DocFinity User Guide

*Evaluating a Transfer Credit Course (DUS/DGS)*

**Table of Contents**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>To View Dept. Review Queue</td>
<td>2</td>
</tr>
<tr>
<td>To Open a Form</td>
<td>2</td>
</tr>
<tr>
<td>To Review a Syllabus</td>
<td>2</td>
</tr>
<tr>
<td>To Review External Credit Request Form</td>
<td>2</td>
</tr>
<tr>
<td>To Approve a Course</td>
<td>2</td>
</tr>
<tr>
<td>To Approve a Course with Multiple Evaluations</td>
<td>4</td>
</tr>
<tr>
<td>To Reject a Course</td>
<td>8</td>
</tr>
<tr>
<td>To Return a Course</td>
<td>11</td>
</tr>
<tr>
<td>Helpful Hints:</td>
<td>12</td>
</tr>
</tbody>
</table>
A step by step guide to Transfer Credit navigation

To View Dept. Review Queue

1. Log into DocFinity

![DocFinity screenshot](image)

To Open a Form

Select a course from the queue table. Using the wrench icon, open the form.

![Job Queue screenshot](image)

To Review a Syllabus

3. Click on the View attached syllabus task in the Tasks box. The syllabus will open
in the Document Viewer window. Click the icon to view the syllabus in the full screen. After reviewing the course syllabus, click the icon to close the Document Viewer.
To Review External Credit Request Form

4. Click on Review and evaluate external credit request to open the evaluation form in the Forms panel. To view the form in full screen, click the icon.

To Approve a Course

5. If the course should be awarded Vanderbilt credit, list your determination on the evaluation form. Type the subject area in the (Equivalent or Non Equivalent) Subject box. Click the down arrow on the Course box to select a course. Be sure to add the number of Vanderbilt hours the course should receive. Save Changes.
6. Click on **Choose next action for the request** in the Jobs panel. Select **Approve** as the next action for the request.

7. Once each task has been completed, select the wrench icon with the green check mark to complete the job.
To Approve a Course with Multiple Evaluations

8. If the course should be awarded Vanderbilt credit, but should receive credit for multiple courses, list your determination on the evaluation form.

9. If the course should receive both Equivalent and Non Equivalent credit, type the subject area in the Subject boxes. Click the down arrow on the Course box to select a course. Be sure to add the number of Vanderbilt hours the course should receive. Save.
10. If the course should receive multiple Equivalent credits enter the first course as you would normally (see step 6). Be sure to edit the number of Vanderbilt hours the course should receive. In the line below, enter the next course you wish to award credit for. Be sure to add the number of Vanderbilt hours the course should receive. **Save.**
11. Click on **Choose next action for the request** in the Jobs panel. Select **Approve** as the next action for the request.
12. Once each task has been completed, select the wrench icon with the green check mark to complete the job.
To Reject a Course

13. If no credit should be awarded for the course, do not enter any evaluation information. Scroll to the bottom of the form and click **Save Changes**.
14. Click on **Choose next action for the request** in the Jobs panel. Select **Reject** as the next action for the request.

15. If rejected, you will be prompted to enter a reject reason (e.g., this course should not be awarded Vanderbilt credit).
16. Once each task has been completed, select the wrench icon with the green check mark to complete the job.
**To Return a Course**

17. If the course needs to be evaluated by a different department, or if more information is needed to make a determination, please select **Return** as the next action for the request.

18. If returned, you will be prompted to enter a return reason (e.g., this course should be evaluated by a different department).
19. Once each task has been completed, select the wrench icon with the green check mark to complete the job.

<table>
<thead>
<tr>
<th>Complete</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>View attached syllabus</td>
</tr>
<tr>
<td>✔️</td>
<td>Review and evaluate external credit request</td>
</tr>
<tr>
<td>✔️</td>
<td>* Choose next action for the request</td>
</tr>
<tr>
<td>✔️</td>
<td>* Explain why request is being returned</td>
</tr>
</tbody>
</table>

**Helpful Hints:**
• Click the icon to exit out of a form without saving changes.

• When making your determination, a numerical value must always be displayed in order to save (e.g., 0, 3, etc.).
- To save the syllabus to your computer, right click in the Document Viewer and select Open as PDF. From there, you can save or print the pdf.

Please contact the YES Help Line at yes@vanderbilt.edu or 615-343-4306 if you have questions or need additional assistance.