



COLORADO STATE UNIVERSITY GLOBAL MODERNIZES DEGREE AUDIT AND TRANSFER EVALUATION WITH KUALI ADVISOR

A KUALI ACADEMIC OPERATIONS CASE STUDY



Executive Summary

At [CSU Global](#), degree audit and transfer evaluation are high-volume, high-stakes work. Students arrive with varied transfer histories, programs evolve frequently, and staff need to create and maintain audits that downstream teams can confidently use.

Before Kuali Advisor, transfer evaluation and audit maintenance required too much manual effort, and audit output often needed extra interpretation for downstream teams.

With [Kuali Advisor](#), CSU Global shifted to a degree audit experience that is easier to maintain and easier to interpret, delivering instant and accurate degree audits that students and downstream teams can trust as a single source of truth.

RESULTS AT A GLANCE



Transfer evaluation moved from manually adding up courses to a more automated, rules-driven process.



The audit model scales to CSU Global's pace with frequent starts, frequent completions, and lots of configurations.



Audit output became a shared source of truth that Student Success advisors can work from.



Students receive a completed degree progress audit and can view it directly in the portal.



Students can run “what-if” scenarios to see how completed courses apply across programs.



Challenge

CSU Global serves a large online population with rolling starts and significant transfer activity. With more than 13,000 active students, the institution had to keep degree audits accurate, understandable, and easy to maintain at scale.

Before Kualī Advisor, transfer evaluation and audit maintenance required excessive manual effort—especially when students brought in varied transfer work and needed real-world exceptions applied consistently. Audit output also wasn't as clear or actionable as it needed to be for the people downstream who relied on it, which meant staff spent extra time interpreting results, answering follow-up questions, and reconciling edge cases, rather than moving students forward efficiently.



Because we're a transfer-heavy school, taking the transfer credit into consideration—and how to apply it to the degree audit—that was really, really hard.

Marlise Sipes, Registrar,
COLORADO STATE UNIVERSITY GLOBAL

Because audits served as the foundation for academic planning support across teams, any lack of clarity or flexibility quickly amplified, turning routine audit and transfer work into repeated back-and-forth and preventable friction.



Solution

CSU Global adopted **Kualī Advisor**, a modern degree audit and academic planning platform built for real-time, accurate audits in complex environments. Advisor flexibly represents degree requirements and uses a deterministic, rules-driven audit engine to evaluate a student's record dynamically—consistently applying rules, honoring exclusions, and placing eligible coursework appropriately across requirements.

Designed to handle complex academic rules in any institution, Advisor supports the kinds of scenarios CSU Global deals with every day—transfer credit, frequent program updates, and real-world exceptions—without forcing requirements into rigid templates or brittle logic. It provides a consistent audit view that downstream teams can rely on, while keeping requirement logic maintainable as policies and programs evolve.



Transfer evaluation used to be really manual for us. Now the audit is accurate and clear, Student Success can work from it, and students can see exactly where they stand.

Marlise Sipes, Registrar, **COLORADO STATE UNIVERSITY GLOBAL**



Result: Accurate Catalog & Transformed Processes

CSU Global moved from degree audits that required interpretation to instant, accurate audits that teams could trust and act on.

With Kualī Advisor, transfer evaluation no longer depended on manually adding up coursework, and audits became easier to complete and maintain—even when transfer credit and real-world exceptions made cases more complex. Degree progress audits could be shared through the portal, giving students clearer visibility into where they stood.

Just as importantly, Student Success advisors gained a reliable source of truth to work from. Instead of spending time translating audit output or chasing clarification across teams, advisors could use the same audit view with confidence, reducing back-and-forth and supporting more consistent academic planning conversations.

Finally, for CSU Global's busy students—many balancing work, family, and school—Advisor's "what-if" scenarios make it possible to instantly explore different program pathways and see where they stand right away. That same capability can also help surface additional opportunities along the way, like being close to an undergraduate certificate, minor, or specialization, without requiring staff to rebuild audits from scratch.



Why It Matters for Registrars

CSU Global's story is a registrar story: audit design, transfer evaluation, and maintainability at scale.

If your institution is already "doing degree audit" but still spending too much time on manual interpretation, side processes, or clarifying what the audit output means, CSU Global demonstrates a different approach: treat degree audit modernization as a usability and governance problem—then roll out in a way that de-risks change for staff and students.

*LET'S DO SOMETHING
REMARKABLE.*



Talk to us about what makes our next-generation curriculum management solution so amazing.

LET'S CHAT

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