

Entering Transfer Credit

Purpose: The following instructions describe how to add transfer courses to the student's external org. The first step is to enter the external course defaults and add courses. The second step is to associate the UNI equivalents.

Entering External Course Defaults and Adding Courses

| Step | Action |
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| 1. | Navigate to the External Education page: Main Menu > Records and Enrollment > Transfer Credit Evaluation > External Education |
| | Note: You may also access via Admissions |
| 2. | Enter search criteria. Click the Search button. |
| | Result: The External Education tab displays. |
| | Favorites Main Manu > Records and Enrollment > Transfer Credit Evaluation > External Education |
| | External Education Courses and Degrees |
| | School Information Find View All First 1 of 1 Last |
| | *External Org ID: 634661 Q North High School I Checklist item Update |
| | Career Data Find View All First 4 1 of 1 Last |
| | Data Number: 1 *Carcer: High Schl • Image: Carcer: High Schl • Term Type: Semester • External Term: Image: Carcer: Image: Carcer: |
| | *Action Transcript Date Date Received Transcript Type Transcript Status Data Source Data Medium |
| | Received • 11/19/2010 11/19/2010 0 Official • Incomplete • School • Iard Copy • |
| | Transcript Summary Customize Find View All] First 1 or 1 Last Term GPA/Units Rank |
| | *Summary Type External Term Ext Year Acad Level Institution |
| | 1 RAI - 2010 Unknowr - UNI - + - |
| | Customize Find View All 2 2 First 1 of 1 E Last |
| | *External Subject Area Course Level Institution GPA Type External GPA Converted GPA |
| | |
| | |
| | Transfor To: Course Credits - Go |
| | 🗟 Save 🔍 Return to Search 🗵 Notify 🕼 Refresh |



| Step | Action |
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| 3. | Select the Courses and Degrees tab. External Education Courses and Degrees |
| | External Organization Find View All First I of 1 I Last External Org ID: 634661 North High School |
| | External Course Defaults Data Number: External Career: High Schl Apply Defaults Data Source: Self-Rpted Term Type: Semester Acad Level: Unknown External Term: Q Institution: UNICS UNI Term Year: Course Type: Course Type: Course Type: Semester Unit Type: Semester Unit Taken: |
| | Grading Scheme: UG Grading Basis: GRD Q Graded External Courses Course Grades Timeframe Details Transfer Credit/ Comments Course School Subject Description Course Nbr Course Name Q E |
| | Degree Field of Study Transcript Transcript |
| | Transfer To: Course Credits Go Save Return to Search Notify Refresh Enter External Course Defaults – any information you provide here will pre- populate the same for all courses you are about to enter. You may use any of these fields; you do not need to use all of them. You may override any fields as you enter courses. |
| | Data Number - If the courses that you enter are linked to a row of transcript data on the External Education page, enter the data number from that page. When you navigate out of this field, the system automatically populates a number of the remaining fields with the data that is linked to this data number. If the courses that you enter are <i>not</i> linked to a data number, do not enter a value in this field but complete the remaining fields. Data Source - School (could also be Self-Reported, if appropriate)* Acad Level - Select the academic level of the person at the time the external data was collected or issued. This value might be different from the current academic level. It can be left "Unknown" |



| Step | Action |
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| 4. | Enter External Course Defaults (CONTINUED) |
| | Institution – UNICS* Course Type – Pre-populated from School Course Classification Unit Type – Pre-populated from School Data set up Grading Scheme – Pre-populated (Grad, Undergrad) External Career – Pre-populated from School Data set up Term Type – Pre-populated from School Data set up Begin Date - Not needed if Term Type exists End Date - Not needed if Term Type exists Course Level - Use what is appropriate (Lower Division, Upper Division, etc) Units Taken - Consider entering the most common number and overriding others, or leave blank and manually enter for each course Grading Basis – Select TRN (Transfer) |
| | Click "+" to add more External Courses Select number of courses to add The Defaults will appear for all new rows Add all courses, grades, credit hours, etc SAVE *These field values can be set up in <i>User Defaults</i>. You may still override the value. This will pre-populate the values and save time on data entry. To set User Defaults navigate to: Main Menu > Set up SACR > User Defaults. |
| 5. | Click the Apply Defaults button. |
| | Data Number: External Career: Undergrad Aceeby Defaults Data Source: Self-Rpted Term Type: Quarter Quarter Acad Levet: Unknown External Term: Quarter Quarter Institution UNKnown External Term: Quarter Quarter Note: Click the Add Row button Image: Acad Core in the external Organization level in |



| Step | Action |
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| 6. | In the External Courses section, add the appropriate courses. Click the Add Row button to add additional rows needed (beyond the one default row) External Courses Course Grades Timeframe Details Transfer Credit/Comments Seq School Subject Description Enter the number of rows needed in addition to the one default row and click the OK button. Enter number of rows to add: OK Cancel |
| 7. | Click the Show All Columns button to see all the fields for external courses. Enter the information for each course. Note: You may override any course default fields as necessary. |
| 8. | Click the Save button. |



Associating UNI Equivalents

| Step | Action | | | |
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| 1. | Now that you have entered the student's courses, the next step is to associate the UNI Equivalents. Navigate to the Course Credits – Automated page: Select Main Menu > Records and Enrollment > Transfer Credit Evaluation > Course Credits – Automated | | | |
| | Favorites Main Menu > Records and Enrollment > Transfer Credit Evaluation > Course Credits - Automated | | | |
| | Course Credits | | | |
| | Enter any information you have and click Search. Leave fields blank for a list of all values. | | | |
| | Find an Existing Value Add a New Value | | | |
| | Maximum number of rows to return (up to 300): 300 | | | |
| | ID: begins with Academic Career: = | | | |
| | Academic Career: = | | | |
| | National ID: begins with | | | |
| | Last Name: begins with First Name: begins with | | | |
| | First Name: begins with Case Sensitive | | | |
| | | | | |
| | Search Clear Basic Search 📳 Save Search Criteria | | | |
| 2. | Click the Add a New Value tab. Enter the student's ID, Academic Career, and | | | |
| | Academic Institution. | | | |
| | Course Credits | | | |
| | | | | |
| | Eind an Existing Value Add a New Value | | | |
| | | | | |
| | | | | |
| | Academic Career: Undergraduate Academic Institution: UNICS | | | |
| | | | | |
| | Add | | | |
| 3. | Enter the student's <i>ID</i> , <i>Academic Career</i> , and <i>Academic Institution</i> . Click the Add | | | |
| | button. | | | |



| Step | Action | | | | | |
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| 4. | On the <i>Transfer Course Details</i> tab, complete the following: | | | | | |
| | | | | | | |
| | Transfer Course Details Transfer Summary | | | | | |
| | Transfer Credit Model | | | | | |
| | | | | | | |
| | Academic Career: UGRD Undergraduate | | | | | |
| | *Model Nbr: 2 | | | | | |
| | *Transcript Level: Unofficial 👻 | | | | | |
| | Target Information | | | | | |
| | Academic Program: Q | | | | | |
| | Academic Plan: | | | | | |
| | Source Information | | | | | |
| | *Credit Source Type: External - | | | | | |
| | External Org ID: | | | | | |
| | Data Source: | | | | | |
| | Transfer Credit Term Hind View All First M 1 of 1 E Last | | | | | |
| | *Articulation Term: Q. Fetch | | | | | |
| | Equivalency Details | | | | | |
| | Status External External Subject / Units Grade Equivalent Subject / Units Grade Grade Repeat Incl in | | | | | |
| | Term Catalog Nbr Taken Input Catig Nbr Accepted Basis Grade Code FA Wi | | | | | |
| | Add/View Comments | | | | | |
| | | | | | | |
| | Save A Return to Search 🔄 Notify | | | | | |
| | | | | | | |
| | Transcript Level | | | | | |
| | Academic Program | | | | | |
| | Academic Plan – LEAVE BLANK | | | | | |
| | • External Org ID | | | | | |
| | • Data Source | | | | | |
| | Articulation Term | | | | | |



| Step | Action | |
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| 5. | Click the Fetch button. | |
| | Result: The <i>Equivalency Details</i> tab populates. | |
| | Transfer Credit Term Find View All First 🔳 1 of 1 🕨 | Last |
| | *Articulation Term: 2112 Q 2011 FALL Posted | + - |
| | *Group Status External External Subject / Units Grade Equivalent Subject / Units Grade Grade Grade Code i | Incl in FA VVI |
| | 1 Posted 2010 FALL MAT 110 3.00 A MATH 1100 3.000 TRN A | \checkmark |
| | 2 Posted 2010 SPR PSY 111 3.00 B PSYCH 1001 3.000 TRN B | \checkmark |
| | 3 Posted 2010 SPR SOC 110 3.00 B SOC 1000 3.000 TRN B | $\overline{\mathbf{v}}$ |
| | 4 Posted 2011 SPR SPC 101 3.00 A COMM 1000 3.000 TRN A | 1 |
| | Note: To see the Incoming Course Name, click the Show All Columns button Image: and then click the Edit Equivalent Course button for the course you we to see the name. Equivalent Course Information Incoming Course Term: 2010 FALL | vish |
| | Course: MAT 110 Math For Liberal Arts Cancel Units Taken: 3.00 3.00 Cancel Cancel | |
| | Grade Input: A A Crse Level: | |
| | Equivalent Course | |
| | Course ID: 004306 Math Decision Making Clear | |
| | Offer Nbr: 1 MATH 1100 Grading Scheme: UIG Undergraduate Grading Scheme Valid Attempt | |
| | Graung Scheme. | |
| | | |
| | Official Grade: A A Include in GPA Units Transferred: 3.000 Grd Pt/Unt: 4.000 Units Att: Yes | |
| | Repeat Code: | |
| | Designation: | |
| | ✓ Include in FA WI Stats | |



| Step | Action | | | | | | | |
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| 6. | You have now added the UNI equivalents, units, and grades to the transfer courses. At this point the status is "Accepted". The next step is to attempt to "Post" the credit. | | | | | | | |
| | <i>Note:</i> In the sample below, you'll see one course "Rejected". This is a No Credit course. We'll need to decide if we wish to leave this on the student's record or not. It can be deleted at this stage by clicking on the minus sign at the end of the row. The Status could also be "No Rule" in which case, the Transfer Rule has not been set up for that course. | | | | | | | |
| | Transfer Credit Term Find View All First 🗷 1 of 1 🕨 Last | | | | | | | |
| | *Articulation Term: 2112 2011 FALL Fetch Submitted | | | | | | | |
| | *Group Status External External Subject / Units Grade Equivalent Subject / Units Grade Repeat In FA Term Catalog Nbr Taken Input Catlg Nbr Accepted Basis Grade Code WI | | | | | | | |
| | 1 Accepted 2011 SPR SOC 220 3.00 B- SOC 1000B 3.000 TRN B- | | | | | | | |
| | 2 Accepted 2010 FALL PSY 102 3.00 A PSYCH 1000A 3.000 TRN A 🗹 🖃 | | | | | | | |
| | 3 Accepted 2010 FALL MAT 117 3.00 C+ MATH 1201 3.000 TRN C+ | | | | | | | |
| | 4 Rejected 2011 SPR MAT 045 4.00 D+ | | | | | | | |
| | | | | | | | | |



| Step | Action |
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| 7. | Select the <i>Evaluator Details</i> tab. Click the Edit Equivalent Course icon to |
| | review the Equivalent Course Information page. |
| | Transfer Credit Term Find View All First 4 of 1 D Last |
| | *Articulation Term: 2112 Q 2011 FALL Fetch Submitted + |
| | Equivalency Details Evaluator Details |
| | *Group <u>Status</u> External External Subject / Units Grade Equivalent Subject / Lock Term Catalog Nbr Taken Input Catlg Nbr |
| | 1 Accepted 2011 FALL MA 111T 3.00 A- MATH 1100 1 🔞 🔯 💌 🖝 📼 |
| | 2 Accepted 2011 FALL CSC 110 3.00 A MGMT 1000Z 🕄 🕅 🖾 🗭 📼 🔲 |
| | 3 Accepted 2011 FALL COM 730 3.00 B XXX CT 1 8 🕅 🕅 🕅 🥅 |
| | Result: The Equivalent Course Information page display, return to the Evaluator Details by Equivalent Course Information Incoming Course Information Incoming Course Information Incoming Course Information Incoming Course OK Term: 2010 FALL Course: MAT 10 Math For Liberal Arts Units Taken: 3.00 Grade Input: A Course ID: 004306 Math Decision Making Clear Offer Nbr: 1 MATH 1100 |
| | Grading Scheme: UG Undergraduate Grading Scheme ✓ Valid Attempt Grading Basis: TRN Transfer ✓ Earn Credit Official Grade: A A ✓ Include in GPA Units Transferred: 3.000 Grd Pt/Unt: 4.000 Units Att: Yes Repeat Code: |
| 8. | Determine if you wish to reject a course or add another equivalent. |
| | If you wish to Then |
| | Reject a courseClick the Reject External Course icon S. Caution: As soon as you click this icon, the course is rejected so DO NOT click on this unless you truly want to reject the course. |
| | Add anotherClick the Add Internal Equivalent icon *. This |
| | equivalent allows you to add another equivalent and creates an |
| | additional row with the equivalent. It also creates the |
| | Delete Internal Equivalent icon |



| Step | Action | | | | |
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| 9. | Click the Comme Comments page. | ent/Overrie | de Reason icon 🗐 to acc | ess the Course Credit | |
| | Course Credit Con | ments | | | |
| | Override Reason | | | | |
| | Comment | | | | |
| | | | | .4 | |
| | OK Cancel | | | | |
| 10. | Enter Override R | eason and | /or Comments as appropr | riate. Click the OK button. | |
| 11. | Click the <i>Transfer Summary</i> tab. | | | | |
| | Transfer Credit Model | | | Find View All First 4 2 of 2 10 Land | |
| | Academic Career: | UGRD | Undergraduate | | |
| | Academic Institution: Model Nbr: | UNICS 2 | University of Northern Iowa Hawkeye Community College | | |
| | Academic Program: | CBAUG | Business Admin-Undergraduate | 1 | |
| | Admit Type/Term: | | FrCollCr 2011 FALL | I | |
| | Articulation Term: | 2011 FALL | Posted Date: | Find View All First I 1 of 1 E Last | |
| | | | and the second second | and and and | |



| Step | Action | | | | | | |
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| 12. | Use the <i>Transfer Summary</i> tab | to calculate an individual's transfer credit stati | stic | | | | |
| | based on the accepted internal e | based on the accepted internal equivalent courses of a transfer credit model. | | | | | |
| | Click the Calculate button. | Calculate | | | | | |
| | Chek the Calculate button. | | | | | | |
| | Result . When you calculate the | e individual's transfer credit statistics, the syste | m | | | | |
| | calculates the units taken and th | | 111 | | | | |
| | Transfer Course Dietails Transfer Summary | | | | | | |
| | | | | | | | |
| | Transfer Credit Model | Find View All First 4 2 of 2 | 110 | | | | |
| | Academic Career: UGRD | Undergraduate | + - | | | | |
| | Academic Institution: UNICS | University of Northern Iowa | | | | | |
| | Model Nbr: 2 | Hawkeye Community College | | | | | |
| | Academic Program: CBAUG | Business Admin-Undergraduate | | | | | |
| | Admit Type/Term: | FrCollCr 2011 FALL | | | | | |
| | pin | Find View All First 🗷 1 of 1 💌 1 | | | | | |
| | Articulation Term: 2011 FALL | Posted Date: | | | | | |
| | Model Status: Submitted | Usier ID: | | | | | |
| | 1 | | | | | | |
| | Transfer Taken for GPA: 9.0 | Calculate Post Unpost | | | | | |
| | Transfer Taken Not for GPA: 3.0 | | | | | | |
| | Transfer Passed for GPA: 9.0 | Not see a substantial second a substantial second sec | | | | | |
| | Transfer Passed Not for GPA: 3.0 | 00 Transfer GPA: 3.780 | | | | | |
| | | | _ | | | | |
| | FA Weeks of Instruction Stats Transfer Taken for GPA: 9.0 | 00 | | | | | |
| | Transfer Taken for GPA: 9,0 Transfer Taken Not for GPA: 3.0 | | | | | | |
| | Transfer Passed for GPA: 9.0 | | | | | | |
| | Transfer Passed Not for GPA: 3.0 | | | | | | |
| | | | | | | | |
| | Course Credits Summary | | - | | | | |
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| | 0.000 (0.00) (0.000 (0.000 (0.000 (0.000 (0.000 (0.000 (0.000 (0.000 (0.000 (0.000 (0.000 (0.000 (0.00) (0.000 (0.00) (0.00) (0.000 (0.00) (0. | 000 Transfer Grade Points: 0.000 | | | | | |
| | | 000 Transfer GPA: 0.000 | | | | | |
| | | | | | | | |
| | | States States | | | | | |
| | Save 🕰 Return to Search 💟 Notify | E+ Add | isplay | | | | |
| | | | | | | | |
| 12 | Click the Save button. | | | | | | |
| 13. | | | | | | | |
| | 🔜 Save | | | | | | |