# Processing Transfer Course Credits - Automated

**Purpose**: Use this document as a reference for processing course transfer credit models with pre-defined rules in ctcLink.

**Audience**: Transfer Credit Evaluator.

You must have at least one of these local college managed security roles:

- ZC SR Transfer Credit Eval
- ZD SR Transfer Credit Eval
- ZZ SR Transfer Credit Eval

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

**Supporting Information:**

External education information must be entered first on the **External Education** page.

If a student has repeated a course multiple times, you'll only see the student's first attempt listed on the External Education page. Be sure to review a PDF or hard copy of the student's official transcript and update the External Education page to add the student's additional course attempts.

It can take 24 hours or more for a Legacy transcript to make it to ctcLink (especially if your college has configured its Legacy transcripts to send only on certain days of the week). If you send yourself a Legacy transcript and don't see it the following day, wait another day or two before submitting a ticket.

Please ensure your Transcript Evaluator knows they MUST review the **upload/download version of the incoming transcript** for repeated coursework for Legacy transcripts. Repeated coursework is seen as duplicate by the system and does not load into External Education. For ctcLink transcripts, review the Unofficial Transcript, accessible through the **Advisor Center**.

On the External Education page, go to the **second tab (Courses and Degrees)** and click the right expander arrow to see all available fields In the External Courses panel. Toward the far right, you'll see **Academic Institution.** You will select your institution from the drop-down to indicate that you want to transfer to that class. Doing so will not affect any other institution or any records. We strongly recommend you **"claim"** one term at a time (*it will make the next step more accessible*). Because **External Term** and **Term Year** are in two separate fields, the simplest way to cluster them is to sort by **Term Year** and eye from there. You can sort by clicking on any column heading.

**Additional Resources:**

- **Producing Electronic Transcripts**
- **Identifying Electronic Transcripts Sent to Your Institution**
- **Entering External Education Information**

**Queries:**

You can track incoming ctcLink transcripts with **QCS_SR_CTC_TRANS_REQ**. You can find transcript requests entered by a user at your college using **QCS_SR_ELEC_TRANS_SENT.** There are no queries available to track incoming Legacy transcripts. Check the Upload/ Download file page to see if any Legacy transcripts have been sent to your college.

**Note:** Some service indicators can be used to prevent an Electronic Transcript Request from being processed. The Override  Service Indicator checkbox can be used to bypass any service indicators that would prevent a transcript from being sent.

- To access the most up-to-date query information, visit **dataservicesmetalink.sbctc.edu**. Discover the best methods for finding queries and reports by visiting **Recommended Methods for Searching Queries and Reports**.

# Transfer Course Details Tab

### Navigation: Records and Enrollment > Transfer Credit Evaluation > Course Credits - Automated

1. The **Course Credits** search page displays.
2. The default option is **Find an Existing Value**. Select **Search** to view existing values.
3. Click the **Add a New Value** tab to request an advisement report
4. Add the student's EMPLID number to the **ID** field.
5. Activate the **Academic Career** drop-down menu and choose **Undergraduate**.
6. Enter or look up the **Academic Institution** by selecting the looking glass.

7. Click the **Add** button.
7. The **Transfer Course Details** tab displays.
8. Enter **Academic Program**. (Academic Plan is not required).
9. Enter **Credit Source Type**
10. Enter **External Org ID**.
11. Enter **Data Source**.
12. Enter **Articulation Term. Please Note** that the student must be term activated in the articulation term for the credits to post. Please see the **Term Activation** QRG for further review of term activation.
13. Select **Fetch**. Using the specified source, the process determines the course transfer equivalency rules. In this case, the rule must have been active before the beginning date of the articulation term. It also determines whether a rule was attached to an individual's academic program or plan. Calculations are based on the individual's external course information and valid rules.
14. The list of external courses displays at the bottom of the page. Each course's status will appear as "Accepted" or **"**No Rule."
15. Select the **Evaluator Details** tab to modify transfer course information.
16. Select the **Edit Equivalent Course** icon to enter equivalent course information.

## Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

## View Tutorial Via Panopto

View the external link to **Transfer Course Details Tab**. This link will open in a new tab/window.

## Transfer Summary Tab

1. Select the **Transfer Summary** tab.
2. The **Transfer Summary** tab displays.
3. Select **Calculate**. The process still calculates the units when you post the transfer credit without clicking the Calculate button.
4. Select **Post**. When you post a model, the Source Information group box becomes greyed out and unavailable.
5. Select **Save**.

6. Process complete.

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