



## **AD Transfer Credit Setup Guide**

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This document is published as a baseline guide. Page shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS SA Baseline Student Administration team.

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## **Section 1      Transfer Credit Setup Description:**

The Transfer Credit process is based on the concept of modeling as many scenarios you can think of to transfer credit articulation. The setup for Transfer Credit is very complicated but it can save you hours of time if you take the time to think of all possible scenarios. You first setup mock-up scenarios for an individual depending on academic programs and plans and show different options of transferring credit. Indicative to your setup, you can model as many scenarios of transferring credit, as you may want for prospects, applicants and current students. You also have the capability to articulate models based predefined rules or ones that are created on the fly.

Before you begin to tackle transfer credit rules and process transfer credits there are many setups that need to be completed by Student Records. The setup components for academic careers, academic programs, academic plans, the course catalog, grading basis, terms and sessions must be completed prior to starting to conceptualize your rules for transfer credits.

An important feature to consider would be to create one group of external courses that a number of external organizations share. The setup involves defining the external organizations from which you accept transfer credit and defining all of the subject areas and courses that the external organization can transfer. A key aid to completing the setup for the Transfer Credit feature is to point any external organization or internal institution to any other external organization's or internal institution's catalog of courses. Sharing course information saves data entry efforts if one or more organizations have the same or similar courses. For example, if your campus receives many transfer students from the San Diego Community College District, which includes San Diego City College, Mesa College and Miramar College, you can create one catalog of external courses where all colleges in that system can point to these courses.

## **Section 2      Organizing Your Data for Transfer Credit Processing:**

External Organizations must be setup to record information for a prospect, applicant or student from whom your campus expects to receive information. This includes the setup for external subjects, terms and courses for each external organization from which you receive transfer credit. External Organizations setup is shared with Campus Community. It is important that efforts are coordinated with the appropriate people from your campus.

Transfer equivalency rules and test transfer equivalency rules need to be created so they can be associated with your academic programs and plans.

## 2.1 Defining External Organizations

### Page Name: Organization Table

Navigation: [Home](#) → [Build Community](#) → [Organization Data](#) → [Use](#) → [Organization Table](#) → [Organization Table](#)

The screenshot displays the 'Organization Table' page in the PEOPLE SOFT system. The page is titled 'Organization Table' and includes tabs for 'Primary Contact and Dept.', 'School Data', and 'Vendor Information'. The 'Primary Contact and Dept.' tab is active. The organization details are as follows:

- Org ID:** 000001989
- Effective Date:** 01/01/1901
- Status:** Active
- Description:** West Campus- Berkeley High
- Long Description:** West Campus- Berkeley High
- Short Description:** West Campu
- Offers Courses:**
- Organization Type:** School
- Proprietorship:** Public

The **Primary Location** section includes:

- Location:** 1 West Campus- Berkeley High
- Address Line 1:** 1222 University Ave.
- Address Line 2:**
- Address Line 3:**
- Address Line 4:**
- City:** Berkeley
- State / Province:** CA
- Postal:** 94702
- Country:** USA
- EDI Address:**
- URL Address:**

At the bottom of the page, there are navigation buttons: Save, Return to Search, Next in List, Previous in List, Add, Update/Display, Include History, and Correct History. The breadcrumb trail is: Organization Table | Primary Contact and Dept. | School Data | Vendor Information.

Use the **Organization Table** page to record external organizations that interact directly with your campus. For each external organization that is defined you will need to record their location, contact, departments and whether they are a vendor.

### 2.1.1 Considerations

You must add an organization to your system before you can specify primary contacts, locations, and departments.

For those organizations that offer courses, before you can specify school subjects, terms, and courses, these items must be set up and already exist in your system, ready for you to use when you add the organization.

Note: SOSS will supply and maintain external organizations for all US Universities and California High Schools. These will be assigned an Org ID starting with 'C'. You will still need to setup subject, terms and courses for those organizations you wish to automatically process transfer credit.

**Organization Type:** Choose the appropriate values for this external organization. Business, School, Non profit, and Other.

**Offered Courses:** In order to create external courses to be used in transfer articulation rules, this field will need to be selected. This makes entering data on the School Data page possible.

**Primary Location:** If you are creating this organization record for the first time, primary locations are unavailable. Assign locations to the organization after you create and save the record. When the record

exists, and you have set up locations on the Organization Locations page, return to the Organization Table page to indicate the primary location.

### 2.1.2 Recommendations

Please see the Campus Community Setup Guide for further information regarding the Organization Table.

## 2.2 School Data

### Page Name: School Data

Navigation: [Home](#) → [Build Community](#) → [Organization Data](#) → [Use](#) → [Organization Table](#) → [School Data](#)

This page is for recording data that applies to the external organizations that offer courses.

### 2.2.1 Considerations

#### School Characteristics

**Accredited:** Indicate by checking the box if the school is accredited.

**Transcript Translation:** When selected, indicates that transcripts from this school are in a foreign language and must be translated.

**School Type:** Need to indicate College or High School.

**School Codes:** This will be defaulted from the values that are currently in the COSAR Table. These need to be entered if you manually create an organization.

**System Default Values:** Career, Term Type & Unit Type are delivered with the system. These are translate values that can be modified.

**Catalog Information:** This page is for recording the information for the school when sharing a course catalog.

**Shared Catalog:** When selected, indicates that this organization participates in a shared catalog with another school.

**Catalog Org:** The External Organization with which this organization shares a catalog.

**School Code:** The FICE number for the school that share a catalog with this external organization.

## 2.2.2 Recommendations

You must use the School Type Table setup page under Design Admissions to set up or edit the school type values for PeopleSoft Student Administration pages. PeopleSoft HR also uses school types, but these are defined by the SCHOOL\_TYPE values assigned in the PS translate table. If you modify the translate values on the PS translate table, you will not see your changes on the Student Administration pages.

Use shared catalogs where possible because this saves on setup and maintenance time.

## 2.3 Organization Affiliation

**Page Name: Organization Affiliation**

**Navigation: [Home](#) → [Build Community](#) → [Organization Data](#) → [Use](#) → [Organization Affiliation](#)**

The screenshot displays the 'Organization Affiliation' page in PeopleSoft. At the top, there is a navigation bar with 'Home', 'Worklist', 'Help', and 'Sign Out' buttons. Below the navigation bar, the breadcrumb trail reads: 'Home > Build Community > Organization Data > Use > Organization Affiliation'. The main heading is 'Organization Affiliation'. The 'Org ID' is 000001989 and the organization name is 'West Campus- Berkeley High'. The 'Affiliation Details' section is expanded, showing 'Affiliation with Institution' with the following fields: '\*Academic Institution:' (Test University), '\*GPA Type:' (100 - 100 Point Scale A), '\*Grading Scheme:' (UGD - Undergraduate), and '\*Grading Basis:' (CNC - Credit / No Credit). Below this is the 'Transfer Credit Transcript Print' section, which includes '\*Level of Detail:' (Detail), '\*Details to Print:' (External and Internal), and a checked checkbox for 'Include Transfer Credit in GPA'. At the bottom of the details section is the 'Organization Groups' table, which has columns for '\*Group Type' and '\*Group Code', and an 'Add' button. The page also includes a 'Save' button and navigation links for 'Return to Search', 'Next in List', and 'Previous in List'.

You would setup the Organization Affiliation page to enter details regarding your institution's affiliation with specific external organizations. The Transfer Credit Transcript Print group box, which contains the default values for printed transcripts, contains the only field that applies to transfer credit processing on this page.

### 2.3.1 Considerations

**Include Transfer Credit in GPA:** Select this check box if you want the transfer credit from this organization to be included in the student's GPA. If you do not select this check box, the system does **not** include transfer credit grade points in the student's GPA.

You can override the default values for specific transcript types on the Transfer/Test/Other Credits page of the Transcript Type component.

## 2.4 External Subject Table

**Page Name:** External Subject Table

**Navigation:** [Home](#) → [Build Community](#) → [Organization Data](#) → [Setup](#) → [External Subject Table](#)

The screenshot displays the 'External Subject Table' interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Help', and 'Sign Out' links. Below the navigation bar, the breadcrumb trail reads 'Home > Build Community > Organization Data > Setup > External Subject Table'. The main heading is 'External Subject Table'. Underneath, the 'External Subject Area' is set to 'ARTS'. A table with one row is shown, containing the following data:
 

*Effective Date:	*Status:
01/01/1901	Active

 Below the table, there are input fields for '\*Description:' (Arts) and 'Short Description:' (Arts). A checkbox labeled 'Academic Interest' is checked. At the bottom of the form, there are several action buttons: 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Use the External Subject Table page to record subject categories found at external organizations. You then link these subjects to external organization's courses that are offered. The subject area that you enter on the External Subject Table can be tied to specific external organizations on the School Subject Maintenance page. For every external organization from which you anticipate receiving academic work for transfer articulation, define all subject areas through this page.

### 2.4.1 Considerations

**Academic Interest:** When selected, indicates that the system should use this code as an academic interest code as well as an external subject code.

### 2.4.2 Recommendations

You may want to record academic interests for recruiting and analysis purposes.

When you enter external subjects for a prospect or applicant on the Education page, all codes defined in this table are available. When you enter academic interests for a prospect or applicant on the Academic Interests page, only those codes flagged as academic interests on this page are available.

## 2.5 External Term Table

### Page Name: External Term Table

Navigation: [Home](#) → [Build Community](#) → [Organization Data](#) → [Setup](#) → [External Term](#)

PEOPLE SOFT

Home Worklist Help Sign Out

Home > Build Community > Organization Data > Setup > External Term [New Window](#)

### External Term Table

External Term Type: QTR Quarter  
 External Term: FALL Fall

**Additional Information**

\*Description: Fall Quarter  
 Short Description: Fall Qtr  
 Begin Month: 09 September  
 \*Term Unit Type: Semester \*Unit Type: Units

**Internal Term Type Conversion** First 1 of 1 Last

*Term Unit Type	*Term Type Multiple
Quarter	1.33

Save Return to Search Next in List Previous in List Add Update/Display

Use the External Term Table page to define the external terms that are made available to track information regarding external institutions for a prospect, applicant, or student.

### 2.5.1 Considerations

Review or modify the translate values for external term types and external terms to make the values available that are required by your campus for this page.

**Begin Month:** Begin month values are delivered with your system as translate values with code attached to them. These translate values should *not* be modified in any way. Any modifications to these values will require a substantial programming effort.

**Term Type Unit:** The type of internal term unit that most closely correlates to this external term type. These are translate values that can be modified.

**Unit Type:** A credit or term type that further describes the correlation of this external term to your institution's term unit type. These are translate values that can be modified.

### Internal Term Type Conversion

**Term Unit Type:** The external term unit type that you want the system to convert to an equivalent of the internal term unit

**Term Type Multiple:** The factor by which the system should multiply the external term unit type to convert it to an equivalent of the specified internal term unit type.

### 2.5.2 Recommendations

Because external institutions use various term structures, possible terms should be available to help identify that particular organization's term structure. Some external terms are redefined translate values. Review these values to verify that they meet your campus needs; create others if necessary.

## 2.6 School Subject Maintenance

**Page Name: School Subject Maintenance**

**Navigation: Home → Build Community → Organization Data → Use → School Subject Maintenance**

The screenshot displays the 'School Subject Maintenance' interface. At the top, the 'PEOPLE Soft' logo is visible. The navigation bar includes 'Home', 'Worklist', 'Help', and 'Sign Out'. The breadcrumb trail is 'Home > Build Community > Organization Data > Use > School Subject Maintenance'. The page title is 'School Subject Maintenance'. Below the title, the organization ID is '000001989' and the name is 'West Campus- Berkeley High'. A table titled 'School Subject' shows one entry: 'Biology' with external subject area 'BIOL'. The details for this entry are shown in a form below the table, including 'Effective Date: 01/01/1901', 'Status: Active', 'Description: Biology', 'Short Description: Biology', and 'External Subject Area: BIOL'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct History'.

Use the School Subject Maintenance page to enter all of the subject areas offered by individual schools.

### 2.6.1 Considerations

You must set up external subjects on the Organization Table Page prior to defining subject areas.

#### School Subject

**School Subject:** The subject offered by your institution for which you want to track the equivalent subject at an external school.

#### School Subject Details

**External Subject Area:** The broad external subject area, from the External Subject Table page, that encompasses this subject at your campus.

### 2.6.2 Recommendations

You should setup school subjects for every school you receive a significant amount of transfer credit from, unless that school is using a shared catalog of another external organization. Schools that are not setup can always be handled through the manual transfer credit process.

## 2.7 School Course Classification

**Page Name: School Course Classification**

**Navigation:** [Home](#) → [Build Community](#) → [Organization Data](#) → [Use](#) → [School Course Classification](#)

PEOPLE Soft

Home Worklist Help Sign Out

Home > Build Community > Organization Data > Use > School Course Classification [New Window](#)

### School Course Classification

Org ID: 000001989 West Campus- Berkeley High

School Subject: BIOL Biology

School Course Number View All First 1 of 1 Last

\*School Course Number: 300 + -

School Course Details First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active + -

\*Description: Biology

Short Description: Biology

\*External Subject Area: BIOL Biology

\*Career: Graduate

External Course Type: Course Course Level: [ ]

External Units: 2.00

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Use the School Course Classification page to record the specific course offerings for each subject area.

## 2.7.1 Considerations

You must enter the subjects for this school on the School Subject Maintenance Page prior to defining specific course offerings.

### School Course Number

**School Course Number:** The number of the external course, usually the catalog number.

### School Course Details

**External Subject Area:** The code, from the External Subjects Table page, that describes the subject area of this external course.

**Career:** The career level (Undergraduate, Graduate, PostDoc, and so on) of this external course. These are translate values that can be modified.

**Course Level:** The level (Freshman, Graduate, Honors, and so on) at which this course is offered. These are translate values that can be modified.

**External Units:** The number of units offered by this external course.

## 2.7.2 Recommendations

Maintaining course data is important when evaluating transcripts from other institutions. The courses you setup here provide the prompts for education data entry. Matching this setup to the external organizations transcript eases data entry.

## 2.8 Transfer Subject Area

### Page Name: Transfer Subject Area

Navigation: [Home](#) → [Manage Student Records](#) → [Process Transfer Credit](#) → [Setup](#) → [Transfer Subject Area](#)

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Process Transfer Credit > Setup > Transfer Subject Area [New Window](#)

Transfer Subject Area Subject Area Elements

View All First 1 of 1 Last

Academic Institution: CSUNR Test University

Source ID: 000001989 West Campus- Berkeley High

Component Subject Area: ART

\*Effective Date: 01/01/1901 \*Status: Active

Description: Art

Catalog Org Type: External

Catalog Organization: 000001989 West Campus- Berkeley High

**Component Defaults**

Min / Max Units: 1.00 99.00 Term Type: Semester

Min / Max Grade Pts per Unit: 1.000 99.000 Transfer Grade:

Save Return to Search Next in List Previous in List Add Update/Display Include History Correct History

[Transfer Subject Area](#) | [Subject Area Elements](#)

Use the Transfer Subject Area page to describe component subject areas for a transfer credit source, otherwise known as an external organization or internal academic institution. Also use this page to set up incoming course default information for the transfer components that you will define within this component subject area. The system applies these defaults to each incoming course that you specify on the Subject Area Elements page of this component.

### 2.8.1 Considerations

You must complete all of the setup previously defined in this document prior to defining the component subject areas.

#### General Fields

**Catalog Org Type:** Designates the table from which you will be selecting a catalog organization for the component subject area of the specified source. Your choices are the following:

*External:* The system prompts you with external organizations in your system. Define external organizations on the Organization Table page.

*Internal:* The system prompts you with academic institutions in your system. Define academic institutions on the Academic Institution Table page.

**Catalog Organization:** Select the catalog organization for this component subject area of the specified source. You can use any external organization or internal academic institution as the

catalog organization to define course equivalencies for this component subject area of the specified source. However, once you define a course equivalency on the Subject Area Elements page, the **Catalog Org Type** and **Catalog Organization** fields become unavailable.

**Component Defaults:** The fields define default information for incoming courses that you select for this component subject area of specified source on the Subject Area Elements page. You can later override these default values for an individual incoming course by selecting the Incoming Course Information link for the incoming course to change on the Subject Area Elements page.

**Transfer Grade:** Select this check box if you generally want to transfer the grade from the incoming course to the student's record at your campus. If you clear this check box, the Transfer Credit process *always* uses the transfer grade value defined on the Academic Program Table.

## Page Name: Subject Area Elements

**Navigation:** [Home](#) → [Manage Student Records](#) → [Process Transfer Credit](#) → [Setup](#) → [Transfer Subject Area](#) → [Subject Area Elements](#)

The screenshot displays the 'Subject Area Elements' page in the PeopleSoft system. The page is titled 'Transfer Subject Area' and 'Subject Area Elements'. It shows a form for defining transfer components for a component subject area. The form is divided into several sections:

- Academic Institution:** CSUNR, Test University
- Source ID:** 000001989, West Campus- Berkeley High
- Component Subject Area:** ART
- Effective Date:** 01/01/1901, **Status:** Active
- Description:** Art
- Subject Area Elements:**
  - \*Sequence Number: 0001
  - \*Description: Art
  - \*External Term Type: Semester
  - Transfer Course:
  - \*Transfer Priority: 1
  - Contingent Credit:
- Incoming Course:**

*Seq#	W	*Subject	Course Number
1	<input type="checkbox"/>	BIOL	300
		Biology	Biology

[Incoming Course Information](#)
- Internal Equivalent:**

*Course ID	*Offer Nbr	Units	Req Designtn
000004	1	4.00	
		Introductory Biology	BIO 1A

The page also features a navigation bar at the top with Home, Worklist, Help, and Sign Out buttons, and a breadcrumb trail at the bottom: [Home](#) > [Manage Student Records](#) > [Process Transfer Credit](#) > [Setup](#) > [Transfer Subject Area](#) > [Subject Area Elements](#).

Use the Subject Area Elements page to define the transfer components of the component subject area.

Within each transfer component you define the incoming courses and internal equivalent courses. For each transfer component, you define the external term type of the incoming course, the transfer priority in relation to other transfer components within the component subject area, and some general information.

## Page Name: Incoming Course Information

**Navigation:** [Home](#) → [Manage Student Records](#) → [Process Transfer Credit](#) → [Setup](#) → [Transfer Subject Area](#) → [Subject Area Elements](#) → [Incoming Course Information Link](#)

The screenshot shows the 'Incoming Course Information' page. The breadcrumb navigation is: Home > Manage Student Records > Process Transfer Credit > Setup > Transfer Subject Area. The page title is 'Incoming Course Information'. The form contains the following fields:

School Subject:	BIOL	Biology	
School Course Nbr:	300	Biology	
Course Level:			
External Units:	2.00		
Begin / End Date:	01/01/1900	12/31/9999	
Min / Max Units:	1.00	99.00	*Maximum Age: 99
Min / Max Grade Pts per Unit:	1.000	99.000	Transfer Grade: <input checked="" type="checkbox"/>

Buttons: OK, Cancel

Use the Incoming Course Information page to adjust the default information for a particular incoming course within the component subject area. Default information for incoming courses of a particular component subject area is defined on the Transfer Subject Area page.

**Begin / End Date:** By default, the system populates the begin and end date of the incoming course with 01/01/1900 and 12/31/9999. These dates inform the Transfer Credit process when this incoming course is valid for the course transfer equivalency rule to which you attach this component subject area. You may want to change the default Begin Date to match what you are using as your campus default, i.e. 01/01/1901.

**Min / Max Units** (minimum and maximum units): The system displays the default minimum and maximum units for incoming courses within this component subject area. You can override these default values.

For instance, you might want to specify the same incoming course twice but differentiate each specification by how many units are earned. In that case, you would specify the same incoming course multiple times but with different minimum and maximum unit ranges.

**Min/Max Grade Pts Per Unit** (minimum and maximum grade points per unit): The system displays the default minimum and maximum grade points per unit for incoming courses within this component subject area. You can override these default values.

**Maximum Age:** This field defines, in years, the maximum age of the incoming course. This prevents an individual from transferring credit for this course into your academic institution when the individual took the course more years ago than the number that you specify here. By default, the system sets the maximum age of an incoming course to 99 years, but you probably should override this default value. For instance, you might want restrict individuals from receiving transfer credit for a course when an individual has taken the course more than 4 years previous to the date your institution processes that individual's transfer credit.

**Transfer Grade:** The system displays the default value of this field according to your selection for the corresponding field on the Transfer Subject Area page. Select this check box if you want to transfer the grade from the incoming course to the student's record at your academic institution.

If you select this check box, the Transfer Credit process copies the grade from the incoming course to the equivalent course, provided that the grade is a valid value for the grading scheme and grading basis of the student's academic program. If the grade is not a valid value, then the Transfer Credit process uses the transfer grade value defined on the Basic Data page for the equivalency rule.

If you clear this check box, the Transfer Credit process *always* uses the transfer grade value defined on the Academic Program Table component for the equivalency rule.

## 2.8.2 Recommendations

Use the above options to restrict the incoming courses you will accept for transfer. For instance, if you only take courses with a 'C' or above grade, you would enter in the Min/Max Grade Pts Per Unit a 2.00 to 4.00 range, if you are using a 4.00 system.

## 2.9 Course Transfer Rules

**Page Name: Course Transfer Rules**

**Navigation: [Home](#) → [Manage Student Records](#) → [Process Transfer Credit](#) → [Setup](#) → [Course Transfer Rules](#)**

The screenshot displays the 'Course Transfer Rules' page. At the top, there is a navigation bar with 'Home', 'Worklist', 'Help', and 'Sign Out' buttons. Below the navigation bar, the breadcrumb trail reads: 'Home > Manage Student Records > Process Transfer Credit > Setup > Course Transfer Rules'. A 'New Window' link is also present.

The main content area is titled 'Course Transfer Rules'. It features a form with the following fields:

- Academic Institution:** CSUNR (Test University)
- Source ID:** 000001989 (West Campus- Berkeley High)
- Equivalency Rule:** BERKY1
- \*Effective Date:** 01/01/1901
- \*Status:** Active
- \*Description:** Art

Below the form is a 'Transfer Subject Area' table with the following entries:

Transfer Subject Area	First	1-3 of 3	Last
ART Art			
BIOLOGY Biology			
ECONOMICS Economics			

At the bottom of the page, there are several action buttons: Save, Return to Search, Next in List, Previous in List, Add, Update/Display, Include History, and Correct History.

Use the Course Transfer Rules page to define course transfer equivalency rules for external organizations or internal academic institutions.

### 2.9.1 Considerations

You must define component subject areas on the Transfer Subject Area component prior to creating course transfer equivalency rules.

**Transfer Subject Area:** Select the component subject areas to tie to the course transfer equivalency rule. Each component subject area defines the incoming courses, their internal equivalent courses, and detail about how the Transfer Credit process must function. The Transfer Credit process uses the transfer component data for component subject areas to determine an individual's transfer credit. Define component subject areas by source on the Transfer Subject Area component.

## 2.9.2 Recommendations

For each transfer equivalency rule, attach component subject areas that you have defined for the source in the Transfer Subject Area component. You can define multiple course transfer equivalency rules for a single source. For example, you might define multiple rules to account for academic program and academic plan differences in equivalency rules.

## 2.10 Program/Source Equivalency

### Page Name: Program/Source Equivalency

**Navigation:** [Home](#) → [Manage Student Records](#) → [Process Transfer Credit](#) → [Setup](#) → [Program/Source Equivalency](#)

PEOPLE  
Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Process Transfer Credit > Setup > Program/Source Equivalency [New Window](#)

Basic **Rules Specification**

**Institution:** CSUNR Test University  
**Academic Program:** UNDGR Undergraduate West Campus- Berkeley High  
**Academic Plan:**  
**Source ID:** 000001989 West Campus- Berkeley High

View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active  
 \*Description: Berkeley Transfer Rules  
 \*Grading Scheme: UGD Undergraduate  
 \*Grading Basis: GRD Graded  
 \*Transfer Grade: T Transfer  
 Transfer HS Courses:

Save Return to Search Next in List Previous in List Add Update/Display Include History Correct History

[Basic](#) | [Rules Specification](#)

### 2.10.1 Considerations

You must define course transfer equivalency rules prior to setting up the parameters for processing transfer credit.

When you initially select the Academic Program to which you want to assign the course transfer equivalency rule, the **Grading Scheme**, **Grading Basis** and **Transfer Grade** display the default of the specified academic program. These values may be overridden now, and you can later override these values for individual transfer courses that you process.

**Transfer HS Courses:** Select this checkbox to include any course taken during high school in an individual's transfer credit for this academic program, academic plan, and source combination.

## 2.10.2 Recommendations

Use the Program/Source Equivalency - Basic page to set up some basic parameters (such as grading basis and transfer grade) for processing transfer credit within a specified academic program or plan.

## 2.11 Rules Specification

**Page Name:** Rules Specification

**Navigation:** [Home](#) → [Manage Student Records](#) → [Process Transfer Credit](#) → [Setup](#) → [Program/Source Equivalency](#) → [Rules Specification](#)

Use the Rules Specification page to set the course equivalency rules for this academic program or academic plan that the system will use to evaluate transfer credit from the specified institution.

### 2.11.1 Considerations

You must setup course transfer equivalency rules prior to assigning them to an academic program or plan.

**Rule Source Type:** By selecting *external organization*, the system prompts you with the source IDs of external organizations in your system. You define external organizations on the Organization Table page. By selecting *institution*, the system prompts you with source IDs of academic institutions you have defined in your system. You define institutions on the Academic Institution Table page. As the Transfer Credit process evaluates courses, it will use the rules in the following order: agreement, override, default.

The following three group boxes all have the **Agreement**, **Override**, and **Default** fields. Each identically named field functions as a row of data to define a course equivalency rule.

**Rule Source ID:** Use the fields in this group box to select the source ID for the course transfer equivalency rule for this academic program/plan and source combination.

**Course Equivalency Rule:** Use the fields in this group box to select the specific course transfer equivalency rules for this academic program, academic plan, and source combination.

**Note.** If you only have one rule for this source, you must enter it in **Course Equivalency Rule** field on the **Default** row. The Default row is the only row on the page that requires a course equivalency rule.

### 2.11.2 Recommendations

Use the Program/Source Equivalency component to select the academic programs and plans within your campus to which you want to assign the course transfer equivalency rules. The system requires that you attach the rule to an academic program, but it is optional whether you attach the rule to an academic plan.

## 2.12 Test Transfer Rules

Page Name: **Test Credit Rule/Component**

Navigation: **Home → Manage Student Records → Process Transfer Credit → Setup → Test Transfer Rules → Test Transfer Rules/Component**

### 2.12.1 Considerations

**Test ID:** Select the identification number of the test for which you are defining this test equivalency rule. Define test ID values on the Test Table page.

**Test Component:** Select the component of the test for which you are defining this test equivalency rule. Define test component values on the Test Component Table page.

**Transfer Priority:** Enter the transfer priority number for this row of the test equivalency rule. The Transfer Credit process evaluates the rows within the test equivalency rule according to the transfer priority of each row. It is best to determine your priority before you do your setup.

**Min/Max Score:** Enter the minimum and maximum score of applicable transfer tests for this row of the test equivalency rule, or enter the minimum percentile.

**Minimum Percentile:** Enter the minimum percentile of the applicable transfer tests for this row of the test equivalency rule, or enter the minimum and maximum score.

**Course ID:** Select the course to which the given test component is equivalent. The system prompts you with courses from your academic institution's course catalog. You can add rows to create a one-to-many test equivalency rule.

### 2.12.2 Recommendations

Use the Test Credit Rule/Component page to predefine sets of test transfer equivalency rules. Setting up your test transfer equivalency rules is similar to setting up your course credit transfer equivalency rules. For each test equivalency rule that you define, describe the rule, select the test and test component for the rule, and specify course equivalencies for the test component.

## 2.13 Program/Test Equivalency

### Page Name: Test Credit Equivalency

**Navigation:** [Home](#) → [Manage Student Records](#) → [Process Transfer Credit](#) → [Setup](#) → [Program/ Test Equivalency](#) → [Test Credit Equivalency](#)

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Process Transfer Credit > Setup > Program/Test Equivalency [New Window](#)

Test Credit Equivalency

Institution: CSUNR Test University  
 Academic Program: UNDGR Undergraduate  
 Academic Plan:

View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active  
 \*Description: SAT Test Results - Undergrad  
 \*Grading Scheme: UGD Undergraduate  
 \*Grading Basis: GRD Graded  
 \*Transfer Grade: T Transfer

Test Equivalency Rules

\*Default:   
 Override:

Save Add Update/Display Include History Correct History

### 2.13.1 Considerations

You must define test transfer equivalency rules prior to setting up the Test Credit Equivalency Page.

When you initially select the Academic Program to which you want to assign the course transfer equivalency rule, the **Grading Scheme**, **Grading Basis** and **Transfer Grade** display the default of the specified academic program. These values may be overridden now, and you can later override these values for individual transfer courses that you process.

**Test Equivalency Rule:** Use the fields in this group box to select the specific test transfer equivalency rules for this academic program or academic plan. As the Transfer Credit process evaluates test credit, it will use the rules in the following order: **Override, Default.**

### 2.13.2 Recommendations

Use the Test Credit Equivalency page to set the test transfer equivalency rules that the Transfer Credit process uses to evaluate transfer test credit for specific academic programs and academic plans.

## 2.14 Study Agreement Table

### Page Name: Study Agreement Table

**Navigation:** [Home](#) → [Manage Student Records](#) → [Manage Academic Records](#) → [Setup](#) → [Study Agreement Table](#)

The screenshot shows the PEOPLE Soft web application interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Sign Out' links. Below the navigation bar, the breadcrumb trail reads: 'Home > Manage Student Records > Manage Academic Records > Setup > Study Agreement Table'. A 'New Window' link and a 'Saved' status are also visible. The main content area is titled 'Study Agreement Table' and contains a form with the following fields:

- Academic Institution:** CSUNR Test University
- Study Agreement:** ITALY
- \*Effective Date:** 01/01/1901
- \*Status:** Active
- \*Description:** Italy Exchange Program
- Short Description:** Italy Exch

At the bottom of the form, there is a toolbar with buttons for 'Save', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The page also shows a 'View All' link and a 'First 1 of 1 Last' indicator.

Use the Study Agreement Table page to define study agreements for use with external organizations.

You can attach study agreements to individual student records on the External Study page of the Term Activation component. Study agreement codes are normally used to represent study abroad, exchange, and visiting programs.

### **2.14.1 Considerations**

Use the Study Agreement Table page to define study agreements for use with external organizations.

### **2.14.2 Recommendations**

Attach study agreements to individual student records on the External Study page of the Term Activation component. Study agreement codes are normally used to represent study abroad, exchange, and visiting programs.