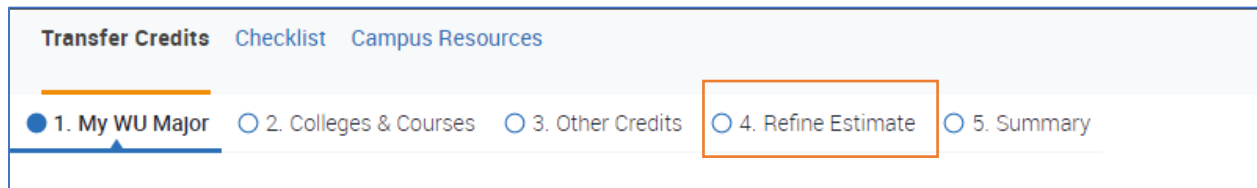# Refine Estimate Feature (Optional)

What is Refine Estimate Feature?

Refine Estimate is an optional feature to enable, and allows a student to self report more information about each course they add into Transfer Portal, like when the course was taken, what grade they received, and the number of credits they were awarded. The goal of this feature is to provide a more accurate output on the Degree Completion page for the student.

Feature Overview

The Refine Estimate feature is optional to enable. If enabled, the feature will populate as a 4th tab for the student to fill out, after Other Credits and before the Summary page.

Refine Estimate allows the student to provide more information about their prior coursework. A student can choose to fill in any combination of the fields shown below, all are completely optional. If Refine Estimate data are entered by student, Transfer Portal's output on the Degree Completion page will be adjusted to more accurately represent your institution's course equivalency data stored in the Student Information System (SIS).

- **Term Taken** – requests the timeframe the course was taken at the originating institution. This drop down menu is customizable by the partner, and by default has the options: Fall, Spring, Summer.
- **Year Taken** – requests the year in which the course was taken at the originating institution. This is a free text box that validates any response to be between 1900-9999.
- **Credits** – requests the number of credits this course awards at the originating institution. This is a free text box that validates any response that is not an integer.
- **Grade** – requests the grade the student received in this course at the originating institution. This is a customizable field for the partner. This drop down menu is customizable by the partner, and by default has the options: A, B, C, D.

Configuration
- **Share your drop-down field customization preferences**
  - Term taken
  - Grade – please share grade point values for each grade present in feature (ie, A+ = 4.0, B = 3.0, etc)
- **Testing**
  - If testing feature during implementation, have EAB enable in your production environment
  - Follow user testing protocol and document any issues that occur
  - If testing feature after you have launched, have EAB enable in your implementation environment (test site), and schedule time with your Strategic Leader and Data Integration Services representative to test

Frequently Asked Questions

1. How do I know if my institution is a good candidate for this feature?
   - *Talk with your Strategic Leader and Data Integration Services representative, they will be able to identify any technical limitations, as well as walk you through the decision process.*
2. How do I enable this feature?
   - *After making the decision with your EAB team, your Strategic Leader or Partner Support Team can triage your request to enable the Refine Estimate feature in production.*
3. Can this be required for students?
   - *No, Refine Estimate will always be optional for students.*

Related Articles

1. Colleges & Courses Tab
2. Pending Course Workflow