Re-evaluation of Transfer Credit Process
Approvers: How To Guide

Contents

Background ................................................................................................................................................. 2
Review and Approve a Re-evaluation of Transfer Credit Request ...................................................... 3
View a Re-evaluation of Transfer Credit Request .................................................................................. 16
Appendix A – Email Notification Examples........................................................................................... 21
  Email Student receives when they submit a request ................................................................. 21
  Email student receives when they re-submit a request ......................................................... 21
  Email student receives when their request is denied .......................................................... 22
  Email student receives when their request is recycled ......................................................... 22

Email Student receives when they submit a request .............................................................................. 21
Email student receives when they re-submit a request ........................................................................ 21
Email student receives when their request is denied ............................................................................ 22
Email student receives when their request is recycled ........................................................................ 22
Transfer Credit Re-evaluation Process
Approver: How To Guide

Background

This document provides Transfer Credit Re-evaluation approvers with instructions for reviewing and approving electronic requests (eForms) from students. Undergraduate students wishing to request a re-evaluation of their posted Transfer Credit are able to submit an eForm request, available online in their ConnectCarolina Student Center.

Once submitted, the request will be electronically routed to the Office of Undergraduate Curricula and to the appropriate Departmental Approver, if needed, to record and approve a credit decision. Based on that credit decision, the request will then be routed to the Office of Undergraduate Admissions (for Transfer Credit report updates) or to the Office of the University Registrar (for Tar Heel Tracker updates). While the new solution provides a more streamlined, electronic approach to the evaluation process, the underlying business process remains the same.

Email notifications are sent to the next approver at each step. Notifications will also be sent to the student after they have submitted their request and once the approval process has completed. Additional notifications will be sent, as needed, for other actions such as Deny, Recycle, Resubmit, and Withdraw. Examples of these emails are provided in Appendix A.

This tool was developed to streamline a cumbersome transfer credit re-evaluation process, resulting in improved credit decision process efficiency for students and administrative offices. Benefits include:

- Reduced cycle time through automated work flow, resulting in faster posting of transfer credit updates and potentially improved course selection and graduation rates.
- Ability for students to track the location and progress of their requests directly from their Student Center. Previously, students had to call multiple offices to determine the status of their updates, leading to confusion and frustration.
- Consistent communication of transfer credit re-evaluation results, allowing students to work with academic advisers to plan for the future.
- Centralized tracking of requests and results, enabling administrative offices to ensure that individual student records and articulation rules are accurately updated—ultimately resulting in fewer future requests for re-evaluation.
- Improved transfer credit re-evaluation decisions through online access to similar requests.
- Ability to restrict re-evaluation requests in ConnectCarolina to enrolled students, enabling staff to prioritize their efforts and provide better support. Prospects and applicants will be directed to the Office of Undergraduate Admissions for support.
- Ability to communicate with other students who qualify for transfer credit re-evaluation, ensuring the most advantageous and consistent transfer credit is awarded.
- Improved reporting and query capabilities for assessment purposes

Web: http://admissions.unc.edu/explore/academics/credit-for-outside-coursework/transfer-credit-evaluation-for-current-students/re-evaluation-of-transfer-credits/
Transfer Credit Re-evaluation Process
Approver: How To Guide
Email: transfercredit@admissions.unc.edu

Review and Approve a Re-evaluation of Transfer Credit Request

1. When students submit a re-evaluation of transfer credit request, the appropriate approver will receive an email notification.

   To review and approve the request, click on the Credit approval link in the email you receive (see Appendix A). Go to step 2 to review the form.

   Alternatively, you can navigate to the Approve Transfer Request form as follows:

   Note: Go to Main Menu > Student Admin Menu >> Other Academic Requests >> Credit Home page in ConnectCarolina.

2. Click on the Evaluate a Transfer Credit eForm link.
Transfer Credit Re-evaluation Process
Approver: How To Guide

3. The **Evaluate Search** page appears

You can search by:
- eForm ID
- PID (Empl ID)
- Name
- Other Criteria

4. **Review the Student Academic Summary information.**

This area includes:

a. Student Name
b. PID
c. Request Date (the date the student submitted their request)
d. eForm ID (numeric identifier of this request)
e. Email Address
f. Transfer Hours (total number of posted transfer course credits, visible on the student’s Transfer Credit Report)
g. Terms in Residence
h. Requirement Term
i. Graduation Status
j. Academic Program/Plan/Subplan (student’s current, active academic programs, plans, and subplans (Degree, Major or Minor, and Concentration)
5. Review the student’s Credit Request Information; this information was entered by the student.

Note: hovering over the ? icon will display tool tip text for the field. Tool tips will not work in Internet Explorer.
Transfer Credit Re-evaluation Process
Approver: How To Guide

a. **Course Title**
   The title of the course the student wants evaluated.

b. **Transfer Institution**
   The institution where the student completed the course.

c. **Incoming Course**
   The abbreviation and course number of the course (e.g. CHEM 101).

d. **Units Taken**
   The number of credit hours the student received.

e. **Grade**
   Letter grade the student received.

f. **Course description and pre-requisites**
   A description of the course and its pre-requisites copied from the web or a paper catalog.

g. **Math and Biology course website link**
   For math and biology courses, students must provide a link to the course’s official course catalog website.

h. **Syllabus attachment**
   Student must attach a syllabus for the course to be evaluated. Additional documents may be attached if needed.

i. **Desired Credit Type (optional)**
   Type of credit the student is requesting. Includes Major/Minor, General Education, Supplemental General Education, and Elective credit.

j. **Desired UNC Equivalent (optional)**
   This field is for students who are requesting credit for a specific UNC course (i.e. BIOL 101).

k. **UNC Equivalent Subject**
   This field is for students without a specific course in mind, but think a certain subject applies.

l. **Desired General Education Requirement**
   This field is for students requesting a specific requirement for General Education credit.

6. **Review** the student’s course syllabus and any additional documents.

   ![View button]

   Click the View button to view the attached syllabus.

**Note:** Please make sure your browser has its pop up blockers configured to allow access to ConnectCarolina.

7. **Note** the student acknowledged the following the **Form Messages**
   This section reflects the messages that the student acknowledged when submitting the request:
Transfer Credit Re-evaluation Process
Approver: How To Guide

8. Review the Comments for Students area

View any important comments entered during previous steps in the credit evaluation process or add a comment/explanation to the form.

Note that you can only edit this section on Page 2 of the eform. If you are NOT awarding any credit to the student, please indicate so in this section on Page 2.

Note: The comment will become part of the Comment History at the bottom of the form and will be viewable by the student, and all other approvers. Department approvers should use Student Comments when recycling the form back to the student or when a course is not approved for major/minor or elective credit.

9. Once you have reviewed the student request information, click the Next button. This will go to the page where you will assign credit.

Additional Page 1 Button Actions:

- Close
  Select this action to close the form without saving any changes. You will return to the Transfer Credit Home Page.
- Search
  Select this action to close the form and return to the Evaluate search results page without saving changes.
10. Review the **Step 2 of 3: Evaluate Request** section:
This section provides instructions for completing your evaluation of the student’s request.

![Evaluate a Re-evaluation Transfer Credit eForm](image)

11. Review the **Routing and Current Credit Information**
This section includes which department the request was routed to as well as the student’s current UNC credit for the course.

- **Request routed to**
The department pre-selected in this dropdown box should match your own department.
  - Important note: Please do not update this field!
  - If for any reason you believe the request has been routed to your department incorrectly, or needs to be routed to a different department for review, please contact Heather Thompson (heather_thompson@unc.edu) for assistance and do not approve the eForm.

- **Student’s current credit**
This field should be pre-filled with the student’s current UNC credit. If the student has not received any UNC credit for the course, then you will see “rejected” or "No Credit Awarded". Please do not update this field.
Transfer Credit Re-evaluation Process
Approver: How To Guide

12. Review any Comments for Evaluators

View any comments left by other evaluators during previous steps in the credit evaluation process or add a comment/explanation to the form. The comments you enter here can only be viewed by authorized staff; they cannot be viewed by the student who requested the re-evaluation. We recommend that you add your initials and a note reflecting your credit decision for the next approver’s information. You can also provide any additional instructions or explanation for authorized staff to see.

13. Make your official Academic Department Credit Evaluation:
   a. Credit Awarded
      • Select “No course credit change. Student’s current credit (above) is correct.” if the student’s current credit should not change at all. Be sure to leave a comment for the student at the bottom of the page when you select this option.
Transfer Credit Re-evaluation Process
Approver: How To Guide

- Select **UNC equivalent course.** if the incoming course is equivalent to a course offered at UNC. When you select this option, provide the subject and catalog number for the equivalent course (e.g. CHEM 101).

![Image](image1.png)

- Select **Departmental elective credit (no equivalent).** if the course does not have a UNC equivalent, but the student’s current credit should change.
  - Select **Counts towards major/minor** if the course should count towards the student’s major or minor. When you select this option, provide the Tarheel Tracker Code associated with the requirement. You can find the Tarheel Tracker code by clicking on the Tarheel Tracker Configuration Finder link.

![Image](image2.png)

  - The Tarheel Tracker Code must be entered as three sets of 4-digit numbers, separated by dashes (i.e. 1111-1111-1111). The Tarheel Tracker Configuration Finder automatically formats this code for you, so you may copy and paste directly from the site.

Note: If you experience difficulty with the Tarheel Tracker Configuration Finder link, contact tarheeltracker@unc.edu for assistance.
1. After clicking on the link, you will be taken to a general sign-in page. All you need to do here is enter younyen@ad.unc.edu and hit the “enter” or “tab” key (do not enter a password). This will direct you to the login page for Tarheel Tracker.

2. Enter younyen@ad.unc.edu and your onyen password to log into the Tarheel Tracker site.

3. Find Tarheel Tracker code by entering the plan, subplan, and requirement term for the course in question.
Transfer Credit Re-evaluation Process
Approver: How To Guide

- Select “Counts towards supplemental general education” if the course should count towards the student’s supplemental education requirement.

- Select “Counts as elective hours towards degree” to assign elective credit hours in your department (e.g. BIOL--- or CHEM---).
  - You will need to do this if the student’s current credit is anything other than what you plan to award, and it is especially important if the current credit is listed as “rejected” or “No Credit Awarded”.
  - When you select this option, provide the subject abbreviation the credit should fall under (e.g. BIOL).
Transfer Credit Re-evaluation Process
Approver: How To Guide

b. **Applicable to all students?**
   - Indicate whether or not your credit decision should apply to future requests for transfer credit for the same incoming course from the same institution. Your answer to this field will inform course articulation decisions made by the Office of Undergraduate Admissions.

![Academic Department Credit Evaluation](image)

14. **Approve** the your credit decision:
   Click the **Approve** button to finalize your decision and route the request to the next step.
   - Be sure to leave a student comment before approving the form. **Students can only see the comment history section in this part of the form, so your comment is essential.**
   Note: Even if you do not award the credit requested by the student, click the Approve button to ensure the requested is appropriately routed, and the student is notified of the transfer credit decision.

![Approval Options](image)

**Additional Approver Actions:**

- **Recycle**
  Select this action if you want to send the request back to the student for additional information. When you choose the recycle option, the student will receive an email to update the request form as shown in the example in Appendix A. This button will send the form back to the student only. If you need to return a form to the Office of Undergraduate Curricula, please contact that office directly.

- **Hold**
  Select this action to save your changes and return to the form later.

- **Previous**
  This button simply takes you back to the student information page in case you would like to review the request information further.
Transfer Credit Re-evaluation Process
Approver: How To Guide

15. Confirm your Approval Action
   Review the Approval Action Message and click the Yes button.

16. Review the Follow Up Information

   The Step 3 of 3: Evaluation Complete page contains important information on the transfer credit re-evaluation request including:

   a. Student summary
      Same student information present throughout the form.
   
   b. Form Status
      A message indicating the current status of the request.
   
   c. A Process Visualizer
      A graphical indication of where the request is in the Official Re-evaluation of Transfer Credit process.
   
   d. Navigation
      Navigation to review the current request or close the form.

   In the example above, the Process Visualizer indicates that the request has been approved by the Departmental Approver, and that it has been forwarded to the Office of Undergraduate Admissions.
Transfer Credit Re-evaluation Process
Appraiser: How To Guide

Form Status
You have just APPROVED this form. This action passed the form to RETC Approver for Ugrad Admssn for further processing.

Process Visualizer
1. 
(44 minutes)
2. RETC Approver - OUC Route (1 minute)
3. RETC Approver (6 hours 27 minutes)
4. RETC Approver 2
5. RETC Approver - OUC Evaluate
6. RETC Approver for Ugrad Admssn
7. RETC approver for OUR
8. System
Transfer Credit Re-evaluation Process
Approver: How To Guide

View a Re-evaluation of Transfer Credit Request

To view the status of a Re-evaluation of Transfer Credit Request, follow these steps:

1. In ConnectCarolina, go to Main Menu > Student Admin Menu >> Other Academic Requests >> Credit Home page.

2. Click on the View a Transfer Credit Re-evaluation eForm link.

3. The Transfer Credit View Search page appears

   You can search by:
   
   - eForm ID
   - Name
   - PID (Empl ID)
   - Other Criteria
   - Note: you will need to alter the “Originated Date From” criteria when searching for forms older than 90 days

   The Re-evaluation of Transfer Credit Request appears in view-only mode.

4. Review Step 2 of 4: View a Re-evaluation of Transfer Credit Request
Transfer Credit Re-evaluation Process
Approver: How To Guide
5. Click on the Next button to view the Step 3 of 4 View Re-evaluation Transfer Credit Decision page.
Transfer Credit Re-evaluation Process
Approver: How To Guide

View a Re-evaluation Transfer Credit eForm

Step 3 of 4: View Re-evaluation Transfer Credit Decision

** Note: Only administrative approvers have access to view this information.

** Student Summary

Student Name: [Redacted]

Request Date: 03/10/2015
eform ID: 8302

PID: [Redacted]

Email ID: [Redacted]

Transfer Hours: 11

Requirement Term: 2011 Fall

Terms in Residence: 7

Graduation Status: Eligible for Graduation

Routing and Current Credit Information

Request routed to: Biology

Student's current credit: GENR ...

Comments for Evaluators

Evaluator ONLY Comments:

Evaluator Comments History:

Academic Department Credit Evaluation

Credit Awarded:

- No course credit change. Student's current credit (above) is correct.
- UNC equivalent course.
  - Course Number: BIOL 101
- Departmental elective credit (no equivalent).
- Applicable to all students:
  - Yes
  - No

General Education and General Elective Credit Evaluation

- Meets General Education Requirement
- Assign hours for graduation (GENR...)
- No course credit change. Student's current credit (above) is correct.

Comments for Students

Comments for Students: (viewable by students and administrative offices)

Comment History:
Transfer Credit Re-evaluation Process
Approver: How To Guide

6. Click on the Next button to view page the Step 4 of 4 Form History page.

The Step 4 of 4 Form History page contains important information on the request including:

- **Form Information**
  The official status of the request.

- **Who can Work this form**
  View the employees who are allowed to process the request.

- **Review Process Visualizer**
  A graphical indication of where the request is in the Re-evaluation of Transfer Credit process.

- **Transaction/Signature Log**

7. Use the Previous, Search and Close buttons
Email Student receives when they submit a request

From: transfercredit@admissions.unc.edu  
Date: December 23, 2013 at 3:00:44 PM CST  
To: sschmitt@email.unc.edu, jlwiv23@gmail.com, jennifer_drake@unc.edu  
Subject: Your Transfer Credit Re-evaluation Request has been SUBMITTED

Dear Student,

Thank you for submitting your Re-evaluation of Transfer Credit Request for %4 at %5. Please allow up to two three weeks for your request to be evaluated and for any updates to appear in ConnectCarolina. If additional information is needed, we will let you know. As soon as the re-evaluation is completed, we will send you an email notification.

<a href="%22">Click here</a> to review and check the status of your request.

If you have any questions, please visit admissions.unc.edu or contact the Office of Undergraduate Admissions.

Thank you.

Email student receives when they re-submit a request

From: transfercredit@admissions.unc.edu  
Date: December 23, 2013 at 3:00:44 PM CST  
To: sschmitt@email.unc.edu, jlwiv23@gmail.com, jennifer_drake@unc.edu  
Subject: Your Transfer Credit Re-evaluation Request has been RE-SUBMITTED

Dear Student,

You have successfully re-submitted your Re-evaluation of Transfer Credit Request for %4 at %5. Please allow up to two three weeks for your request to be evaluated and for any updates to appear in ConnectCarolina. If additional information is needed, we will let you know. As soon as the re-evaluation is completed, we will send you an email notification.

<a href="%22">Click here</a> to review and check the status of your request.
Transfer Credit Re-evaluation Process
Approver: How To Guide

If you have any questions, please visit admissions.unc.edu or contact the Office of Undergraduate Admissions.

Email student receives when their request is denied

From: transfercredit@admissions.unc.edu
Date: December 23, 2013 at 3:00:44 PM CST
To: sschmitt@email.unc.edu, jlwiv23@gmail.com, jennifer_drake@unc.edu
Subject: Your Transfer Credit Re-evaluation Request

Dear Student,

We are sorry to inform you that your Re-evaluation of Transfer Credit Request for %4 at %5 cannot be evaluated. <a href="">Click here</a> to view your request. Please review the comments for further explanation and additional information.

For Reference (eForm id): %1

Email student receives when their request is recycled

From: transfercredit@admissions.unc.edu
Date: December 23, 2013 at 3:00:44 PM CST
To: sschmitt@email.unc.edu, jlwiv23@gmail.com, jennifer_drake@unc.edu
Subject: Your Transfer Credit Re-evaluation Request

Dear Student,

Your Re-evaluation of Transfer Credit Request for %4 at %5 has been sent back to you for more information. Please review the comments, update your request information, and RESUBMIT your request within 5 days.

The review and approval process will not continue until you have resubmitted your request with the new and/or updated information. Please withdraw your request if you no longer wish to proceed with the re-evaluation process.

<a href="">Click here</a> to Update or Withdraw your request.

For Reference (eForm ID): %1

Additional information about the Re-Evaluation of Transfer Credit process can be found at the following link:
Transfer Credit Re-evaluation Process
Approver: How To Guide

http://admissions.unc.edu/explore/academics/credit-for-outside-coursework/transfer-credit-evaluation-for-current-students/re-evaluation-of-transfer-credits/