Pending Course Workflow

What is the Pending Course Workflow?

The Pending Course Workflow is used by partners to identify, track, and evaluate new course equivalencies submitted by prospective transfer students.

Feature Overview

There are 6 steps in the Pending Course Workflow. Some steps are completed by students, some by staff, and some steps are completed outside of Transfer Portal.
1. Student submits a pending course
2. Partner is notified of pending course
3. Partner evaluates pending course
4. Partner resolves pending course
5. Student is notified of decision
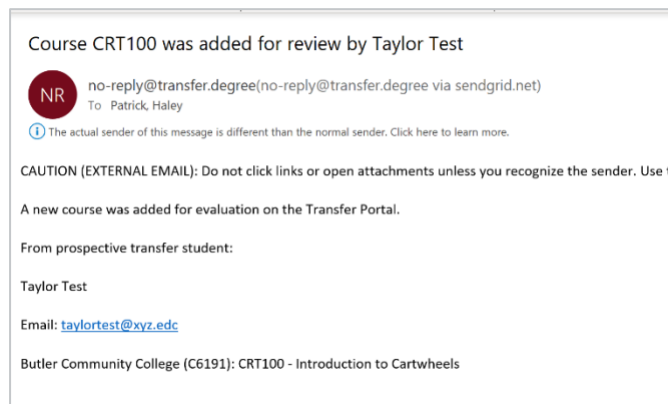6. Student logs in to Transfer Portal

Below are descriptions of each step.

1.   Student submits a pending course.
Please read [pending course student facing] article for full detail about how and when a student submits a pending course in Transfer Portal.

2.   Partner is notified of pending course.
Partner can decide how they will know there is a new pending course for review. There are two options:
- **Real time notification** – Partner can choose to get an email with pending course details in real time, as submitted by the student. Partner will enter one (1) email address in the Pending courses section of Contact Emails in Site Setup. The emails will always be sent in the same format, as shown below.
    - o Notes about automatic email:
        - ▪ The text in the email is not customizable.
        - ▪ Student must create a profile to submit a pending course.
- **Partner checks dashboard at regular cadence** – Partner can choose to log into Transfer Portal at a regular, predetermined cadence and check the Pending Course Dashboard for new courses.
    - o Note: Partner must have an email address present in the Pending Course section of Contact Emails. Please enter a "dummy" email address in this field if you wish to not receive emails, such as OptedOutDuringImpl@eab.com

Course CRT100 was added for review by Taylor Test

NR no-reply@transfer.degree(no-reply@transfer.degree via sendgrid.net)
To Patrick, Haley
(i) The actual sender of this message is different than the normal sender. Click here to learn more.

CAUTION (EXTERNAL EMAIL): Do not click links or open attachments unless you recognize the sender. Use th

A new course was added for evaluation on the Transfer Portal.

From prospective transfer student:

Taylor Test

Email: taylortest@xyz.edc

Butler Community College (C6191): CRT100 - Introduction to Cartwheels

Real time notification email to partner, if configured. Detail outlined in blue is pulled from the student profile. Detail outlined in orange and green is pulled from pending course form submitted by student.

To manually resolve a course, go under the **Unresolved Courses tab, click on the hamburger icon** next to the course you want to resolve, and **select Edit**.

You can **view the Resolved Courses under the Resolved Courses tab**. **Please Note: You cannot edit anything from this tab, it's read-only.**

3.   Partner evaluates pending course
This step is completed <u>outside</u> of Transfer Portal. The partner completed their typical course review process, then builds the course equivalency rule (if applicable) in the Student Information System (SIS). For purposes of Transfer Portal, there are 3 outcomes, or resolution methods, for a pending course:
- Course receives credit (course equivalency is built in SIS)
- Course does not receive credit (course equivalency build in SIS optional)
- Course will not be reviewed (no course equivalency build in SIS)

4.   Partner resolves a pending course
SIS data is loaded on a nightly basis to Transfer Portal. The day after a course equivalency is built in the partner's SIS, it will load to Transfer Portal. As mentioned above, there are three (3) ways to resolve a pending course:
- Course receives credit
  - o Pending Course must be matched to an SIS course before resolving as receives credit. You may log in and see the course has been automatically matched by the system, in

3

which case you must only Resolve the course for the student. If the course is not automatically matched, you can search for it using the Magnifying glass button and "force match" to the pending course.

- o Note: Course will not automatically match if the course equivalency rule in SIS does not use the same course code as entered by student. You will need to manually search for the course in this situation.
- Course does not receive credit
  - o If the partner built a course equivalency rule in SIS that states the pending course does not transfer, be sure to match that course before resolution. If partner did not build a course equivalency rule, skip the matching step.
  - o Resolve as does not receive credit. You must enter a note to the student when a course is resolved this way.
- Course will not be reviewed
  - o Use this option sparingly, based on your pending course review strategy. This option will not send a notification to the student.

5. *Student is notified of decision*
Partner can choose how to notify students of the day's pending course decisions.
- Automatic email sent from Transfer Portal with **all student's pending course decisions from the day.** Meaning, if 3 of 5 of a student's pending courses were resolved that day, they would receive an email with a summary of which of the 3 received credit and/or did not receive credit.
- Manual email sent from partner institution with summary of review. Partner can own the communication about the results of a student's course review.

6. *Student logs back in to Transfer Portal to review their degree completion page.*

Auto Resolve Pending Courses

If the Auto Resolve configuration is turned on, Transfer Portal will auto resolve pending courses that are auto matched. The default setting is to "Always give a credit?". Auto Resolve will only apply to courses submitted after the configuration is turned on.

Student Profile
You can also view a student's profile from the Pending Courses table. **Click on the hamburger icon** next to the course you want to resolve and **select Student Profile**.

Frequently Asked Questions

1. Can I customize any of the auto emails sent from Transfer Portal for pending course workflow?
   - *No, no customization is currently available.*
2. Can I add multiple email addresses for pending course notifications?
   - *No, Transfer Portal only supports one email address in that field. However, you can create a shared inbox that multiple staff members have access to and add that email address to Transfer Portal.*

Related articles

1. Pending Course Student Facing
2. Colleges & Courses tab