



DocFinity User Guide

Evaluating a Transfer Credit Course (DUS/DGS)

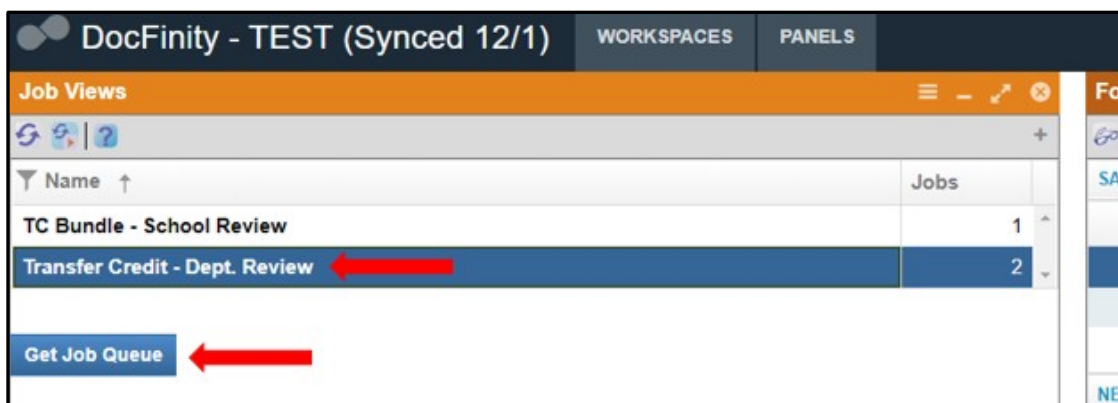
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A step by step guide to Transfer Credit navigation

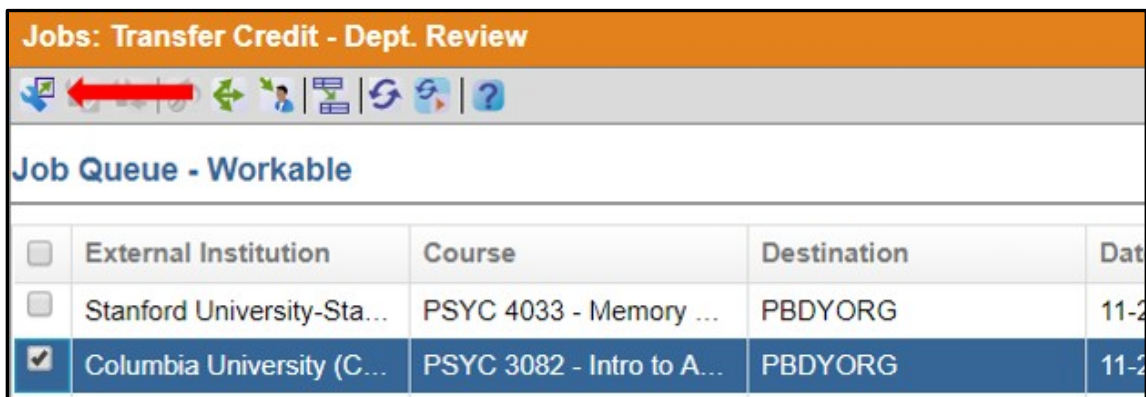
To View Dept. Review Queue

1. Log into [DocFinity](#)
2. Select **Transfer Credit – Dept. Review** from the **Job Views** queue list. Select **Get Job Queue**.





To Open a Form

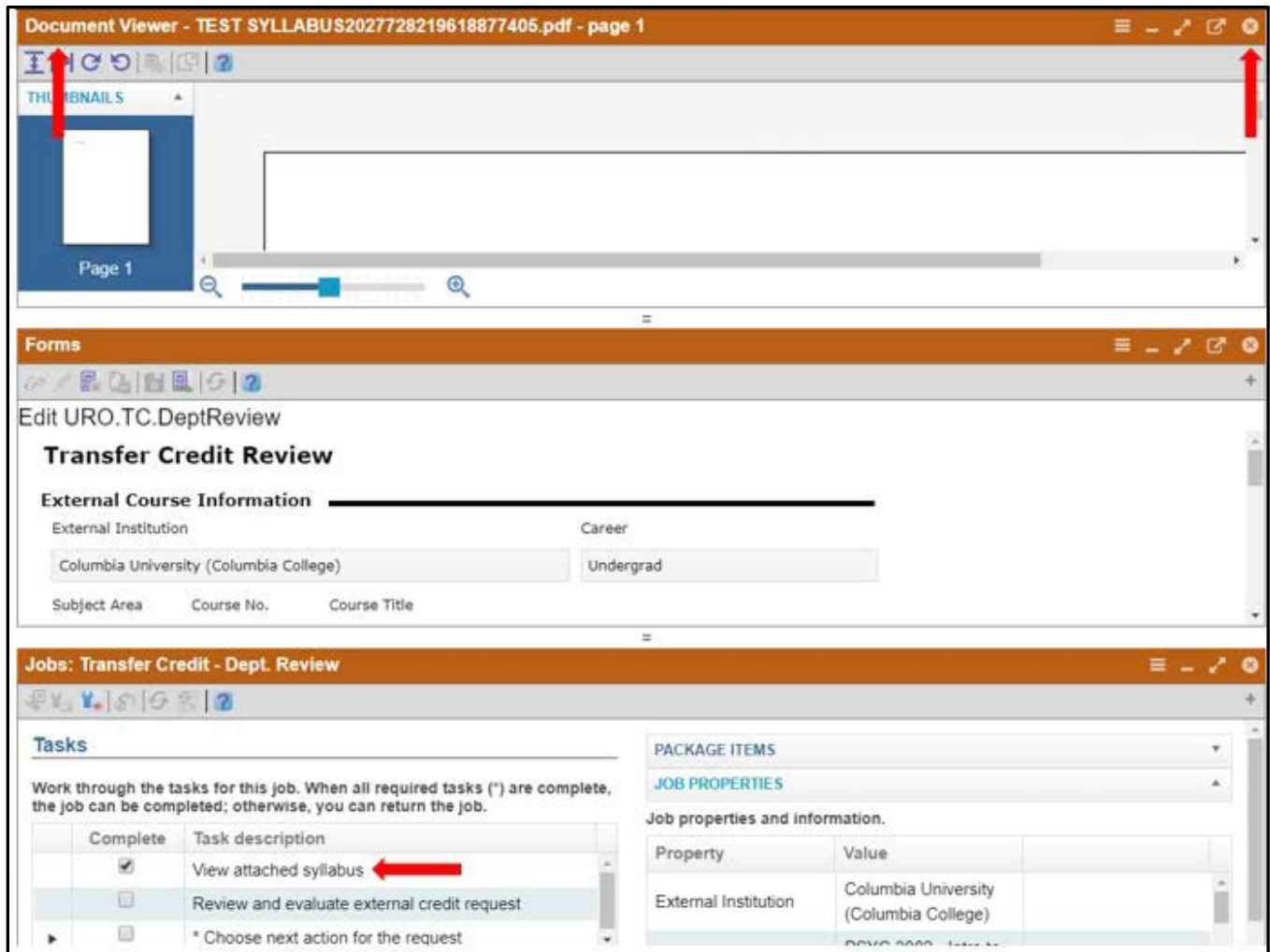
Select a course from the queue table. Using the wrench icon, open the form.



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.




The screenshot displays a web application interface with three main sections:

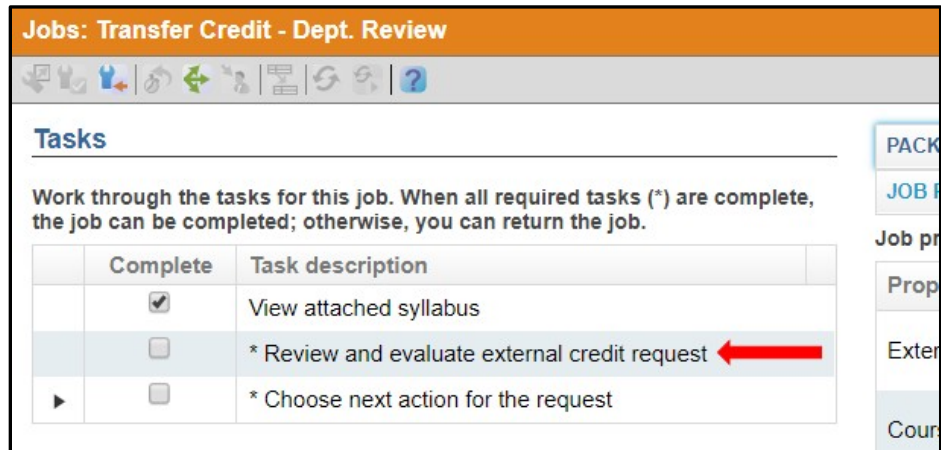
- Document Viewer - TEST SYLLABUS2027728219618877405.pdf - page 1**: This section at the top shows a PDF viewer with a toolbar on the left and a zoom slider at the bottom. Two red arrows point to the 'Full Screen' icon (top right) and the 'Close' icon (top left).
- Forms**: This section contains a form titled 'Edit URO.TC.DeptReview' with the sub-heading 'Transfer Credit Review'. It includes fields for 'External Institution' (Columbia University (Columbia College)) and 'Career' (Undergrad).
- Jobs: Transfer Credit - Dept. Review**: This section features a 'Tasks' table and a 'JOB PROPERTIES' table.

Complete	Task description
<input checked="" type="checkbox"/>	View attached syllabus 
<input type="checkbox"/>	Review and evaluate external credit request
<input type="checkbox"/>	* Choose next action for the request

Property	Value
External Institution	Columbia University (Columbia College)

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.



Jobs: Transfer Credit - Dept. Review

Tasks

Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.

	Complete	Task description
	<input checked="" type="checkbox"/>	View attached syllabus
	<input type="checkbox"/>	* Review and evaluate external credit request 
▶	<input type="checkbox"/>	* Choose next action for the request

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.**

Forms

Edit URO.TC.DeptReview

PSYC 3082 Intro to Abnormal Psychology

Course Term Course Year VU Credit Hours Exemption Reason

Spring 2012 3

Evaluate Course

	Subject	Course	Credit Hours
Equivalent	PSY	3100 - Abnormal Psychology	3
Multiple Courses			0
Non Equivalent		Select ...	0

Requirement Designation

Select ...

Apply

Extra Credit

Select ... 0

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.

Jobs: Transfer Credit - Dept. Review

Tasks

Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.

Complete	Task description
<input checked="" type="checkbox"/>	View attached syllabus
<input checked="" type="checkbox"/>	* Review and evaluate external credit request
<input checked="" type="checkbox"/>	* Choose next action for the request

PACKAGE ITEMS

JOB PROPERTIES

Job properties and information

Property

External Institution

Course

Destination

To Approve a Course with Multiple Evaluations

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

Next Action

Next Action

Select...

Select...

Approve ←

Reject

Return

Save Cancel

* Choose next action for the request

Forms

Edit URO.TC.DeptReview
Evaluate Course

	Subject	Course	Credit Hours
Equivalent	ECON	3650 - Development Economics	2
	Multiple Courses		Credit Hours
			0
Non Equivalent	ECON	2060 - Non-Equivalent Credit (ECON elective at the	1
		Requirement designation	
		Select...	
Extra Credit	Apply		Credit Hours
	Select...		0

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.**

Forms

Edit URO.TO DeptReview

Equivalent

Subject Area	Course Title	Credit Hours
CHEM	2221 - Organic Chemistry	3
CHEM 2221L		1

Non-Equivalent

Subject Area	Course Title	Credit Hours
	None available	0

Extra Credit

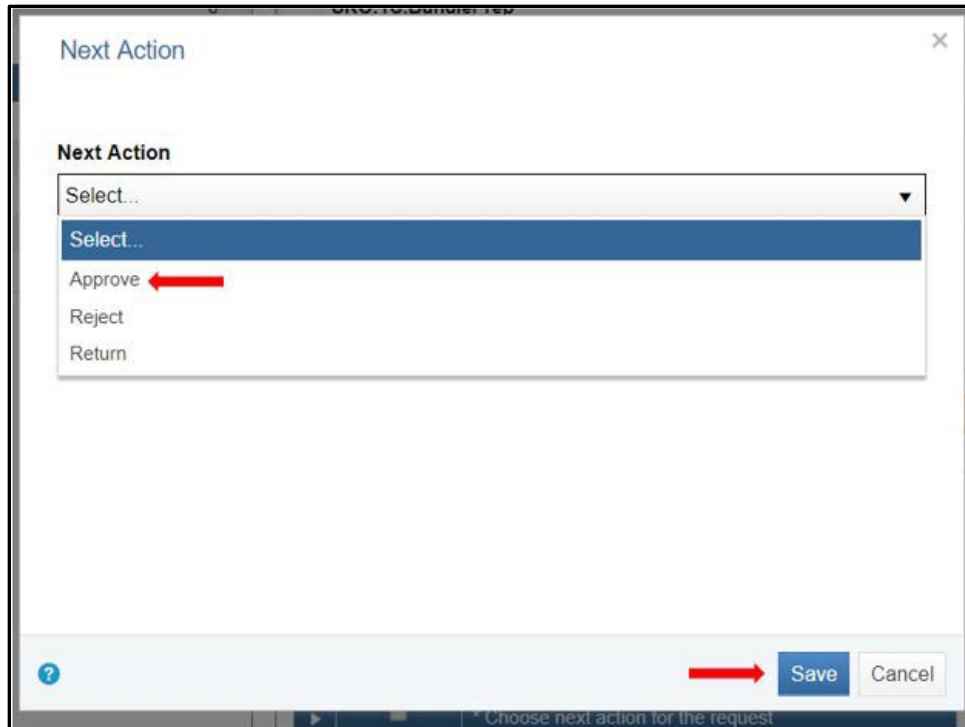
Extra Credit	Credit Hours
Select ...	0

Hours Difference Reason

Reject Reason

Save Changes

11. Click on **Choose next action for the request** in the Jobs panel. Select **Approve** as the next action for the request.



- Once each task has been completed, select the wrench icon with the green check mark to complete the job.

Jobs: Transfer Credit - Dept. Review

Tasks

Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.

Complete	Task description
<input checked="" type="checkbox"/>	View attached syllabus
<input checked="" type="checkbox"/>	* Review and evaluate external credit request
<input checked="" type="checkbox"/>	* Choose next action for the request

PACKAGE ITEMS
JOB PROPERTIES

Job properties and information

Property

External Institution

Course

Destination

To Reject a Course

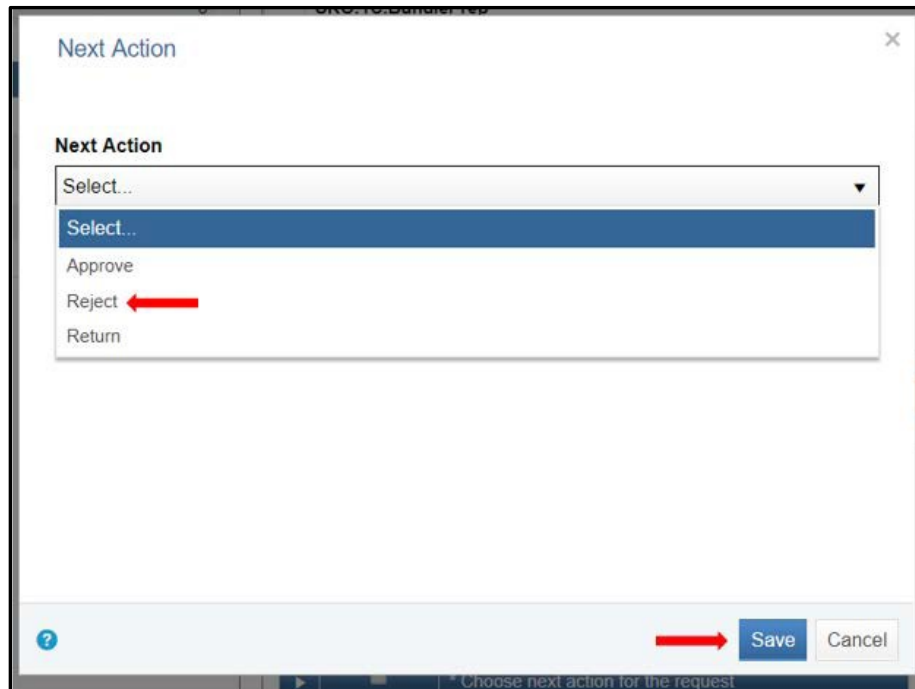
13. If no credit should be awarded for the course, do not enter any evaluation information. Scroll to the bottom of the form and click **Save Changes**.

The screenshot shows a web form titled "Forms" with a sub-header "Edit URO.TC.DeptReview" and "Evaluate Course". The form is divided into four main sections, each with a "Credit Hours" field set to "0":

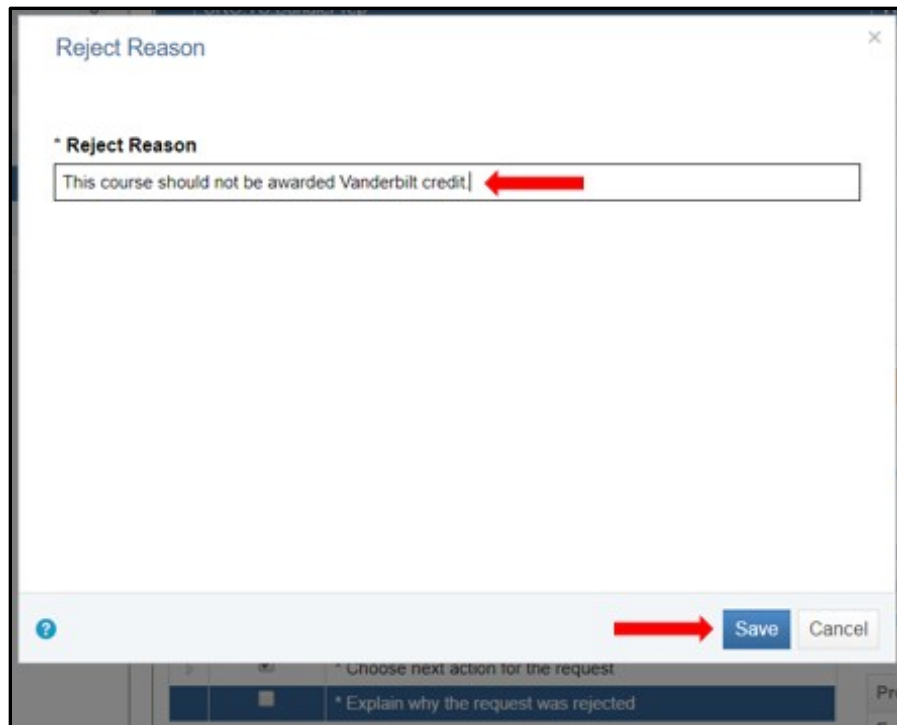
- Equivalent:** Includes a "Subject" input field and a "Course" dropdown menu currently set to "None available".
- Multiple Courses:** Includes a text input field for listing multiple courses.
- Non Equivalent:** Includes a "Subject" input field, a "Course" dropdown menu set to "None available", and a "Requirement Designation" dropdown menu set to "Select...".
- Extra Credit:** Includes an "Apply" dropdown menu set to "Select..." and a "Credit Hours" field set to "0".

At the bottom left of the form, there is a "Save" button with a red arrow pointing to it from the right.

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.

Jobs: Transfer Credit - Dept. Review

Tasks

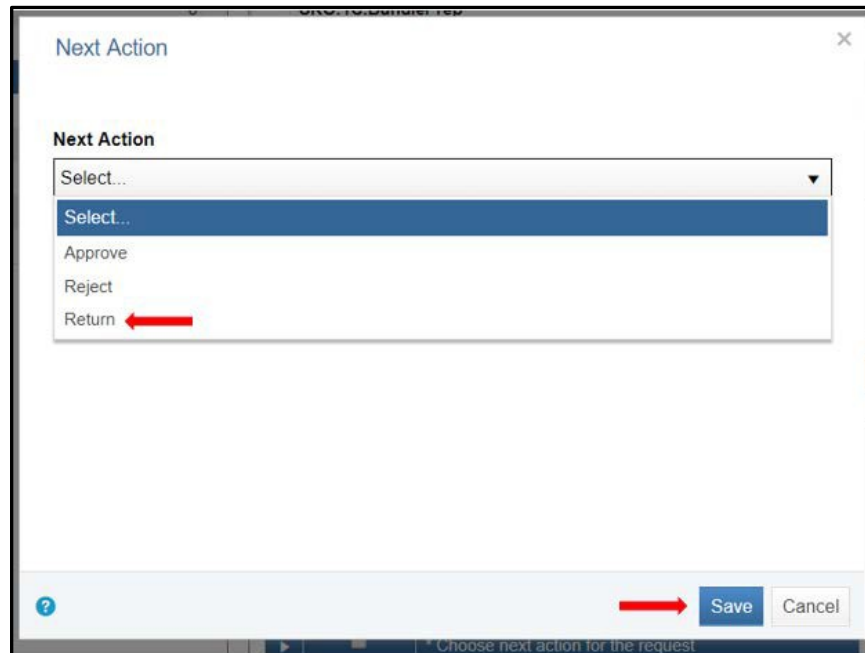
Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.

Complete	Task description
<input checked="" type="checkbox"/>	View attached syllabus
<input checked="" type="checkbox"/>	* Review and evaluate external credit request
<input checked="" type="checkbox"/>	* Choose next action for the request
<input checked="" type="checkbox"/>	* Explain why the request is being rejected

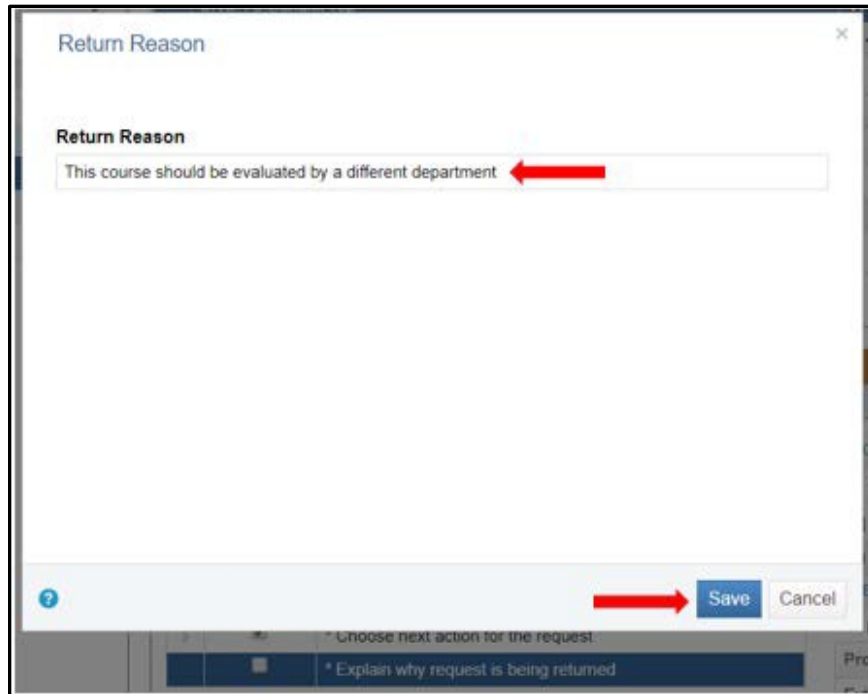
Job properties: PACKAGE IT, JOB PROPER, Property, External Ins, Course, Destination, Date Submi

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).



- Once each task has been completed, select the wrench icon with the green check mark to complete the job.

Jobs: Transfer Credit - Dept. Review


Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.

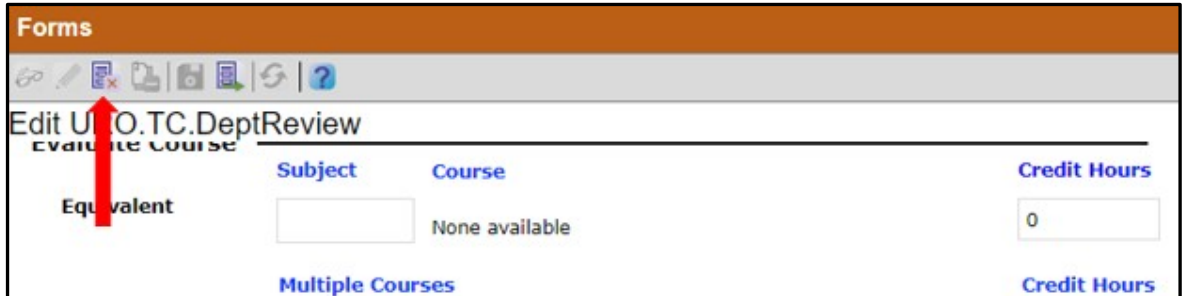
Complete	Task description
<input checked="" type="checkbox"/>	View attached syllabus
<input checked="" type="checkbox"/>	Review and evaluate external credit request
<input checked="" type="checkbox"/>	* Choose next action for the request
<input checked="" type="checkbox"/>	* Explain why request is being returned

Job properties

- Property
- External Insti
- Course
- Destination
- Date Submitt

Helpful Hints:

- Click the  icon to exit out of a form without saving changes.

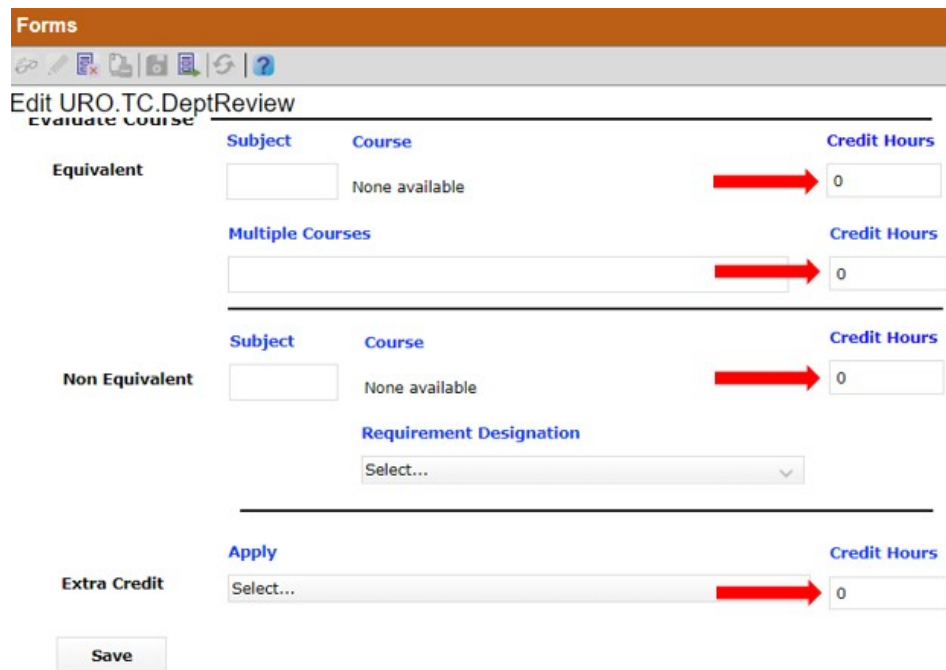


Forms

Edit URO.TC.DeptReview
Evaluate Course

	Subject	Course	Credit Hours
Equivalent	<input type="text"/>	None available	<input type="text" value="0"/>
Multiple Courses			Credit Hours

- When making your determination, a numerical value must always be displayed in order to save (e.g., 0, 3, etc.).



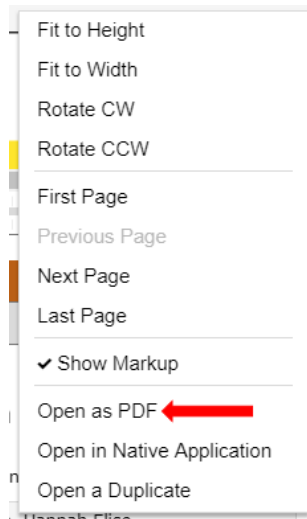
Forms

Edit URO.TC.DeptReview
Evaluate Course

	Subject	Course	Credit Hours
Equivalent	<input type="text"/>	None available	<input type="text" value="0"/>
Multiple Courses			Credit Hours
<input type="text"/>			<input type="text" value="0"/>
Non Equivalent	<input type="text"/>	None available	<input type="text" value="0"/>
Requirement Designation			
Select...			
Extra Credit	Apply		Credit Hours
Select...		<input type="text" value="0"/>	

Save

- 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.