

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
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
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
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
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			
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					
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	
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							
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
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				
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						
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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		000 Transfer GPA: 0.000					
		States States					
	Save 🕰 Return to Search 💟 Notify	E+ Add	isplay				
12	Click the Save button.						
13.							
	🔜 Save						