Processing Course Transfer Credit with Predefined Rules

Trigger:

Concept

There are two ways to evaluate course transfer credit:
- Using predefined rules (using the Course Credits component).
- Manually (using the Course Credits - Manual component).

Use the Course Credits component to use predefined course transfer equivalency rules to articulate course transfer credit. Predefined rules can be attached to academic programs, academic plans, and student-specific study agreements. You will create models of articulation based on the source of the transfer credit and the student’s academic program and plan. You can create as many models as necessary.

To process course transfer credit using predefined equivalency rules:
1. Set up the source information and target information for the transfer credit model on the Transfer Course Details page.
2. Select the articulation term for the model and command the system to evaluate the courses according to the predefined rules in the Transfer Credit Term group box on the Transfer Course Details page.
3. Calculate transfer credit statistics for the model, post and unpost transfer credit, and view a summary of transfer credit statistics on the Transfer Summary page.
4. View summary student statistics, once you have saved a posted or unposted model, in the Course Credits Summary group box of the Transfer Summary page.

In this topic, you will evaluate course transfer credit using predefined rules.
<table>
<thead>
<tr>
<th>Field(s)</th>
<th>Comments</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Output - Results</th>
<th>Comments</th>
</tr>
</thead>
</table>

Additional Information
Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by accessing the <strong>Transfer Course Details</strong> page. Click the <strong>Records and Enrollment</strong> link.</td>
</tr>
</tbody>
</table>
Business Process Document
myZou Admissions: Processing Course Transfer Credit with Predefined Rules

<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Course Credits - Automated</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td>3.</td>
<td>Click the <strong>ID</strong> object.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Transfer Credit Evaluation</strong> link.</td>
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</tbody>
</table>
5. Click the **Course Credits - Automated** button.
Step | Action
---|---
6. | Click the **Add a New Value** tab.

Add a New Value
Step | Action
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7. | You will process transfer credits for Eddie Brock, whose student ID is 14002638. Enter the desired information into the **ID** field. Enter "**14002638**".
8. | Select the student's academic career from the Academic Career drop down list.
9. | Click the **Add** button.
10. | Use the **Transfer Course Details** page to create course transfer credit models and run the Transfer Credit process to evaluate the models.
11. | If existing transfer credit is listed, and you are adding evaluating credit from a new school, you want to first add a new model row for Eddie by clicking on the + (plus) sign. Otherwise continue on to the next step to evaluate the transfer credit.
Step 12. You will need to select the school that you are evaluating the credit for. Click the Look up External Org ID (Alt+5) button.
### Business Process Document

**myZou Admissions: Processing Course Transfer Credit with Predefined Rules**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>13.</td>
<td>Click the <strong>ID</strong> object.</td>
</tr>
</tbody>
</table>

Last changed on: 6/10/2007 5:45 PM
Step | Action
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14. | Select the school you are evaluating. We will be evaluating Columbia College.

Select Columbia College from the **Search Results** table.

Note: If the transcript for the school you are evaluating has not been entered by the Records department, the school will not display in the search results.

<table>
<thead>
<tr>
<th>ID</th>
<th>Org ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1400263810000006</td>
<td>1000000699</td>
<td>East Central College</td>
</tr>
<tr>
<td>14002638100132173</td>
<td>Columbia College</td>
<td></td>
</tr>
</tbody>
</table>
### Steps and Actions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 15.  | You need to select the source of the transcript.  
     | Click the **Data Source** list. |
| 16.  | Select the data source for Eddie's external transfer credit.  
     | For this example, select **Self-Rpted** from the list. |
| 17.  | Enter the Articulation Term code in the Articulation Term field. This should be the term the student will beginning attending classes.  
     | Click in the **Articulation Term** field. |
| 18.  | Enter the term for which you want to process Eddie's transfer credit for this row of the model. In this case, the term is Fall 2007, term 3543.  
     | Enter the desired information into the **Articulation Term** field. Enter "3543". |
| 19.  | Clicking this button runs the **Transfer Credit** process.  
     | Click the **Fetch** button. |
20. After you run the **Transfer Credit** process for this row of the model, the system retrieves the details of subjects and catalog numbers for each course that it evaluated.

21. Click the **Edit Equivalent Course** icon to access the **Equivalent Course Information** page.

22. Click the **Reject External Course** icon to remove this course row.

23. Click the **Add Internal Equivalent** icon to access the **Equivalent Course Information** page.

24. Click the **Delete Internal Equivalent** icon to remove this course row.

25. Click the **Comment/Override Reason** icon to access the **Course Credit Comments** page.

26. Check the Lock check box to lock the row from being edited.
<table>
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<tr>
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<tbody>
<tr>
<td>27.</td>
<td>Click the <strong>Transfer Summary</strong> tab.</td>
</tr>
<tr>
<td>28.</td>
<td>Use the <strong>Transfer Summary</strong> page to calculate an individual's transfer credit statistics, based on the accepted internal equivalent courses of a transfer credit model.</td>
</tr>
</tbody>
</table>

29. When you calculate the individual's transfer credit statistics, the system calculates the units taken and the units transferred. If you selected to include the courses in the individual's GPA, the system calculates that as well. Click the **Calculate** button.

30. Click the **Post** button.
31. To post the transfer credit to the student's record, click the **Post** button.

![Image of the myZou Admissions: Processing Course Transfer Credit with Predefined Rules interface]
### Step 32
Click the **Save** button.

![Save button](Image)

### Step 33
You have successfully processed transfer credit models using predefined rules.

**End of Procedure.**