INDIANA UNIVERSITY

OFFICE OF THE EXECUTIVE VICE PRESIDENT FOR UNIVERSITY ACADEMIC AFFAIRS

University Transfer Office

Course Credits – Automated Process Manual

Course Credits – Automated connects the courses listed in the Education Panel with the transfer articulation rules created in SIS, and then applies and posts transfer credit to a student's record. This can be done automatically but it requires that each part of the process be completed: courses listed in education panel, articulation rule created, student is term active, and proper program and term selected.

If the credit was not processed automatically, it can also be created individually in Course Credits – Automated. This manual will walk through each step so that if there are any errors, or the automated process did not work, the credits can still be articulated and posted to the student's record.

To open: Main Menu → Records and Enrollment → Transfer Credit Evaluation → Course Credits – Automated.

- Enter Student ID.
- Hit *Search.*

- If no record is brought up you will have to Add a New Value.

Course Credits

Find an Existing Value | **Add a New Value**

ID:

Academic Career:

Academic Institution: IUINA

Add

Find an Existing Value | Add a New Value

- Enter Student ID.
- Academic Career = Undergraduate.
- Academic Institution = your campus code.
- Click *Add.*

1. Transfer Course Details Tab

- This is a blank form that would be created if using *Add a New Value*. If the record was created automatically, all fields and courses will populate.
- If the fields are not populated, the academic program, External Org ID, and Articulation Term will have to be gathered.
  - Academic Program and Articulation Term can be found in IU Term Statistics. They have to match in order for the credit to be posted to the student's record.
    - Main Menu → Records and Enrollment → Student Term Information → IU Term Statistics.
  - External Org ID can be found in the Education Panel.
  - Data Source will be School.
- Once all fields are entered, hit *Fetch*. This will pull over courses from the Education Panel and apply the articulation rules that are created in SIS. It also applies the program- and rule-specific guidelines, ex grading basis, minimum grade points, etc.
- Once you have filled the form and clicked *Fetch*, it should look like below:

- o - Transfer Status Detail. Describes the Status shown in the second column. Example: shows why a rule might not have been applied to a course.

- o - Edit Equivalent Course. This will add or Change IU course equivalent details. Further explanation below.

- o - Reject External Course. This ultimately removes the equivalent course.

- o - Add Internal Equivalent. This is used when more than one equivalency course is going to be used for one external course.

- o - Comment/Override Reason. Comments can be made if special exceptions are made for individual students.

- o - Lock button. If the lock is checked, the external course and equivalent course will not be affected if the fetch button is pressed again.

- o - Move to Group. This can only be seen when no equivalent course is selected. This is used to connect two or more external courses together.

- If courses were already entered and posted, the record will need to be unposted before all fields are visible and any change can be made.

Equivalent Course Information

- When the Edit equivalent Course is selected, the Equivalent Course Information will be opened.
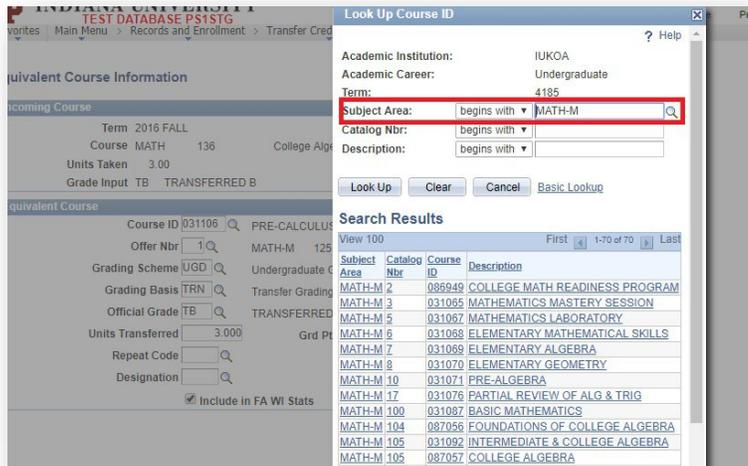

- The top section shows the Incoming Course, while the bottom section shows the IU Equivalent Course.

- If the course ID is not known, the magnifying glass can be used to search for the appropriate course.

- o Use the Subject Area to search for the subject and course.
- o The search is limited to the IU course catalog for the articulation term selected.

- Once the Course ID is entered or selected, the rest of the fields will populate according to defaults and course information. Double check to make sure the Units Transferred equals the same as Units Taken.
- If the course is developmental or has too low a grade, make it nontransferable by entering 077814 for the Course ID.

- If credit is part of a milestone and the student's transferable course work does not total 30 credit hours for STGEC milestone, or 60 credit hours for TSAP milestone, but the milestone is on their record, the transfer credit model will have to be updated to include course work enough to total the appropriate amount of credit hours via exception. To do this, look up the Course ID which would be the typical transfer credit course for this articulation. Select it to return to the screen. Update the official grade to "E*" where the asterisk is the grade the student received in the course (i.e. a D is entered as ED).

- Hit *OK* to go back to the Transfer Course Details, once the appropriate course has been selected.

2. Transfer Summary Tab

Once all the courses have an equivalency, move to the Transfer Summary Tab to calculate the totals and post the credit.

- *Calculate* will produce the credit totals that will be applied.
- When *Post* is selected, the repeat rules will be applied and totals recalculated if the student is term activated. Once posted the credit will appear on the student record and equivalencies will be locked.

o   NOTE: Courses that were entered in the Education Panel and then later removed will cause the corresponding external courses to disappear. The equivalent course and totals will remain. These cause issues and need to be removed.

- When *Post* is selected, the Model Status will change to *Posted*.

- If an error message appears, check to see what it is telling you as it might mean the credit cannot be posted yet.
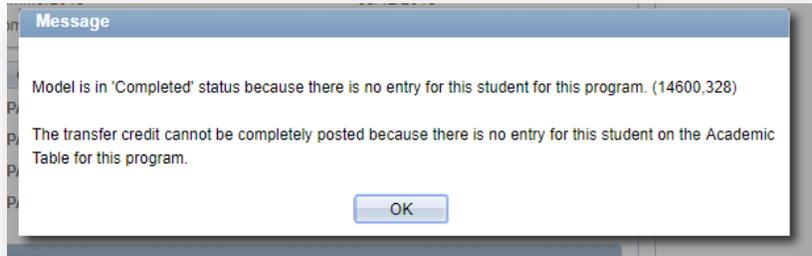
  o If this is the message, it means:
    - The program is incorrect. This is a common occurrence where the student applied for one program but for some reason the program was later changed. Check IU Term Statistics to see what the correct program is.
    - Or it could mean that the term is incorrect. The student has to be active for that articulation term or else the credit will not post. Either it is too soon to post or the student changed the term they were starting. Check IU Term Statistics to see the available terms.
- Regardless of if the credit is posted to the students account, once *Post* is selected all the credit is locked. If the credit shows as *Completed*, rather than *Posted*, it will have to be unposted until the student is active for a term and program. Usually if left alone and unposted, SIS will automatically post the credit when it can, but if the term and program never match it will never be posted.
- To check if the credit has posted to the student record properly, go to the unofficial transcript. If the credit is missing, or totals are incorrect, go back to Course Credits-Automated and verify the information.

If you have any questions or concerns with this document, contact the UTO at uto@iu.edu.