

# Pending Course Workflow Overview

A Pending Course is a course added by a student for a specific institution that does not have an equivalency built in EAB Transfer Portal Partner's SIS. This workflow document outlines the process and nuance for how to resolve such courses in the Transfer Portal.

**1** **Student** submits new course through Portal



- Student must create an account to enter a pending course
- Student provides the following information:
  - Course Prefix
  - Course Number
  - Course Name
  - Credit Hours

**2** **Partner** receives new course via email and admin dashboard



**Configuration Decision**

- **Option 1:** Partner's pending course email account can receive one email per submitted pending course (in real time, as submitted by the student)  
OR
- **Option 2:** Partner does not receive pending course email and checks admin dashboard for updates

**3** **Partner** uses existing process to evaluate course outside portal



- Partner builds new equivalency in SIS
  - SIS data is automatically refreshed in portal\*

**\*Configuration decision:**  
*once daily, twice daily refresh*

**4** **Partner** resolves pending course in portal



**Configuration Decision**

- **Option 1: Auto-resolve**
  - When data is refreshed, the incoming transfer course that was built in SIS will automatically match to submitted pending course(s) and resolve as "course receives credit"
  - Non-articulated courses will need to be resolved manually as "course does not receive credit" or as "course will not be reviewed"OR
- **Option 2: Manual Match**
  - After data is refreshed, the incoming transfer course that was built in SIS will be present under *Matched Course*
    - If missing, use the magnifying glass next to the pending course record and lookup the incoming transfer course
  - Select the Resolve button and choose one of three options
    - Course receives credit
    - Course does not receive credit
    - Course will not be reviewed

**5** **Student** is emailed that course has been reviewed



**Configuration Decision**

- **Option 1:** Student receives 1 email overnight (~midnight EST) with the day's aggregated pending course decisions  
OR
- **Option 2:** Student does not receive email with pending course decision and partner must contact student with information

**6** **Student** logs in to see how new course applies to degree



- Student may contact a transfer counselor if they have further questions about their unofficial credit evaluation

# Sample Email to Partner

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## Configuration Decision

- **Option 1:** Partner's pending course email account can receive one email per submitted pending course (in real time, as submitted by student)

OR

- **Option 2:** Partner does not receive pending course email and checks admin dashboard for updates

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## Notes

- This text in this email is **not** customizable or configurable.
- A student must create a profile to submit a pending course. Information required in their profile are:
  - First Name
  - Last Name
  - Email Address

From: [no-reply@transfer.degree](mailto:no-reply@transfer.degree) <[no-reply@transfer.degree](mailto:no-reply@transfer.degree)>  
Sent: Wednesday, March 18, 2020 10:23 AM  
To: Akalonu, Allison <[AAkalonu@eab.com](mailto:AAkalonu@eab.com)>  
Subject: Course LIFT300 was added for review by Haley Patrick

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

From prospective transfer student:

Haley Patrick

Email: [haley\\_patrick26@yahoo.com](mailto:haley_patrick26@yahoo.com)

Butler Community College: LIFT300 - Introduction to Lifting Weights

# Sample Email to Student

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## Configuration Decision

- **Option 1:** Student receives 1 email overnight (~midnight EST) with the day's aggregated pending course decisions

OR

- **Option 2:** Student does not receive email with pending course decision and partner must contact student with information

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## Notes

- This text in this email is **not** customizable or configurable.

**From:** [no-reply@transfer.degree](mailto:no-reply@transfer.degree) <[no-reply@transfer.degree](mailto:no-reply@transfer.degree)>  
**To:** "[haley\\_patrick26@yahoo.com](mailto:haley_patrick26@yahoo.com)" <[haley\\_patrick26@yahoo.com](mailto:haley_patrick26@yahoo.com)>  
**Sent:** Tuesday, March 17, 2020, 11:30:58 PM EDT  
**Subject:** WU has reviewed your courses

Haley,

WU has reviewed 1 of your courses.

Courses receiving credit:

SPC 101: Introduction to Public Speaking

Log in to see your progress towards your degree.

Login: [https://u4093340.ct.sendgrid.net/ls/click?upn=03MihqffnPrSKs1HWhK3D-3DnedG\\_2A3L99v9b5HdibSHBatBBR9xwNeTjcdjP6wmjJP-2BafhSDPUv2BPISgzuyfWHK2Ow2lac7uxXxo9tyTD2i6rr7Jd-2Fvm1RIDjiladvDUS-2BOLK2B3S1D0xY0EOS3SyF-2F8vuHBouFKQIB-2Fcc4hr1E-2BG-2FNGTDS1irVhy](https://u4093340.ct.sendgrid.net/ls/click?upn=03MihqffnPrSKs1HWhK3D-3DnedG_2A3L99v9b5HdibSHBatBBR9xwNeTjcdjP6wmjJP-2BafhSDPUv2BPISgzuyfWHK2Ow2lac7uxXxo9tyTD2i6rr7Jd-2Fvm1RIDjiladvDUS-2BOLK2B3S1D0xY0EOS3SyF-2F8vuHBouFKQIB-2Fcc4hr1E-2BG-2FNGTDS1irVhy)

Sincerely,

WU Transfer Team

# Pending Courses Dashboard

**Pending Courses**

Unresolved Courses    Resolved Courses

	MATCHED COURSE	COURSE ID	COURSE NAME	TERM	CREDITS	GRA...	ORIGINATING SCHOOL	COLLEGE SIS CODE	STUDENT	SUBMITTED TIME	STATUS AND NOTES	LAST ACTION
☰	⊖	MATH1314	College Algebra	--	3		Sul Ross State University	C6685	Isadora Garcia	10/02/2023	New	Isadora Garcia
☰	⊖	AME20210	Introduction to Des...	--	3		University of Notre Dame	C1841	Josie Martinez	09/08/2023	Sent to Faculty	Allison Akalonu
☰	⊖	eng1301	Composition I	--	3		Sul Ross State University	C6685	Isadora Garcia	09/06/2023	New	Allison Akalonu
☰	⊖	BRE101	Sourdough Bread B...	--	3		Washington County Co...	C6191	JL Test	08/23/2023	Info from Student R...	Jen Loh
☰	⊖	ACCOU2140	Financial Accounting	--	3		College of DuPage	C1083	Erasto Martin...	05/11/2023	New	Erasto Martinez...
☰	⊖	MATH1428	College Algebra	--	3		College of DuPage	C1083	Erasto Martin...	05/11/2023	New	Erasto Martinez...
☰	EV150: Envir...	ENV101	Introduction to Envl...	--	3		Washington County Co...	C6191	October Is Gre...	10/27/2022	Found Course in SIS	Gina Schorr

## 1. Two ways to achieve a **Matched Course**

- If **auto-resolve is enabled**, partner builds course equivalency in SIS and after data is loaded, the incoming transfer course that was built in SIS is matched to the submitted pending course AND resolved as "course receives credit" by the system.
- If **auto-resolve is not enabled**, partner builds course equivalency in SIS and after data is loaded, the incoming transfer course that was built in SIS is matched to the submitted pending course. *Last Action* by will indicate *System* and have the incoming transfer course populated under *Matched Courses*. Partner will then need to manually resolve course.
  - Note: if course is missing, partner manually searches the SIS using the magnifying glass button.*

## 2. Three ways to **Resolve** a Pending Course

- Course receives credit - notification is sent to a student based on prior configuration decision. If **auto-resolve** is enabled, matched courses will be auto-resolved with this status
- Course does not receive credit – a note to the student is **required** in this instance to explain decision; notification is sent to student based on prior configuration decision
- Course will not be reviewed – portal does not send a notification to the student and partner must communicate explanation back to student outside of the portal; should be used sparingly

## 3. **Status and Notes** – can be updated manually or automatically

- Four non-configurable drop-down options:
  - Found Course in SIS*
  - Info from Student Requested*
  - Sent to Faculty*
  - Syllabus Requested*
- Open textbox for internal notes

# Edit Pending Course - Status

### Information about the Student and Course

Josie Martinez has entered this course as:  
AME20210: Introduction to Design Thinking in Engineering  
University of Notre Dame (C1841)  
3 credits  
Submitted 09/08/2023 08:14:25 AM

### Information about the Course and SIS

This course is not in SIS Navigate to the Match tab to find a Matched Course in the SIS.

### Notes & Activity

2 ENTRIES

09/08/2023 08:14:26 AM:  
User: Josie Martinez  
Status: New

09/27/2023 01:15:42 PM:  
User: Allison Akalonu  
Status: Sent to Faculty

Resolve — Match — **Status**

### Update Status

New Status

Sent to Faculty

Add a note

Submit

## 1. Student Information

- Student Name
- Pending Course Prefix, Number, and Name
- Transfer college associated with pending course
- Number of credits earned for course
- Submit date

## 2. Update Status

- System will automatically update to *Found Course in SIS* when pending course is auto-matched to incoming transfer course
- Staff can manually update to four non-configurable drop-down options:
  - Syllabus Requested*
  - Info from Student Requested*
  - Sent to Faculty*
  - Found Course in SIS*

## 3. Add a Note

- Staff are encouraged to add notes about pending course evaluation, as needed

## 4. Notes & Activity

- Updates in real time as statuses are changed
- Notes added by staff will be reflected in this section in aggregate

# Edit Pending Course - Match

1. Partner builds course equivalency in SIS and after data is loaded, the incoming transfer course that was built in SIS is automatically matched to the submitted pending course.
  - If course is missing, partner **manually** searches the SIS for the incoming transfer course
2. A pending course **must** be matched before it can be resolved with decision **“Course receives credit”**.
3. When a course is matched, students can now search and add this course, from this institution, on the Past Colleges & Courses tab.
  - \* *Even if this course is not yet resolved for the student who added the Pending Course, new students can see it on the front end of the Portal.*

## What is a matched course and how is that different from a student’s submitted pending course and an equivalent course?

- A **matched course** is the incoming transfer course that is built in your SIS.
- A **pending course** is the course information that a student provides for review if they’re unable to find their course.
- An **equivalent course** is the course offered at your institution (and built in your SIS) that a student is awarded for an incoming transfer course.

Sometimes, the student submits a pending course where there is a typo or the name varies from what is built in the SIS, in these instances you may see a difference between the submitted pending course name or ID and the matched course information in portal.

The portal does not currently display any equivalent course detail back to the student or staff. The equivalent course information is only available for staff to view directly in their SIS.

# Edit Pending Course - Resolve

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

1. Update type - This field is required
  - a) **Course receives credit** – Pending Course will receive credit per the equivalency entered in SIS. This option sends an email to the student, if configured, notifying them of the status of the course. Student can log back in to see how course applies to degree.
  - b) **Course does not receive credit** – Pending course is non-transferable (i.e. no direct course equivalency available at partner institution) and student would not be awarded credit. Common examples of this could be development courses or technical courses. This option requires staff to add a *Special note to student* to explain the decision. This option sends an email to the student, if configured, notifying them of the status of the course.
  - c) **Course will not be reviewed** – To be used sparingly\*; a catch-all for courses that will not be reviewed. This option does **not** send an email from the portal to the student, regardless of configuration decision – partner must own explanation back to student outside of portal.

*\* When would this be used? One example may be if the student incorrectly submitted the pending course information (e.g. incorrect college) and they need to re-input or partner capacity is low and unable to review at this time.*
2. Select blue *Submit* button