

Transferring Course Credit Overview

After you have identified the external institutions and courses for a student, you transfer the course credit by creating a transfer credit model. When you create the model, you apply the transfer credit to the Undergraduate career and Undergraduate program. You select the student's external organization and the specific courses you want to transfer. After you make your selections, you calculate the transfer credit and apply the units to the student's record.

California State University, Channel Islands Business Process and Policies

Current CSUCI policies governing transferring course credit apply when using the PeopleSoft Student Administration system.

CSUCI will only have one transfer credit model per student per institution. Any additions or changes will be made to the same model.

All transfer credit activities completed in the PeopleSoft Student Administration system is for undergraduates only.

Co-term students will always have an academic program of Undergraduate (UG).

Transferring Course Credit

Transferring a student's course credit involves setting up the transfer credit model, reviewing the course transfer details, calculating the transfer credit, and then posting the credits to the student's record.

Setting Up the Transfer Course Credit Model

The first procedure in transferring course credits is to create the transfer model. You identify the student's academic program to which you want to apply the transfer credits, and then the external organization.

If you want to add a transfer credit model specifications to a student's record that already contains a transfer credit model, the system will prompt you to update the existing record.



To Set Up a Transfer Credit Model for a Student

1. From the **Home** menu, select **Manage Student Records**, and then select **Process Transfer Credit**.

The Process Transfer Credits window appears.

2. From the **Use** menu, select **Course Credits**.

The Add–Course Credit dialog box appears.

3. In the **EmplID** field, type the student's EmplID.

Note: If you do not know the student's EmplID, press the magnifying glass and use the Last Name and First Name fields to search by name.

4. From the **Academic Career** drop-down list, select **Undergraduate**.

5. From the **Academic Institution** drop-down list, select **CICMP**.

6. Click **Add**.

The Model Setup panel appears. The student's name, EmplID, Career, and Institution appear at the top of the panel.

Note: If the student's record already contains transfer credit models, you will receive a message indicating that the specified record already exists. Click Yes to add a new transfer credit model.

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Home Help Sign Out

Home > Manage Student Records > Process Transfer Credit > Use > Course Credits [New Window](#)

Transfer Course Details | **Transfer Summary**

Jeffrey Seeger ID: 000001600

Transfer Credit Model View All First 1 of 1 Last

Academic Career: UGRD Undergraduate + -

Academic Institution: CICMP Channel Islands

Model Nbr: 1

Transcript Level: Unofficial

Target Information

Academic Program: UGRD Undergraduate Apply Agreement

Academic Plan:

Source Information

Credit Source Type: External

External Org ID: C30000124 CALIF SU NORTHRIDGE

Data Source: School

Transfer Credit Term View All First 1 of 1 Last

Articulation Term: 2028 Fall 2002 Fetch + -

Transfer Status	External Term	External Subject / Catalog Nbr	Equivalent Subject / Catlg Nbr

[Add Comments](#)

Save Add Update/Display

Transfer Course Details | [Transfer Summary](#)

7. In the **Model Nbr** field, accept the default of **1**.
8. From the **Transcript Level** drop-down list, select **Official**.
9. From the **Academic Program** drop-down list, select **UGRD**.
10. If you know the **Academic Plan** populate it otherwise, leave the **Academic Plan** field blank.
11. Under **Source Type**, click **External**.
12. From the **External Org ID** drop-down list, select an external organization that you have defined for the student.

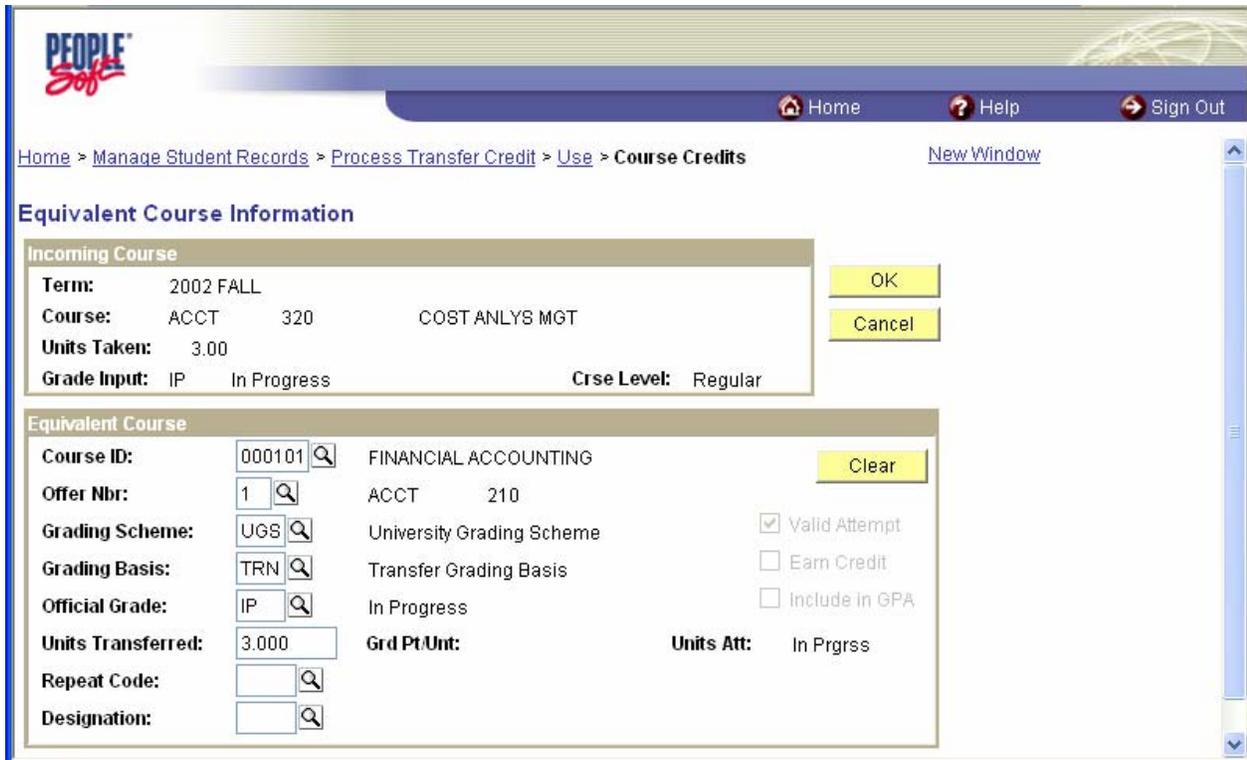
Note: The External Org ID list contains only external organizations that have been identified on the Education–External Data panel.
13. From the **Data Source** drop-down list, select **School**.
14. In the **Articulation Term** field, enter the term that the student was admitted into.

15. Click the **Fetch** button.

The system retrieves the list of transfer courses for the student from the external organization. The system saves the model information on the Model Setup panel, and the status of the model changes to Submitted.

16. Click the **Edit Equivalent Course**  button to add and edit the equivalent course information.

The Equivalent Course Information panel appears.



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Home Help Sign Out

Home > Manage Student Records > Process Transfer Credit > Use > Course Credits [New Window](#)

Equivalent Course Information

Incoming Course

Term: 2002 FALL
 Course: ACCT 320 COST-ANLYS MGT
 Units Taken: 3.00
 Grade Input: IP In Progress Crse Level: Regular

OK
 Cancel

Equivalent Course

Course ID: 000101 FINANCIAL ACCOUNTING
 Offer Nbr: 1 ACCT 210
 Grading Scheme: UGS University Grading Scheme
 Grading Basis: TRN Transfer Grading Basis
 Official Grade: IP In Progress
 Units Transferred: 3.000 Grd Pt/Unit Units Att: In Prgrss
 Repeat Code:
 Designation:

Valid Attempt
 Earn Credit
 Include in GPA

Clear

17. In the **Course ID** field, press the magnifying glass to search for the appropriate equivalent course.

18. Click **Tab**.

Many of the subsequent fields will automatically populate.

19. In the **Units Transferred** field, update the value if needed.

20. Click **OK**.

The Transfer Course Details panel reappears.

Transcript Level: Unofficial

Target Information

Academic Program: UGRD Undergraduate

Academic Plan: [] Apply Agreement

Source Information

Credit Source Type: External

External Org ID: C30000124 CALIF SU NORTHRIDGE

Data Source: School

Transfer Credit Term View All First 1 of 1 Last

Articulation Term: 2028 Fall 2002 Fetch Submitted

Group	Transfer Status	External Term	External Subject / Catalog Nbr	Equivalent Subject / Catlg Nbr					Lock
1	Accepted	2002 FALL	ACCT 320	ACCT 210					<input type="checkbox"/>
2	No Rule	2001 FALL	BLAW 308						<input type="checkbox"/>
3	No Rule	2001 FALL	CH S 380						<input type="checkbox"/>
4	No Rule	2002 FALL	ECON 310						<input type="checkbox"/>
5	No Rule	2002 SPR	FIN 303						<input type="checkbox"/>
6	No Rule	2001 FALL	IS 324						<input type="checkbox"/>
7	No Rule	2002 SPR	MKT 304						<input type="checkbox"/>
8	No Rule	2001 FALL	MKT 346						<input type="checkbox"/>
9	No Rule	2002 FALL	SOM 306						<input type="checkbox"/>
10	No Rule	2002 FALL	ART 305						<input type="checkbox"/>

Save Return to Search Add Update/Display

Transfer Course Details | Transfer Summary

21. Click the **Comments**  button to record comments specific to this particular equivalent course
22. Ensure the **Lock** check box is selected.

Calculating and Posting Transfer Course Credits

After you have reviewed, modified, and locked the transfer credits, you calculate the transfer credit amount and post the transfer credits to the designated quarter.

Before you begin this procedure, make sure the Transfer Course Credits panel is displayed.



To Calculate and Post the Transfer Course Credits

1. Click the **Transfer Summary** tab.

The Transfer Summary panel displays data from the Transfer Course Details panel.

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Home Help Sign Out

Home > Manage Student Records > Process Transfer Credit > Use > Course Credits [New Window](#)

Transfer Course Details | **Transfer Summary**

Esther Box ID: 000004590

Transfer Credit Model View All First 1 of 1 Last

Academic Career:	UGRD	Undergraduate
Academic Institution:	CICMP	Channel Islands
Model Nbr:	1	CALIF SU NORTHRIDGE
Academic Program:	UGRD	Undergraduate

Admit Type/Term:

View All First 1 of 1 Last

Articulation Term:	Fall 2002	Posted Date:
Model Status:	Submitted	User ID:

Calculate Post Unpost

Units Taken: 0.00
Units Transferred: 0.000

Course Credits Summary

Units Taken:	0.00
Units Transferred:	0.000

Save Return to Search Add Update/Display

[Transfer Course Details](#) | [Transfer Summary](#)

2. Click the **Calculate** button to calculate the amount of transfer credits to apply to the student's record.

The statistics for the selected transfer courses appear in the Units Taken and Units Transferred fields.

3. Click the **Post** button to post the calculated transfer credits to the student's academic record.

The model status changes from Submitted to Posted. The Posting process records and saves the data.

Note: If the student is not term activated, their units will not post and the model status will say Complete. In order to get the units posted, the student must be term activated, their units unposted, and then reposted. After reposting, the model status changes to Posted.

Module Recap



Having completed this module, you should now be able to:

- Set up the transfer course credit model
- Review and select transfer course details
- Calculate and post the transfer course credits
- Review the transfer course credit summary

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