Add, Edit, and Evaluate Transfer Credit for Student

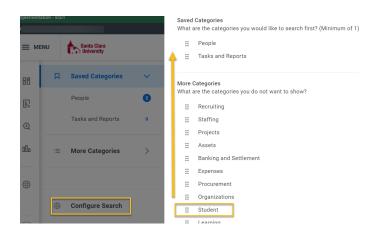


Overview

The purpose of this quick reference guide is to instruct you on how to Edit and Add a student's transfer credit in Workday. Please be aware this task is limited to those who have appropriate security.

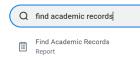
Process

1. First, you will search for a student record. The most convenient way to do this is to configure your search in Workday. On the *Search Page*, click on **Configure Search** drag **Student** up to the top.



NOTE: If the student has a preferred name that differs from the legal name, the preferred name will be prioritized in searches even if you search by the legal name.

You can also enter **Find Academic Records** into the **Search Bar** and press **Enter**. This report will allow you to locate the student and click directly to their profile.



- 2. In the search results, click the appropriate name to access the student **Profile**.
 - Enter the student's name in the **Search Bar** and press **Enter**.
- 3. From the **Student Profile**, click the **Academics** tab on the left Profile menu.

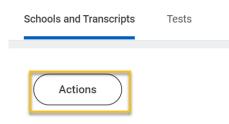


Entering Transfer Credit from an Institution

1. Click on **External Records** on the top tabs in the middle of the page.

CU STU Student Registrations	Transfer Credit	Plan	External Records	FERPA Information	More
Actions •				2	
Educational Institutions 1 item				×I = O	
Educational Institution		Attendances	Transcripts		
College Canyons		1	1	Add Transcript)

2. Click on the Actions button.



- 3. Click Add Student External Transcript.
- 4. Type in the **Educational Institution** name, then click **OK**.

Add Student External Transcript

Student *	× Brooklynn Whittley …	≔
Educational Institution *	Search	:=

NOTE: Enter at least 3 characters of each word.

- 5. Complete the **Add Student External Transcript** form by entering the following required information:
 - Academic Unit: Undergraduate will enter SCU.
 - Check the box labeled **Official**.
 - Enter the **Issued Date** the transcript was issued/printed.
 - Select a Transcript Type (Final when there are no in progress grades and In Progress if courses are in progress).
 - Select a Transcript Grading Scheme of 01.
 - Select the **Course History** tab to start entering course credit.

NOTE: Other fields are optional and may want to be captured for data purposes.

Add Student External Tr	anscript Brooklynn Whittley 🚥	
Academic Unit	★ X Santa Clara University	
Educational Institution	* West Valley College	
Official		
Self-Reported		
Issued Date	MM/DD/YYYY	
Received Date	MM/DD/YYYY	
Academic Start	MM/DD/YYYY	
Academic Exit	MM/DD/YYYY	
Educational Institution Attendance	:=	
Student External Transcript Designations	:=	
Туре	*	
Transcript Academic Level	:=	
Transcript Grading Scheme	:=	
Transcript URL		
Credentials Course History A	ttachment	
Credentials 0 items		

- 6. Click on the + symbol to add courses. Enter the following fields and click **OK**.
 - Course Start Date
 - Course ID
 - Course Title (if blank)
 - Course Units Earned
 - Course Unit Type (Semester or Quarter)
 - Course Units Attempted
 - Grading Scheme (01)
 - Grade
- 7. Review the data on the next screen and click **Done**.

\oplus	Course Start Date	*Course ID		Academic Area			Course Title
	01/02/2019 🖬	Ame	L 12 - African :≡ rican ature			:=	African-American Literati
ourse	History 1 item						
	History 1 item ng Scheme		Grade		Grade Points	Additional	I Course ID
			Grade			Additional	I Course ID

NOTE: Course Title, Course Unit Type, and Course Units Attempted may populate based on the Course ID selected if information for the course is in the catalog.

Edit Transfer Credit

- 1. Back on the student profile, you can edit the transfer credit, by clicking the number next to the Transcript and then **View Details.**
- 2. Hover over the magnifying glass icon and select the *Related Actions* button.
- 3. Click Student External Transcript and then Edit.

NOTE: Transcripts cannot be edited once they are articulated. Once articulated, make a copy of the transcript and enter an issued date more recent than the older transcript.

2 iten	ns						
Tran	Iscrip	ts	Official		Туре		
Q			Yes		Final		
٩		Actions			Student Ex	ःः ternal	Tran
ર		Student Externation	IS		dit Transcript opy Transcript	Frans	cript:
lo		Integration IDs	>	R	emove Transcript Educational Ins	titution	Colle
-					Transcript Type		Mid-'
ŝ					Official		No
					Issued Date		03/0

Initiate Transfer Credit Evaluation

1. To evaluate transfer and test credit after it has been added, go back to the student profile. Click the number under Transcripts and then **View Details.**

NOTE: Only official transcripts can be evaluated for transfer credit.

Sducational Institutions 1 item			ऱ ┉ ☶ ." 🎟
Educational Institution	Attendances	Transcripts	
College Canyons	1	1 -	View Details
Test Results 3 items			Export to Excel (All Columns) Export to PDF

- 2. Hover over the magnifying glass icon and select the *Related Actions* button.
- 3. Click Student External Transcript and then Initiate Transfer Credit Evaluation.

			0 0 0 0 0 0		
	Actions		Student External	Transcript	
	Student External Traps]	Copy Transcript Initiate Transfer Credit Evaluation	Cassidy Block	
	Integration IDs	>	Educational Institution	College Canyons	
			Transcript Type	Final	
E			Official	Yes	
f			Issued Date	09/01/2019	
d			Academic Start	(empty)	
4			Academic Exit	(empty)	
			Academic Exit	(empty)	

Cancel

4. Review the External Transcript record a final time and then click OK.

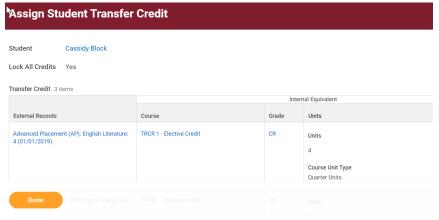
nitiat	e Transfer Credit Ev	aluatior	1								
Student Ex	cternal Transcript College Cany	yons - 09/01/2	019								
External Tra	anscript Records 3 items									ΞĒ	: I
Course Start Date	Course ID	Academic Area	Course Title	Course Designations	Course Units Earned	Earned Grade Points	Course Unit Type	Course Units Attempted	Grading Scheme	Grade	Grade Points
	HIST_111 - United States History I		United States History I		3	0		0		в	C
	HIST_112 - United States History II		United States History II		3	0		0		A	C
	POLISC_150 - Intro-Amer Government/Politics		Intro Amer Government/Politics		3	0		0		A	C

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- 5. Review the **Overall Transfer Credits** page. Once you are ready to assign credit, click the **Assign Student Transfer Credit** button on the button of the page.
- 6. On the Assign Student Transfer Credit page, choose the External Record type and click OK.

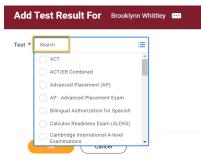
Student *			
External Records			
Official External Transcript		:=	
Create Official External Tran	nscript)	
Official External Education	Test Results		

 Review the following page to make sure the credit is assigned correctly and click **Done**. You can now go back to the student profile to review the assigned credit.



Add a Test Record

- 1. To add a test record, go back to the **External Records** page in the students profile.
- 2. Click on the Actions button and then select Add Test Result.
- 3. On the **Add Test For** screen, click in the **Test** box and scroll to choose the exam you wish to enter. You can also type the test name in this box and it will automatically populate.



- 4. Click **OK**.
- 5. Choose the **Academic Unit** the test score is being entered for and specify the **Test Date** of the test score.

It is optional to upload a copy of the test scores to the students account. To do so, click on the **Select Files** button or drag and drop files to the grayed out area.

Test	ACT		շիսյ	Received Date	MM/DD/YYYY
Academic Unit	*	≔	0		
Test Date	* MM/DD/YYYY				Drop files here
Test Administration Site		≔			or
Registrant ID					Select files

6. In the **Section Name** box select the test section type. Enter the test score and percentile as well.

1 item	
(+)	*Section Name
4	

- 7. Complete additional information, if applicable and click **OK**.
- 8. Verify that the test records you entered are correct on the Add **Test Result** screen. Click **Done**.

Test	ACT - 10/01/2020 for Brooklynn Whittley	Received Date	(empty)
Academic Unit	History Department	Updated Date	11/07/2022
Test Date	10/01/2020	Updated By	srichardson-scr / Sasah Richardson on behalf of 000000 Shenouda-Williams
Test Administration Site	(empty)		Shehouda-Williams 🖮
Registrant ID	(empty)		
Official	No		

- 1. To evaluate test credit after it has been added, go back to the student profile. Click the number under *Number of Attempts* and then **View Details.**
- 2. Hover over the magnifying glass icon and select the *Related Actions* button.
- 3. Click Student External Transcript and then Initiate Transfer Credit Evaluation.

Test Re	sult						
SAT - C	3/10/2018 for			000			×
SAT - 1	0/06/2018 for Cassidy Block	Actions		Test Result		×	PDF
		Test Result	Jhn -	Edit	idy Block		
		Favorite	~	Initiate Transfer Credit Eva			
	Student Santa Clara Univ			Delete			
	(Actions)	Integration IDs	>	Student Name Ca	ssidy Block		

4. Review the Initiate Credit Evaluation page and click OK.

Test Result SAT - 03/10/2018 for Cassidy Block 0	fficial 🔽			
Test Date 03/10/2018 3 items				
Section Name		Score	Percentile	Omission Co
Total		1280	0	
Evidence-Based Reading and Writing Section		660	0	
Math Section		620	0	

Initiate Test Credit Evaluation

- 5. Review the **Overall Transfer Credits** page. Once you are ready to assign credit, click the **Assign Student Transfer Credit** button on the button of the page.
- 6. On the Assign Student Transfer Credit page, choose the External Record type and click OK.

SAssign Student Transfer	r Credit			×
Student *	_	:=		
External Records				
Official External Transcript			:=	
Create Official External Trans	script			
Official External Education T	est Results			
OK Orrest				
OK Cancel	\supset			

7. Review the following page to make sure the credit is assigned correctly and click **Done**. You can now go back to the student profile to review the assigned credit.

Assign Student Transfer	Credit			
Student Cassidy Block				
Transfer Credit 3 items	Interr	Internal Equivalent		
External Records	Course	Grade	Units	
Advanced Placement (AP): English Literature: 4 (01/01/2019)	TRCR 1 - Elective Credit	CR	Units 4 Course Unit Type Quarter Units	
Done (AP): English Language:				