication plans were developed at each college early in the process to prepare for go-live. Colleges should go back and review their plan. The college's communication plan should be updated to include the communications needed for post go-live. Due to the frequency and importance of keeping the college community informed, an updated communications plan is essential. DG5 executive sponsors and project managers reported how helpful the communication-related guides were in planning their post go-live communications.

The communications strategies should include websites, emails, and meetings, as well as Canvas, faculty members, student services, email, texts, robo-calls, etc. for students. Colleges who are preparing to go-live with ctcLink have a plethora of materials they can use to plan out their communications.

- College-wide and Supervisor communications strategies, especial email templates, are located in the following link:
 - [ctcLink DG6-A Executive Sponsor Guide](#)
 - [ctcLink DG6-B Executive Sponsor Guide](#)
 - [ctcLink DG6-C Executive Sponsor Guide](#)
 - [Seattle Colleges communications](#)
 - [Skagit Valley College communications](#)
 - Communication sections of this guide on pages 10-11, 23-28, and 30-31.
- Student communications strategies, ideas, and templates are located in the following links:
 - [ctcLink Student Communication Resource Guide](#)
 - [Seattle Colleges communications](#)
 - Frequently Asked Questions, Appendix B
 - Communication sections of this guide on pages 10-11, 23-28, and 30-31.
- Attend the SBCTC Communications Meeting, contact [Janelle Runyon](#) or [Sherry Nelson](#) for more information.

In addition to communicating the normal go-live activities, the communications plan should include how to report ctcLink issues, resolution of issues announcements, and outages long-term for the college.

Training Plan

Training plans were developed at each college early in the process to prepare for go-live. Colleges should go back and review these plans. The plan needs to include processes to train new employees and people transitioning to subject matter expert roles. The plans should also include the schedule of sessions for the first six months post go-live, including workshops for first activities—such as account activation for everyone; for all employees: time and absence reporting; for faculty members: rosters, permission codes, and grading; for students: registration; and administrators and assistants: requisitions and travel. It is better for the colleges to plan for the training and have to change a few training events than it is to not plan and have to find the resources to add the training. (See the Grays Harbor Training Plan Draft template in Appendix C.)

The Washington State Board for Community and Technical Colleges has quick reference guides for all of the ctcLink functions colleges use. Many colleges brand the quick reference guides and use them as how-to guides for college wide instructions to account activation, reporting time and leave, submitting grades, etc. To conduct a search, please go to the [ctcLink Reference Center](#). Grays Harbor College put links to the QRGs for each of the business processes mapped in their business

process fit gap (BPF) sessions. (See Appendix D, Grays Harbor College Business Process and Links to ctcLink Reference Center.)

General accounting and governmental accounting principles training is recommended by previous deployment groups for people who work within the Finance and Student Financial/Financial pillars. Due to the integration of the ctcLink system, understanding basic accounting principles has served staff well in stabilizing, understanding, and using the ctcLink system, especially financial reporting.

Local Triage Support and Management Plan

Colleges need to have a local triage support and management plan developed and ready to implement prior to go-live with ctcLink. Colleges who have previously implemented ctcLink advise colleges in the deployment group 5 and 6 (DG5 and DG6) to conduct a dry-run test of their local triage support and management plan while doing User Acceptance Testing or during the last phases of the dry-run data validation activities. Finding out there was a bottleneck in the process post go-live brought significant frustration to a college that did not test its Support plan prior to go-live.

The SBCTC ctcLink Support team offers the [Local Triage and Support Management Planning Guide](#) to help colleges determine the best approach to manage issues reported by ctcLink users, perform initial local triage prior to requesting SBCTC Customer Support assistance, and handle escalation and communication related to these issues after go-live. Following this plan will benefit the colleges as it allows SBCTC ctcLink Support to respond more efficiently since its focus will more likely be on actual errors or issues with the ctcLink system and not taking time to determine if an escalated issue is the result of not understanding the PeopleSoft system.

Inserted below is Seattle Colleges draft triage support and management plan by task area. It identifies the parties involved and specifies their involvement (i.e., Responsible, Accountable, Escalates, Consulted, or Informed) in the tasks outlined below:

Exhibit 1: Draft of Seattle Colleges Triage Support and Management Plan by Task Area

Task Area
<p>Security: Issues reported related to security access.</p> <ul style="list-style-type: none"> • Responsible: The District IT Security team makes updates to employee security roles in ctcLink following the Security Management Plan. • Escalates: Security issues will be escalated to the security team by IT helpdesk staff, by pillar leads, and by managers.
<p>Student Account Activation: Issues with student account activation.</p> <ul style="list-style-type: none"> • Responsible: The IT helpdesk teams will provide direct assistance with supporting student through their account activated. Help will be provided through Zoom rooms, information on the IT Services webpage, and email tickets. • Escalates: Student services staff and faculty may direct students to the IT helpdesk resources. • Consulted: IT helpdesk will consult with Enrollment Services at each college if the support issues involve the student's enrollment status.
<p>Employee support: Issues with employee account activation.</p> <ul style="list-style-type: none"> • Responsible: The IT helpdesk teams will provide direct assistance with supporting employees through their account activated. Help will be provided through Zoom rooms, information on the IT Services webpage, and email tickets. • Escalates: Employees and managers may escalate issues to the IT helpdesk resources. • Consulted: IT helpdesk will consult with HR/Payroll at each college if the support issues involve the employment status.
<p>Process Scheduler: Process Scheduler issues (why did my process fail, where is my report).</p> <ul style="list-style-type: none"> • Responsible: The ctcLink Pillar lead for that area will be responsible for addressing Process Scheduler issues.

<ul style="list-style-type: none"> • Escalates: Employees and managers may escalate issues to the Pillar Leads. IT helpdesk staff can escalate issues to Pillar Leads as well. Pillar leads will decide which issues to escalate to SBCTC ERP Support. • Consulted: Pillar Leads will consult with IT Security team if the issue is security related.
<p>Browser Issues: Browser issues (pop-up blocker, saving bookmarks, clearing cache, errors with direct URL usage).</p> <ul style="list-style-type: none"> • Responsible: The IT helpdesk teams will provide direct assistance with supporting student and employees with browser issues, as they do currently. Help will be provided through Zoom rooms, information on the IT Services webpage, and email tickets. • Escalates: Everyone can escalate issues to the IT helpdesk.
<p>Automated Workflow Approval issues (where is my approval email, stuck approvals, why am I being asked to approve this).</p> <ul style="list-style-type: none"> • Responsible: The ctcLink Pillar Lead for that area will have primary responsibility for Automated Workflow Approval issues during and after deployment. Information will be provided through the Seattle Colleges ctcLink website, and effort made to educate appropriate managers about AWA issues. • Escalates: IT Helpdesk, employees, and line managers may escalate AWA issues to our pillar leads. Pillar Leads will escalate to ERP support when necessary. • Consulted: Pillar Leads will consult with IT Security team when/if the issue is security related.
<p>Invalid Values: The system is telling me I have an invalid value (inactivated department codes, I can't save my page due to an invalid value).</p> <ul style="list-style-type: none"> • Responsible: <ul style="list-style-type: none"> ○ The first support is the employee's supervisor. ○ The second level of support is the Pillar Lead for that area. • Escalates: IT Helpdesk, employees, and line managers may escalate Invalid Values issues to our pillar leads.
<p>Financial Aid Dual Processing integration issues (FAM, HPUX, PeopleSoft)</p> <ul style="list-style-type: none"> • Responsible: <ul style="list-style-type: none"> ○ Technical issues: Any kind of technical issues with access the legacy environments (FAM, HPUX) should be directed to D Lee in IT. ○ Reconciliation/Functional issues: PeopleSoft functional issues should be escalated to Derreck Pressley. • Escalates: Financial Aid employees may escalate.
<p>Budget: No Budget Exists issues.</p> <ul style="list-style-type: none"> • Responsible: The College and District Business Office Director is responsible for creating and managing Finance Departments for their colleges, and helping employees use the correct budget. • Escalates: Staff should escalate to their manager, who can escalate to the college business office. • Consulted: Business Office teams may consult with the Finance Pillar lead re any Chartfield issues.
<p>Search Results: Search criteria is returning no results (lookups empty, search criteria to enter a page does not show values for entered criteria).</p> <ul style="list-style-type: none"> • Responsible: <ul style="list-style-type: none"> ○ The first support is the employee's supervisor. ○ The second level of support is the Pillar Lead for that area. • Consult: College staff can consult with their peers at other colleges (North, South, Central) • Escalate: The Pillar Lead will escalate to SBCTC ERP Support when necessary.
<p>Data Integrity Errors.</p> <ul style="list-style-type: none"> • Responsible: The ctcLink Pillar lead for that area will be responsible for addressing Data Integrity issues. • Escalates: Employees and managers may escalate issues to the Pillar Leads. IT helpdesk staff can escalate issues to Pillar Leads as well. Pillar leads will decide which issues to escalate to SBCTC ERP Support.
<p>Queries: I can't find a query (query roles, highly sensitive data roles, help searching available queries).</p> <ul style="list-style-type: none"> • Responsible: <ul style="list-style-type: none"> ○ The first support is the employee's supervisor.

<ul style="list-style-type: none"> ○ The second level of support is the college reporting lead <ul style="list-style-type: none"> ▪ Central: Jenni Branstad ▪ North: Joel Wright ▪ South: Katherine Hinkelman ▪ District: Mark Baumann ○ Third level of support is the Pillar Lead <ul style="list-style-type: none"> • Consult: College staff can consult with their peers at other colleges (North, South, Central) • Escalate: The Pillar Lead will escalate to SBCTC ERP Support when necessary.
<p>General Login/Out Issues (signing in, logging out, closing browser windows, using multiple browsers).</p> <ul style="list-style-type: none"> • Responsible: The IT helpdesk teams will provide direct assistance with supporting student and employees with browser issues, as they do currently. Help will be provided through Zoom rooms, information on the IT Services webpage, and email tickets. • Escalates: Everyone can escalate issues to the IT helpdesk.
<p>Mass Student Complaint: Mass student complaints about access or ability to use the system for a specific task.</p> <ul style="list-style-type: none"> • Responsible: The ctcLink Project Director will take point on coordinating responses to any mass student complaints, in collaboration with the executive sponsor, steering committee, CS Pillar lead, and the relevant student services leaders. • Escalate: IT HelpDesk will escalate to the ctcLink Project Director.
<p>Mass employee complaints about access or ability to use the system for a specific task.</p> <ul style="list-style-type: none"> ○ Responsible: The ctcLink Project Director will take point on coordinating responses to any mass employee complaints, in collaboration with the executive sponsor, steering committee, HCM Pillar lead, and the HR & Payroll leadership.

Appendix E and Appendix F display drafts of the Bellevue College Go-Live Support and Triage Plan as well as the Bellevue College High-Level Student Support Plan, respectively.

Security Plan

Colleges must have a security plan. The plan will identify the process for establishing and managing security roles, i.e., what pages people can access. The SBCTC ctcLink project team developed the [Local Security Management Plan Guide](#) to help colleges develop their security plan specific for their local business practices and managing security once on PeopleSoft. In other words, the guide helps colleges determine the best approach to managing security after go-live with ctcLink and ensure readiness for effective security management.

Colleges who have previously implemented ctcLink advise colleges in the deployment group 5 and 6 (DG5 and DG6) to conduct a dry-run test of their security plan while doing User Acceptance Testing or during the last phases of the dry-run data validation activities. Finding out there was a bottleneck in the process post go-live brought significant frustration to a college that did not test its security plan prior to go-live.

Security set-up requires a steep learning curve and a lot of time/resources to manage, especially as it relates to SACR security and user preferences. Pay attention to the security spreadsheet offered by the SBCTC ctcLink project team, which is individual to each college. Colleges should identify all of the college's employees and then identify what access they need. The mapping activities should happen as soon as possible before go-live.

Colleges should test their business processes in the SVX or SVL environment prior to go-live in order to verify the appropriate security roles, as the SVX and SVL environments are closer to the production environment than UAT. If there are issues with the security roles, colleges should follow their security management plan for security role changes. This activity will allow colleges to identify strengths and weaknesses in the security management plan and make necessary changes prior to go-live.

Jason Hetterle, Wenatchee Valley College PM, wrote, “In the lead up to go-live, we made sure our security people were trained and prepared. They must be given enough time to be able to learn as much as they can.”

Plan Alternative Support Due to Closed Services Prior and After Go-Live

Colleges should consider central help locations or labs (virtual and/or physical) while student, human resources, and business services are closed during the first two weeks after go-live. The people leading and serving at the central help locations, whether virtual or physical, cannot be the same people who are engaged in the WebEx training sessions offered the first two-weeks of go-live.

Volunteers in IT services, department administrative assistants, student workers, student government persons, and faculty members are often good people to consider staffing central help locations while the subject matter experts (SMEs) are not available during the first two weeks of go-live. Jason Hetterle, Project Manager of Wenatchee Valley College, suggested asking people who had taken most of the Canvas training to volunteer who are not SMEs to help during these first two weeks. Multiple colleges, such as Olympic College and Seattle Colleges, had great success with using designated faculty members as the lead to problem solve or answer questions among faculty members about ctcLink.

Communication

Communicate regularly, consistently, positively, transparently, and in multiple ways. Make sure communication is available to everyone. Communication should acknowledge and help people anticipate the challenges with people’s ability to use the ctcLink system at go-live.

Communication materials before go-live should set realistic expectations that the ctcLink system will not be perfect on day one. Everyone will be learning the new system, and aspects of the systems will need to be set up after go-live—such as setting student registration appointments, assigning students to student groups, applying milestones to students, creating combo codes in the Grants module, and entering open/blanket purchase orders. Other items to communicate are schedules, tangible benefits of ctcLink, training, and more.

Colleges need to find the balance between communicating too much and not enough. The executive sponsor should regularly communicate with the college community to reinforce the importance of the transition to ctcLink. ctcLink should be a regular agenda item at all department and division meetings, even if it is just to answer questions and reinforce the messages sent from the executive sponsor.

Colleges are encouraged to make sure they have well established methods of communication prior to go-live so that the college community can anticipate messages and knows where they can find information and updates. Some of these employee-based communication methods are included in the [DG5](#) and [DG6](#) ctcLink executive sponsor resource guides. One important communication strategy is regular communication with the supervisors.

Set and communicate expectations for post-implementation success. Communicate service closures often and in multiple ways. Set the expectation that service departments will be fully closed to the public and to other college offices for at least the two weeks post go-live. Staff really need that time to focus and attend the support sessions that walk them through the business processes for the first time in ctcLink live.

Communicating with students has proven to be problematic because many do not check their email, answer their phones, or listen to voicemails. The [ctcLink Student Communication Resource Guide](#) has templates, language, and strategies that colleges can use to communicate the upcoming ctcLink

related changes, including office closures, activating their account, and registering for the subsequent quarter.

Colleges live with ctcLink have found using faculty members to communicate with students is an effective strategy. Communication strategies from faculty members to students for both pre and post ctcLink go-live are offered in the ctcLink Student Communication Resource Guide.

One example worth highlighting is the college's ctcLink communication team create a weekly information slide/page for faculty to share with their courses via Canvas, Zoom, and in-person. Colleges should be mindful of students whose primary language is not English and ensure they are supported in the language they use.

It is important to note that for faculty members to deliver the message effectively, they should be aware of the transition to ctcLink and understand the importance and necessity of the transition. Their positive and supportive influence on students is essential to mitigate the risk of this change to ongoing operations, e.g., potential registration delays or enrollment decline.

Faculty to faculty communication strategies are also effective. Many colleges currently using ctcLink commissioned faculty leaders to deliver faculty-specific ctcLink communication and problem-solve issues preparing to go-live, go-live weekend, and go-live stabilization phases. Olympic College and Seattle Colleges have great examples and resources to share.

One of the most common ways colleges communicate with the community, students, and employees is through the website and intranet. Scattered throughout the website and intranet are references and links to the Legacy system and supplemental systems (third party) that will be replaced by ctcLink or unavailable for a while. Prior to going live with ctcLink, colleges will need to do an audit and develop a plan to revise the relevant pages and links.

The colleges frequently have all of the training and resources for both students and employees on a convenient website. *Appendix G: Samples of Videos and Resources to Help People Get Started in ctcLink* has links to many videos and resources for post deployment colleges that may be useful when planning out post go-live communications.

The SBCTC ctcLink project team uses the Go-Live Communications and Crisis Management Plan. It includes communication methods and tools, milestone messages of the go-live weekend, media protocol, key messages for colleges to use, and college and SBCTC contacts. The ctcLink project communications teams works with the deployment group colleges to customize the plan for each sub-deployment. (See Appendix H.)

Go-Live Plan

Colleges should use the following list of activities to create the go-live plan for their college. **It is important to note, that the timeline decisions below are at the colleges' discretion and/or may not be accurately timed for each individual college or sub-deployment group of colleges, as denoted by an asterisk (*).** When will systems and business processes stop in order to give colleges enough time to prepare for the transition and stabilize the business processes in ctcLink?

Pre-Go-Live Decisions

- Training to be completed
- Last day for budget transfers, operating budgets and grants into FMS
- Last day to make P-card purchases and pay airfare

Four weeks before Go-Live

- Last day for start of term faculty contracts*
- HR – Last day to enter new jobs
- Last day to submit travel expense reports
- Last day for Purchasing dept. to receive approved requisitions
- Last day to submit Invoice Attached, Check Enclosed, and A19 documents.

Three weeks before Go-Live

- Last Day HR processing or payroll changes (direct dep, W4, etc.)
- Process 10th day contracts and grants to process in-directs
- TERM STARTS*

Two weeks before Go-Live

- 100% tuition refund period ends*
- Last day hand drawn checks (payroll)
- Last invoice/AP, P-cards posted, 100% refunds, travel posted- entry into HP, revenue/expense transfers and GL corrections
- Cashiering – last transactions
- Financial Aid – last transactions (no FA or scholarship disbursements)
- Last check print. Last Day for Bank mobile Run. Last Day for Student Refund Checks. Last day for FA manual checks and travel reimbursement.
- Legacy web admissions portals will close until new ctcLink admissions portals open. Note: All pending web admissions need to be matriculated before legacy shutdown.
- Cancel all checks 6 months and older.
- Web transaction server down and no CyberSource. Campus CE – no more transactions (no changes to SMS, no CyberSource to use). Can't hold credit cards

- Approve/submit timesheets

Transition week - Legacy to ctcLink

- Complete Payroll Processing in Legacy. No hand-drawn checks if timesheet not in and approved
- 30-day loan amount released – may need to cut checks early
- Run forced check job – cut all checks before system is down.
- Finance Close prior month
- Last day for FA Disbursements
- Legacy Down noon Thursday
- After all batch and production jobs have completed, access to the legacy system will be restricted to conversion activities only. Noon – read only, 3pm down
- Classes – last day to register and pay for fall classes*
- Data Validation & Go approval

Go-Live Week

- Live on PeopleSoft Monday 8am
- Begin entering transactions that were tracked manually, after approval by Finance Pillar lead.
- Begin processing new purchases through ctcLink, after approval by Finance Pillar lead.
- Timesheets in ctcLink
- All part-time hourly and student employees will begin submitting electronic timesheets through ctcLink Employee Self-Service. All employees will begin submitting electronic absence (leave) requests through ctcLink Employee Self-Service.
- First Payroll in PeopleSoft – staff need to have leave and hours in PS

Post Go-Live Miscellaneous Activities

- ctcLink Down – no transactions
- Student Access to ctcLink
- Priority Registration begins
- Continuing student Enrollment begins
- New student enrollment begins

Special Attention in Preparing to Go-Live in the Finance Pillar

One of the most significant factors in minimizing the issues related to finance, student financials, and financial aid is developing and following the plan to go live with the details provided in the previous section, especially in terms of when it is okay to begin entering and processing transactions, using all of the available modules in the Finance pillar, following mapped-out business processes, training, and communication.

PeopleSoft is a completely integrated system. Many transactions, such as registering for a class, automatically populate areas in the Finance pillar. **Therefore, it is especially important to postpone most transactions in ctcLink PeopleSoft until after the SMEs in Finance and Student Financials are able to do their data validation work and post go-live configuration work.** The Finance pillar lead should make the decision of when to commence transactions in PeopleSoft. The project manager and finance pillar lead need to have a communication plan ready to let people know when and what they can begin to enter into PeopleSoft.

Colleges of past deployment groups have grappled with the unintended impact of making changes in the Campus Solution pillar that updated modules in the Finance pillar. All colleges from post deployment had to extend the time of “no transactions” to complete the data validation, corresponding clean-up, and post go-live configuration work.

One of the most successful strategies to prepare and train people to use the functionality in PeopleSoft in general, the finance module in particular, is to have the business processes clearly mapped out. Colleges are encouraged to use the [9.2 Finance Quick Reference Guides](#) instructions and localize them as business processes specific to their college.

Because PeopleSoft is completely integrated, colleges have found the system users of the Finance and Student Financials/Financial Aid pillars significantly benefit from a fundamental understanding of accounting principles. Knowing the principles of accounting and governmental accounting help system-users to predict what and where their entries/changes in the system will create corresponding changes to other fields, modules, and even pillars in PeopleSoft.

Financial Aid staff should understand how Item Types and Program Plan factor into the ability to disperse/process financial aid—requiring a fundamental understanding of Item Types within the context of governmental accounting principles. Overall, colleges benefit when people working in business services, cashiering, and financial aid have a fundamental understanding of accounting to know how and why the system works the way it does. This knowledge enables people to troubleshoot issues and determine if the issue is a result of a configuration error, business practice, or system issue.

The Legacy system is barely integrated—creating the perfect conditions for people to work in silos. Due to the integration of the ctcLink PeopleSoft system, people working in cashiering office, business office, and financial aid departments will need to work closely together and communicate often. Colleges are encouraged to take the opportunity in User Acceptance Testing (UAT) to learn how one business process drives another business process, e.g., financial aid student registration impacts student financials and finance. Colleges are encouraged to identify what those changes look like in PeopleSoft and who is/are the person/people involved in each step before go-live.

Overall, things do not look the same or function the same in PeopleSoft as it does in Legacy. As an example, where one requisition entry may be entered and viewable in Legacy, in ctcLink it may be combined with some other requisition. The SBCTC ctcLink Customer Support team recognizes this is

a steep learning curve after go-live. They have provided guides and two weeks to support colleges in this conversion data validation and learning process.

The SBCTC ctcLink project and support teams both recommend to use a phased in approach to start allowing people to enter business related transactions. Only allow a few people at the beginning and track each transaction through completion. Then allow distinct groups to begin entering transactions so that each transaction can be tracked until there is an understanding of the complex integration of PeopleSoft. Be sure that the people who are processing the transactions understand chart-strings, i.e., budget codes. They need to be prepared to use very different processes which are also more complex than Legacy. Build in capacity for the college's business office to walk people through the processes initially.

Go-Live Weekend Plan

The college project manager needs to work with the college's ctcLink steering team and pillar leads to plan out the go-live weekend. The plan must consist of contact information for everyone, logistical plan for Sunday data validation, and criteria for final go-live decision on Sunday after data validation. On occasion, pillar leads may need to be contacted on Saturday if there is an issue or question about the data being converted.

Colleges will need to determine the logistics for Sunday data validation. They should decide if they want to validate data collaboratively in computer labs, in offices, or virtually. Often the logistics are determined at the pillar and module level. This data validation is similar to the Mock data validation for cycles 4 and 5. This does not require large amounts of data to be validated at the college. Staff will have guides, provided by SBCTC, to follow along with their own list of concerns.

Depending on pandemic-related protocol, gathering in-person and food may be considerations for Sunday data validation. The meeting to make the final decision to go-live is held on Sunday, after data validation. Make sure to invite the college/district CEO, e.g., President or Chancellor, executive sponsor, and any other appropriate executive leadership to the meeting.

Go-Live Readiness Decision Process

By the time colleges get to the go-live they have a good idea of what issues to expect at go-live because of all of the conversion testing activities throughout the implementation phase, including a dry-run (Mock) of go-live conversion activities weeks before go-live. These activities and other readiness indicators, tracked by the colleges and SBCTC ctcLink Project team, inform the college's initial go-live decision—usually about four-to-eight weeks prior to go-live. College PMs and executive sponsors will meet with SBCTC project staff regularly to self-assess readiness. Colleges inform the SBCTC's ctcLink Steering Committee of their decision and recommendation to go-live. The ctcLink Steering Committee makes the decision to go-live for each sub-deployment group.

At go-live weekend, decision criteria to go or not go-live are based on catastrophic failure, such as the general ledger does not convert, there are no employees in the system, or no students in the system. It is important to note that if one college within the sub-deployment group determines they cannot go-live, no college goes live on that Monday. Therefore, the college decision criteria should be discussed with the fellow sub-deployment group project managers.



Month One

When ctcLink PeopleSoft is live people need the time to get their bearing on the new ways they will conduct their work. Services to employees and students, e.g., business services, human resource services, and student services, should be closed so that these employees can focus on stabilization activities and completing the first of many business processes live in ctcLink.

First Two-Weeks: SBCTC Support Sessions

ctcLink Customer Support team convenes a structured schedule for two-weeks post go-live to walk colleges through the first business processes live on ctcLink. Colleges should plan to attend and fully engage in these sessions. A schedule of daily activities will be released and posted by SBCTC ctcLink Support prior to go-live for planning purposes. The sessions are scheduled to be concurrent with the timing of college's business process, such as payroll. The sessions need to be attended by anyone involved directly or peripherally in the business process. The sessions walk colleges through the business process, identifies how the system works, and describes the system's interconnectedness in the context of each business process as well as supporting procedures. Feedback from DG4 and DG5 regarding these sessions were unanimously and overwhelmingly positive.

Activities by Pillar

SBCTC ctcLink Support have put together [activity guides](#) for the first week through the first month for each ctcLink Pillar. There is overlap between these activities and the two-week support sessions described in the previous section. Be sure to attend the scheduled session for the business process. In addition, use these guides to support your activities when you are not in the session. There will be open WebEx's to get questions answered and follow-up. It will be helpful to review these activities prior to go-live, just to be prepared. ctcLink Support is there to help!

- [Campus Solutions ctcLink First Week/First Month Activity Guide](#)—The guide provides access to an introduction to Campus Solutions in ctcLink. It provides a basic guide to high-, medium- and low-priority cutover tasks, term-dependent tasks, and other Campus Solutions resources.
- [Finance ctcLink First Week / First Month Activity Guide](#)—The guide provides access to an introduction to Finance in ctcLink. It provides a basic guide to overall setup, core processes, and other financial resources.
- [Financial Aid First Week / First Month Activity Guide](#)—This guide provides access to an introduction to Financial Aid in ctcLink. It provides information to prepare for and conduct dual processing, including but not limited to academic plan review, item type crosswalks, and security roles.
- [Financial Aid Dual Processing Business Processing Guide](#)—This guide provides an overview of dual processing as well as detailed descriptions and instructions of how-to dual process financial aid in FAM and ctcLink.
- [Human Capital Management \(HCM\) ctcLink First Week / First Month Activity Guide](#)—This guide provides basic setup instructions as well as instructions but not limited to perform the tasks related to HCM, including payroll, faculty workload, time and labor, absence management, and Talent Acquisition Manager (TAM).
- [Student Financials ctcLink First Week / First Month Activity Guide](#)—This guide provides an introduction and description of Student Financial related activities for prior to the first week

of go-live, first week activities for Cashiering and Student Accounts, first month activities and other Student Financials resources.

Account Activation

From lessons learned of previous deployment groups, employees should activate their accounts in a phased-in approach. Employees whose duties are predominantly working in the system should activate their account as soon as possible. Others can wait a few days, depending on the timing of go-live with payroll. All employees should have the opportunity and support to activate their account by the end of the first week. This includes student employees. When student-employees access ctcLink they will also have access to their student information, so be prepared for some student questions.

Students should activate their accounts after employees have—optimally in the third week although not likely. This allows time for employees to become somewhat familiar with the ctcLink system and SMEs to have gone through the two-week support sessions. However, waiting until the third week is just not likely due to registration cycles for the next quarter. Students will want to get into ctcLink to explore the new system, view their registration appointment time, and review the classes available for the next term. Students who are also employees will need to activate their accounts when employees do to make sure they are included in the payroll and often their work is conducted in the ctcLink system. Faculty members and other volunteers can help students as they activated their accounts, especially within the second week of go-live.

Many colleges have worked with their IT departments to create a place where employees and students can log-in using their current credentials and view their new ctcLink ID. Even if the college doesn't create something that is publicly facing be sure to have a crosswalk of SID to ctcLink ID readily available for helpdesk staff. Two queries that may be helpful are listed below.

- CS: QCS_CS_EXT_SYS_LEGACY_ID_NBR (list of EMPLIDs with SID for students)
- HC: QHC_HR_EXT_SYS_LEGACY_ID_NBR (list of EMPLIDs with SID for employees)

Give employees and students a reason to activate their accounts, otherwise some of them will wait. For employees, ask them to activate their account to make sure their emergency contacts, benefits, bank account information, and address are all correct. Be sure to have a system in place to deal with errors or needed updates employees request by reviewing the information as this is often additional work for the human resources department. For students, let them know that they will have to activate their account to register for the next term's classes.

Colleges should be able to monitor account activation and follow-up with people to get their accounts activated.

Security

Often when colleges go live there are number of people who expect to have access to functionality within ctcLink and do not. Sometimes people need the additional access and sometimes they do not, they are just used to seeing it. Derreck Pressley, Seattle Colleges, shared that Seattle Colleges benefitted from having a faculty member lead and coordinate security access for instructional people.

Colleges will be more prepared if they identified all of the current users and mapped the activities for each user prior to go-live. However, even with the best planning, there will be changes that need to be made.

Colleges are also encouraged to have a data governance structure in place that identifies what access to information will be allowed at the college. The data governance structure will need to identify the criteria for granting access to different information. As an example, many people want to see student information to better help students, but is it necessary? Don't forget IT and Institutional Research in developing criteria for granting access, since they do not perform transactions within the system. There will have to be decisions made about what level of access will be given to them and what will be off limits. Typically view access (ZD roles) is sufficient. These groups do need to see the data to understand how the data is collected and what question or title is used in order for some data to be meaningful.

Some of the complexities around managing security (access to information) in ctcLink relates to SACR security and user preferences. Colleges are encouraged to make sure they are using the security spreadsheet offered by the SBCTC ctcLink Project Team to each individual college when setting roles. Sometimes people have the same security role, giving them both access to a page, and yet do not have the same access to the data due to user preferences and SACRs.

Tim Wrye, Highline College Executive Sponsor, shared an example that a requisition approver could not see the attachments on the requisition but had the security role that should allow the approver to see attachments. The fact the particular approver could not see the roles was due to user preference settings.

Support: Triaging Issues

When an issue is identified, the college's tier 1 support/triage must be prepared to perform initial troubleshooting as outlined in each college's support plan, including reviewing the issue by the college's pillar lead or business analyst when necessary. Initial troubleshooting process may include the following:

- Clear browser cache and try again
- Try a different browser
- If Finance related incident, check budget status
- Verify correct Chartfield string
- Login with correct information
- Utilize the Canvas Training Courses and ctcLink Reference Center (global resources) for pillar areas and/or departments to ensure the correct business processes are being followed
- Check the effective date on a record to ensure it is in the correct status

Participation—in the form of actively reading, asking questions when relevant, and staying informed—in the [ctcLink Support eLists](#) is one of the most effective ways to troubleshoot specific issues. The following listservs are available: Campus Solutions, Finance, Financial Aid, Student Financials, Human Capital Management, Reporting, Coding, ctcLink Security, Online Admissions Application Portal Admins, ctcLink Point of Contact, and ctcLink Business Analysts.

Colleges need to have a list of staff who are approved to submit tickets to SBCTC ctcLink Support, and provide this list to ctcLink Support. College project managers should develop and document the process to monitor tickets in its support plan. The process should include ways for the pillar leads to ask for issues to be escalated to SBCTC ctcLink Support and check status of tickets. As college decide how to triage and the roles necessary to problem-solve, the [ctcLink Project College Roles, Departmental Dependencies & Alignment](#) document can be helpful.

If an issue cannot be resolved at the college level, the designated person at the college will submit a service ticket outlining the issue and identifying a priority level for the college. After the ticket is submitted to the ctcLink Support help desk, the ticket will be routed to the most appropriate person in the ctcLink Support functional or technical teams.

The SBCTC ctcLink Support person receiving the ticket will review the ticket. The ticket will be assigned to a person on the ctcLink Support team. That person will clarify any information needed. They will be responsible for designating a severity level to the ticket based on the information gathered and consultation from others throughout ctcLink Support team. The process and timelines are outlined in the ctcLink Service Level Agreement 2.0, revised June 2021.

College PMs should regularly review open tickets and remind staff to follow-up on tickets pending their response.

Creating Budget, Recognition, Patience, and Compassion for Learning New Business Processes

College leaders should anticipate the heightened level of stress that learning and performing new tasks are for team members. Subject matter experts and power-users of ctcLink will need to feel especially supported during the first ninety days of post go-live with ctcLink. The college community should have some level of awareness to the “what” and “why” human resources, business services, student services, and instructional services cannot be as quick to respond to their requests and concerns; this can happen through regular communications with the college community.

As subject matter experts and power-users of ctcLink perform the business processes for the first time in ctcLink, tasks take longer. Plan for increased personnel costs in terms of overtime, more hourly employees, and stipends for exempt personnel. For example, the first payroll process in all post deployment groups has been under immense time pressure. There has not been a single first payroll that ended before 9 p.m. on a payroll cutoff for any of the previous deployment groups. The length of time to conduct payroll decreases as they learn the process, but it takes multiple payroll periods before the time they need is similar or less than the time it took in Legacy to perform the work.

Supervisors and executive leadership are encouraged to recognize and celebrate the accomplishments of individuals and teams that are doing the ctcLink work. The heavy lift of preparing and stabilizing ctcLink is noteworthy and worth celebrating. Previously deployed colleges recommend holding awards, celebrations, personalized thank-you cards, and mementos with personal touches.

They are urged pay attention to the health and wellbeing of team members. Leadership may have to actively provide and encourage team members to take ample time for breaks and vacation. Frequently, team members just want to make sure they are getting the processes done and do not take the time they need. Consequently, their mental and physical health suffers and errors may be made, which then must be corrected demanding more time. Compassion for the employees goes a long way during the first 90 days after go-live with ctcLink.

Assessing and Stabilizing ctcLink at the College

Use the college's ctcLink steering committee to track the functionality of ctcLink post go-live. There are multiple ways to track the functionality on a regular basis. Listed below is one way.

Prior to go-live identify a list of functions required to operate the college. Here are some examples:

Examples of Activities Required to Operate College

- Manage Employees - self service
- Separations
- Pay
- Requisition
- Purchase
- Pay for purchases
- Close books at end of month
- Travel request and authorization
- Travel reimbursement including travel advance
- Billing
- Access data for institutional research
- Reporting
- Apply to Clark College
- Register for classes add drop (UGRD)
- Course catalog
- Class schedule
- Requisites
- View student progress for advising purposes
- View student info bio demo classes grades etc.
- Class rosters
- Grading
- Continuing Ed register for classes
- Pay tuition
- Produce transcript
- Award degrees
- Compliance related reporting
- Fin Aid (PS Data)

PeopleSoft Functions Required to Operate College

Campus Solutions

- Online Admissions
- Beginning of Term
- End of Term
- Enrollment
- Managing Academic Plans
- Managing Student Groups
- Awarding Degrees and Certificates
- Transfer Credit
- Transcripts
- Comments, Communications & Checklists
- Reporting
- Course Management
- Class Scheduling
- Prerequisite Management
- Reporting - course and class

Human Capital Management

- Payroll
- Faculty Workload
- Benefits
- HR Core
- Time & Labor
- Absence Management
- Employee Self Service
- Manager Self Service
- Reporting

Financial Management

- GL
- Accounts Payable
- Travel & Expense
- Accounts Receivable
- Grants
- Treasury
- Purchasing
- P-card
- Asset Management
- Reporting

Student Financials

- Cashiering
- 3rd Party Contracts
- Payment Plan
- Refunds
- Collections
- Tuition Calc
- Term Roll-over
- GL Interface
- Reporting

Financial Aid

- ISIR/Processing
- Awarding & Packaging
- Disbursing
- Loans
- Work Study
- 3 Cs
- Customer Service
- Dual Processing/SF
- Reporting

Security Roles

- Assigning Security Roles
- Documenting Security Roles
- Reporting/Audit

Once a list is developed in coordination with the college pillar leads, the college can use that list to assess the status of each item on the list on a regular basis. The assessment should occur in partnership between the department(s) performing the business process, the project manager, and, possibly, the college's ctcLink steering team. For example, the college's ctcLink steering team can be the convener and organizational body responsible for the assessments. Once assessed, PMs can prioritize problem-solving solutions and aim to get all functions and activities working appropriately.

At Clark College, the project manager used the working list to organize Clark's ctcLink Steering Team meetings throughout stabilization phase. (See Appendix I.) An excerpt of the list is shown below:

Exhibit 2: Image of Clark College Tracking, Assessing and Stabilizing ctcLink Document

	A	B	C	D	E	F
1	Core functions at Clark College	Status	Comments			not tested yet
2	Hire	4	Clark security roles. Special access, need ZC in some			1 not able to do this function
3	Manage Employees - self service	2	can't transfer, promote, not getting notifications			2 minimally functional, extra steps to make work
4	Separations	1	not able to payout - SBCTC must process			3 successful, still issues to resolve
5	Pay	3	go live issues, post payroll processes			4 working as intended
6	Requisition	3	self approval - ticket still open - req to PO issue causing delay, after ok			
7	Purchase	3	via Commitment Control - we are purchasing			updated by Steering Team 1/27/2020
8	Pay for purchases	4	via Commitment Control			
9	Close books at end of month	4	no month end reports - need to build some.			
10	Travel request and authorization	4	still learning and dealing with unique situations			
11	Travel reimbursement including travel advance	3	have processed/need last step to reconcile			
12	Billing	2	not doing the first set of GL entries. Christy working with sbctc			
13	Access data for institutional research	3	key students and employee and FMSQ data available, working to create reports			
14	Reporting	2	PSQ issues - broad access, have process to restrict some queries, concerned about quality of existing queries			
15	Apply to Clark College	4				
16	Register for classes add drop (UGRD)	4				
17	Course catalog	4				
18	Class schedule	3	multiple components = multiple canvas shells, classes look different to faculty, graded components			
19	Requisites	3	fine tuning as we Id issues. Having co requisites - how to make work			
20	View student progress for advising purposes	3	advisors starting to use			
21	View student info bio demo classes grades etc	3	need more training, people want transcript access which has been limited			
22	Class rosters	4				

Olympic College's ctcLink project management office systemically assesses the functionality of ctcLink in relation to their business processes. Olympic assesses each business process as In Remediation, Stable, or Benefits Realized.

Olympic College continues to track the business processes in remediation. The business processes in remediation have associated tickets. When a business process is in remediation at Olympic, a workshop is held. The subject matter experts (SMEs) review the documentation about the issue's impact and go through a root cause analysis. There are several reasons for outstanding tickets: (1) people need more training, (2) the business process does not maximize the use of a ctcLink function, (3) the implementation of a particular module is not complete, (4) the functionality is not working as intended in ctcLink. When the functionality is not working in ctcLink, tickets are submitted to the SBCTC ctcLink Support to be resolved.

Training Resources

While there are many great training resources offered by the SBCTC ctcLink Support organization, the colleges should develop additional training opportunities within the context of their organizational structure and business processes.

Use the SBCTC offered training as pre-requisites to the training offered by the college. For example, Seattle Colleges developed a Purchasing Requisition Training to those who have completed FIN: PU100 Purchasing – Requisitions and FIN: PU102 Purchasing – Receipts and Maintenance. Throughout the second and third month after go-live, colleges have found they are offering college-developed training often informed by frequently asked questions once colleges go live. Business analysts and pillar leads are great sources of information regarding what materials to include in the training developed by the colleges.

DG5 and DG6 colleges can use other college's training materials, as a number of colleges have developed their own training materials to supplement what the SBCTC offers. Colleges are encouraged to link to specific training materials in the [ctcLink Reference Center](#) whenever possible as these documents will be maintained by SBCTC Support. Colleges are also encouraged to localize the training materials in the ctcLink Reference Center. However, if colleges create a lot of their own documents, they should have a plan for who is responsible for maintaining these long-term. To anticipate what your college may need, check out [Seattle Colleges overview of training](#) on their website. As a note, many colleges put their employee training on the college's intranet, so if you have questions be sure to reach out and ask college project managers.

The training medium preferences, such as videos or documents, seem to differ by college and employee type. Quick guides and other documents are very helpful as long as they include screenshots and are captioned. (At first many people say they prefer videos and then will often prefer documents—as long as they have screen shots and are captioned appropriately.) Many colleges using ctcLink have used [Clark College's quick guides](#) as inspiration of how to present training materials to their colleges. Videos for specific functions may be more helpful than guides. For example, Clark College faculty members requested a short video about how to assign class permissions and Centralia College has a few videos to guide people through purchasing at employees' request.

For the most part, students are pretty easy to train. ctcLink offers current technology functionality that many students are familiar navigating. As a rule of thumb, when current students have to do something differently, such as register for classes, offer training material and a place (virtual or physical) to go to troubleshoot. The [ctcLink Student Communication Resource Guide](#) offers examples of training materials for students on pages 23-24 and 27.

Workshops and Open Help Labs

Whether in a virtual or physical location, open help labs and workshops are extremely helpful to employees and students to activate their accounts and complete the new tasks in ctcLink. Open labs and workshops should be scheduled during the timing of account activation. Some of the workshops will need to be scheduled within the second month of go-live.

Additional workshops that should be scheduled include time and leave reporting, advising center and faculty center, student enrollment, and grading and permission codes.

Account Activation Open Labs and/or Workshops

Set up a helpline, online location (e.g., Zoom or WebEx), and/or have an open lab for people to receive assistance to activate their ctcLink account. The common reasons both students and employees will need to access the help is they forgot their ctcLink ID, already activated their account and don't remember, and may need additional guidance to navigate and change their personal information in ctcLink.

No matter how much communication goes out about writing down their new ctcLink ID, some people just don't do it. (Don't be discouraged; continue to let people know the need to write down their new ctcLink ID.) Other times, students and employees may have already activated their ctcLink at another college or the SBCTC agency and don't realize it is the same system. It will likely be more common for people from DG5 and DG6 colleges to already have an activated account on the ctcLink system and not know it because many people do not understand that ctcLink is one system for the state.

Time and Leave Reporting Workshops

In addition to the open labs, hold workshops to help people problem-solve issues and learn to report time and leave for the **first two payroll cycles**. Both supervisors and employees will need support with this. Be prepared for hiccups in notifications. If a person has activated their ctcLink account with another college or SBCTC agency, they may get the notification at another email. So, make sure the facilitators of the time and leave workshops understand this and can walk people through how to change their primary email. Colleges should plan to have these workshops for at least the first two pay periods.

Advising and Faculty Center Workshops

Often the timing of the go-live is right before the registration for the subsequent quarter. At most colleges, advising is timed with registration. Prior to go-live they will have been trained. In addition to the SBCTC training for advisors, real time workshops on how to use the Advising Center and Faculty Center will be helpful. Students must be assigned to advisors post-go-live via an upload process, so these workshops should be timed after the students are assigned an advisor in ctcLink.

Student Enrollment Workshops

Get students prepared to registered. By now, they should be aware that they will have to register for classes in the new system, ctcLink. The degree of awareness will really depend on the college's pre-go-live and go-live communication strategies.

The college must decide if they are primarily asking students to log into PeopleSoft and go to their Student Center to register, or if they are asking students to use the HCX mobile app. **Screens look different and local training and instruction materials should be created for both.** It is important to note that the mobile app is more accessible but does not have full functionality. Students will have to use ctcLink PeopleSoft to upload documents, access activity guides, enroll in the payment plan, and check account balances and amounts due if enrolled at multiple institutions. In terms of registration activities and reviewing personal information, the mobile app works fine.

Most colleges have found that students more easily transition to ctcLink's new functionality overall. If students haven't activated their account and not paid attention that the college is using a new system, they may need extra support. Make sure the college has conveniently located the materials to support student account activation and registration. These materials should be accessible and in multiple languages. Faculty members can be great partners in communicating with students. Other successful strategies colleges have used are listed below:

- Incorporate account activate activation and registration instructions and activity into College 101 class material.
- Identify the high touch areas or "hang-out areas" at the college—both virtual and physical—and use these as student enrollment workshops. Examples include student multicultural offices, tutoring, worker retraining, and veteran offices.
- Partner with ESL and ABE departments and collaboratively plan student enrollment workshops for these populations.

Plan to address unanticipated issues that students may encounter while stabilizing ctcLink, even unrelated to go-live activities ctcLink. Two examples of this are listed below:

- Clark College referred students to complete admissions processes, register, and make tuition payments at kiosks throughout the campus. Since the kiosks were public, they were not configured to allow students and potential students to go to websites required to complete the payment processes in ctcLink.
- The first registration cycle for DG4 colleges did not go as smoothly as planned due to a problem in the class search function. This issue was unrelated to go-live activities but did occur during DG4's first registration cycle in ctcLink.

Planning may look like scenario planning or “what if planning,” as Jason Hetterle calls it. What if students were not able to register for classes? What could the college do? Mr. Hetterle also cautions, “Too much ‘what if planning’ can be counterproductive.” (See Appendix J.)

Grading and Permission Codes Workshops

The first grading period and student registration cycle, and maybe the second grading cycle—workshops for faculty members can be very helpful. The workshops should walk faculty members through the grading process, help them trouble-shoot any issues, and teach them how to assign and distribute permission codes to students to enroll in courses. These workshops may be timed in the second quarter.

Purchase Requisition and Travel Workshops

Colleges have found that workshops to walk through the first purchase requisitions and travel request processes in ctcLink are helpful. As with all of the other workshops, the workshops should supplement ctcLink training, not replace the training.

Communication

Communicate progress, updates, and issues regularly, consistently, positively, transparently, and in multiple ways. Continue to use the established communication methods, especially faculty members, supervisors, and student government. People need to know what to expect and need information handed to them just-in-time. Send out instructions on the days specific things are supposed to happen. For example, on the day employees are to activate their account, send the instructions. See Seattle Colleges Day 2 and Day 3 Update. (Note: Some of the links are not accessible to the public.):

Exhibit 3: Seattle Colleges Second- and Third-Day Email Post Go-Live

Email message sent to all employees February 23, 2021: ctcLink 2nd Day Update

This email is to provide several updates, resources, and answers to a few frequently asked questions. We will send out a similar ctcLink update email each day this week.

Open Time & Leave Drop-In Help

In addition to the scheduled ctcLink Time & Leave training sessions, we also have an open drop-in help session each day from 10am – noon [via Zoom](#). The drop-in sessions are listed on the [full Time & Leave training schedule](#).

Employee Emergency Contact Information & Personal Information

A few employees have noticed their current emergency contact information is not in ctcLink. Previously, that information was stored locally at the college and department level, and not entered into our central employee data. Please take this opportunity to update your emergency contact information.

How to update your personal information in ctcLink:

- [Add / Update Emergency Contact Information](#)
- [Request a Preferred Name in ctcLink](#)
- [Add / Update Preferred Email Address for Notifications](#)
- [Add / Update Direct Deposit Information](#) (note that employees can now have multiple direct deposits)

Other First Week Resources:

Update: Student Data Crosswalks: Our page describing how some of our student data has transformed in ctcLink has been updated with the final 'Go Live' crosswalks.

Update: Legacy – ctcLink Budget Crosswalk: The crosswalk tool that shows how a particular legacy budget string (like 149-086-AB17) has been converted to ctcLink (149-11200-086) has been updated with our final Go-Live information.

[ctcLink Budget Number Explanation](#)

[Budget Number Crosswalk tool](#)

Permissions & Security

- **Go beyond the Tiles:** Not all the tools in ctcLink have their own Tile. Some need to be reached through the NavBar. Please use a [quick-reference-guide](#) to check the navigation path before requesting a security change.
- **Security Changes:** [How to make a security / permissions change request](#)

ERP Support Sessions

Staff across many departments are working in [all-day training sessions this week](#) with the SBCTC support team. We appreciate everyone's patience as our enrollment, advising, admissions, payroll and HR, financial aid, finance, and cashiering offices continue their all-day work with SBCTC.

Student Employees

For purposes of ctcLink account activation, please encourage student employees to activate their ctcLink account this week and submit any time worked between 2/16 and 2/28 so that they can get paid in the next payroll. The account activation process is the same for student employees as all employees. Note: Student employees who activate their accounts this week as employees also see (and activate) their student self-service.

One Last Thing

If you forgot your ctcLink ID number, [here are the instructions for recovering it](#).

Thanks everyone!

Daniel Cordas

Executive Director, ctcLink & Student Success Technology

Email message sent to all employees February 24, 2021: ctcLink Day 3 Update - Faculty Please Activate Your ctcLink Account

To keep you informed during ctcLink deployment week, we're sending a daily email that provides updates, offers resources, and answers frequently asked questions.

Faculty Account Activation

We invite faculty members to activate their ctcLink account.

- Step-by-step instructions are available on the [ctcLink Training and Resources for faculty page](#) (select the accordion box for Account Activation).
- If you encounter technical problems while trying to activate your account, please contact the [IT Helpdesk](#).
- If you forget your ctcLink ID number, [here are step-by-step instructions to recover it](#).
- We encourage you to [add or update your emergency contact information](#).

Verify Your Courses in ctcLink

Faculty members, once you have activated your account, you are encouraged to verify your courses in ctcLink. If you do not see a course you are expecting to see attached to your name, please contact your division office.

When Activating Your ctcLink Account

The ctcLink login icon is located on the Employees web page for each college ([North](#) | [Central](#) | [South](#)).



You may also login to ctcLink using the “Employee Login for ctcLink” button on the [district Employees page](#) or directly at gateway.ctclink.us or ptprd.ctclink.us/psp/ptprd.

Attention: Employees Who Have Activated Their Accounts

We want to make sure you’ve activated your account in the ctcLink “production environment” and not the test environment used prior to our February 22 go-live. Please verify that by logging in using the links in the section above (When Activating Your ctcLink Account). If you activated your ctcLink account in the User Acceptance Testing (UAT) environment, you need to reactivate at one of the links in the section above.

ctcLink Email and Junk Mail Folders

Initially with the deployment of ctcLink at Seattle Colleges, emails generated from ctcLink were ending up in recipients’ junk mail folders. IT staff have worked with SBCTC to rectify this situation. As of roughly 3 pm on Tuesday, February 23, new ctcLink emails are being delivered to inboxes correctly. Emails that were delivered to junk mail prior to that time will remain in junk mail and need to be manually moved to inbox if desired.

Student Employees May Activate Their Accounts Now

Supervisors of student employees are asked to encourage their student workers to activate their ctcLink account this week. They will want to submit any time worked between 2/16 and 2/28 so that

they can get paid in the next payroll. The account activation process is the same for student employees as all employees. Step-by-step instructions are available on [the ctcLink Resources for Students page](#).

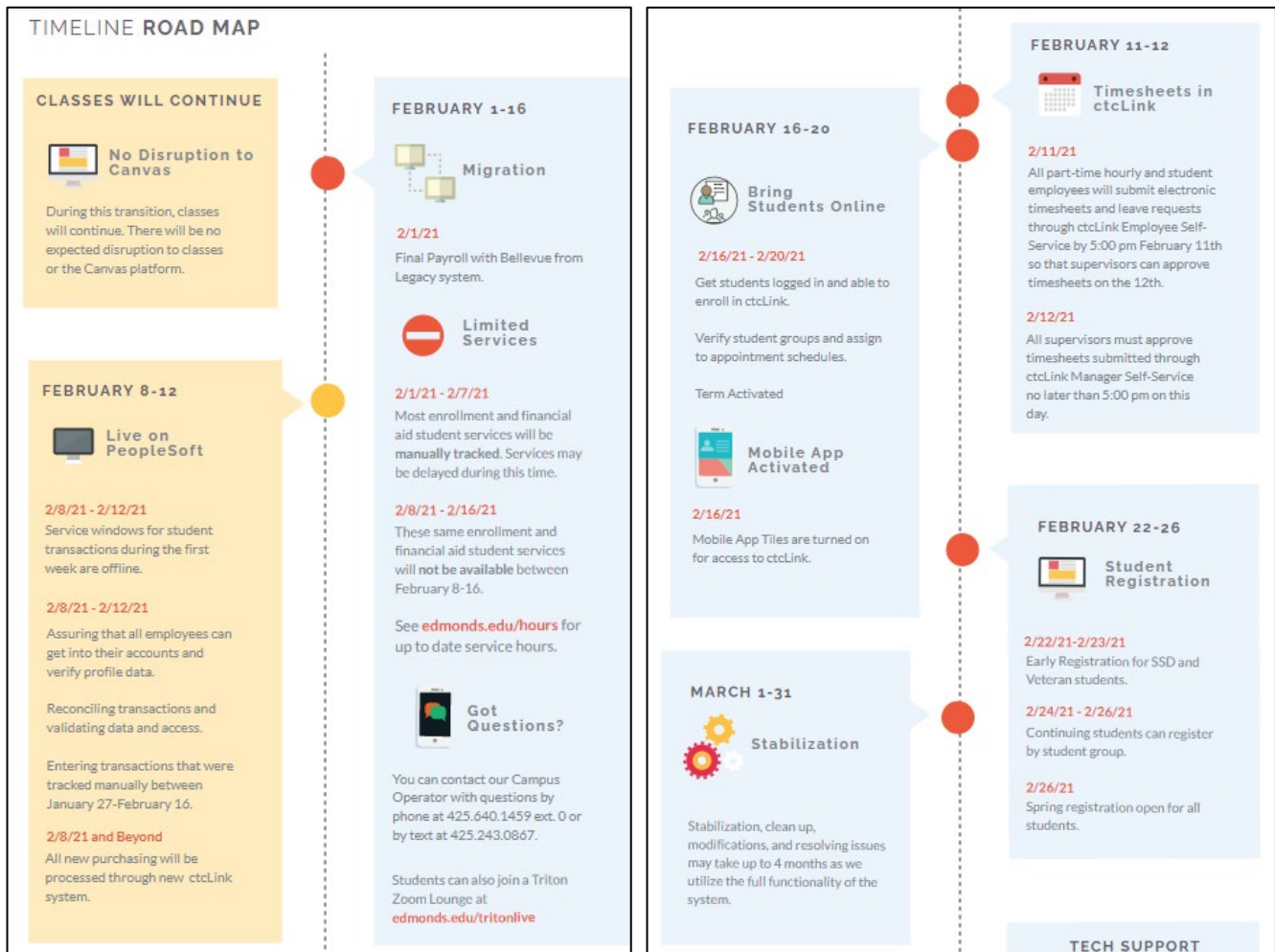
Note: Student employees who activate their accounts this week as employees also see (and activate) their student self-service. All other students will be invited to activate their ctcLink account starting Monday, March 1.

Seattle Colleges has made available all of its [email communication materials](#) to both students and employees. DG5 and GG6 colleges are encouraged to read through the messages. It will help them anticipate when and what to expect, communicate, and resources to offer.

Colleges have found that messages can go out to employees every day for the first and second week of go-live. After that the messages should go out weekly and at special times, such as grading, enrollment, etc. It is helpful if the college community, especially faculty members and student services personnel, are made aware of the messages students receive.

Edmonds College and Highline College used a timeline graphic/tool on their website with up-to-date information about going live with ctcLink. It was a convenient place for people to go to get the information they needed. The timelines contained dates, information, and links for both students and employees, especially convenient for people who were serving students.

Exhibit 4: Edmonds College ctcLink Timeline Road Map Excerpts



Listed below are some topics to send out to employees:

- Directions on how to activate and check their personal information in ctcLink.
- Reminder to the college community about the closures and that your service departments people are very busy and cannot support normal operations just yet.
- Provide summaries of accomplishments and outstanding issues.
- Define and estimate a schedule for ctcLink stabilization and optimization:
 - Stabilize the use of the technology, making sure the technology is working as it should. For ctcLink, you may also want to praise people utilizing the new business processes and not reverting back to elements of previous business processes.
 - Optimize the use of ctcLink. Once the technology and business practices are stabilized, you will want to make improvements to the business processes and technology.
- Updates about ctcLink accessibility updates.

Since communication goes two-ways, make sure to connect with the following groups:

- Supervisors to find out how it is going and how you can support them in reinforcing the use of ctcLink with their teams.
- Special interest groups and union leadership to see how they are doing and how you can support them and their constituents in the change process.
- Executive leadership team to ask them how it is going and request their partnership in reinforcing the change with their teams.

PMs will need to have a process in place to communicate with students and employees about updates to ctcLink, and when there are both planned and unplanned outages. Every time a sub-deployment group goes live on ctcLink, the system is taken down. For example, when deployment group 5-B goes live, the whole system is taken offline; no colleges using ctcLink, including DG5-A, can access the system. Regular maintenance is scheduled for Saturday mornings. These planned outages are communicated on the Gateway page in red font.

Paying Tuition

When students pay tuition in ctcLink PeopleSoft, they see a detailed list of fees that they never saw before. They often question and expect answers to why they have to pay specific fees and how the amount of the fee is determined. For example, during COVID-19 all colleges went into remote operations. Students often asked why they had to pay a building fee when they were no longer accessing the physical campus. Be prepared with explanations of why and what the different fees are and that colleges often do not choose the names for the fees. A new feature in ctcLink is that students can enrolled in a program to make payment installments—if the college chooses to use it. If colleges choose to use it, be sure it is configured and students understand the program.

Self-Service

In ctcLink, users can access their own personal information (name, address, emergency contacts, salary, benefits, and more) in ways not available to them in Legacy. People from colleges in previous deployment groups were surprised to see so transparently their personal information and feared that others else could see it too.

Be prepared to communicate what people can and cannot see.

- Other people cannot see other users' self-service page where the personal information is shown.

- Security roles determine what people can see. Security roles are determined by work responsibilities. For example, a person working in payroll will have access to payroll and benefit information for individuals in order to do their work.
- Colleges develop their own security role plan, including approving who can be assigned roles, then assigning, managing, and auditing the roles.
- Bottom line: Data security is always the highest priority in assigning security roles.

Query Development and Reporting

Some colleges in previous deployment groups wished they were prepared better for operational reporting post go-live. Some said that they assumed many of the reports they would need would be available in PeopleSoft ctcLink and discovered they were not what they expected.

The PeopleSoft (PS) queries are intended to be all encompassing for all 34 colleges' needs, rather than customized. The individual college can revise or reformat the reports after the query is downloaded to Excel to meet their needs, e.g., change order of columns and delete unneeded columns.

Multiple colleges recommended having ample PS Query Developers trained prior to go-live. Other colleges took a different approach and run most of their reports, once the college develops it, out of dataLink, rather than PS Query.

Edmonds College shared that they were preparing for query development and reporting prior to go-live and realized there isn't a lot that can be done until go-live. Beth Farley, Edmonds College Project Manager, shared that Edmonds' Institutional Research department does the operational reporting out of dataLink. The learning curve, no matter where the reports are generated, is significant and doesn't really kick in until the college is live on ctcLink. The college community needs to know that the data and information in the reports will not be available to them until the reports are written post go-live.

Supplemental Systems (Third Party or Homegrown Systems)

College should review and update their supplemental systems analysis and plan. Colleges have other technology solutions that are dependent on PeopleSoft ctcLink production data and will need to be up and running. This will take time as much of the work cannot be finalized until after go-live. Colleges will need to prioritize which supplemental systems will be addressed first, as not all systems can be connected at the same time. Be prepared to communicate the expected schedule and progress with those who use the supplemental systems. It is not uncommon to have to reprioritize a supplemental system or two after ctcLink go-live.



Months Two and Three

Many of the activities in months two and three post go-live are extensions of the first month's activities. Learning a system and changing the way work is conducted definitely takes more than one month. Some of the items presented in Month One may take place in Month Two of go-live, such as registering for classes and paying tuition.

Assessing and Stabilizing ctcLink at the College

Continue to assess and stabilize the functionality of the college's business processes within ctcLink. (See previous section, Month One: Assessing and Stabilizing ctcLink at the College.) Months two and three post go-live are the time when people may become frustrated by the change and instead of following and improving the ctcLink business process plan they are trying to make ctcLink work like the Legacy system. As colleges have set up a process to track and review business processes that use ctcLink, these will come to light. Develop a plan for what to do when that occurs. One suggestion is to evolve the college's ctcLink steering team to hold workshops to review and offer improvements strategies, similar to the college's educational program review process.

Staying Connected

Make sure that SMES are using the eLists, i.e., listservs, to ask questions, network, and stay connected. The following [ctcLink eList](#) are available: Campus Solutions, Finance, Financial Aid, Student Financials, Human Capital Management, Reporting, Coding, ctcLink Security, Online Admissions Application Portal Admins, ctcLink Point of Contact, and ctcLink Business Analysts.

About four-to-six weeks after go-live, the weekly meetings with the ctcLink project team will transition to the ctcLink Customer Support team. The focus moves from implementation to stabilization. In addition, there are monthly all project manager meetings.

PMs can ask other colleges to host a session on how they use a particular functionality. Some of these are already recorded and available. These are available in the canvas course ctcLink Pillar Work-session Information. At the May 2021 ctcLink Executive Sponsor and Project Manager Summit, participants requested and shared the need for centrally organized and intentional support networking events and resources for colleges to learn from each other and develop common business processes to optimize the use of ctcLink.

Building Internal College Coalitions

To reinforce the changes ctcLink has brought throughout the college, keep checking in with supervisors, union leaders, and student government about what they are hearing. Adapt communication, rewards, and celebrations in response to the feedback that is provided. Executive leadership also play a key role in reinforcing changes, responding to adversity and frustration, and positively recognizing the what and the importance of the work. Strong coalitions working together with common messages and goals provide the fertile ground for effective change.

Communication

Change is hard. One of the most effective ways to alleviate some frustration and reinforce the change is to provide consistent and predictable communication of progress updates, accomplishments, outstanding issues, and acknowledging frustrations. In addition, consistently address any rumors – substantiate and clarify the ones that are true—including the plan to mitigate—

and directly call out and bring truth and context to the ones that are not true. The best communication methods to use are those that were used prior to go-live with ctcLink and during the first month.

Regular communication during months two and three can be reduced to twice a month or every other week. Continue to communicate about the topics listed in Month One. Listed below are helpful topics of communication:

- Provide summaries of accomplishments and outstanding issues.
- Address openly the rumor mill.
- Remind people of the schedule for ctcLink stabilization and optimization:
 - Stabilize the use of the technology, making sure the technology is working as it should. For ctcLink, you may also want to include people utilizing the new business processes and not reverting back to elements of previous business processes.
 - Optimize the use of ctcLink. Once the technology and business practices are stabilized, you will want to make improvements to the business processes and technology.
- Continuously monitor and share ctcLink accessibility updates.
- Messages of reinforcing changes to business processes. Partner with the supervisors, special interest groups, union leadership, and executive leadership to make sure messages are relevant and responsive.

[Seattle Colleges](#) has put communication sent out for the duration of their stabilization period on its website.

Ongoing Workshops

Open labs and workshops should be scheduled during the time of significant firsts, such as account activation, payroll, registration, paying tuition, etc. These workshops were already described in Month One. They should be planned for in the training plan, as described in the previous section: Preparing for ctcLink Go-Live, Training Plan.

Colleges have found that sometimes it is beneficial to hold a second workshop or open lab for the second time the college goes through a major business process. For examples, colleges have found it useful to offer a workshop for the second payroll in ctcLink. Employees have needed additional support with submitting time and managers seem to encounter more unique situations during the second payroll. Holidays and how to handle them in ctcLink will need to be addressed by colleges when they occur in the pay period.

Security

By the second month, everyone at the college should have the security roles they need to do their primary job. At this time there is a lot of effort to identify what additional roles people are requesting and if that is appropriate for the work they are doing. This may also be the time where the security management plan is updated with improvement based on experiences during the first month of go-live.

During the second or third month after go-live with ctcLink, the college should begin auditing roles, especially ZC roles due to what should be limited use in most cases. Colleges do not need more than

one version of a role, e.g., ZC, ZZ, and ZD. Make sure the audit includes running queries for segregation of duties in HCM and FIN to ensure you don't have staff with too many roles.

Financial Aid Check-In and Support

Pay attention to financial aid employees because they will be dual processing for the remainder of the academic year; working simultaneously in FAM and ctcLink. Check in with the lead of financial aid to find out what support the financial aid team may need, especially during April, May, and June. While the rest of the college business processes should be stabilized with ctcLink, financial aid will only be beginning stabilization as they move into the 2022-2023 academic year.



Institutionalizing ctcLink Project Management

Colleges are encouraged to keep their ctcLink Project Manager post go-live. These positions manage the ctcLink at the college, serve as the liaison with the SBCTC regarding ctcLink, organize efforts to optimize business processes in ctcLink, and coordinate query development. Because ctcLink is such an integrated system, having ctcLink centrally managed at the college is recommended.

Listed below are typical duties the ctcLink Project Manager performs **post go-live**:

- Chair ctcLink Steering Team
- Lead stabilization and optimization efforts
- Manage HEUG membership
- Manage Lucid chart accounts
- Liaison to SBCTC for ctcLink access, including the following:
 - Distributed security staff,
 - List of staff who can submit tickets to SBCTC,
 - Query developers (can delegate to a lead query developer),
 - Access to dataLink (at Clark no one has access), and
 - QARS accounts
- Participate in monthly All PM Meetings
- Escalate issues and tickets with SBCTC Support
- Provide the resources to troubleshoot issues, e.g., participation on ctcLink listservs
- Coordinate user acceptance testing of fixes and upgrades (Pillar PMs)
- Communicate system down time
- Project Management for implementation of Campus CE, Online Admissions Application, Budget Planning Tool, and any other upgrades.

ctcLink will bring lasting change to the way colleges do business and structure themselves across departments. These changes are up to each college and will vary, just as college organizational structures vary today. Regardless of the organizational structure, colleges need people to fill the following roles before, during, and after go-live. Most of the roles are further defined in [ctcLink Project College Roles, Departmental Dependencies & Alignment](#) document are listed below:

- Reporting Lead
- Security Lead
- Test Lead(s)
- Training Lead
- Functional/Business Analyst: Campus Solutions
- Functional/Business Analyst: Finance
- Functional/Business Analyst: HR & Payroll
- Support/Help Desk Lead

Appendix A: Bellevue College Transition Punch Plan (Draft)

Communications

Media response protocol

Response to legislators

Training

Security

Readiness

Preparation (see project dates for details)

ADKAR Steps:

Training

- Opening Day Presentations 9/23/21
- Create 6-month training plan/schedule by 10/1/21
- Communicate the 6-month training plan by 10/5/21
 - o Email via Coach
 - o Publish to website

Support & Triage

- Hire Internal Support Specialists by 10/8/21
- Determine naming of support network by 9/15/21
 - o OneBC Support Network
 - o Bulldog Service Center
- Create Triage flow-chart by 9/1/21
- Provide ISS training by 11/5/21
- Establish ISS Schedule by 11/1/21
- Create calendar invites with dial-in details for all Staff and Student support sessions by 10/29/21
- Create webpage with Staff and Student support details by 11/1/21
- Publish Staff and Student support session webpage by 11/4/21
- Determine what tech is needed by 10/1/21
- Distribute tech to ISS employees by 11/1/21
- Prepare resource library by 11/1/21
 - o Explanations (why fees are on the tuition page, other?)
 - o what people can/cannot see across institutions
 - o why/how the system works that way
- Prepare a living FAQ by 11/1/21
 - o Advising: Assigning advisors to students is manual. Provide list of advisees to faculty prior to go-live.
- Identify department office hours by 10/29/21
- Publish department office hours on website by 11/1/21

Security/Reporting/ITS

- Test critical processes in SVX prior to go-live by 11/1/21

- Identify query developers and how we'll run reports 10/1/21
- Determine training needed for query developers 10/1/21
- Schedule training for query developers to occur prior to 10/29/21
- Identify supplemental system roll-out schedule by 10/15/21
- Publish supplemental system roll-out schedule by 10/20/21

Project Management

- Create college stabilization assessment document by 10/29/21
 - Identify functionality related to business process and evaluate based on Remediation, Stable or Benefits Realized. If Remediation, follow process on p. 18 of [90-day guide](#).
- Create departmental [Contingency Plans](#) template by 9/1/21
 - Contingency Plans Finalized by 10/29/21
 - Publish Contingency Plans to website by 11/1/21
- Create communications email templates
 - Go-Live announcement
 - Daily update
- Create logistics plan for Mock & Go-Live Sunday by 10/1/21
 - Book group mock go-live and official go-live space by 10/1/21
 - Gather contact information for everyone involved by 10/13/21
 - Determine what tech is needed by 10/13/21
 - Conduct mock go-live on 10/14/21
 - Order formal go-live catering by 10/1/21
 - Determine mock go-live test sequence by 10/13/21
 - Determine mock go-live decision criteria by 10/8/21
 - Catastrophic failure: General Ledger doesn't convert, no employees in the system, no students in the system.
 - Confirm final go-live decision criteria by 10/29/21
 -

Transition

Week 0 – Nov 1-5

- Access
 - Legacy access removed 12pm on 11/4/21
 - Legacy accounts deactivated 3pm on 11/4/21
- Support
 - Daily email?
 - Send reminder on 11/1/21 about Legacy shut down
 - Provide info of what to expect, where to get questions answered
 - Sign-up sessions on Nov 9 and 10 released this week (11/4/21?)
 - Reminder of support plan, schedule, resources on 11/4/21
- Project management

-
- Go-Live Weekend: Collaborative onsite validation
 - Go-Live Leads arrive by 12pm

- Computer lab, U building
 - Set up catering by 12pm
- Validation from 1-4pm
- Go/No Go Decision at 4pm
- [Pillar-Specific Activity Guides](#)

Week 1 - Nov 8-12

- Focus
 - Staff & Faculty Account Activation
 - Attend SBCTC-led work sessions
 - Security adjustments
 - HR, FIN and Payroll up and running
- Access
 - Nov 8, morning: HR, Payroll, Finance, Student Finance, Financial Aid
 - Nov 8, 12pm: UAT primary participants, Workshop Participants
 - Nov 9: All staff get access, last name A-M receive support
 - Nov 10: Staff last name N-Z receive support
 - Nov 12: Faculty, Time & Leave sessions offered
- Support
 - Nov 8: staff/student support available
 - Nov 9: Staff support sign-up sessions last name A-M receive support
 - Nov 10: Staff support sign-up sessions, last name N-Z receive support
 - Support Options:
 - Staff: Structured customer service support sessions offered by SBCTC by Pillar, walk through first business processes.
 - Staff and Students: Help line, Zoom Rooms, Open Labs, Walk-up help desk/concierge
 - Nov 12: Time & Leave sessions offered
 - Follow Triage structure for escalating issues
- Communication:
 - Daily Update email
 - Reminder about access days/times and sign-up sessions for Nov 9 and 10,
- Security
 - Use triage plan to address and escalate issues
 - SLA target ?

Week 2 – Nov 15-22

- Focus
 - Student Account Activation
 - Staff/Faculty ramp-up and troubleshooting
 - Security adjustments
 - Timesheet submission
- Access

- Nov 15: Time & Leave sessions offered (Put recordings on website)
 - Nov 17: Students get access, release student sign-up and drop-in session details
 - Nov 18-29: student sign-up and drop-in sessions
 - Nov 22 (Mon) SBCTC support day, then no more support
 - Support
 - Unstructured customer service support open sessions
 - Follow Triage structure for issues
 - Communication
 - Daily Update email
 - Student email, including department office hours and where to sign up for help
 - Security
 - Use triage plan to address and escalate issues
 - SLA target ?
- Communication Daily Update
- Where to find help
 - Drop-In sessions, website, handouts, etc.
 - SBCTC support sessions
 - What has come up: nuances employees have noticed, tips and tricks
 - First Week Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info
 - What to do prior to requesting a security change

Transition: Things to note

- FIN, SF, FA need to validate data and do post go-live configuration prior to opening transactions
- Phased approach to entering transactions

Stabilization

Week 3 - Nov 22-24 (Holiday 11/25-26)

- Focus
 - Student account activation
 - Account activation outreach
 - Staff/Faculty ramp-up and troubleshooting
 - Security adjustments
- Communication Daily Update
 - Where to find help
 - Drop-In sessions, website, handouts, etc.
 - What has come up: nuances employees have noticed, tips and tricks
 - First Month Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info
 - What to do prior to requesting a security change

Week 4 Nov 29-Dec 3

- Focus
 - Student Registration
 - Student account activation
 - Account activation outreach
 - Timesheet submission
 - Security Adjustments
- Communication Twice-Weekly Update
 - Where to find help
 - Drop-In sessions, website, handouts, etc.
 - What has come up: nuances employees have noticed, tips and tricks
 - First Week Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info
 - What to do prior to requesting a security change

Month 2 - December

- Focus
 - Student Registration
 - Student account activation
 - Faculty grades
 - End of Term activities
- Communication Weekly Update
 - Where to find help
 - Drop-In sessions, website, handouts, etc.
 - What has come up: nuances employees have noticed, tips and tricks
 - First Week Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info
 - What to do prior to requesting a security change

Month 3 – January

- Focus:
 - Beginning of Term activities
- Security Leads audit security roles (p29 of 90-day guide)
- Communication Weekly Update
 - Where to find help
 - Drop-In sessions, website, handouts, etc.
 - What has come up: nuances employees have noticed, tips and tricks
 - First Week Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info

- What to do prior to requesting a security change

Month 4 – February

- Focus
 - SBCTC Instructor-Led Training for staff
- Communication Weekly Update
 - Where to find help
 - Drop-In sessions, website, handouts, etc.
 - What has come up: nuances employees have noticed, tips and tricks
 - First Week Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info
 - What to do prior to requesting a security change
 -

Month 5 – March

- Focus:
 - Student Registration
 - End of Term activities
- Communication Weekly Update (biweekly?)
 - Where to find help
 - Drop-In sessions, website, handouts, etc.
 - What has come up: nuances employees have noticed, tips and tricks
 - First Week Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info
 - What to do prior to requesting a security change

Month 6 – April

- Focus:
 - Beginning of Term activities
- Communication Weekly Update (biweekly?)
 - Where to find help
 - Drop-In sessions, website, handouts, etc.
 - What has come up: nuances employees have noticed, tips and tricks
 - First Week Resources
 - Links to crosswalks, budget number explanations/crosswalk, EMPLID lookup tool
 - Security & Permissions Info
 - What to do prior to requesting a security change

Support structure

- Please see the [Go-Live Support & Triage Plan](#) and [Timeline](#) for details about the support structure.

Appendix B: ctcLink College Samples Frequently Asked Questions and Website Content for Students

PRIOR TO GO-LIVE WITH CTCLINK

Grays Harbor College Sample: Student FAQs

Question

How can I request an official transcript during the ctcLink transition phase (October 25 – November 22, 2021)?

Answer

Students may continue to request official transcript orders, but Grays Harbor College will not be sending official transcripts electronically, with the exception of transcripts that need to be sent to Washington state community and technical colleges or Washington state public universities. All other transcripts will be in paper format and sent through mail delivery. Our processing time will be delayed, but we will try our best to fulfill orders as soon as possible. Please request your official transcript by reviewing the steps on this page and emailing enrollment@ghc.edu.

Question

Do I have to wait until student accounts go active on November 18 to check my unofficial transcript and payment overview?

Answer

You may still view your unofficial transcript at <https://www.ghc.edu/transcripts>, however, all old systems will transition to ctcLink in November, including the ability to view your payment overview. That system will be down from October 25 until we have transitioned to ctcLink.

Question

I have missed the deadline (October 24) to make changes needed to My GHC Student Portal. So, what should be doing next?

Answer

You'll be able to update and make changes to your student record after you activate your ctcLink account on November 18.

Question

Is Canvas going away?

Answer

No. We will continue using Canvas, and you can continue logging into Canvas throughout the transition to ctcLink and after.

Question

Can I access my ctcLink student portal from my mobile device?

Answer

Yes. You will download the ctcLink mobile app from any app store. The ctcLink mobile app will provide information about Grays Harbor and serve as a pathway to your student portal. You will be able to register for classes, pay tuition, and more from your ctcLink mobile app.

Question

Can I still access my Fall 2021, Winter 2022, and Spring 2022 financial aid information?

Answer

Yes, you can still access your financial aid information for the Fall 2021, Winter 2022, and Spring 2022 through the Financial Aid portal, <https://www.ghc.edu/financialaid/check-my-financial-aid-status>.

Question

I need to drop a class and the link on the Grays Harbor College website led me here. What is the new process for dropping a class?

Answer

Please contact our Registration department to drop a class by emailing enrollment@ghc.edu. Once Registration has confirmed you have dropped your class, make sure the instructor of the class you dropped is aware of this change.

Grays Harbor College Sample: Sample Web Content Prior to Go-Live with ctcLink

What Students Should Expect with ctcLink

In November 2021, Grays Harbor College will move to a new student technology system, ctcLink. Manage your entire college experience from your mobile device, laptop, or home computer. With ctcLink you will be able to do the following:

- View and update your student information and manage personal contact info.
- Register for classes, add, and drop.
- Pay tuition and fees and handle financial aid processes.
- View your grades, track academic goals, and apply for graduation.
- Contact your instructor or advisor.

ctcLink offers a more consistent experience across the Washington community and technical college (CTC) system. You'll have 24/7 access to an online student center, and so will your advisors and

instructors. You will continue to use Canvas in your classes; this will not change or be interrupt with the change to ctcLink.

When will this change take place?

ctcLink is scheduled to go live for Grays Harbor College during Fall Quarter on November 8, 2021. As we get closer to the go live date, you'll receive more information.

Key Dates

- September 20, 2021 – Fall Quarter Classes Begin
- October 25, 2021 – Look for information about using ctcLink to register for Winter Quarter in your Grays Harbor College email.
- November 8, 2021 – ctcLink goes live at Grays Harbor
- Week of November 15, 2021 – Students will have access to ctcLink to activate their account

ctcLink Student Website

Preparing for the Change

In the months prior to “go live,” staff across Grays Harbor College are preparing for the new ctcLink system. As you can imagine learning and implementing an entirely new system can be challenging. Right now, staff members are engaged in training, building the new system, verifying data, and testing the system to ensure it is ready for launch. Countless hours have been and continue to be devoted to these efforts.

As we prepare, you may notice a slowdown in processing information and day-to-day activities. Additionally, all Student Services offices have reduced hours on Fridays through December 2021, allowing staff to complete required training and testing sessions. We ask for your patience as our staff works to balance training, testing, and daily work in two systems – our current system and the new ctcLink environment. Please know, students are our first priority and we strive every day to meet your needs in a timely way, even now as we transition to ctcLink.

Changes in Class Registration

Registration for Winter Quarter 2021 for current students has been pushed back from **** and will now being November **** using the new ctcLink system. Look for more information after October 25 about how to use ctcLink to register.

New Student ID Numbers

If you are a current student, you will be assigned a new ID number—a ctcLink ID. Expect to receive an email message about your new ID number and instructions after October 25. With this new ID, you will have one login to access your information at Grays Harbor Colleges as well as all Washington State community and technical colleges. If you transfer in from or out to another CTC in Washington state, your ID will follow you and you will be able to use the same ID to access your information.

Expect more information and instructions to come before any changes occur. All new incoming students also will receive a ctcLink ID.

Background about ctcLink

All CTCs across Washington state are transitioning to ctcLink, replacing an outdated computer system. So far, half of the community college have moved to ctcLink.

Washington's 34 CTCs have shared back-office administrative systems for 30 years, but that software is now both limited in its functionality and outdated. CTCs are implementing a new and more flexible information system to meet business and educational needs now and into the future. However, it is about much more than new software. ctcLink is an unprecedented and significant business transformation project for all 34 CTCs and the State Board for Community and Technical Colleges agency. It will change the way we all do business—both locally and together as a system.

POST GO-LIVE WITH CTCLINK

Grays Harbor College Sample Inspired by Skagit Valley College: Student FAQs

How do I get to the ctcLink login screen?

- Go to the Grays Harbor College website.
- You may get to the ctcLink login screen directly at the URL <https://gateway.ctcLink.us>.

How will I get my ctcLink ID number?

- Returning Students: If you are a current or returning student, you will get your new ctcLink ID number (called EMPLID in the system) when you activate your ctcLink account. Be sure to write down your new number when you get it and keep it in a safe place.
- New students: Your ctcLink ID number is included in the welcome email you receive from Grays Harbor College.

What if I forget my ctcLink ID number?

- Be sure to write down your new ctcLink ID number (EMPLID) when you get it and keep it in a safe place. You will need it to login to ctcLink.
- If, however, you forget your ctcLink ID after you activate your account, you can retrieve your credentials by contacting the Student Help Desk.

What if I already have a ctcLink ID from another college?

If you have already received a ctcLink ID number from another college in Washington state, you do not need to activate your account or receive a new number. The ctcLink ID number you already have is what you will use at GHC as well.

Where can I get help activating my ctcLink account or using ctcLink?

You won't be alone as you start using ctcLink. GHC staff will be on standby to assist with technical issues. Online help and support—both self-service tutorials and Zoom meetings are available:

Student Support Zoom Room

If the how-to guides and GHC ctcLink student canvas course have not provided you the help you need, please visit our student ctcLink support zoom room. Please see the schedule for times and meeting room links.

Thursday, November 18: Join the Thursday ctcLink student support zoom room

- 9 – 10 am
- 12 – 1 pm
- 3 – 4 pm

Friday, November 19: Join the Friday ctcLink student support zoom room

- 9 – 10 am
- 12 – 1 pm

On Saturday, November 20 and Sunday, November 21 from 10a-2p, the Student Help Desk will be available for ctcLink student support, account activation and troubleshooting via the Student Help Desk zoom lobby.

Student Assistance Team

If a student can't make one of the pre-scheduled ctcLink support zoom session on the 18th or 19th, you can drop into the Student Help Desk zoom lobby, which is available 9am - 4pm Monday through Friday. On the weekend of November 20 and 21, the help desk will be available from 10a-2p for ctcLink student support, account activation and troubleshooting.

Do my old student SID and PIN go away?

Yes, student SID and PIN numbers will no longer be used with the new system. They are replaced by the ctcLink ID number (called an EMPLID in the new system) AND password. Students now set up their own passwords and associated security questions (for use if the password is forgotten) when they activate their ctcLink account and log in to the new system for the first time.

New students starting Winter Quarter 2021 and after will receive a ctcLink ID and will use that number. New students will still need to activate their ctcLink account.

Refer to the instructions for how to activate your ctcLink account.

Is Canvas going away?

No. We will continue using Canvas, and you can continue logging into Canvas with your My GHC email and password.

Canvas Login: ghc.instructure.com

Can I still access my unofficial transcript in the old My GHC Student Portal system?

You can access your unofficial transcript in ctcLink. Refer to the instructions for how to view your unofficial transcript.

Can I still access my Fall 2021 financial aid information?

Yes, you can still access your financial aid information for the Fall 2021, Winter 2022, and Spring 2022 through the Financial Aid portal.

How do tuition and fees appear in ctcLink?

ctcLink displays more information to students about tuition and fees than Grays Harbor College's previous system. One big change is that tuition is now shown split out into the Operating, Building, and S&A (Services and Activities) components.

Grays Harbor College follows the Washington State Board for Community and Technical Colleges (SBCTC) tuition and fees policies, which generally describe the amounts that are charged for different types of classes and students.

What if my tuition and fee charges don't appear?

It is possible this could happen if you are using the mobile app for ctcLink. If this happens:

Log into the main ctcLink portal at gateway.ctclink.us instead of using the app.

- Select 'Student Homepage'
- Select 'Financial Account'

This should fix the issue and you should be able to see your account charges. Here are links to the How-To Guides: [Check Your Account Balance](#) and [Make Payment on Your Account](#).

What if I encounter problems when I try to pay tuition with my credit card?

We are aware that some students have encountered problems when trying to pay tuition through a credit card transaction in ctcLink.

If you encounter this problem, try the tips below:

- Use the main ctcLink webpage to login and pay (instead of the mobile app).
- Use the Firefox or Safari browsers (instead of Google Chrome).
- Try clearing your browser's cache or turn off the pop-up blocker on your browser. Check out [Tips Before You Begin Using ctcLink](#).

Where can I get my 2020 (or older) 1098-T forms?

Past student 1098-T forms are not available in ctcLink. Students may go to our Education Tax Credit website to access their 2020 and past 1098-T forms.

How do I get the ctcLink app for my mobile phone or devices?

One exciting feature of ctcLink is an app you can use on your mobile devices. Search the app store (iPhone) or play store (Android) on your mobile device for “ctcLink” to download and install this free app today. After you activate your ctcLink account, you’ll be able to access ctcLink directly through your mobile device using this app. A How-To guide to obtain the ctcLink app is available for you.

Note: You must activate your ctcLink account before using the mobile app or its web-based version.

What can I do in ctcLink and Canvas?

You will use a combination of ctcLink and Canvas while you’re a student at Grays Harbor College.

ctcLink: ctcLink is your student information system. ctcLink is the tool you will use to conduct your college business, including registering for classes, view your student information, apply and view financial aid information, pay tuition, check grades, view unofficial transcripts, communicate with instructors and advisors, and more.

Canvas: Canvas is the virtual campus of Grays Harbor College. Some courses are fully hosted online at Canvas; other times instructors will utilize Canvas as part of a 'hybrid' course, where students meet face-to-face as well as participate in class online. You can find more information about and support for Canvas from eLearning.

Do I use ctcLink to report time I have worked as a student employee of Grays Harbor College?


Yes. Student employees need to use ctcLink to report their time worked so they can get paid. Step-by-step instructions are available.

Do I need a permission number for every class in ctcLink?

No, you do not need a permission number for every class.

There is some confusion about when students need to request permission numbers (formerly known as entry codes) because the Permission Number Box automatically appears on the registration page. You do not need a permission number for every class. We encourage you to go through the process to register for your courses, and if you need a permission number, the system will inform you after you click the Enroll Button. Step-by-step instructions are available.

Appendix C: Grays Harbor Post Go-Live Training Plan (Draft)

=Notes to Grays Harbor

=How-To Guides to be created

=College decisions to make

Purpose

This plan outlines the necessary training regimen to achieve the staff, faculty and student's abilities to navigate the ctcLink PeopleSoft system in the future state. In order of this project to become a success, employees at Grays Harbor College (GHC) must become fully trained on the new system, understand how business processes change from the way they were performed in the Legacy system, and optimize the use of ctcLink.

Pre-ctcLink Go-Live Training and Support

Grays Harbor College employees have been actively engaged in the work packages to prepare for ctcLink. Not all of those activities prepare faculty and staff for all the possible scenarios in ctcLink, training offers more holistic preparation to go live on ctcLink. Without training, differentiating what it is working in ctcLink appropriately and what is not working is impossible. Moreover, the SBCTC Customer Support Service Level Agreement includes the expectation that college employees have been trained in the area where a ticket is submitted.

Washington State Board for Community and Technical Colleges ctcLink Support Training

Prior to go-live with ctcLink, the training materials for employees are offered by the Washington State Board for Community and Technical Colleges (SBCTC) ctcLink Support. They are developed for specific ctcLink features and functionality. The training, while timely, is important for users to understand how ctcLink works.

To access the recommended training, the directions are listed below:

How to Register for Training Courses

1. Go to the [ctcLink Training Registration](#) page (opens new tab on the SBCTC website).
2. Complete the registration. For Institution, choose Grays Harbor College from the pull-down menu. For Email Address, enter your Grays Harbor College email address (e.g., username@ghc.edu).
3. Select the courses you would like to register for. The end of this document has a guide to help, based on employee type and function. See the Recommended Training by Employee Type and Function/Role section at the end of the document.
4. When you next log in to Canvas, the training courses you selected will be available under your course list.

Train the Volunteer Trainers

Since the subject matter experts (SMEs) and system power-users will be engaged the first two weeks of intensive training hosted by the SBCTC ctcLink Customer Support, other people will be needed to run the open training/support sessions during the first two weeks.

The people who will run the open training sessions in the first two weeks will be GHC PM; administrators, faculty, and staff volunteers; and student government volunteers (referred to as

volunteer trainers). The list below includes the open training/support sessions with the required training needed by the volunteer trainers prior to holding the open training/support sessions post go-live. Follow the instructions above, “How To Register for Courses,” for instructions to register. Volunteer trainers should also familiarize themselves with the relevant step-by-step guides that are listed in the Post Go-Live Training and Support section below. **Consider using the no-class day (Friday, October 8) as times to suggest taking the courses and offering the GHC developed and scheduled training to prepare the volunteer trainers.**

Activate Account for Employees

- PeopleSoft Fundamentals
- ES100 HCM Employee Self-Service
- CF100 Faculty Self-Service—optional, only because people may access and have easy questions, otherwise refer them to the Advising and Faculty Center Workshops
- CA100 Advisor Self-Service—optional, only because people may access and have easy questions, otherwise refer them to the Advising and Faculty Center Workshops
- CH100 CS Staff Self-Service—optional, only because people may access and have easy questions
- GHC developed and scheduled training, including understanding the most frequent issues listed below:
 - Accessing whether they already have an account activated (Someone in the support session will need access to run the query to see if their account is activated.)
 - What to do when they didn’t write down their ctcLinkID
 - What to do when their personal information is not correct, **Where will people go if they have issues with their personal information? Will they submit tickets?**

Activate Account for Students

- PeopleSoft Fundamentals
- CC100 Campus Community (Student Information)
- CS100 Student Self-Service
- CH100 CS Staff Self-Service
- GHC developed and scheduled training, including understanding the most frequent issues listed below:
 - Accessing whether they already have an account activated
 - What to do when they didn’t write down their ctcLinkID
 - What to do when their personal information is not correct, **Where will people go if they have issues with their personal information? Will they submit tickets?**

Time & Leave Reporting

- ES100 HCM Employee Self-Service
- MS100 HCM Manager Self-Service
- **Need to have a triage plan: Where will people go if they have issues with time and leave? Will they submit tickets—knowing that the answers will require a tight turn around?**

Advising and Faculty Center Workshops

- CF100 Faculty Self-Service
- CA100 Advisor Self-Service

- CH100 CS Staff Self-Service
- CS100 Student Self-Service
- **Need to have a triage plan: Where will people go if they have issues?**

Post Go-Live Training and Support

The post go-live training approach will be timed according to when employees and students get access to ctcLink and have to complete the functions within ctcLink for the first time. How-to guides will be available for employees and students. In addition, open sessions **via zoom and at the college** will be available for people experiencing issues.

First Two Weeks Post Go-Live

Subject Matter Experts: First Two Week SBCTC ctcLink Support Sessions

ctcLink Customer Support team convenes a structured schedule for two-weeks post go-live to walk colleges through the first business processes live on ctcLink. Colleges should plan to attend and fully engage in these sessions. The SMEs attendance will impact their ability to assist other training efforts for the college. The GHC PM; administrators, faculty, and staff volunteers; and student government volunteers (referred to as volunteer trainers) will lead the support sessions that occur during the first two weeks.

A schedule of daily activities will be released and posted by SBCTC ctcLink Support prior to go-live for planning purposes. The sessions are scheduled to be concurrent with the timing of college's business process, such as payroll. The sessions will be attended by anyone involved directly or peripherally in the business process. The sessions walk colleges through the business process, identifies how the system works, and describes the system's interconnectedness in the context of each business process as well as supporting procedures.

SBCTC ctcLink Support have put together [activity guides](#) for the first week through the first month for each ctcLink Pillar. There is overlap between these activities and the two-week ctcLink support sessions. SMEs and power-users can use these guides to support the activities when they are not in the session. There will be open WebEx's to get questions answered and follow-up. It will be helpful to review these activities prior to go-live, just to be prepared. ctcLink Support is there to help!

- [Campus Solutions ctcLink First Week/First Month Activity Guide](#)—The guide provides access to an introduction to Campus Solutions in ctcLink. It provides a basic guide to high-, medium- and low-priority cutover tasks, term-dependent tasks, and other Campus Solutions resources.
- [Finance ctcLink First Week / First Month Activity Guide](#)—The guide provides access to an introduction to Finance in ctcLink. It provides a basic guide to overall setup, core processes, and other financial resources.
- [Financial Aid First Week / First Month Activity Guide](#)—This guide provides access to an introduction to Financial Aid in ctcLink. It provides information to prepare for and conduct dual processing, including but not limited to academic plan review, item type crosswalks, and security roles.
- [Financial Aid Dual Processing Business Processing Guide](#)—This guide provides an overview of dual processing as well as detailed descriptions and instructions of how-to dual process financial aid in FAM and ctcLink.

- [Human Capital Management \(HCM\) ctcLink First Week / First Month Activity Guide](#)—This guide provides basic setup instructions as well as instructions but not limited to perform the tasks related to HCM, including payroll, faculty workload, time and labor, absence management, and Talent Acquisition Manager (TAM).
- [Student Financials ctcLink First Week / First Month Activity Guide](#)—This guide provides an introduction and description of Student Financial related activities for prior to the first week of go-live, first week activities for Cashiering and Student Accounts, first month activities and other Student Financials resources.

Activate Account for Employees

Employees, other than Subject Matter Experts, will activate their account on November 9 and 10. Employees will be asked to go into Human Capital Management (HCM) Self-Service to check the accuracy of their personal information. **Where will people go if they have issues with their personal information? Will they submit tickets?**

They will have an **activate account step-by-step guide** to help them through the activation process. A zoom session will be available from ****.**** to help work through issues. The people running the open sessions will not be SMEs required to attend the SBCTC ctcLink Support sessions.

Time & Leave Reporting

Employees will have a **time and leave reporting step-by-step guide** to enter their time and leave, due by November 15 for the November 25 paycheck. Open sessions for the first and second payroll will be available **Friday, November 12 and Monday, November 15 from **.****. Volunteers will run the open sessions for the first payroll on ctcLink so that payroll SMEs can attend the required SBCTC ctcLink Support sessions. A second set of sessions will be offered **Monday, November 29; Tuesday, November 30; and Wednesday, December 1 from **.****. **(NOTE: Sessions will need to be offered when all people can attend; for example, open sessions will need to be available for people working swing or overnight shifts.)**

Advising and Faculty Centers

Advisors and Faculty members will have a number of step-by-step guides to help them navigate the advising and faculty centers. With priority registration beginning November 22, advisors and faculty members will want to access the system and know what to do. However, the pairing of advisors to students occurs after go-live – so that process will need to be complete prior to encouraging people to explore the advising center. The step-by-step guides are listed below:

- Advising Center
 - Add an Advising Note
 - View Academic Advisement Report
 - View and Notify Advisees
 - View Student Transcript
 - View Student Enrollment
- Faculty Center
 - View your Teaching Schedule
 - Class Roster
 - No Show Drops
 - Enter Grades
 - Grading FAQ

- Assigning Permission Codes
- View and Accept Faculty Contract for Moonlight and Adjunct

Zoom sessions will be available from ****.** on November 12, 15-16** to help work through issues and answer questions. **Will you hold on-campus training?** The volunteer trainers running the open sessions will not be SMEs required to attend the SBCTC ctcLink Support sessions. **Where will people go if they have issues with the information? Will they submit tickets?**

Activate Account for Students

Students will begin account activation on Thursday, November 18. Students will be encouraged to activate their account to make sure their student information is correct and that they are ready for winter quarter (2022) registration. The following step-by-step guides will be available to them:

- Activate Your Account
- Set or Update your ctcLink Account Recovery Options
- Check Your Enrollment Date
- Update Your Student Profile
- Reset Your Password
- Download Mobile App

Zoom sessions will be available from ****.** on November 18-19 and 22-23** to help work through student issues. Training volunteers, especially students, will lead the sessions. Break-out sessions will be necessary for individual student help to protect student privacy. The volunteers running the open sessions will not be SMEs required to attend the SBCTC ctcLink Support sessions on November 18 and 19.

Week 3 – Week 20

Student Enrollment

Student registration begins on November 22 for priority registration. Open sessions will be available on **zoom and in-person** from ****.** on November 22-24, and 29-December 3** for students to receive needed help. These sessions will be supplemental to the step-by-step guides students will receive to register for winter quarter (2022) classes. Advisors and student enrollment professionals will lead these enrollment sessions with mechanisms to maintain student privacy, such as break out rooms on **zoom**. The list of student enrollment related step-by-step guides are listed below:

- Check Your Enrollment Date
- Search for and Enroll in Courses
- Search for Courses Using Mobile-Friendly Website on Desktop/Laptop and Using Mobile App
- Drop a Class
- Review Tuition, Fees and Account Balances
- Make Payments

The college must decide if they are primarily asking students to log into PeopleSoft and go to their Student Center to register, or if they are asking students to use the HCX mobile app. **Screens look different and local training and instruction materials should be created for both.** It is important to note that the mobile app is more accessible but does not have full functionality. Students will have to use ctcLink PeopleSoft to upload documents, access activity guides, enroll in the payment plan, and

check account balances and amounts due if enrolled at multiple institutions. In terms of registration activities and reviewing personal information, the mobile app works fine.

GHC could also consider the following options.

- Incorporate account activate activation and registration instructions and activity into College 101 class material.
- Identify the high touch areas or “hang-out areas” at the college—both virtual and physical—and use these as student enrollment workshops. Examples include student multicultural offices, tutoring, worker retraining, and veteran offices.
- Partner with ESL and ABE departments and collaboratively plan student enrollment workshops for these populations.

Plan to address unanticipated issues that students may encounter while stabilizing ctcLink, even unrelated to go-live activities ctcLink. Two examples of this are listed below:

- Clark College referred students to complete admissions processes, register, and make tuition payments at kiosks throughout the campus. Since the kiosks were public, they were not configured to allow students and potential students to go to websites required to complete the payment processes in ctcLink.
- The first registration cycle for DG4 colleges did not go as smoothly as planned due to a problem in the class search function. This issue was unrelated to go-live activities but did occur during DG4’s first registration cycle in ctcLink.

Student enrollment sessions will be held during the week of February 14 to help students register for spring quarter. This may not be true because based on GHC’s advising model.

Advising and Faculty Centers

Two additional advising and faculty centers sessions will be offered during student enrollment (November 22-December 3). Faculty members will need to know how to provide permission codes to students or may need help with advising and enrollment functions of ctcLink. This/these sessions could be led by the Dean of Enrollment Services and the GHC PM. There will not be a lot of people attending.

Time & Leave Reporting

A second set of time and leave reporting sessions will be offered Monday, November 29; Tuesday, November 30; and Wednesday, December 1 from **-**. Employees will still have the time and leave reporting step-by-step guide to enter their time and leave. Additional people will likely attend this session due to the Thanksgiving week.

Purchase Requisition and Travel

Once the Business Office confirms that ctcLink is validated to take financial transactions, training sessions for purchase requisition and travel that include questions and answers will be held by the Business Office. These sessions will be held the week of November 29. Three training sessions will be held, two for purchase requisitions and one for travel scheduled to best accommodate participants’ schedules. The Business Office training leads will walk people through the business process. These sessions are a supplement, not replacement to the ctcLink step-by-step training guides listed below:

- Approving Travel Authorizations

- Travel and Expense Delegation
- Grant Authority to Enter an Expense Report
- Creating Expense Reports from Travel Authorization
- Approving Expense Reports

Grading

During the first and second grading period, training sessions will be held for faculty members. These are directed training sessions with time for questions and answers to follow. The training sessions will be held two-five times to best meet faculty member's schedule during the following dates **December 9-14**. The workshops should walk faculty members through the grading process and help them trouble-shoot any issues. The second set of grading sessions will be offered **March 24-29, 2022**. These sessions are a supplement, not replacement to the ctcLink step-by-step training guides listed below:

- Enter Grades
- Grading FAQ

New Students

New students will be introduced to activating their account in the Welcome Packet they receive when their application has been processed. A link to the step-by-step guide will be included in the welcome email.

Instructions on how to enroll, access their unofficial transcripts, and enroll in classes will be included in the Orientation Materials.

The Website will be updated with all of the student processes and procedures in ctcLink. Student processes and procedures using Legacy will be replaced with ctcLink instructions.

Enrollment Services and Advisors will help new students navigate ctcLink as needed.

New Employees

New employees will take the training as a part of their onboarding process, following the guide by employee type in Appendix A. Supervisors will provide time for training.

Recommended Training by Employee Function

General Employees

- All Employees
 - PeopleSoft Fundamentals-optional
 - ES100 HCM Employee Self-Service
- Employees Who Initiate Travel or Purchase Requests
 - EX100 Travel & Expenses: Traveler/General User
 - PU100 Purchasing: Requisitions
- Managers
 - MS100 Manager Self-Service
 - EX101 Travel & Expenses: Approver

Finance and Administrative Employees

- All Finance and Business Office Employees
 - PeopleSoft Fundamentals-optional
 - ES100 HCM Employee Self-Service
 - EX100 Travel & Expenses: General User
- Accounting
 - AM100 Asset Management
 - AP100 Accounts Payable
 - AR100 Accounts Receivable
 - AR200 Intermediate Accounts Receivable
 - BI100 Billing
 - BI200 Intermediate Billing
 - CT100 Treasury (Cash Management)
 - GL100 General Ledger Basics
 - GL200 Intermediate General Ledger
 - GL300 Advanced General Ledger
- Finance and Administrative Managers
 - EX101 Travel & Expenses: Approver
 - PU100 Purchasing: Requisitions
 - MS100 HCM Manager Self-Service
- Grant Managers
 - CN100 Customer Contracts
 - GR100 Grants
 - GR200 Intermediate Grants
 - KK100 Commitment Control
 - PC100 Project Costing
- Purchasing
 - PU100 Purchasing: Requisitions
 - PU101 Purchasing: Purchase Orders
 - PU102 Purchasing: Receipts and Maintenance
 - PU103 Purchasing: P-Card
 - AM100 Asset Management
- Travel Coordinators
 - EX100 Travel & Expenses: General User

- EX101 Travel & Expenses: Approver
- EX102 Travel & Expenses: Travel Admin/Finance

Human Resources (HR) and Payroll Employees

- All HR and Payroll Employees
 - PeopleSoft Fundamentals
 - ES100 HCM Employee Self-Service
 - MS100 HCM Manager Self-Service
 - HR100 HCM Core
 - EX100 Travel & Expenses: General User
- HR Directors and Generalists
 - HR200 Intermediate HCM Core
 - FW100 Faculty Workload
 - FW200 Intermediate Faculty Workload
 - TM100 Talent Acquisition Manager
 - AB100 Absence Management
 - TL100 Time and Labor
- HR and Payroll Managers
 - EX101 Travel & Expenses: Approver
 - PU100 Purchasing: Requisitions
 - PU101 Purchasing: Purchase Orders
- HR Staff and Payroll
 - AB100 Absence Management
 - TL100 Time and Labor
 - PR100 Payroll
 - BN100 Benefits
 - TM100 Talent Acquisition Manager
 - FW100 Faculty Workload
 - FW200 Intermediate Faculty Workload
 - HR200 Intermediate HCM Core

Instructional Employees and Faculty

- All Instructional Employees and Faculty
 - PeopleSoft Fundamentals
 - ES100 HCM Employee Self-Service
- Managers
 - CF100 Faculty Self-Service
 - CS100 Student Self-Service
 - AS100 Academic Structure
 - EX100 Travel & Expenses: General User
 - SR100 Curriculum Management: Course Catalog
 - SR101 Curriculum Management: Class Scheduling
 - CC100 Campus Community (Student Information)
 - FW100 Faculty Workload
 - FW200 Intermediate Faculty Workload
- Faculty
 - CF100 Faculty Self-Service

- CS100 Student Self-Service
- CA100 Advisor Self-Service
- Instruction Managers
 - EX101 Travel & Expenses: Approver
 - PU100 Purchasing: Requisitions
 - PU101 Purchasing: Purchase Orders
 - MS100 HCM Manager Self-Service
- Optional (depending on department, some of these courses may be useful)
 - SR105 Credentials Management: Evaluations & Transfer Credit
 - SR106 Credentials Management: End of Term & Graduation
 - AA100 Academic Advisement Rules
 - CC101 Managing 3Cs & Message Center
 - SF106 Term Rollover
 - SR107 Special Student Populations
 - CE100 Continuing Education

Student Services Employees

- All Student Services Employees
 - PeopleSoft Fundamentals
 - CC100 Campus Community (Student Information)
 - CS100 Student Self-Service
 - CH100 CS Staff Self-Service
 - ES100 HCM Employee Self-Service
 - EX100 Travel & Expenses: General User
- Admissions
 - CC100 Campus Community
 - CC101 Managing 3Cs & Message Center
 - CC201 3Cs Communications Setup
 - RA101 Admissions
 - RA201 Admissions: OAA Suspense Management
- Advising and Student Support
 - CA100 Advisor Self-Service
 - AS100 Academic Structure
 - AA100 Academic Advisement Rules
 - CC101 Managing 3Cs & Message Center
 - SR100 Curriculum Management: Course Catalog
 - SR101 Curriculum Management: Class Scheduling
 - SR102 Student Records: Beginning of Term Processes
 - SR103 Student Records: Enrollment Processes
 - SR105 Credentials Management: Evaluations & Transfer Credit
 - SR106 Credentials Management: End of Term & Graduation
 - SR107 Special Student Populations
- Curriculum Management
 - AA100 Academic Advisement Rules
 - AS100 Academic Structure
 - CC101 Managing 3Cs & Message Center
 - SR100 Curriculum Management: Course Catalog
 - SR101 Curriculum Management: Class Scheduling

- SR105 Credentials Management: Evaluations & Transfer Credit
- SR106 Credentials Management: End of Term & Graduation
- SR107 Special Student Populations (optional)
- CE100 Continuing Education (optional)
- CF100 Faculty Self-Service (optional)
- Financial Aid
 - CC100 Campus Community
 - CC101 Managing 3Cs & Message Center
 - CC201 3Cs Communications Setup
 - FA100 ISIR Processing
 - FA101 Managing 3Cs & Processing FA Applications
 - FA102 Awarding Financial Aid & SAP
 - FA103 Authorizing & Disbursing Financial Aid
 - FA104 Processing Pell Payments & Direct Loans
 - FA105 Processing Return to Title IC (R2T4)
 - FA106 Financial Aid Reporting (FISAP, SNG, URR)
 - FA107 Reconciliation, Including Work-Study
 - FA206 Intermediate Reporting (WCG, FISAP)
 - FA207 Intermediate Financial Aid Reconciliation
 - SF100 Tuition Calculation
 - SF106 Term Rollover
- Student Financials
 - SF100 Tuition Calculation
 - SF101 Cashiering
 - SF102 Refunds
 - SF103 Payment Plans
 - SF104 Third-Party Contracts
 - SF105 Collections
 - SF106 Term Rollover
 - SF205 Intermediate Collections
- Student Leadership and Development
 - CA100 Advisor Self-Service
 - CC101 Managing 3Cs & Message Center
 - SR107 Special Student Populations
- Student Registration and Records
 - AA100 Academic Advisement Rules
 - AS100 Academic Structure
 - CC101 Managing 3Cs & Message Center
 - CC201 3Cs Communications Setup
 - SF106 Term Rollover
 - SR102 Student Records: Beginning of Term Processes
 - SR103 Student Records: Enrollment Processes
 - SR104 Student Records: End of Term Processes
 - SR105 Credentials Management: Evaluations & Transfer Credit
 - SR106 Credentials Management: End of Term & Graduation
 - SR107 Special Student Populations
 - SR100 Curriculum Management: Course Catalog
 - SR101 Curriculum Management: Class Scheduling

- Student Service Managers
 - MS100 HCM Manager Self-Service
 - EX101 Travel & Expenses: Approver
 - PU100 Purchasing: Requisitions
 - PU101 Purchasing: Purchase Orders

Employees Performing ctcLink PeopleSoft Data Reporting and Queries

- PeopleSoft and Legacy State Reporting
 - [State Enrollment Reporting Training](#)
- PeopleSoft Reporting (PSQuery)
 - For most users: [PS Query Reporting](#) (viewing reports for end users)
 - For those who may need to create their own queries:
 - [Query Development Life Cycle](#)
 - [PS Query Training 101](#)
 - [PS Query Training 201](#)
 - [PS Query Training 301](#): Information for Reporting Student Data
- For Institutional Effectiveness or other employees reporting on PS student or instructions data, the following Campus Solutions courses are also recommended.
 - CC100 Campus Community (Student Information)
 - AS100 Academic Structure
 - SR100 Curriculum Management: Course Catalog
 - SR101 Curriculum Management: Class Scheduling
 - SR105 Credentials Management: Evaluations & Transfer Credit
 - SR106 Credentials Management: End of Term & Graduation
 - SR107 Special Student Populations
 - CC101 Managing 3Cs & Message Center

Appendix D: Grays Harbor College Business Process and Links to ctcLink Reference Center

This document links ctcLink how-to references from the Washington State Board for Community and Technical Colleges Quick Reference Guide to Grays Harbor College's business processes for Human Capital Management, Finance Management, and Campus Solutions in ctcLink PeopleSoft. Not all resources found in the ctcLink Reference Center are linked in this document. To conduct a search, please go to the [ctcLink Reference Center](#).

Human Capital Management

Human Capital Management: Business Process	Quick Reference Guide
New Hire	HCM – Human Resources Core
Benefits	HCM-Benefits
Absence Management	HCM – Absence Management
Time and Labor Administration	HCM – Time & Labor
Recruiting / Talent Acquisition Management	Navigating the Recruiting Home Page
Payroll	Links QRGs for Payroll Processing
Employee Change and Termination	HCM – HR Core
HR Structure Management	Creating New Departments; Entering Departmental Transfers
Tenure Track	Add Tenure Information

Finance Management

Finance Management: Business Process	Quick Reference Guide
Grants Management	FIN – Grants/Projects/Contracts
Travel Authorizations, Cash Advances, Expenses	FIN – Expenses: Travel
General Ledger (Daily Ops, Reporting, Month & Year End Close)	FIN – General Ledger
Budget Creation, Execution, Monitoring	FIN – Budget/Budgeting (Commitment Control)
Budget Development	Not Yet Available: Planning Budget Cloud Services Introduction
Procure to Pay	FIN – Purchasing
Accounts Receivable & Billing Non-Student	FIN – Billing
Payables Without Purchase Order	FIN – Accounts Payable
Managing Cash in PeopleSoft	FIN - Treasury - Cash Management
Capital Projects, Project Costing, Project Management	FIN – Project Costing
Asset Management	FIN – Asset Management

Information Technology

Information Technology: Business Process	Quick Reference Guide
Security	PeopleSoft Security

Campus Solutions

Campus Solutions: Business Process	Quick Reference Guide
General Student Admissions	CS – Admissions
Course Management	CS - Curriculum Management
Create and Manage Class Schedule	CS - Curriculum Management: Class Scheduling
Process ISIR and Financial Aid Applications	FA – ISIR Processing
Faculty Workload Management	HCM: Faculty Workload
Manage Beginning of Term	CS - Student Records: Beginning of Term Processes
FA Awarding & Packaging Financial Aid	FA - Packaging and Awards
Build Degrees and Certificates	CS - Student Records: Student Program and Information
Student Financials Structure & Student Billing	SF – Cashiering
Enrollment / Program Plan Stack	CS – Student Records: Enrollment ; CS – Student Records: Student Program and Information
FA Pell / Loan / Packaging / Self-Service	FA – Loans: Loans & Pell
FA Authorize / Disburse / Reconciliation	FA – Disbursement
Manage 3Cs (Comments, Communication, & Checklist)	3Cs: Comments, Communications and Checklists
SF Payment Plan & Cashiering & Cancellation	SF – Payment Plans
Running Start Admissions & Billing	Running Start Admissions Processing Guidelines OAAP Running Start Application without a Fee Running Start Billing & Payment Process in Finance Running Start Queries

Campus Solutions: Business Process	Quick Reference Guide
	Process Running Start
Manage End of Term	End of Term Processes
Manage Third Party Accounts	SF – Third Party Contracts
Manage Satisfactory Academic Progress	FA – SAP
Manage Student Collections and Write Offs	SF – Collections
Manage Student Groups and Service Indicators	CS – Campus Community: Service Indicators Assigning a Student to a Student Group in SF Adding, Updating and Viewing Student Groups CS – Student Records: Student Groups
Selective Admissions	CS – Admissions: Evaluating and Admitting Applicants
Manage Placement Assessment, Advising, and Early Alert	CS – Academic Advisement Academic Advisement for Test Placement CS – Curriculum Management: Student Alert
Manage Award of Credit, Transcript Production, and Records	CS - Student Records CS - Student Records: Transcripts
Recruit Prospects & Management Campaigns	CS – Admissions: Managing Prospect Records
Manage Military and Veterans Benefits	CS – Student Records: Veteran Benefits Reporting
Manage Committees, Affirmations, Organizations, and Events	CS – Campus Community: Events & Committees
Manage Continuing Education	CS - Continuing Education
Manage Adult Basic Education	PeopleSoft Coding for Basic Skills Updating a Course Grading Basis Transitional Studies Academic Plans

Campus Solutions: Business Process	Quick Reference Guide
	Admissions Processing Guidelines Per Admit Type: BEdA Student Admissions Processing Guidelines
Manage International Student Programs	Admissions Processing Guidelines Per Admit Type: International Students Admissions Processing Guide Adding, Updating and Viewing Student Groups
Manage Work Study	Adding, Updating and Viewing Student Groups Financial Aid Item Types HCM Earning Codes - Description
Manage Workforce Development	Third Party Reporting Financial Aid Item Types
Manage High School Partnership Programs	College in the High School Admissions Processing Guide OAAP College in the High School Admissions Application without a Fee Financial Aid Item Types Processing Other Credit Admissions Processing Guidelines Per Admit Type: Tech Prep Student Admissions Processing Guidelines Admissions Processing Guidelines Per Admit Type: Running Start Admissions Processing Guidelines
Manage Vocational Partnership Programs	Adding, Updating and Viewing Student Groups
Manage Other Government Funding	Adding, Updating and Viewing Student Groups
Manage Other Specialized Student Programs	Admissions Processing Guidelines Per Admit Type: Department of Corrections Admissions Processing Guidelines

Campus Solutions: Business Process	Quick Reference Guide
	Adding, Updating and Viewing Student Groups
Manage Student Biographic Record and Student Reporting	Generating a National Student Clearinghouse (NSC) Report Processing a Deceased Student Record Duplicate EMPL IDs for Same Person Preventing Duplicate EMPL IDs: Searching for Records (Using Search/Match) CS - Campus Community: Personal Information CS – Campus Community: Student Services Center Viewing FERPA Display FERPA Quick Entry 1098-T Set Up and Sending Missing National ID (SSN) Communications Recommended Methods for Searching Queries and Reports
Financial Aid Dual Processing	FA – Dual Processing

Appendix E: Bellevue College ctcLink Go-Live Support & Triage Plan: Staff & Students (Draft)

Overview

This document outlines the plan for supporting staff and students through the transition and stabilization phases of the ctcLink implementation. A detailed timeline of when each population receives support can be found in the [Timeline](#). A Faculty support plan can be found [here \(insert link\)](#).

Tier 1

Who	User
Responsibilities	<ul style="list-style-type: none"> ▪ Navigate to self-service help autonomously
When	Staff: Indefinitely Students: Indefinitely
Where	BC Website

Tier 2A & 2B

Who	Internal Support Specialist
Responsibilities	<p>2A - Incoming</p> <ul style="list-style-type: none"> ▪ Answer questions: how to activate account, how to confirm if a user already has an account, how to navigate Employee and Student Self-Service, how to initiate registration and navigate class search ▪ Basic knowledge of: how to apply for FA, why registration isn't working, how to release holds from accounts, how to use self-booking tool, what else? ▪ Answer incoming chat, phone ▪ Primary resource for live drop-in sessions ▪ Schedule appointments ▪ Escalate Issues and Open Tickets to Tier 3 <p>2B - Outgoing</p> <ul style="list-style-type: none"> ▪ Answer questions: how to activate account, how to confirm if a user already has an account, how to navigate Employee and Student Self-Service, how to initiate registration and navigate class search ▪ Basic knowledge of: how to apply for FA, why registration isn't working, how to release holds from accounts, how to use self-booking tool, what else? ▪ Initiate outgoing phone, email: account activation outreach, follow-up to tickets ▪ Schedule appointments

	<ul style="list-style-type: none"> ▪ Escalate Issues and Open Tickets to Tier 3 ▪ Secondary resource for live drop-in sessions and answering incoming chat, phone, text, email
When	Staff: Nov 8 – Dec 15 Students: Nov 8 – Jan 14
Where	Teams & Zoom Drop-In Rooms Teams Chat Teams Phone Computer Lab Welcome Center U-Building Lobby

Tier 3

Who	Project Leadership or Key SME Security
Responsibilities	<ul style="list-style-type: none"> ▪ Answer tickets ▪ Escalate tickets to Tier 4 and/or SBCTC ▪ Primary resource for scheduled support sessions and appointments ▪ Secondary resource for drop-in support sessions
When	Nov 8 -
Where	Teams & Zoom Drop-In Rooms Teams Chat On-Campus office or meeting location (i.e. lobby)

Tier 4

Who	Project Manager, Maria Rivas Project Assistant, Marisa Miller Executive Sponsor, Rodger Harrison
Responsibilities	<ul style="list-style-type: none"> ▪ Overall project management ▪ Answer escalated tickets ▪ Escalate tickets to SBCTC ▪ Track pending SBCTC tickets ▪ Alternate resource for scheduled and drop-in support sessions
When	Nov 8 -
Where	Teams & Zoom Drop-In Rooms Teams Chat

Beyond January 14

Tier 1, 3 and 4 support will remain in place indefinitely. Tier 2 responsibilities will migrate to permanent staff positions within those specific departments (example, Financial Aid questions will be directed to the Financial Aid employees).

Appendix F: Bellevue College High-Level Student Support Plan for ctcLink (Draft)

Strategy

Start with self-service; providing many resources for students to use on their own. First line of support to be an outsourced call center well trained and walk students through basic activities. When they can't resolve the issues they hand off to a second, tier internal support team (small army) that will help students with issues. Call Center will also do proactive outreach to students.

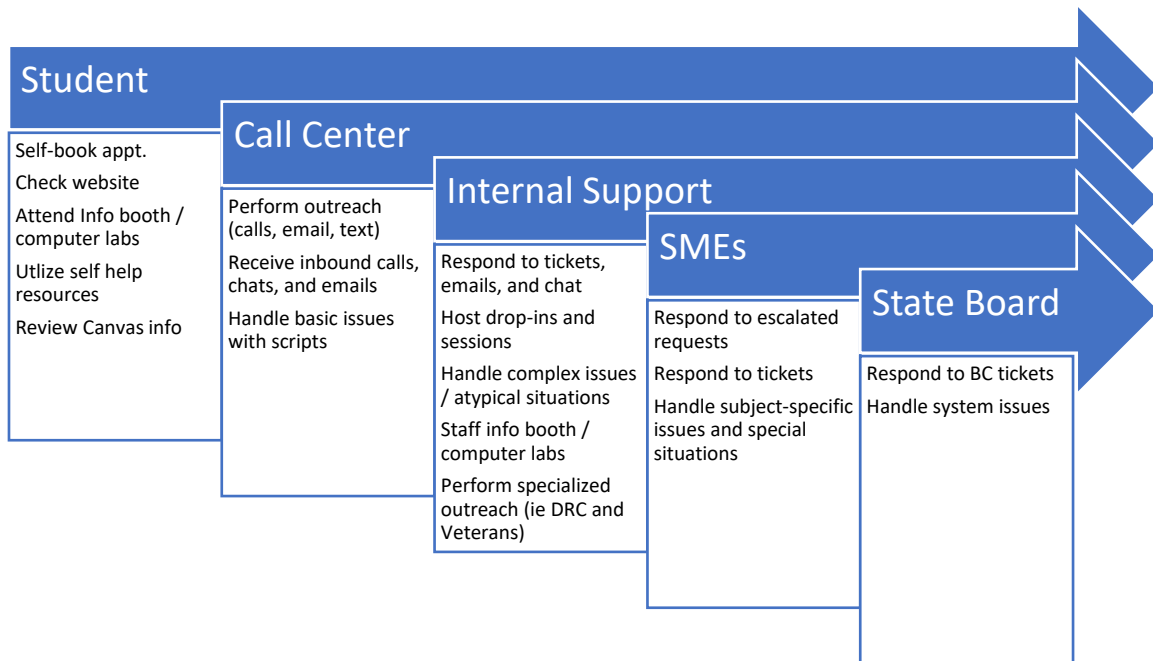
Purpose of student support plan

Communicate approach for the tiered support services for students and the responsibilities of the key roles.

Student Support Tiered Approach

Student support will have a solid foundation of self-service resources for students to use on their own. If they have trouble with the self-service resources or need more guidance, they can receive additional support in a tiered model based on their specific needs.

The following diagram illustrates the support methods and roles.



The first line of support after student self-service is handled by an outsourced Call Center. They will provide basic support for common questions. If the Call Center is unable to resolve the issue or answer student questions, they will refer the student to the appropriate Internal Support person/department.

Internal Support will consist of temporary hires for a second line of support. They will handle more complex and atypical questions and requests, will host drop-in sessions, and will staff the info booth and

computer labs. If Internal Support needs to escalate to a SME, they will provide a warm hand-off for the student to ensure the student gets to the right department/person to resolve the issue or question.

SMEs will handle specific, advanced questions and issues related to their area of expertise. They will function as a third line of support and support for more specialized subject matter knowledge.

Finally, for resolutions that involve system issues or updates that impact all colleges, the Internal Support and/or SME will submit a ticket to the State Board.

Roles and Responsibilities

The following table outlines the specific responsibilities and clarifies the distinction between the Call Center role and the Internal Support role.

Role	Responsibilities
Whole College	Train everyone on how to support students with basic functions such as logging in. Provide student support 101.
Call Center	<p>Be available as a resource to students from 11/01/21 to 01/14/22 during the following hours:</p> <ul style="list-style-type: none"> • Phones: 7am-7pm M-F, 10-4 S-S <p>Perform outreach activities:</p> <ul style="list-style-type: none"> • Beginning Nov 16, daily outreach to students who haven't activated their account, offer to walk them through it, provide direction on where to find the link, etc. <p>Provide realistic response time. Answer calls, chat, and texts within 24-48 hrs. providing resources, instructions or live walk throughs helping students to perform basic activities such as:</p> <ul style="list-style-type: none"> • Activate ctLink account • Register for classes • Navigate class search • Drop classes • Find/know their ID number <p>Escalate when they are unable to help students do what they need to do:</p> <ul style="list-style-type: none"> • Reassure students they will get the help they need • Submit internal BC tickets • Direct unknown questions and escalate issues to the right resources • Triage for Running Start info and tuition questions, referring where appropriate to specialized resources • Refer/schedule meetings (virtual and in-person) for: <ul style="list-style-type: none"> ○ Payments ○ Financial Aid <p>Tracking and communicating common questions:</p> <ul style="list-style-type: none"> • Submit suggestions for FAQ updates based on common questions

	<ul style="list-style-type: none"> • Send out communication to other resources when an issue is identified and resolved <p>Maintain knowledge of:</p> <ul style="list-style-type: none"> • Key dates • Contact points • Department schedules (open hours, drop-in hours, appt. times) • How to answer common questions and when to escalate • FAQs as listed in Student Communication Resource Guide
<p>Internal Support Team (Estimated 15)</p>	<p>Be available as a 2nd tier resource to students from 11/01/21 to 01/14/22 during the following hours:</p> <ul style="list-style-type: none"> • Phones: 7am-7pm M-F, 10-4 S-S <p>Answer student support needs from multiple sources</p> <ul style="list-style-type: none"> • Handle escalated questions and issues from the Call Center • Help students with complex issues and atypical situations • Respond to tickets, emails, and chats (Teams/Zoom) • Host Teams/Zoom FAQ sessions, presentations • Be available for drop-in sessions (In person and Teams or Zoom) to answer student questions • Set up and staff info booth • Set up and staff Computer lab <p>Escalation as needed through tickets</p> <ul style="list-style-type: none"> • To SMEs <p>Tracking and communicating common questions</p> <ul style="list-style-type: none"> • Submit suggestions for FAQ updates based on common questions • Send out communication to other resources when an issue is identified and resolved <p>Maintain knowledge of:</p> <ul style="list-style-type: none"> • Key dates • Contact points • Department schedules (open hours, drop-in hours, appt. times) • Up-to-date knowledge on ctLink • When to escalate
<p>Special Populations</p>	<p>DRC (1 specialist, 2 with extra knowledge)</p> <ul style="list-style-type: none"> • Provide ctLink support for students with disabilities • Maintain knowledge of up-to-date information from Accessibility Mitigation Group, where applicable <p>Dual-enrolled high school program (6)</p> <ul style="list-style-type: none"> • Support students with dual enrollment in the high school • Address parents effectively

	Special knowledge for support network <ul style="list-style-type: none"> • Who is registering early • Extra triage steps
IT Support	<ul style="list-style-type: none"> • Respond to permissions related tickets • Make sure support people have access
State Board	<ul style="list-style-type: none"> • Respond to tickets • Providing live training to SMEs to support students if needed

Timeline

The Student Support timeline covers the tasks necessary to stand up, resource, and support the Call Center team and the Internal Support team. There are some resources common to both, such as scripts for basic questions/issues, a support knowledge bank, and an escalation flowchart with instructions for escalation. Other action items will require specific steps to stand up each team. See the following embedded timeline for a detailed breakdown.

[embed updated timeline here once finalized]

Questions to consider

- Which existing staff will be the points of contact for each area? (SMEs)
- Who will ensure internal and external (Call Center) support staff are in sync and function as a coordinated support team?
- What access will Call Center have to internal BC systems? Will they be able to create tickets for escalation? They will need email and ability to create tickets. May need ctclink access.
- What tickets go to IT help desk? Security?
- Do you want to set up daily calls to review common issues?
- Use of Teams channels? tact
- Use of tool such as snapshot to be able to playback user activity when researching issues.

DRAFT job description:

DESCRIPTION

Reporting to the ctclink Project Manager, the Call Center Specialist will work with Bellevue College answering phone calls, texts, chats and emails while exhibiting exceptional customer service and maintaining up to date knowledge for issues regarding the new data management system, ctclink. The Call Center Specialist will help answer calls and direct students, staff, and employees with ctclink. The position will work alone with limited supervision. Employees must represent Bellevue College at all times and the successful candidate will work up to 20 hours a week.

POSITION DUTIES

- Answer phone calls, texts, emails, and chats in a timely, efficient and professional manner
- Record any issues or findings via ticket or/and adequately report to the direct supervisor
- Maintain professionalism, calm, and patience during times of stress
- Participate in trainings and activities related to the job role
- Have a desire to help others and seek answers

QUALIFICATIONS

- High School diploma or GED required
- Experience working in a customer service-based environment
- Excellent verbal and written communication skills
- Experience with Microsoft Word, Excel and Outlook
- Effective in multi-tasking and learning new concepts, maintaining organization, and quick thinking
- Ability to stay positive and motivated
- Demonstrated ability to work in a culturally diverse environment with demonstrated flexibility and composure

PREFERRED QUALIFICATIONS

- Experience working in an office environment
- Prior experience working in a call center or similar type setting
- Experience in technology and/ or systems
- Experience working on a large college campus.
- Experience teaching others about technology

SPECIAL INSTRUCTIONS FOR APPLICANTS

Applications will be received on a rolling basis until positions are filled. Offers will be extended to successful applicants on Oct. 8. The start date for this position will be Monday, Oct. 11 with training to take place on Oct. 11, 12, and 13. This position is expected to end December 15th, with the possibility of some specialists extending into January 2022.

Appendix G: Samples of Videos and Resources to Help People Get Started in ctcLink

Repository of Previous ctcLink Deployment Colleges' Resources

Student Videos and Resources

- ctcLink Overview Video: [Tacoma Community College Overview Video](#)
- Videos to Activate Account¹
 - [Pierce College Activate ctcLink Video](#)
 - [Peninsula College Activate ctcLink Video](#)
- Videos to Register for Classes
 - [Peninsula College Registering for Classes Video](#)
 - [Pierce College Registering for Classes Video, Part 1](#)
 - [Pierce College Registering for Classes Video, Part 2](#)
- Videos to Use ctcLink to Find Enrollment Information
 - [Peninsula College Find Advisor Video](#)
 - [Pierce College Find Advisor Video](#)
 - [Peninsula College Search for Class on my ctcLink Student Portal Video](#)
- ctcLink Student Tutorials Resources—How To¹
 - [Clark College Account Setup, navigating ctcLink Mobile, and Navigating ctcLink](#)
 - [Seattle Colleges Student Resources](#)
 - [Highline College Tutorials](#)
 - [Centralia College's How To](#)
 - [Edmonds College Student Resources](#)
 - [Lower Columbia College Student Resources](#)
 - [Cascadia College Student Resources](#)
 - [Peninsula College Student Resources](#)
 - [Pierce College Student Resources](#)

Employee Videos and Resources

- Video to Understand and Navigate PeopleSoft Layout
 - Understanding ctcLink - SBCTC:
<https://sbctc.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=a8fc97ab-67c5-4e5f-8232-abdb0178b8df> (Not captioned)
 - Navigating ctcLink SBCTC:
<https://sbctc.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=71852d9e-2153-48aa-9409-abdc001f4f60> (Captioned)

¹ On July 31, 2021, the ctcLink Login process was updated on Saturday, July 31, 2021 to provide better security and user-friendly self-service password-reset options. The [ctcLink portal link address](#) and basic functionality didn't change, but the new ctcLink PeopleSoft login portal will change the way passwords are currently reset. DG5 and DG6 colleges need to keep this in mind when reviewing and producing resource materials for employees and students. Changes will need to be made to prior deployment groups' materials.

- How to Tutorials and Help Resources:^{1,2}
 - [Seattle Colleges](#)
 - Wenatchee Valley College: [Resources](#) and [Training Registration](#)
 - [Highline College](#)
 - [Centralia College](#)
 - [Edmonds College](#)
 - [Clark College](#)
 - [Lower Columbia Colleges](#)

- Job Specific Videos for Employees
 - Search Match (To Prevent Duplicate Records of People): [Clark College Search Match Video](#)
 - Finding Class Permission Numbers/Code for Students to Enroll in a Course: [Clark College Class Permission Code Video](#)
 - The ctcLink Reference Center has a lot of videos that show [how to do specific job functions](#) in ctcLink PeopleSoft organized by pillar.
 - [ctcLink Training and resources for Seattle Colleges faculty members](#)
 - Centralia College Purchasing Videos: Centralia College Purchasing Videos: [Purchasing in PeopleSoft Part One: An Introduction](#) and [Purchasing in PeopleSoft Part Two: Requisitions](#)

² All post ctcLink deployment groups have ctcLink resources for employees. The only colleges listed here have at least some of their employee resources on the internet; many colleges put some or all employee materials on the intranet.

Appendix H: DG4-A Go-Live Communications & Crisis Management Plan

For Internal Use

Communication Methods/Tools

- DG4 Milestones Email Distribution List (college ctcLinkAlerts, ctcLink governance, SBCTC ITD)
- Milestone Messages to DG4A Conversion/Go-Live Milestones group email list Friday through Sunday
- Group text for PMs, PIOs and ctcLink Communications Team. Comms Leads to quickly report any social media activity, media inquiry needs, support
 - Just-in-time conference calls if needed
- Messaging samples: going well, known issues being addressed, milestones, reminders that it will take time to learn the new system
- Internal FAQs for possible media inquiries – as needed, Janelle/Laura

Go-Live Activities & Milestone Messages – *Message timing is approximate*

Activity/Event	When (approx.)	How	Message/Content	Responsible & Status
PMs review, adjust membership of local ctcLink alerts group email for Go-Live Weekend Milestone Messages	January PM meeting and/or email to PMs	Janelle request	Ask PMs to add PIO/Comms Leads, college/ctcLink leadership to local ctcLink alerts email list so they can receive the Go-Live Weekend Milestone Messages. <i>Note: Colleges manage membership of their local ctcLink alerts group email. After go live weekend, colleges may choose to adjust dist. list membership to those that need to receive production alerts (planned, unplanned downtime)</i>	<ul style="list-style-type: none"> • Janelle • Complete
Test college ctcLinkAlerts email addresses from SBCTC to colleges		Send test email to college ctcLink alert email addresses	In preparation for Go-Live Weekend, I am testing the communication channels between DG4-A and SBCTC. PM's: Please reply to this email to confirm you received this message.	<ul style="list-style-type: none"> • Janelle • Complete

Create local Go-Live Milestones Dist. List	Internal list. Janelle complete prior to Go-Live weekend	<ul style="list-style-type: none"> • Internal project comms task 	Internal list for ctcLink Communications Office	<ul style="list-style-type: none"> • Janelle
Go/No-Go Decision Communication	Jan. 12, 2021 By 5:00 p.m.	<ul style="list-style-type: none"> • Email to PMs and Governance Groups • Blog Post • ES Message Template 	Message based on Steering Committee meeting discussion and decision	<ul style="list-style-type: none"> • ctcLink Comms • Complete
Go-Live Communications Plan Walk-through with PIO/Comms Lead	January 14 and Feb. 2	<ul style="list-style-type: none"> • Thursday 3:00 p.m. Communication meetings 	Meeting with college PIOs to walk through this plan, ask if any local concerns/issues, discuss media protocol (if any inquiries), and give DG4-A PIOs a chance to share concerns.	<ul style="list-style-type: none"> • Janelle • Complete
Reminder of downtime for DG4A Conversion	Several times prior to Go-Live	<ul style="list-style-type: none"> • ctcLink Alerts 	Standard downtime alert for ctcLink colleges, what services are affected (in this case, all but Canvas).	<ul style="list-style-type: none"> • App Services
Notice on ctcLink Gateway (for current ctcLink colleges)	Prior to Go-Live	<ul style="list-style-type: none"> • ctcLink Gateway 	Alert of system downtime, why and what is affected	<ul style="list-style-type: none"> • App Services
Legacy Shutdown	Legacy team determines	<ul style="list-style-type: none"> • Legacy Listservs 	Alert Legacy colleges of downtime needed to support ctcLink Conversion	<ul style="list-style-type: none"> • Ray Gartner
BEGIN MILESTONE MESSAGES	ALL TIMES ARE APPROXIMATE			
Welcome to Go-Live Milestones! And, confirm upcoming ctcLink Downtime for DG4A Conversion	Feb. 5, 2021 1:30 P.M.	Milestone 1 to Milestones eList	Welcome and overview of Milestone Messages System down in 90 minutes Activities to start in 90 minutes.	<ul style="list-style-type: none"> • App Services • Janelle

ctcLink System Down; Start Pre-Conversion Activities	Feb. 5, 2021 3:00 – 3:30 p.m.	<ul style="list-style-type: none"> • Milestone 2 to Milestones eList 	ctcLink system is closed to users and being taken down; pre-conversion activities underway for DG4-A conversion to ctcLink. Team begins Data Move (DMS) to Gold; Validate and DMS to Prod)	<ul style="list-style-type: none"> • Janelle
Start Group Text (Comms Leads and PMs)	Feb. 5, 2021 By 7:00 p.m.	<ul style="list-style-type: none"> • Send group text to all members 	Welcome all to group text and ask them to respond with name so everyone else knows who's who	<ul style="list-style-type: none"> • Janelle •
Conversion Start	Feb. 5, 2021 7:00 p.m.	<ul style="list-style-type: none"> • Milestone 3 to Milestones eList 	Conversion had begun and will continue through the night. CS expected to take 26 hours. FIN/HCM expected to take 17 hours. Report on earlier Security Builds/Migrations work	<ul style="list-style-type: none"> • Janelle •
Update on Overnight Activities	Feb. 6 8:00 a.m.	<ul style="list-style-type: none"> • Milestone 4 to Milestones List 	Conversion status update by pillar. Report on completion of Security Migration and Validation in Production if not already reported	<ul style="list-style-type: none"> • Janelle
Update on Conversion Activities	Feb. 6 1:00 p.m.	<ul style="list-style-type: none"> • Milestone 5 to Milestones eList 	Status of Pillar Conversions – HCM and FIN Complete (if applicable); Status of CS. HCM to FIN Workforce sync to begin this afternoon Status of Security Migration & Validation to Prod.	<ul style="list-style-type: none"> • Janelle
Conversion Complete – All Pillars (if applicable)	8:00 p.m.	<ul style="list-style-type: none"> • Milestone 6 to Milestones eList 	Conversion Update (CS should be complete within 2 hours) HCM sync to CS (Workforce) will begin once CS Conversion complete (est. to begin 9:00 p.m.) Update on Manual Config/Validation Internal Team Validation on schedule for 6:15- a.m. On track for upcoming Sunday, 1-5 pm College SME Validation Other updates as applicable Next update at 9:30 a.m.? (Or 8 a.m. check-in too)	<ul style="list-style-type: none"> • Janelle
Sunday Morning Check-In	Feb. 7	<ul style="list-style-type: none"> • Milestone 7 to 	Internal Team Validation Complete	<ul style="list-style-type: none"> • Janelle

on Activities Complete and Upcoming College Validation	8:00 a.m. – Quick check in 9:30-10:00 a.m. – Update and Confirm College SME Validation schedule	<ul style="list-style-type: none"> Milestones List Quick morning check-in at 8:00 Official Milestone 7 by 10:00 a.m. 	Backup of Validation Enviro Complete	
Update on Upcoming College Validation Activity	Feb. 7 12:45 – Ready for 1:00	<ul style="list-style-type: none"> Milestone 8 to Milestones eList 	<p>Confirm College Validation is on Schedule, starting at 1:00.</p> <p>Reminder of WebEx support; links, etc.</p> <p>Next message will be 7:00 p.m. following Leadership final “go” approval</p>	<ul style="list-style-type: none"> Janelle
College Validation Complete Go/No-Go Decision <i>Internal Readiness Discussion – 5-5:30 p.m.</i> <i>ctcLink/College Leadership final go-live approval: 5:40-6:40 p.m.</i>	<p>Approximately 7:00 p.m.</p> <p>Following go-live approval meeting</p>	<ul style="list-style-type: none"> Milestone 9 to Milestones eList Email to governance, PM/OCM, other listservs 	<p>Results of College Validation Activity</p> <p>GO Decision</p> <p><i>Example: Go/No-Go meeting held with College/SBCTC Leadership. Been briefed on College Validation Activity. Colleges weighed in and officially approved launching ctcLink tomorrow morning.”</i></p> <p>Final cleanup, check of system, then ctcLink expected online at...time?</p>	<ul style="list-style-type: none"> Janelle
FINAL MILESTONE MESSAGE Conversion Complete; DG4-A is live! ctcLink System Up and Operational	TBD – Milestone Message sent after ctcLinkAlerts sent by ctcLink Support.	<ul style="list-style-type: none"> Milestone 10 Message to Milestones eList ctcLink Alerts 	<p>The system is up and back to normal operations</p> <p>DG4A colleges can log support tickets as needed per the usual local college/district process.</p> <p>TheDG4-A post go-live support room will open at 9:00 a.m. tomorrow morning for immediate support needs.</p>	<ul style="list-style-type: none"> Janelle App Services
WE ARE LIVE!!!	Mon. Feb. 8	<ul style="list-style-type: none"> Blog post 		<ul style="list-style-type: none"> ctcLink Comms
If needed, reminder to PMs to update their	Week of Feb. 8, 2021	<ul style="list-style-type: none"> Email 		<ul style="list-style-type: none"> Janelle

<i>ctcLink alerts email membership</i>				
--	--	--	--	--

Protocol for fielding media calls

- **Refer to SBCTC:** Any questions about ctcLink project overall: Statewide Plan, Cost, Timeline, Schedule, Background, Technical-related questions affecting all ctcLink colleges. Be sure to notify your college PM and local team of any media or legislative inquiries.
- **College PIO/Spokesperson handles:** Campus-centered questions about how ctcLink impacts the colleges directly, any issues affecting students, faculty staff and how addressing it locally (then refer to SBCTC if larger issue to be fixed).
- **If any social media activity or media inquiries, please contact each other immediately via group text**
 - **PIOs/Comms Leads be on social media alert; let all contacts and backups know if ctcLink discussions surface**
- **Good time to remind employees about**
 - media and legislative contact procedures
 - complaints/issues escalation path (local process for any ctcLink complaints; follow tiered process; info to PMs)

Protocol for inquiries from (or complaints to) legislators

- Colleges handle local inquiries
 - Inform SBCTC if inquiries from legislators
 - Ask SBCTC (Laura and Janelle) for help with responses as needed
- Keep WA Office of the Chief Information Officer (OCIO) informed – Janelle

Messaging

Key Messages

- Our college is converting from our “legacy” administrative systems to ctcLink (PeopleSoft).
- ctcLink replaces our old system with Oracle’s PeopleSoft Campus Solutions, Human Capital Management and Finance modules and other core functionality.
- We are joining many colleges that have already switched over to ctcLink (Clark, Cascadia, Lower Columbia, Olympic, Peninsula, Pierce, Spokane, Spokane Falls and Tacoma community colleges)
- All ctcLink colleges are affected by the weekend downtime.

- eLearning platform (Canvas) is not affected by this downtime
- We will be introducing staff and students to ctcLink in waves. We plan to open up ctcLink to students beginning the week of XXXXX.
- It will take time to learn the new system; we have how-to resources and training support in place for students, faculty and staff

Messages After Go-Live – *If Needed*

Successful launch of ctcLink

We're pleased that the launch of ctcLink at our college went as smoothly as it did. It was a huge undertaking. With assistance from our state agency project team, our staff put everything they had into making sure the go-live went according to plan. With ctcLink, our students, faculty and staff will have access to information they need when they need it, with a broad range of self-service tools. Students will also benefit from a new ctcLink mobile app.

We had some issues

We're aware of the issues with XXXXX following this weekend's launch of the new ctcLink system. Students, faculty and staff are our top priority, and we're committed to providing top-quality education for our students. We take this very seriously. We are working around the clock to identify the issue and resolve it as quickly as possible.

Post Go-Live Communications

- Janelle to set up check-in meetings post go-live
- Reminders during key processes/activities performed for the first time using ctcLink
 - We are all learning this new system together. Have patience. There will be issues. We will work through them. We are here to help.
 - Having an issue? We will get it fixed.
- Discuss messaging/talking points needed for post go-live activities
 - ctcLink Account Activation – Employee, Faculty, Students; Timesheets/Absences; Payday, Student Registration, Faculty Grading, Financial Aid disbursement)

Contacts

ctcLink Project/SBCTC Communications –

Janelle Runyon, ctcLink Project Communications: cell,

Laura McDowell, SBCTC Communications Director;

Backups:

- Sherry Nelson: cell,

- Katie Rose: cell,
ctcLink Project/SBCTC Communications –
Janelle Runyon, ctcLink Project Communications: cell,
Laura McDowell, SBCTC Communications Director; cell,
Backups:

- Sherry Nelson: cell,
- Katie Rose: cell

DG4-A Communications Contacts

Centralia College

- **Primary:**
- **Backup: N/A**

Edmonds College

- **Primary:**
- **Backup:**

Highline College

- **Primary:**
- **Backup:**

Wenatchee Valley College

- **Primary -**
- **Backup –**

SBCTC Project Team and College PMs

Contact Info for DG4 PMs:

-

Contact Info for ctcLink Team:

-

Appendix I: Clark College Tracking, Assessing and Stabilizing ctcLink Document

Core functions at Clark College

	Status	Comments
Hire	4	Clark security roles. Special access, need ZC in some
Manage Employees - self service	2	can't transfer, promote, not getting notifications
Separations	1	not able to pay out - SBCTC must process
Pay	3	go-live issues, post payroll processes
Requisition	3	Self-approval - ticket still open - req to PO issue causing delay, after ok
Purchase	3	via Commitment Control - we are purchasing
Pay for purchases	4	via Commitment Control
Close books at end of month	4	no month end reports - need to build some.
Travel request and authorization	4	still learning and dealing with unique situations
Travel reimbursement including travel advance	3	have processed/need last step to reconcile
Billing	2	not doing the first set of GL entries. Christy working with SBCTC
Access data for institutional research	3	key students and employee and FMSQ data available, working to create reports
Reporting	2	PSQ issues - broad access, have process to restrict some queries, concerned about quality of existing queries
Apply to Clark College	4	
Register for classes add drop (UGRD)	4	

#	Description
	Not Tested Yet
1	function not able to do this
2	minimally functional, extra steps to make work
3	successful, still issues to resolve
4	working as intended

**updated by myClark
ctcLink Steering Team
1/27/2020**

**Core
functions at
Clark College**

	Status	Comments
Course catalog	4	
Class schedule	3	multiple components = multiple canvas shells, classes look different to faculty, graded components
Requisites	3	fine tuning as we ld issues. Having co requisites - how to make work
View student progress for advising purposes	3	advisors starting to use
View student info bio demo classes grades etc.	3	need more training, people want transcript access which has been limited
Class rosters	4	
Grading	4	NOTE: Configuration errors causing data cleanup
ECD register for classes (OSECE)	2	tuition calc for winter is still manual; cc payment problems (appear random)
Pay tuition	4	
Produce transcript	4	
Award degrees	4	Have not posted fall completions yet, have done summer certificates
Compliance related reporting	2	still many errors - waiting for NSC
Fin Aid (PS Data)	3	dual processing, still learning as they go

Appendix J: Wenatchee Valley College Pre- & Post Go-Live Things to Consider

Before Go-Live

TOPIC:	DESCRIPTION:
Attitude	We were so burned out that no one cared what was going to work and what wasn't. We figured that we would just get it live and start fixing it.
Pillars	Leads were fully prepared to own their area and work directly with the SBCTC project and support staff to resolve all issues.
Project Management	My role was escalations and facilitation for cross-pillar issues
"What if" Planning:	Challenge your pillar leads to think about the critical daily functions and the functions and the occasional functions that will be needed soonest after go-live. This is where you need to put your effort. Too much "what if" planning can be counterproductive.
Security Planning:	In the lead up to go-live, we made sure our security people were trained and prepared. They must be given enough time to be able to learn as much as they can.
Support Planning:	Ask staff to volunteer a few weeks out. If you have someone who completed most of the canvas courses that were assigned, ask them to assist.
Staff Support:	The largest group that need support was faculty and advisors. Contact previous ctcLink schools to see if they can put on some walkthrough sessions. Record them. The advisee list per advisor does not convert. Copy this list and provide it to the advisors as a work around. Manually entering advisees takes time and may not be done in time for advising.
Student Support:	This is where you will need help. Engage your special populations staff to assist with answering phones and providing Virtual Assistance rooms for students,
Support Tools:	Use video conferencing for screen sharing purposes. Use a chat program like zoom or teams to connect with student services staff. SS staff will be overwhelmed and will not have time to answer phones or email in a timely manner. However, they seem to answer chats very quickly. Provide online forms or a ticketing system so people can add their issue/ question in the event that the phone lines get overwhelmed.

At Go-Live

TOPIC:	DESCRIPTION:
SURPRISE	All project staff engaged in training and go-live activities for the entire two weeks. This was a miss on my part. Project staff need the time to properly finish go-live tasks. They need to have these two weeks after go-live to work in the system. I highly recommend closing certain offices to anything but ctcLink activities.
RECOVERY	I am fortunate to be the IT director and was able to assign my entire team to support account activation issues.
STAFF ACTIVATION (was relatively smooth.)	- Critical Miss - Our budget analyst was not engaged as much as she should have been. (GL, Department Codes, Item Types, Combo Codes, etc.) When it

<p>We pulled reports provided by Susan and were able to determine who hadn't activated, giving us the ability to contact and assist.)</p>	<p>came time to do commitment control and assign dollars to budgets, she was confused and didn't understand the change in department structure. We were able to pull through and now we are moving forward.</p> <ul style="list-style-type: none"> - Faculty/Advisor Demo - We engaged Renne from Peninsula (faculty advocate) to do a walkthrough of the faculty and advisor center on Thursday of the first go-live week. - Assigning advisors to students was a manual process. Our career center stepped up to complete this task. It did take some time to assign and several instructors were questioning why they had no students assigned. Because of the delay, it would have been nice to provide the faculty with a list of their advisees prior to go-live. - Data becomes available in dataLink for the first time in a meaningful manner. This was the kickoff of supplemental system integrations. Still ongoing. - Report writers - Make sure your report writers have taken the required training and signed the necessary forms. They need to understand how the reporting system is deployed. Report writing and editing is not done in production. it is done in PCD which gets a data refresh from PRD once a month. It is enough to give a great sample set of data to work with.
<p>STUDENT ACTIVATION (did not go smoothly)</p>	<ul style="list-style-type: none"> - There are two versions of ctcLink, Mobile and Desktop. Mobile is a simple interface that is very easy for students to navigate. However, it is missing several key elements that are needed. (payment portal, permission codes for when students don't meet a pre-req. The desktop version is full-featured but not as easy to navigate. - We didn't encourage the students to access the system, unless they were employees, until two weeks after go-live. This let the department staff finish their go-live activities. - Students did not understand account activation. At WVC, (with COVID) we have two ways to communicate with students, email and canvas. The email was only 30% effective. Canvas was more effective. We only were able to activate about 50% of our students prior to registration. The ones who were not paying attention learned that they needed to activate when they were trying to register and figured out that the old way was no longer available. - On day one of student activation, the class search in the desktop version was broken. Everyone for all 17 schools were pushed on to the mobile version, which became very slow due to the traffic. We discovered an issue with Chrome where during certain activities like enrolling in courses, the students would get kicked out of the system back to the login page. This also happened in the payment portal. Right now, the only fix is to not use chrome. Firefox is recommended. - We ramped support using zoom and teams chat between the key front-line departments and the support team - We opened a ctcLink virtual assistance zoom room - This is a much more effective method because of the ability to screen share. - We engaged workforce development staff to help support students. We asked for volunteers across campus and we handled it.

	<p>- You can't count on registration to be available to answer the phone or emails. They will be too busy and you will get a response time of four days on emails and voicemails. To solve this backlog, our IT helpdesk hijacked the registration phone line and answered the simple questions then would relay the complex issues to the registration department.</p> <p>- Enrollment was down at every DG4 school.</p>
--	---

Stabilization

TOPIC:	DESCRIPTION:
NOTE FROM COLLEGE PM	We have discovered major gaps in the system with DG4 go-live. While it might be easier for us all to fix these issues in our own manner locally, I would challenge everyone to remain focused on making the system better for all. I feel that workarounds have become common process for previous deployments and believe that some have given up on making the system work better. This is our system. We own it as a consortium. It is our responsibility to make it better. I am committed to this. I hope others will be as well.
COLLEGE COLLABORATION	We have started monthly sessions (Pat Daniels - Highline). We are hopeful these sessions will be useful. To date, many have been IT focused. We plan to expand into other areas.
DATALINK QUERIES	We are looking to build a SQL query database of dataLink queries. Currently in discussion. The idea is that we all use the same replication package, we should be able to share queries seamlessly. This allows us to build dashboards and tools from the shared query data.
COMMISSION COLLABORATION	There are several weekly collaboration sessions (CS Core, FIN). These are commission-focused. We need to expand these and works as a team to take the brightest and best ideas for process improvement. There is power in numbers. These consortium meetings have the ability to drive change at the global level.