

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.

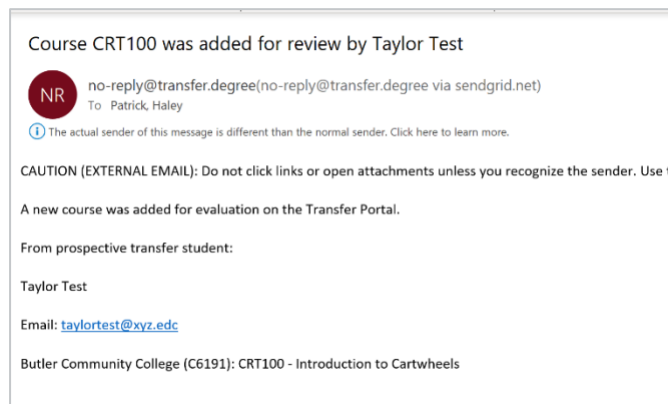
1. Student submits a pending course.

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.
 - 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.
 - 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



TRANSFER ADMIN Home **Transfer Portal Data** Analytics Site Setup User Management

Pending Courses

Pending Courses

Unresolved Courses Resolved Courses

MATCHED COURSE	COURSE ID	COURSE NAME	TERM	CREDITS	GRADE	ORIGINATING SCHOOL	COLLEGE SIS CODE	STUDENT	S
---	MYPC101	My Pending Course	Spring 2005	5	B	Cisco College	C6096	Michael Gens...	0
---	psyc101	psyc	Fall 2007	4	B	Rowan University	CY388	Navya Rukma...	0
---	MATH188	Introduction to Mat...	Fall 2009	4	A	Cisco College	C6096	Navya 1	1
---	CAL121	Intro to Cal	Fall 2009	4	A	Cisco College	C6096	Navya 1	1
---	MATH188	Introduction to Mat...	Fall 2009	4	A	Cisco College	C6096	Navya 1	1
---	MATH188	Introduction to Mat...	Fall 2009	4	A	Cisco College	C6096	Navya 1	1

*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**.

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Unresolved Courses Resolved Courses

MATCHED COURSE	COURSE ID	COURSE NAME	TERM	CREDITS	GRADE	ORIGINATING SCHOOL	COLLEGE SIS CODE	STUDENT	S
---	C101	My Pending Course	Spring 2005	5	B	Cisco College	C6096	Michael Gens...	0
---	101	psyc	Fall 2007	4	B	Rowan University	CY388	Navya Rukma...	0
---	MATH188	Introduction to Mat...	Fall 2009	4	A	Cisco College	C6096	Navya 1	1
---	CAL121	Intro to Cal	Fall 2009	4	A	Cisco College	C6096	Navya 1	1
---	MATH188	Introduction to Mat...	Fall 2009	4	A	Cisco College	C6096	Navya 1	1
---	MATH188	Introduction to Mat...	Fall 2009	4	A	Cisco College	C6096	Navya 1	1

TRANSFER ADMIN Home **Transfer Portal Data** Analytics Site Setup User Management

Pending Courses > **Edit Pending Course**

Resolve Match Status

Change Resolution Status

Update Type *

Course receives credit
 Course does not receive credit (Note required)
 Course will not be reviewed

Special note to student

The note will be displayed in an email to the student for courses that "receive credit" or "do not receive credit". Notes for all such resolved courses will be sent to the student in one email on a nightly basis. Emails are withheld for courses marked as "will not be reviewed". Notes are required only for courses not receiving credit. Notes are also displayed under Notes & Activities section of Status And Notes.

Submit

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

MATCHED COURSE	COURSE ID	COURSE NAME	TERM	CREDITS	GRADE	ORIGINATING SCHOOL	COLLEGE SIS CODE	STUDENT	S
PJ457: Finan...	&ENG&1&211	Intro to &English	Fall 2001	3	B	Rowan University	CY388	Navya Rukma...	0
0609362: Pu...	testscott	test	Fall 2008	3	C	Rowan University	CY388	Navya Rukma...	0
-	SOL111	Soil Toxicology	Spring 2022	4	A	Butler Community College	C6191	April Test	0
ED197: Coop...	DIR101	Introduction to Dirt	Fall 2022 T...	3	B	Butler Community College	C6191	April Test	0
1003220: Mo...	PJ457	Intro to Prashanth	Fall 2011	3	A	Rowan University	CY388	Prashanth Jo...	0
PJ456: Finan...	PJ456	Intro to Prashanth	Fall 2010	3	A	Rowan University	CY388	Prashanth Jo...	0

Resolved courses are read-only.

Confirm Course

RESOLVED MATCHED RECENT ACTIVITY

Information about this Pending Course

Information about the Student and Course

Navya Rukmannagari has entered this course as:
 &ENG&1&211: Intro to &English
 Rowan University (CY388)
 3 credits
 Submitted 05/24/2023 08:56:01 AM

Information about the Course and SIS

This course is entered into SIS as:
 PJ457: Financial Accounting
 Rowan University (CY388)
 Matched on 08/07/2023 04:12:37 PM
 Matched by test navya [inactive]
 If this is not correct, navigate to the Match tab to find a Matched Course in the SIS.

Notes & Activity

5 ENTRIES

3. Partner evaluates pending course

This step is completed outside 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
 - 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

- 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.
- 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
 - 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.
 - 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
 - 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.

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Pending Courses > Edit Pending Course

Confirm Course

RESOLVED MATCHED RECENT ACTIVITY

Information about this Pending Course

Information about the Student and Course

Prashanth Jonnala has entered this course as:
 PJ457: Intro to Prashanth
 Rowan University (CY388)
 3 credits
 Submitted 03/03/2023 11:14:57 AM

Information about the Course and SIS

This course is entered into SIS as:
 1003220: Modern Art
 Rowan University (CY388)
 Matched on 03/03/2023 11:16:48 AM
 Matched by System null
 If this is not correct, navigate to the Match tab to find a Matched Course in the SIS.

Notes & Activity

3 ENTRIES

03/03/2023 11:14:57 AM:
 User: Prashanth Jonnala
 Status: New

03/03/2023 11:16:48 AM:
 User: System
 Status: Found Course in SIS

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**.

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Frequently Asked Questions

- Can I customize any of the auto emails sent from Transfer Portal for pending course workflow?
 - No, no customization is currently available.*
- 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

- Pending Course Student Facing
- Colleges & Courses tab