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

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Sample Email to Partner

- **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 <u>must</u> 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 <no-reply@transfer.degree>
Sent: Wednesday, March 18, 2020 10:23 AM
To: Akalonu, Allison <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

Butler Community College: LIFT300 - Introduction to Lifting Weights

Sample Email to Student

- **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 <no-reply@transfer.degree>
To: "haley_patrick26@yahoo.com" <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:

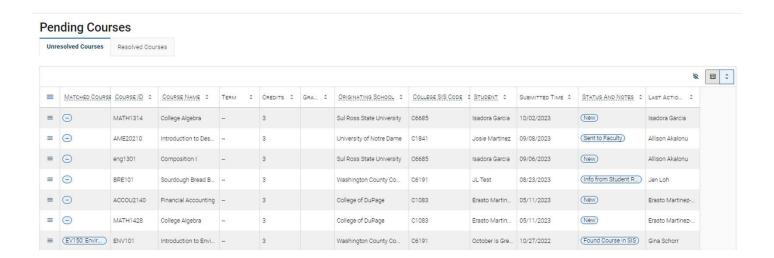SPC 101: Introduction to Public Speaking

Log in to see your progress towards your degree.

Login: https://u4093340.ct.sendgrid.net/ls/click?upn=03MihqffnPrSKs1HWhK 3D-3DnedG_2A3L99v9b5HdibSHBatBBR9xwNeTjcdjP6wmjJP-2BafhSDPUv 2BPISgzuyfWHK2Ow2lac7uxXxo9tyTD2i6rr7Jd-2Fvm1RIDjiladvDUS-2BOLK 2B3S1D0xY0EOS3SyF-2F8vuHBouFKQIB-2Fcc4hr1E-2BG-2FNGTDS1irVhy
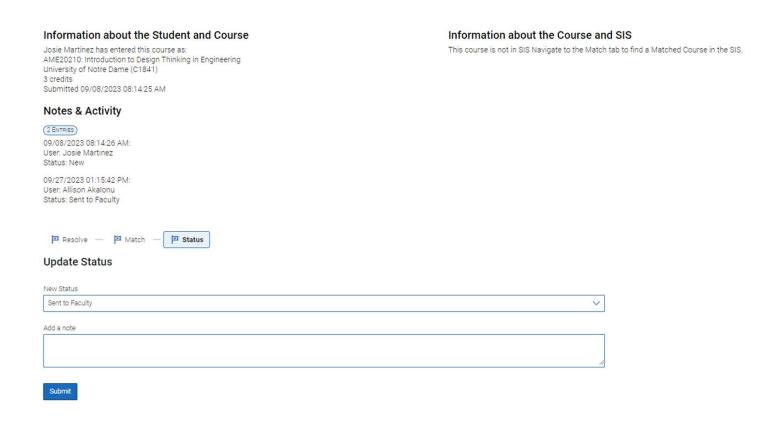
Sincerely,

WU Transfer Team

Pending Courses Dashboard

Pending Courses

	Matched Course	Course ID	Course Name	Term	Credits	Gra...	Originating School	College SIS Code	Student	Submitted Time	Status and Notes	Last Actio...
☰	⊖	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 Envi...	--	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**

   a) 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.

   b) 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.

      i. *Note: if course is missing, partner manually searches the SIS using the magnifying glass button.*

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

   a) 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

   b) 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

   c) 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

   a) Four non-configurable drop-down options:
      - *Found Course in SIS*
      - *Info from Student Requested*
      - *Sent to Faculty*
      - *Syllabus Requested*

   b) 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

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

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.

⚑ Resolve — ⚑ Match — ⚑ **Status**

Update Status

New Status

Sent to Faculty ⌄

Add a note

[   ]

Submit

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1. **Student Information**

   a) Student Name

   b) Pending Course Prefix, Number, and Name

   c) Transfer college associated with pending course

   d) Number of credits earned for course

   e) Submit date

2. **Update Status**

   a) System will automatically update to *Found Course in SIS* when pending course is auto-matched to incoming transfer course

   b) *S*taff 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**

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

4. **Notes & Activity**

   a) Updates in real time as statuses are changed

   b) Notes added by staff will be reflected in this section in aggregate

Edit Pending Course - Match

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

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

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.

⚑ Resolve — ⚑ **Match** — ⚑ Status

Change Matched Course

| Search SIS | ✎ | ▦ |

Use the Search Bar to Find Results

Find the originating school course name in SIS using the above search bar.

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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 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.

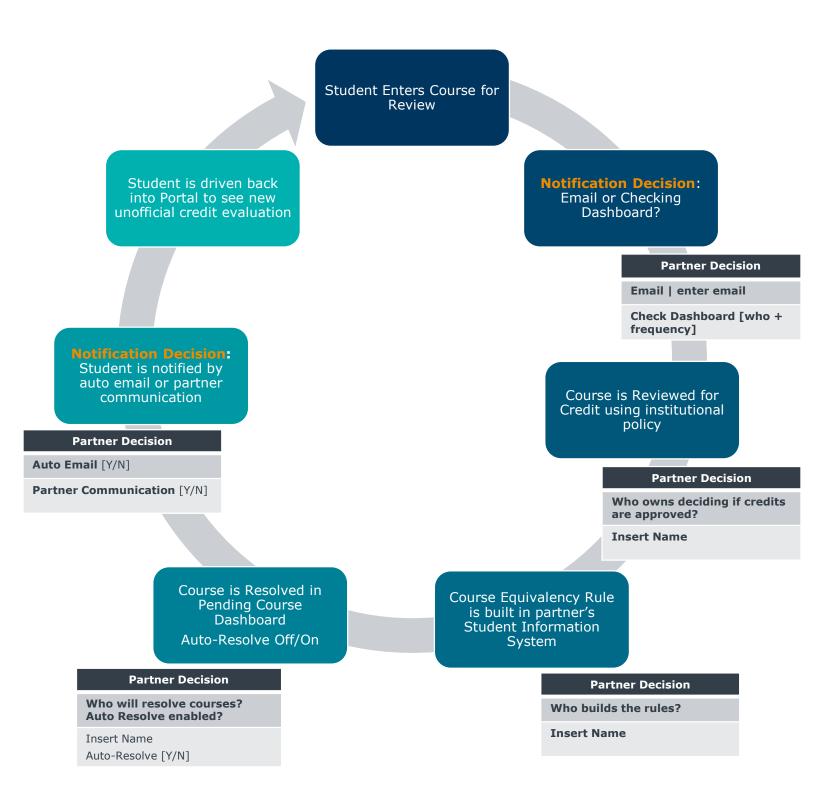eab.com

Edit Pending Course - Resolve

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

Pending Course Process and Decision Map

Document all decision in your Transfer Portal Planner

Student Enters Course for Review

Notification Decision: Email or Checking Dashboard?

Partner Decision
**Email	enter email**
Check Dashboard [who + frequency]

Course is Reviewed for Credit using institutional policy

Partner Decision
Who owns deciding if credits are approved?
Insert Name

Course Equivalency Rule is built in partner's Student Information System

Partner Decision
Who builds the rules?
Insert Name

Course is Resolved in Pending Course Dashboard
Auto-Resolve Off/On

Partner Decision
Who will resolve courses? Auto Resolve enabled?
Insert Name Auto-Resolve [Y/N]

Notification Decision: Student is notified by auto email or partner communication

Partner Decision
Auto Email [Y/N]
Partner Communication [Y/N]

Student is driven back into Portal to see new unofficial credit evaluation

Common Issues

Document all decision in your Transfer Portal Planner

	Situation	Workflow Decision
Student error	Student error inputting course code (ex: History130 instead of HIS130)	Review course normally -OR- Mark as Will not be Reviewed and request an updated pending course by student
	Student error inputting credit amount	Review course normally -OR- Mark as Will not be Reviewed and request an updated pending course by student
	Course entered for incorrect college code	Mark as Does not Receive Credit with note to student -OR- Mark as Will not be Reviewed and request an updated pending course by student
College List or Institutional Issue	Course entered from international college	*Depends on college clean up decision*
	Course from a school that doesn't exist	Mark as Does not Receive Credit with note to student -OR- Mark as Will not be Reviewed and send a separate email to student