Importing Transcripts, Utilizing Degree Audits and Student Ed. Plans

Sue Vaughn, Bakersfield College

Andrew Wright, CSU Long Beach

Renee Cowing, San Mateo Community College District

To Be Covered

Why Import Transcripts?

Considerations

Bakersfield College- Banner

San Mateo- Banner

CSU Long Beach- PeopleSoft, OnBase, and Singularity

Why Import Transcripts

For Degree Audits

High Number of Transfer Students

For Student Educational Plans

Statewide SEP Someday

Bakersfield College

Began to post transfer coursework in 2004

First done manually

Utilized Singularity until 2010

Build a catalog of nearly 5000 courses
from almost 700 college

Plan to reverse articulate within district

SHREDIP

PROD - JInit - Microsoft Internet Explorer

File Edit Options Block Item Record Query Tools Help

Process Submission Controls GJAPCTL 7.3 (PROD)

Process: SHREDIP EDI Transcript Upload Parser

Parameter Set:

Printer Control

Printer: bc_admr01

Special Print:

Lines: 55

Submit Time:

Parameter Values

Number	Parameters	Values
01	Data File	/home/hershey/flat130.dat
02	Test Flag	N
03	Upload Student RAP segments	Y
04	Upload Course RAP segments	Y

LENGTH: 60 TYPE: Character O/R: Required M/S: Single

Submission

Save Parameter Set as

Name:

Description:

Hold

Submit

Destination Printer; DOUBLE-CLICK for available printers, NOPRINT for no printout, DATABASE to review on-line.

Transfer Course Data

Transfer Course Information SHATRNS 7.3 (PROD)

Confidential

ID: @00340770 Adams, Amanda M. Transfer Institution Number: 1

Transfer Course Detail SHATRNS 7.3 (PROD)

Sequence Number: 3
Subject: H ED
Course Number(s): 100
Hours: 3.000 Duplicate: Group: Primary:
Grade: B Title: Health and Wellness

Equivalent Course Detail

Sequence Number	Level	Term	Count in GPA	Subject	Course	Hours	Grade	Grading Mode	Repeat	Repeat System	Title
3	BC	199850	✓	HLED	B1	3.000	B	S			Principles of Health Education

Course Attributes

Attribute	Description
BELE	BC Elective
BLA	BC Liberal Arts Course
CE1	CSU GE Area E-1

SHATAEQ to Equate

Transfer Articulation Evaluation SHATAEQ 7.3.1.1 (PROD)

ID: @00234226 Rehana, Denise L. Institution: 155580 Taft College
Program:

Attendance Period	Term	Level	Transfer Group	Primary Ind	Subject	Course	Credit Hours	Grade	Articulate Ind	Equivalent Level	Subject	Course	Credit Hours	Grade
1	200430	UG			ENGL	1A	3.000	C						
1	200430	UG			INCO	48	1.000	A						
1	200450	UG			SPAN	1	4.000	D						
1	200470	UG			GEOL	10	4.000	A						

Complete Process

Transfer Articulation Evaluation SHATAEQ 7.3.1.1 (PROD)

ID: @00234226 Rehana, Denise L. Institution: 155580 Taft College
Program:

Attendance Period	Term	Level	Transfer Group	Primary Ind	Subject	Course	Credit Hours	Grade	Articulate Ind	Equivalent Level	Subject	Course	Credit Hours	Grade
1	200430	UG			ENGL	1A	3.000	C	Y	BC	ENGL	B1A	3.000	C
1	200430	UG			INCO	48	1.000	A	Y	BC	ENGL	B34	1.000	A
1	200450	UG			SPAN	1	4.000	D	Y	BC	SPAN	B1AB	4.000	D
1	200470	UG			GEOL	10	4.000	A	Y	BC	GEOL	B1A	4.000	A

Posts to Transcript

TRANSFER CREDIT ACCEPTED BY INSTITUTION -Top-

SP 04-FA 04: Taft College

Subject	Course	Title	Grade	Credit Hours	Quality Points	R
ENGL	B1A	Expository Composition	C	3.000	6.00	
ENGL	B34	Intro to Library Research	A	1.000	4.00	
GEOL	B1A	Physical Geology	A	4.000	16.00	
SPAN	B1AB	Elementary Spanish	D	4.000	4.00	

	Attempt Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
Current Term:	12.000	12.000	12.000	12.000	30.00	2.50

Unofficial Transcript

PRE-SYSTEM INSTITUTION SUMMARY HOURS -Top-

	Attempt Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
Total:	6.000	6.000	6.000	6.000	21.00	3.50

Unofficial Transcript

INSTITUTION CREDIT -Top-

Spring 2000

College: Bakersfield College

Academic Standing: Good Standing

Subject	Course	Campus	Level	Title	Grade	Credit Hours	Quality Points	Start and End Dates	R
HLED	B1	Bakersfield	BC	Principles of Health Education	A	3.000	12.00		
MUSC	B27	Bakersfield	BC	History American Popular Music	B	3.000	9.00		

	Attempt Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
Current Term:	6.000	6.000	6.000	6.000	21.00	3.50
Cumulative:	6.000	6.000	6.000	6.000	21.00	3.50

Posts to Degree Audit

Legend

Complete	Complete except for classes In-progress	(T)	Transfer Class	@	Any course number
Not Complete	Nearly complete - see advisor	REG	In-Progress Class	^	Indicates Pre-requisite Required

Degree: Associate in Science — Catalog Year: 2011-2012 — Units Required: 60 — GPA: 2.81 — Units Applied: 138.24

Competency Requirements	Still Needed:	See Competency Requirements section
CSU General Education		
Major Requirements		

Competency Requirements

A minimum grade of 'C' or better is required for all courses required to meet English, Reading and Math Competency requirements. If you've taken any test other than Compass, please see your counselor or educational advisor.

You have demonstrated English Competency.		
Math Competency complete by assessment.		
Reading Competency		
Developing Basic Reading Skills	Still Needed:	1 more Class
Reading for Academic Success	Still Needed:	1 more Class

CSU General Education — Units Required: 24 — Units Applied: 45.71

A. COMMUNICATION & CRITICAL THINKING:					
A.1. Oral Communication:	COMM B1	Public Speaking	B	003.00	Spring 2009
A.2. Written Communication:	ENGL B1A	Expository Composition	B+	003.34	Summer 1998
	Satisfied by	ENGL110 - Calif State Univ,Bakersfield			

Developing Student Ed. Plans

Planner Worksheet AA037042 as of 09/26/2008 at 15:26

Student	Gerrard, Stephen M 19	Level	Undergraduate School
ID	****	College	
Advisor 1	Lockhart, Gilderoy A	Degree	BACHELOR OF ARTS
Advisor 2		Major	Drama
Overall GPA	3.000	Classification	

Degree Progress

Requirements 13%

Units 60%

Bachelor of Arts Degree

Unmet conditions: 74 Units needed; Minimum Units unsatisfied

MAJOR REQUIREMENTS

Needed: **MAJOR block was not found but is required**

Foreign Language Requirements

Needed: See **Foreign Requirement** section

Ed Plan Requirements

Needed: See **You'll never walk alone** section

Blocks included in this block

Foreign Requirement
You'll never walk alone

Foreign Requirement

FOREIGN LANGUAGE REQUIREMENT

Multi-Cultural Studies

Needed: Choose from 1 of the following:

Spanish Culture

Show What If Options

Use What If Scenario

Student Educational Planner Print

Student	Gerrard, Stephen M 19
Current Term	Summer 2003
Description	**Alternative Plan for Drama Major**
Academic Year	2002-2003

Active Plan
Locked

Fall 2003

MATH 1110	3
STAT 1000	3
ANTH 3410	3
ENGL 3003	3
-SOME ELECTIVE	5
Total	17

Notes: I need to decide which elective to take. Right now I am considering ART 1034 or MUSC 1944.

Winter 2004

ANTH 3000	3
PHIL 3332	3
ART 2200	3
SPCH 4860	3
WELS 100	3
MATH 7513	3
Total	18

Notes: WELS 100 can be taken from 2 to 4 credits. I will register for 3 credits.

Spring 2004

ACCT 1101	3
ACCT 1102	3

Notes: This term I may go to France --

Save Plan | Reload Form | Save As... | Delete Plan
Process New | Check All Terms | Uncheck All

Creating the Template

ellucian™ "Michelle J" Pena | Help

Home

Template Management

View Template List | New Template | Change Term Scheme

Template ID: T0000046

Description* BCHISTAT_201499 Active?

Term Scheme: COMPLETE_SCHEDULE_SEMESTERS

Required Template Tags

Level *	Bakersfield	College *	Bakersfield College
Degree *	Associate in Arts for Transfe	Catalog Year *	2014-2015
Program *	History- AA-CSU	Major *	History

Optional Template Tags

Fall Term 1 Total Credits: 10.0

Critical	Course Requirement	Credits	Minimum Grade	Notes
	HIST B1	3.0	C	
	MATH B22	4.0	C	
	ENGL B1A	3.0	C	

Critical	Choice Requirement	Minimum Credits	Minimum Grade	Notes
	BIOL B7 or BIOL B11		C	

Spring Term 1 Total Credits: 12.0

Critical	Course Requirement	Credits	Minimum Grade	Notes
	HIST B2	3.0	C	
	HIST B17A	3.0	C	
	GEOG B1	3.0	C	

Critical	Choice Requirement	Minimum Credits	Minimum Grade	Notes
	THEA B20 or MUSC B21A or MUSC B21B or MUSC B22	3.0	C	

Courses

Collapse All

Course	#	Title

- Academic Development (ACDV)
- Accounting (ACCT)
- Administration of Justice (ADMJ)
- Agricultural Business (AGBS)
- Agriculture (AGRI)
- Air Conditioning/Refrigeration (ACRF)
- American Sign Language (ASL)
- Anatomy (ANAT)
- Animal Science (ANSC)
- Anthropology (ANTH)
- Applied Design (APDS)
- Apprenticeship (APPR)
- Arabic (ARAB)
- Architecture (ARCH)
- Art (ART)
- Astronomy (ASTR)
- Automated Production Tech. (APRD)
- Automotive Technology (AUTO)
- Banking (BANK)
- Behavioral Science (BEHS)
- Biology (BIOL)
- Botany (BOTN)
- Building Trades (BLTR)
- Business (BUS)
- Business Administration (BSAD)
- Business Office Technology (BSOT)
- Chemistry (CHEM)
- Chicano Studies (CHST)
- Child Development (CHDV)
- Commercial Art (CMRT)
- Communication (COMM)
- Computer Graphics (CGRA)
- Computer Science (CSCI)
- Computer Studies (COMS)
- Construction Technology (CNST)
- Correctional Administration (CADM)

Last updated by: Pena, Michelle J on 24-Mar-2014

Delete | Save As... | Save

CSU, Long Beach

In 2002 began to post transfer coursework in PeopleSoft, but transfer articulation rules go back to 1980

Implemented Singularity in 2008

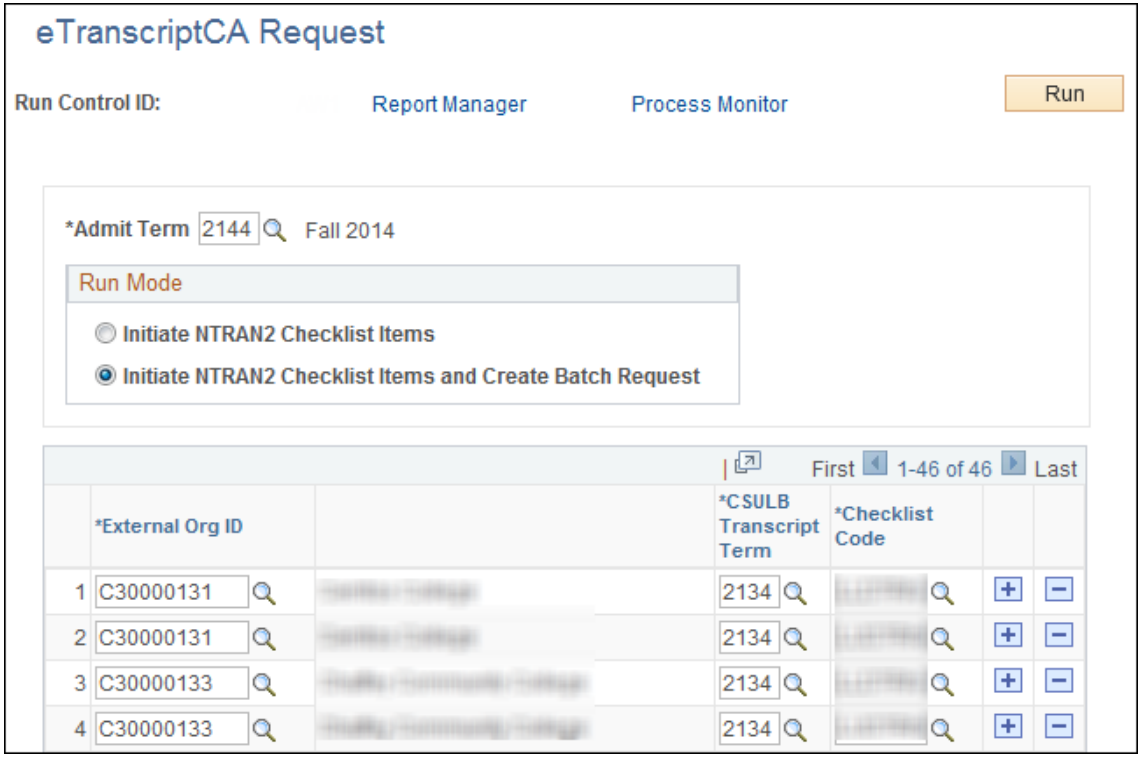
Built articulation rules for 100,000 courses for over 1,500 schools

CSU, Long Beach Admission Process

- Apply between October 1st and November 30th
- Complete the Supplemental Application between January 3rd and February 3rd
- Initial Conditional Admission offers by mid-February
- eTranscript Batch/Manual Requests – Initial Documents
- Online Transfer Confirmations
- eTranscript Batch/Manual Requests Final Documents
- Final Review

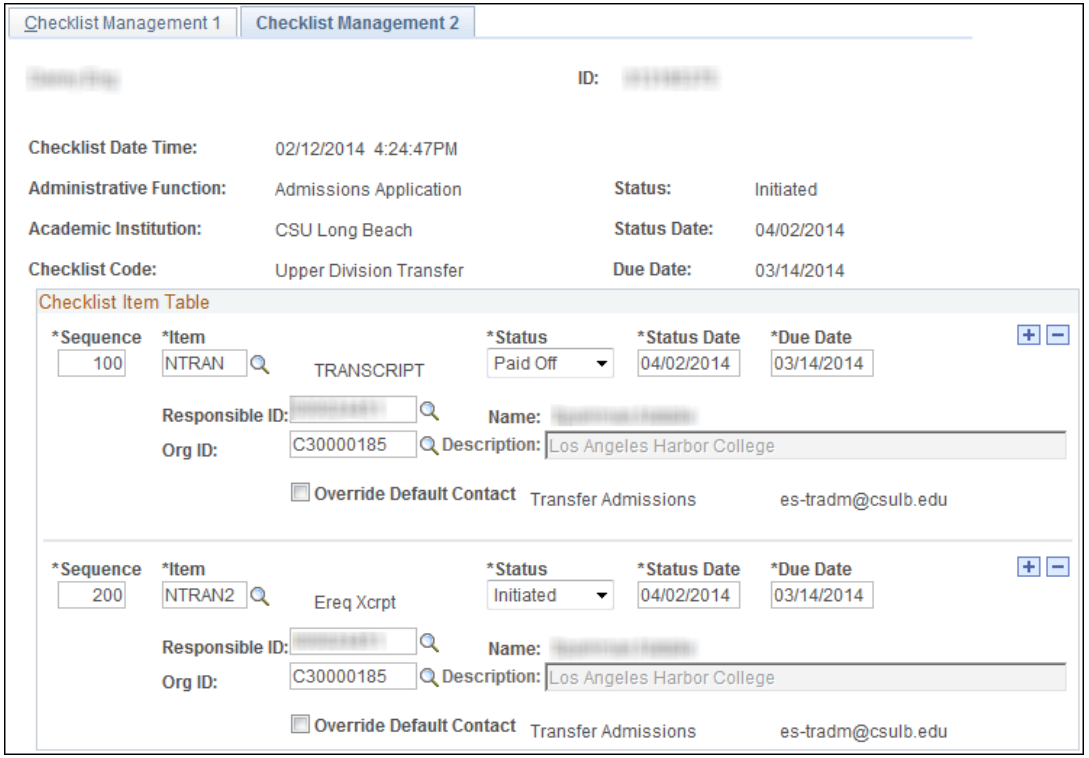
eTranscript Batch Request

- Run for all "Partner Schools"
- Completes the original checklist item to ensure non-duplicated requests
- Initiates a special checklist item for communications



eTranscript Checklist

- Initial Item is “Paid Off”
- Secondary item with same institution is “Initiated” showing an eTranscript has been requested for both communications and staff

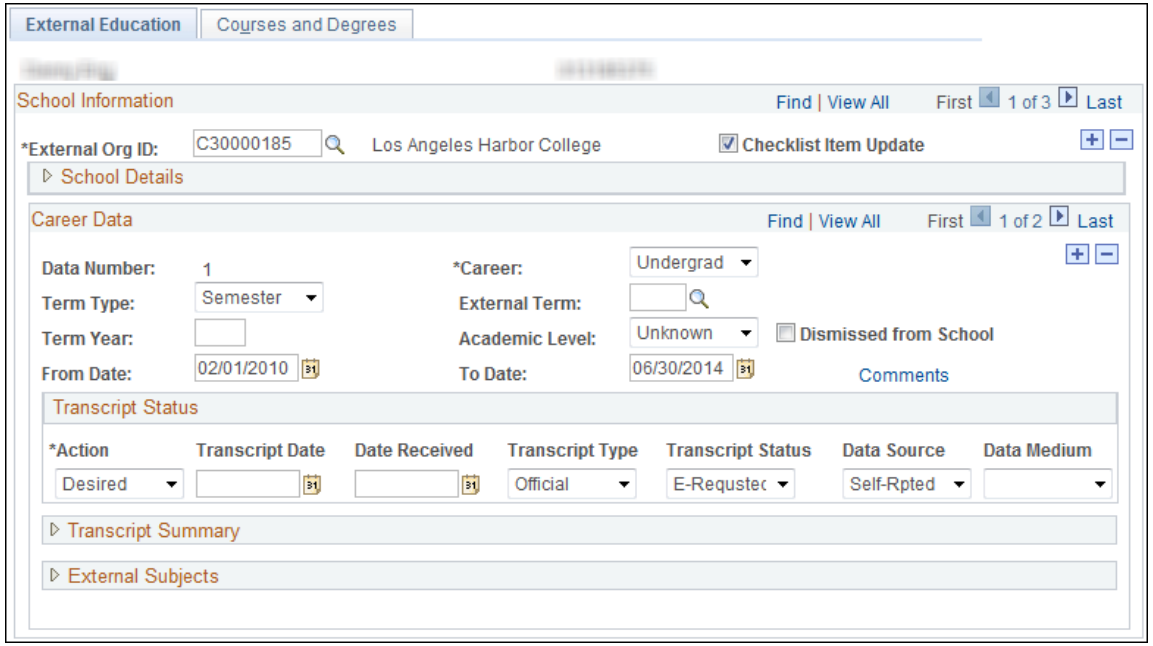


eTranscript Batch Request

PeopleSoft custom batch request creates file to be uploaded to the XAP Control Center.

Transcript Tracking

- The item is marked ‘E-Requested’
- Once transcript is received a ‘Received’ row is added
- Checklist synched with Education page



TS130 Loading

- TS130 Prepare – reformats course numbers to fit institutional needs.
- TS130 Inbound EC Agent – forces institutional parameters as needed.
- TS130 Business Document Summary – allows user to review DAT file format prior to loading.
- TS130 Load – Loads the file into PeopleSoft.
- TS130 Remove Leading 0's – updates the file to remove the leading 0's so the file may post.
- TS130 Org Search – using ATP code, searches for External Org ID.
- TS130 Inbound Data Edit – updates AA-T degree and removes W's.
- EDI Staging Cleanup – Remove's IP grades.
- TS130 Search/Match Post – search matches and posts eTranscripts.

TS130 Upload

Prepare TS130

Run Control ID:

Report Manager Process Monitor Run

*TS130 Input File Path:

*Bus Doc Output Path:

Assume B49 Replacemen

Strip leading zeroes from

Remove Sessions with no

Strip blank from School S

Strip unwanted character and Course Number?:

Save Return to Search

TS130 Load Parameters

Run Control ID: Report Manager Process Monitor Run

*Regulatory Region: USA

Create Acknowledgement

Institution: LBCMP

File Name:

Name Prefix Parms

Male:

Female:

Unknown:

ADM TS130 Post Parm | ADM TS130 Post Parm 2 | Search Parms

Run Control ID: Report Manager Process Monitor Run

Execution Option

Search, Match and Post | Post Only | Search and Match Only

Post Processing Parameters

Process Single Record

Data Source: School

Academic Institution: LBCMP CSU Long Beach

Grading Scheme: UGR Undergraduate

Summary Type from External Career Find | View All First 1 of 1 Last

*External Career: Undergrad

*Summary Type: COLL College Transcript

TS130 Loaded Data

EDI TS130 Process Options | EDI TS130 Org Process Options | EDI TS130 Names | EDI TS130 Addresses

Trans ID: ADM_TRNS_TS130 Queue Inst: 272258 In/Out: Inbound
Cntrl Num: Dt Loaded: 10/07/2013 Posted Dt.:
Last Name: First Name: Middle Initial: D

Processing Options
*Edit: Complete *Search: Perform *Post: Wait Srch

Error Indicators
Last Name First Name Test Comp

Search / Match Results
Order Nbr: 60 Matches: 1

Save | Return to Search | Previous in L

EDI TS130 Activities | EDI TS130 Test Scores | EDI TS130 Sessions | EDI TS130 Academic Summary | EDI TS130 Courses

Trans ID: ADM_TRNS_TS130 Queue Inst: 272258 In/Out: Inbound
Cntrl Num: Dt Loaded: 10/07/2013
Last Name: First Name: Middle Initial: D

Course Data Find | View All First 1 of 6 Last
Session Number: 1 From Date: 08/27/2007 To Date: 12/14/2007
Find | View All First 1 of 1 Last
External Course Number: 1 Crse Error Course Post
School Subject: MUSC Music
Course Nbr: P127 Concert Band
Course Detail
EDI School Subject: MUSC Music
Inbound Course Number: P127 Concert Band
EDI External Course Type: Regular Enrollment
Course Level: Lower Division
Units Taken: 2.00 Grd In/Official: A

Save | Return to Search | Previous in List | Next in List

Transfer Articulation

External Education | Courses and Degrees

External Organization — Find | View All — First 1 of 3 Last

External Org ID: C30000185 Los Angeles Harbor College

External Course Defaults

External Courses — Personalize | Find | View All | First 1-12 of 33 Last

*School Subject	*Course Nbr	*Course Name	*Grading Scheme	*Grading Basis	*Grade In
MUSIC	111	Music Appreciation I	Undergrad	TRN	A
HUMAN	1	Cultural Patterns/Western Man	Undergrad	TRN	A
ART	103	Art Appreciation I	Undergrad	TRN	A
HUMAN	17	Film Appreciation	Undergrad	TRN	A
ENGLIS	101	College Reading & Comp I	Undergrad	TRN	A
PSYCH	1	General Psychology I	Undergrad	TRN	A
POL SC	1	The Government of the U.S.	Undergrad	TRN	A
SOC	1	Intro to Sociology	Undergrad	TRN	A
HISTOR	12	Pol & Soc Hist of the U.S. II	Undergrad	TRN	A
SPEECH	121	The Process/Interpers Comm	Undergrad	TRN	A
ENGLIS	102	College Reading & Comp II	Undergrad	TRN	A
BIOLOG	5	Intro to Human Biology	Undergrad	TRN	A

External Degrees

CSU Long Beach

TAER - Transfer Admission Evaluation Report

Find | View All 1 of 1

Campus Transcript | Print

Report Manager

Seq Nbr: 1

ID: [redacted]

TRANSFER ADMISSION EVALUATION

California State University Long Beach

Name : Jessica Dinh

Student ID: [redacted]

Print Date : 2014-04-02

- - - - - **Transfer Credits** - - - - -

Transfer Credit from Golden West College

Applied Toward Undergraduate Degree Program

Course Trans GPA:	4.000	Transfer Totals :	64.50	64.50	248.000

- - - - - **External Degrees** - - - - -

Golden West College

2013-12-01

- - - - A C A D E M I C A D V I S E M E N T R E P O R T - - - -

Career Simulation - Simulating Undergraduate Career

Undergraduate Degree Program

Human Development BA Plan

Report on Undergraduate Career

TRANSFER ADMISSION EVALUATION

T R A N S F E R A D M I S S I O N E V A L U A T I O N (RG-0008)

BE AWARE: In addition to course requirements, good academic standing at your last institution attended is required for admission to CSULB.

CSULB GENERAL ADMISSION REQUIREMENTS (R-0011)

TOTAL TRANSFERABLE UNITS - 60 Required

ALL-COLLEGE CUMULATIVE GPA - 2.00 Required

GPA (required/actual): 2.000/4.000

CSULB GENERAL EDUCATION ADMISSION REQUIREMENTS - 30 Units Required (R-0012)

WRITTEN ENGLISH COURSE - 3 Units/C Grade or Better Required

Term	Course		Description	Units	Grade	Code
Fall 2014	ENGL	100	Composition II	3.00	A	TR

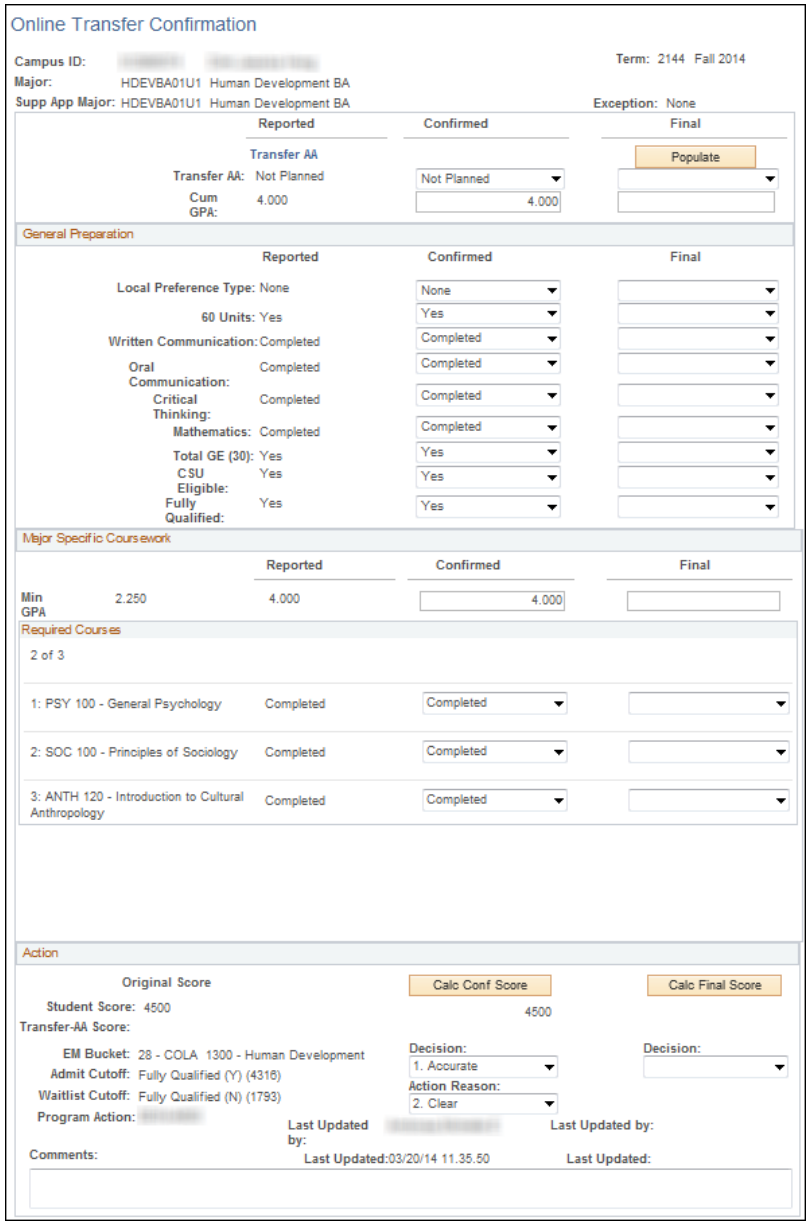
This is a what-if course.

ORAL COMMUNICATION COURSE - 3 Units/C Grade or Better Required

Term	Course		Description	Units	Grade	Code
Fall 2014	COMM	110	Interpersonal Commun	3.00	A	TR

Transfer Online Confirmation

Confirmation procedures performed on all incoming conditionally admitted transfer students.



CSU Long Beach

eTranscript Statistics

Spring Cycle – 3,500 to 4,500 eTranscripts are processed automatically

Fall Cycle – 16,500 to 18,000 eTranscripts are processed automatically

Importing XML Transcripts into Banner

SMCCD

Overview:

Why import transcript data?
- Degree Audits
- Satisfies automated prerequisite testing
- Student Ed Plans (SEP)

- View past, current and planned coursework
- View coursework from other colleges
- Use “what if?” feature

Assist Data + XML + XSLT = DegreeWorks Data

Stats on ASSIST Dataload

ASSIST Catalog Records Loaded: 388,897
Colleges loaded: 107

ASSIST Attribute Code Records Loaded:
610,801

SHTATC

Transfer Institution Catalog

File Edit Options Block Item Record Query Tools Help

Transfer Institution Catalog Entry SHATATC 8.4 (TRNG)

Institution: 435680 CCC San Jose City College Program: Default Institution:

Transferring Course

Group	Primary	Term	Level	Subject	Course	Status	Title	Equivalent Exists	Credits Low	Credits High	Minimum Grade	Catalog	Protect from Import
		199508	01	ACCTG	101	AC	Bookkeeping for Small Business	✓	3.000	3.000			
		200005	01	ACCTG	101	AC	Bookkeeping for Small Business	✓	3.000	3.000			
		199508	01	ACCTG	136	AC	Acct Wrk Exp	✓	1.000	4.000			
		199908	01	ACCTG	136	AC	Occupational Work Experience,	✓	1.000	4.000			
		200005	01	ACCTG	136	AC	Occupational Work Experience,	✓	1.000	4.000			
		199908	01	ACCTG	138	AC	Occupational Work Experience,	✓	1.000	8.000			
		200005	01	ACCTG	138	AC	Occupational Work Experience,	✓	1.000	8.000			
		199008	01	ACCTG	20	AC	Financial Accounting	✓	4.000	4.000			
		199508	01	ACCTG	20	AC	Financial Accounting	✓	4.000	4.000			

Course Details | Course Description

Protect From Import: ○ Select All ○ Deselect All ● None

Course Attributes

Code	Description
CSUO	ASSIST CSU All

Course Comments

Subject Code; subject code of the transferring course.

Record: 4/? <OSC>

The result: Course catalog data from ASSIST is loaded into Banner

Set Up and Processes

- FICE crosswalk: Who is the transcript institution?
- Term codes crosswalk: transcript institution into Banner
- SHRPESI - Banner job to insert data into the database – ready for access by Degree Works

SHAEDIS:

Loading data into Banner

Online Transcripts Activity List SHAEDIS 8.4 (TRNG)

Status:

Pending Or Complete: Pending Complete None

	Last Name	First Name	Middle Initial	ID	Sender	Received Date	Status
*	KUMAR	YASHWENDRA			015235	10-FEB-2014	XML
*	LEVI	DOREY	A		015611	11-FEB-2014	XML
	Mateo	Syndy	B		345124	10-DEC-2013	XML
	Mateo	Syndy	B		345124	10-DEC-2013	ARCH
	Mireles	Salvador	M		345124	08-AUG-2013	ARCH
	O'Con	Anthony	D		345740	25-JUL-2013	ARCH
*	ORQUE	DON	C		015235	10-FEB-2014	XML
*	PEARSON	ROSALYN	G		345740	19-DEC-2013	XML
*	POOLE	DAVINA	N		345124	13-DEC-2013	XML

SMCCD

SHATAEQ:

Courses Ready for Articulation

Transfer Articulation Evaluation SHATAEQ 8.5.4 (TRNG)

I [redacted] Derya, Ener

Institution: 435679 CCC Evergreen Valley College

Program:

Attendance Period	Term	Level	Transfer Group	Primary Ind	Subject	Course	Credit Hours	Grade	Articulate Ind	Equivalent Level	Subject	Course	Credit Hours	Grade
1	200908	01			PED	038	1.000	C	(None)					
1	200908	01			SPAN	001A	5.000	B	(None)					
3	201208	01			COMS	020	3.000	D	(None)					
3	201208	01			HIST	001	3.000	C	(None)					
3	201208	01			PED	038	1.000	C	(None)					
3	201208	01			PHIL	010	3.000	C	(None)					
3	201208	01			POLSC	001	3.000	F	(None)					
5	201303	01			ART	090	3.000	C	(None)					
5	201303	01			ENGL	001A	3.000	D	(None)					
5	201303	01			FCS	050	3.000	C	(None)					
5	201303	01			PED	064	2.000	A	(None)					
5	201303	01			POLSC	001	3.000	F	(None)					
									(None)					

Transcript Data loaded from XML transcript

SMCCD

Articulate All – Load articulation data
(18,664 courses articulated)

XSLT*:

Modifying the incoming XML data

*eTranscriptCA XML enhancement – March 26th, 2014

- Enable SMCCD to accept XML data pushed to us from institutions registered with eTranscriptCA or other institutions
- XSLT + XML = transfer coursework in our SIS

Incoming etranscriptCA XML

```
<CourseCreditBasis>Regular</CourseCreditBasis>
<CourseCreditUnits>Semester  </CourseCreditUnits>
<CourseCreditValue>3.00</CourseCreditValue>
<CourseCreditEarned>3.00</CourseCreditEarned>
<CourseAcademicGradeScaleCode>25</CourseAcademicGradeScaleCode>
<CourseAcademicGrade>A</CourseAcademicGrade>
<CourseQualityPointsEarned>12.00</CourseQualityPointsEarned>
<CourseSubjectAbbreviation>NUTRI</CourseSubjectAbbreviation>
```

XSLT template

```
<!-- Add template to match semester tag followed by two blanks -->
    <xsl:template match="//AcademicSession/Course/CourseCreditUnits">
        <CourseCreditUnits>
            <xsl:value-of select="normalize-space()" />
        </CourseCreditUnits>
    </xsl:template>
```

XML Ready for Banner

```
<CourseCreditBasis>Regular</CourseCreditBasis>
<CourseCreditUnits>Semester</CourseCreditUnits>
<CourseCreditValue>3.00</CourseCreditValue>
<CourseCreditEarned>3.00</CourseCreditEarned>
<CourseAcademicGradeScaleCode>25</CourseAcademicGradeScaleCode>
<CourseAcademicGrade>A</CourseAcademicGrade>
<CourseQualityPointsEarned>12.00</CourseQualityPointsEarned>
<CourseSubjectAbbreviation>NUTRI</CourseSubjectAbbreviation>
```

XSLT in action

Questions ???

How to Reach US

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Renee Cowing
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