



Routing a Transfer Credit Course (OAS) DocFinity User Guide

An OAS user guide for processing a transfer credit request.

User Guide: Routing a Transfer Credit Course (OAS) - Docfinity

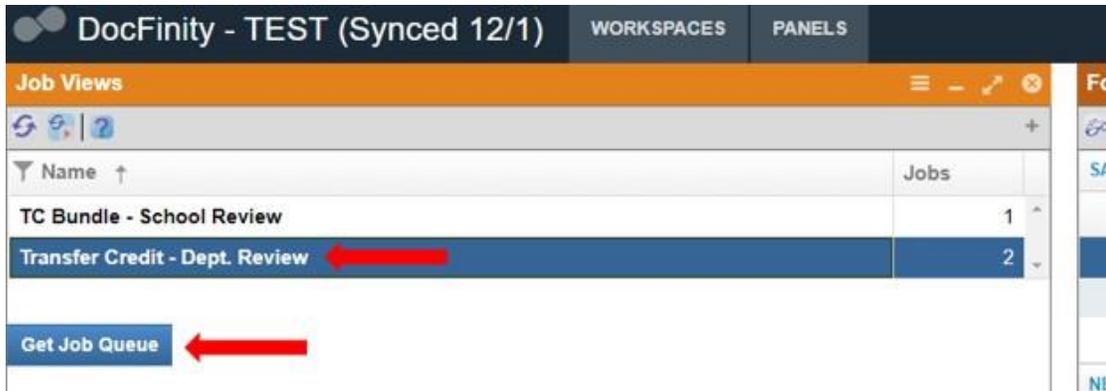
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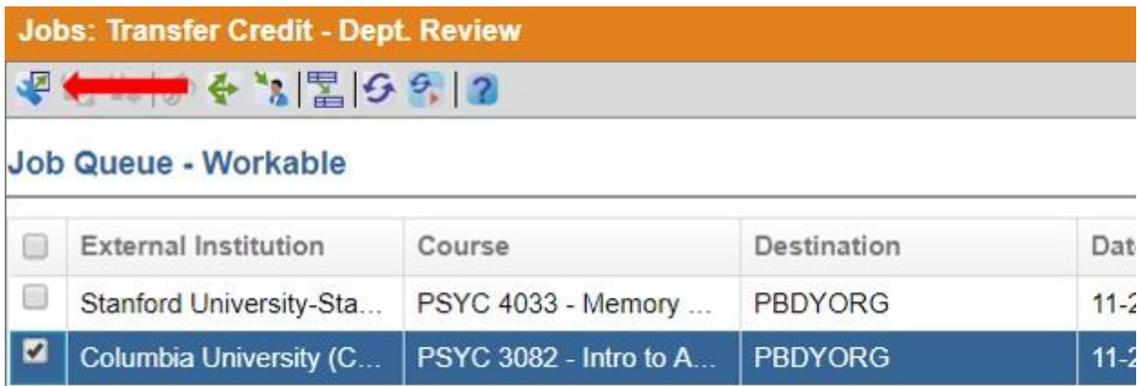
To View Dept. Review Queue

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



To Open a Form

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



To Review a Syllabus

4. 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**.

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The screenshot displays the Docfinity interface with three main sections:

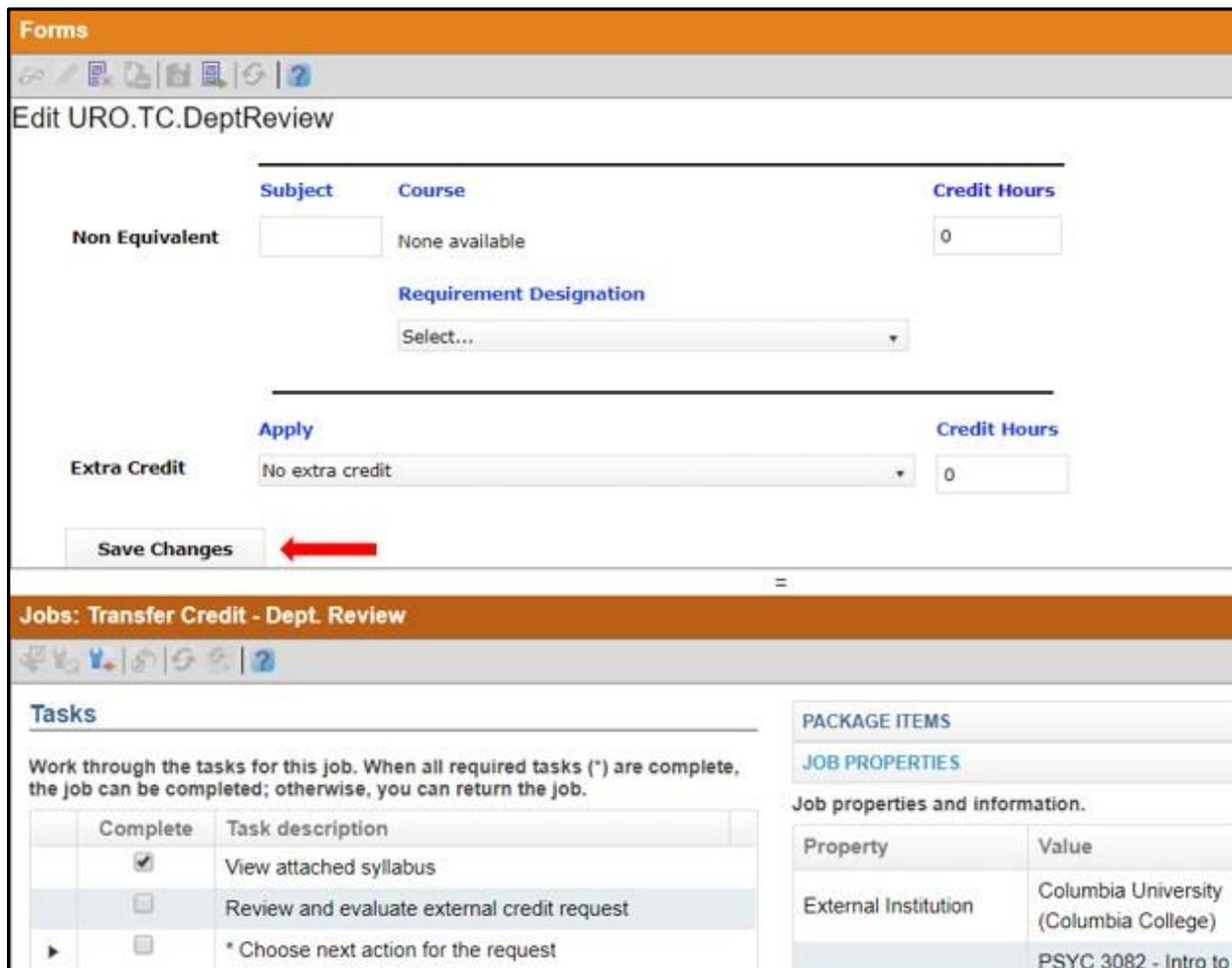
- Document Viewer:** Shows a PDF document titled "TEST SYLLABUS2027728219618877405.pdf - page 1". A thumbnail of the document is visible on the left, and a red arrow points to the top toolbar.
- Forms:** Displays the "Edit URO.TC.DeptReview" form, titled "Transfer Credit Review". It includes fields for "External Institution" (Columbia University (Columbia College)) and "Career" (Undergrad).
- Jobs: Transfer Credit - Dept. Review:** Shows a "Tasks" section with a list of tasks. A red arrow points to the "View attached syllabus" task, which is marked as complete. To the right, there is a "JOB PROPERTIES" section with a table of job properties and information.

Property	Value
External Institution	Columbia University (Columbia College)

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To Determine Department Destination

5. 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.
6. Review the External Course Information to determine to which department to send the course for evaluation. Do not enter any evaluation information at this time. Scroll to the bottom of the form and click **Save Changes**.



The screenshot shows two panels from a software interface. The top panel, titled "Forms", contains the "Edit URO.TC.DeptReview" form. It has two main sections: "Non Equivalent" and "Extra Credit".

Non Equivalent Section:

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

Below this is a "Requirement Designation" dropdown menu with "Select..." as the current selection.

Extra Credit Section:

Apply	Credit Hours
<input type="text" value="No extra credit"/>	<input type="text" value="0"/>

At the bottom of the form is a "Save Changes" button with a red arrow pointing to it.

The bottom panel, titled "Jobs: Transfer Credit - Dept. Review", contains a "Tasks" table and a "JOB PROPERTIES" table.

Tasks 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

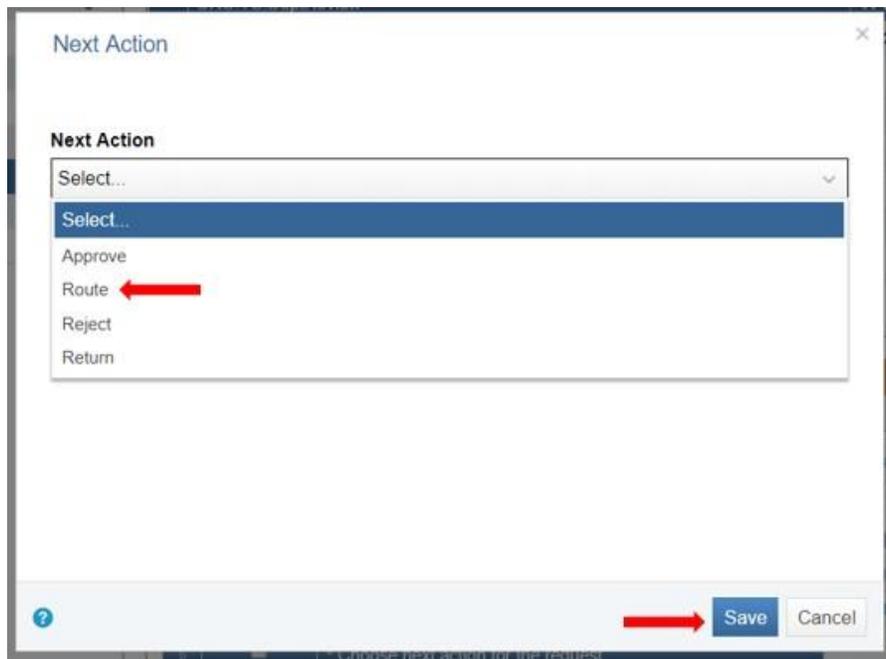
JOB PROPERTIES Table:

Property	Value
External Institution	Columbia University (Columbia College)
	PSYC 3082 - Intro to

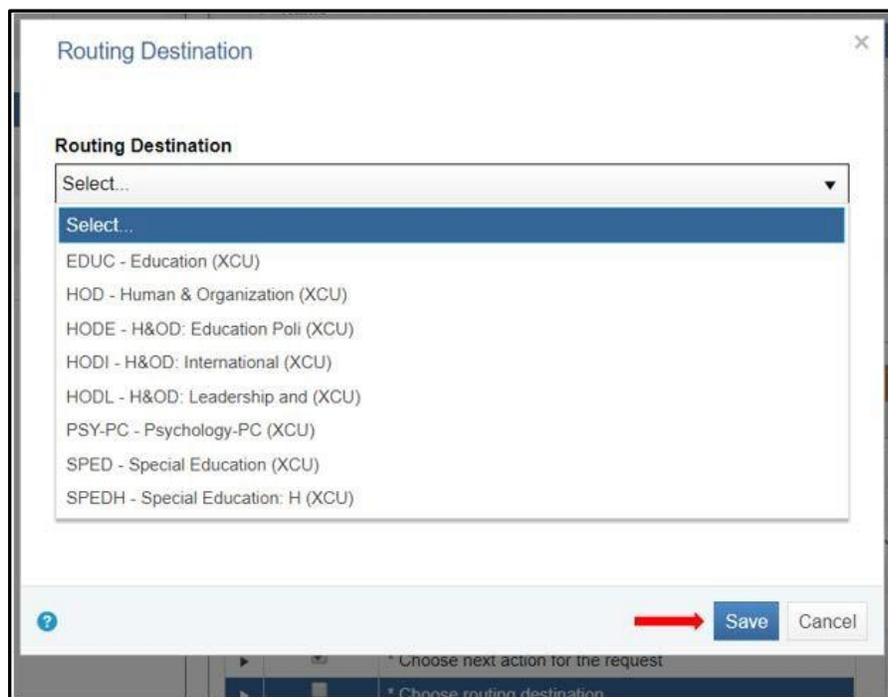
To Route a Course

7. Click on **Choose next action for the request** in the Jobs panel. If Vanderbilt credit is appropriate, please select **Route** as the next action for the request.

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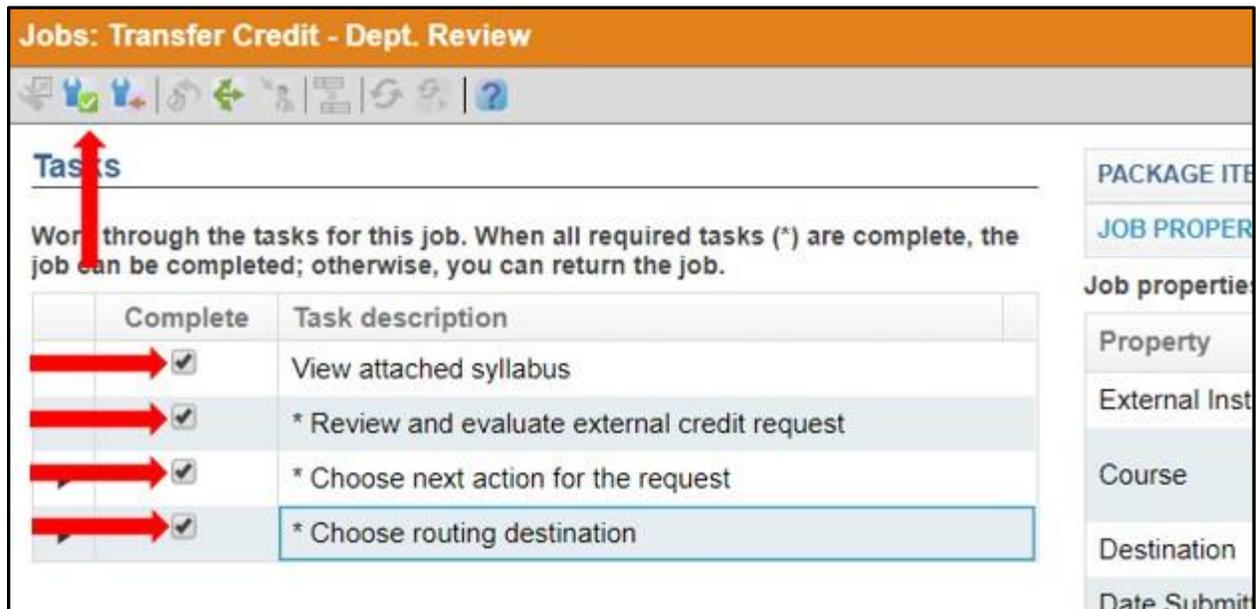


8. Click on **Choose routing destination** to select the most fitting department for the course as the routing destination.



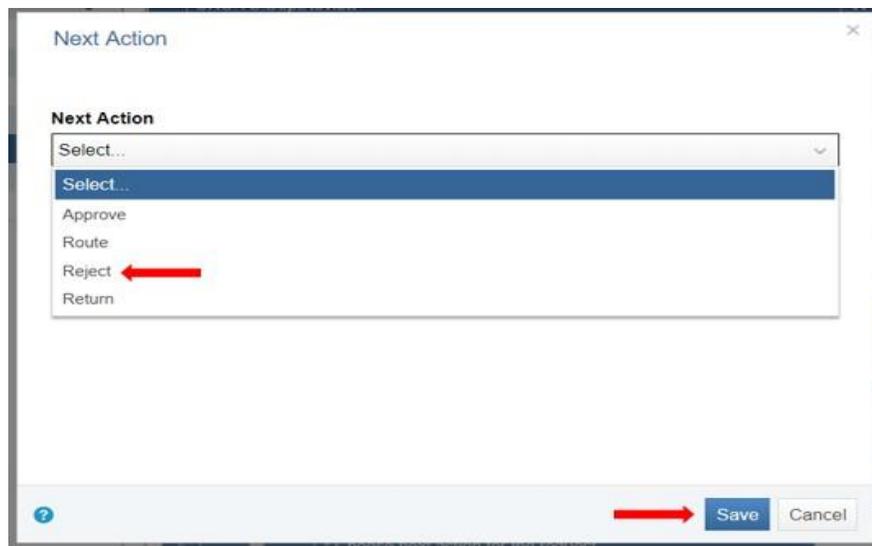
9. Once each task has been completed, select the wrench icon with the green check mark to complete the job.

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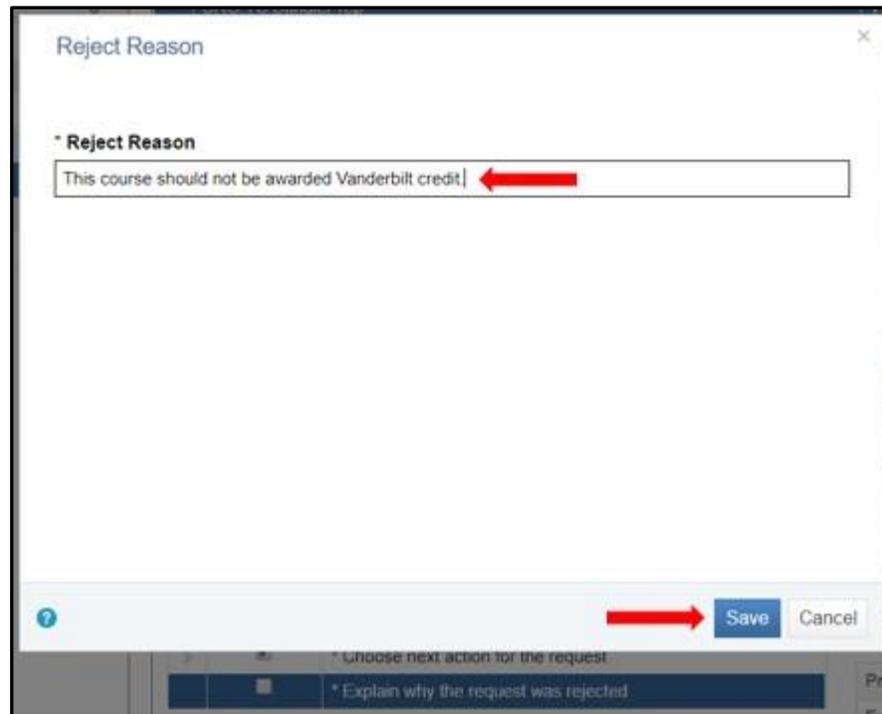


To Reject a Course

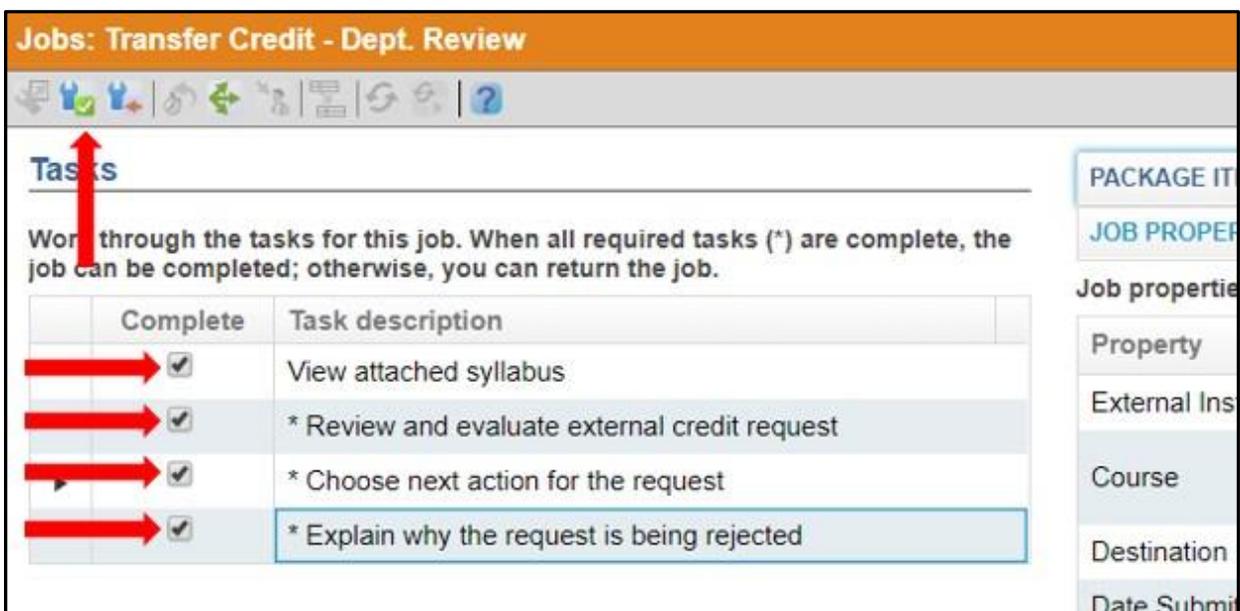
10. If no credit should be awarded for the course, please select **Reject** as the next action for the request. If rejected, you will be prompted to enter a reject reason (e.g., this course should not be awarded Vanderbilt credit).



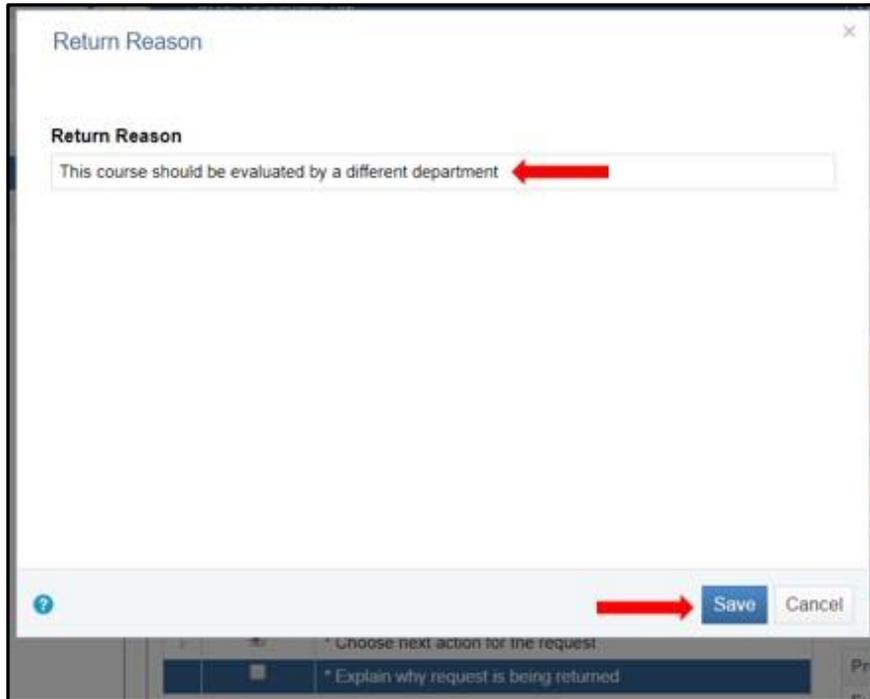
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11. Once each task has been completed, select the wrench icon with the green check mark to complete the job.

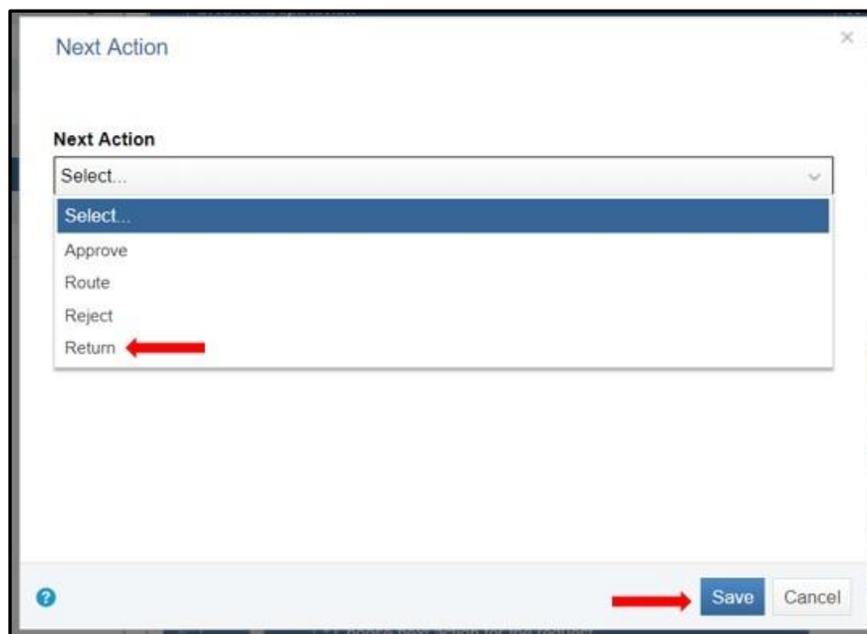


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To Return a Course

12. 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. If returned, you will be prompted to enter a return reason (e.g., this course should be evaluated by a different department).



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13. 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

To Approve a Course

14. If the course should be given GNEL credit, list your determination on the evaluation form. Type the subject area (e.g., GNEL) in the **Non Equivalent Subject** box. Click the down arrow on the **Course** box to select 2000. Be sure to add the number of Vanderbilt hours the course should receive. **Save Changes.**

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Forms

Edit URO.TC.DeptReview

Spring 2012 3

Evaluate Course

	Subject	Course	Credit Hours
Equivalent		None available	
Multiple Courses			0
Non Equivalent	GNEL	2000 - No Equivalent: Not eligible for credit toward th	3
		Requirement Designation: Select...	
Extra Credit	Apply: No extra credit		0

Save Changes

15. Select **Approve** as the next action for the request.

Next Action

Next Action

Select...

Select...

Approve

Route

Reject

Return

Save Cancel

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

The screenshot shows the 'Jobs: Transfer Credit - Dept. Review' interface. At the top, there is a toolbar with various icons. Below the toolbar is a 'Tasks' section with a red arrow pointing to the 'Tasks' header. The text below the header reads: 'Work through the tasks for this job. When all required tasks (*) are complete, the job can be completed; otherwise, you can return the job.' Below this is a table with three rows, each with a 'Complete' checkbox and a 'Task description'. All three checkboxes are checked, and red arrows point to each. The tasks are: 'View attached syllabus', '* Review and evaluate external credit request', and '* Choose next action for the request'. To the right of the table is a sidebar titled 'Job properties and information' with sections for 'PACKAGE ITEMS', 'JOB PROPERTIES', and 'Job properties and information'. The 'Job properties and information' section includes fields for 'Property', 'External Institution', 'Course', and 'Destination'.

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

To Review an Evaluation

17. After a department has reviewed a course, it will be returned to your queue.
18. Open the form.

The screenshot shows the 'Jobs: Transfer Credit - Dept. Review' interface. At the top, there is a toolbar with various icons. Below the toolbar is a 'Job Queue - Workable' section. Below this is a table with four columns: 'External Institution', 'Course', 'Destination', and 'Date'. The table has three rows. The first row is 'Stanford University-Sta...' with course 'PSYC 4033 - Memory ...' and destination 'PBDYORG'. The second row is 'Columbia University (C...' with course 'PSYC 3082 - Intro to A...' and destination 'PBDYORG'. The third row is partially visible. The second row is selected, and a red arrow points to the 'Return to Queue' icon in the toolbar above the table.

External Institution	Course	Destination	Date
Stanford University-Sta...	PSYC 4033 - Memory ...	PBDYORG	11-2
Columbia University (C...	PSYC 3082 - Intro to A...	PBDYORG	11-2

19. If the department has assigned credit, review the form to see the determination made, then **Save Changes**.

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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		Credit Hours
	<input type="text"/>		0

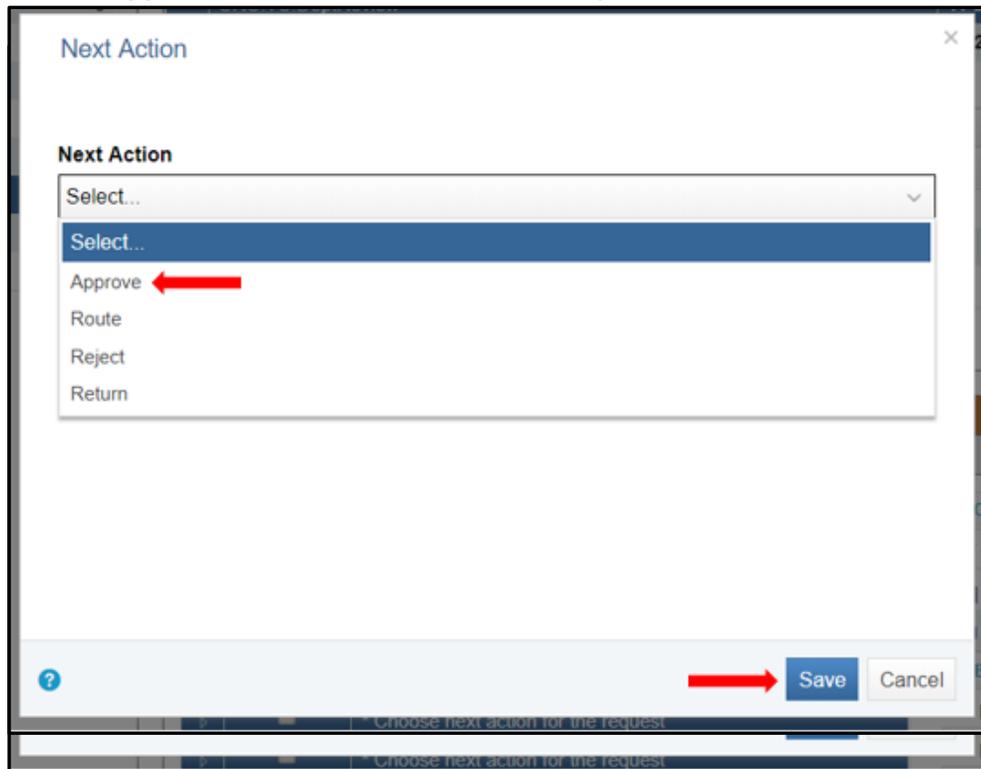
	Subject	Course	Credit Hours
Non Equivalent	<input type="text"/>	Select ...	0
		Requirement Designation	
		Select ...	

	Apply	Credit Hours
Extra Credit	Select ...	0

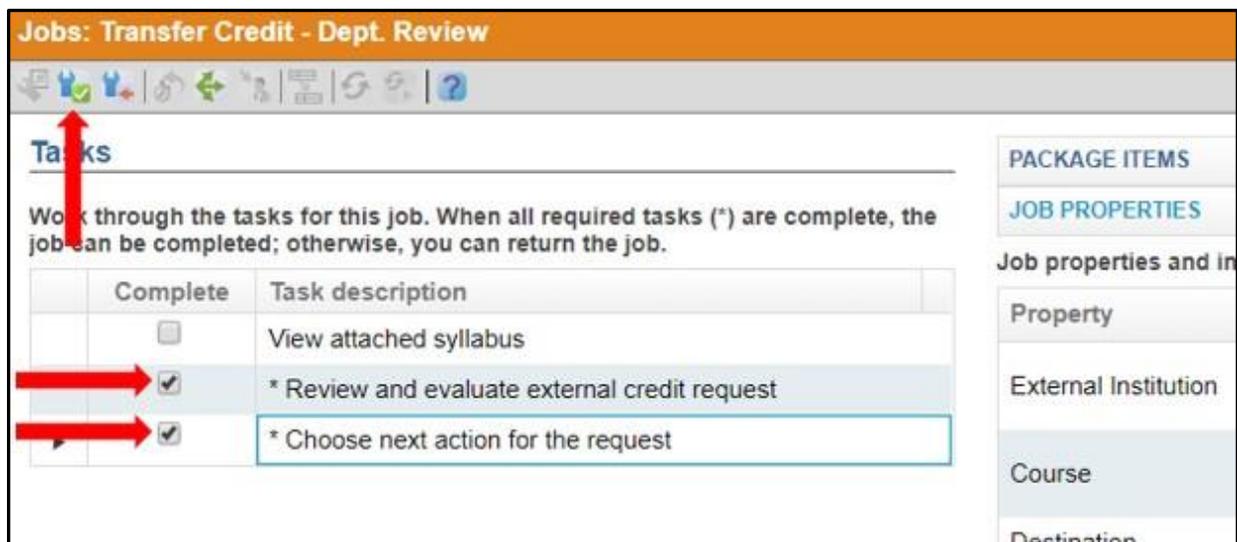
Save Changes ←

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- a. Select **Approve** as the next action for the request.



- b. Once each required (designated by asterisk) task has been completed, select the wrench icon with the green check mark to complete the job.



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1. If the department has rejected the course, review the rejection reason pop-up and select **Save**.

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	
		<input type="text" value="Select..."/>	
Extra Credit	Apply		Credit Hours
	<input type="text" value="Select..."/>		<input type="text" value="0"/>

←

- c. Review the form to ensure no determination has been made, scroll down and select **Save Changes**.

Rejected Request

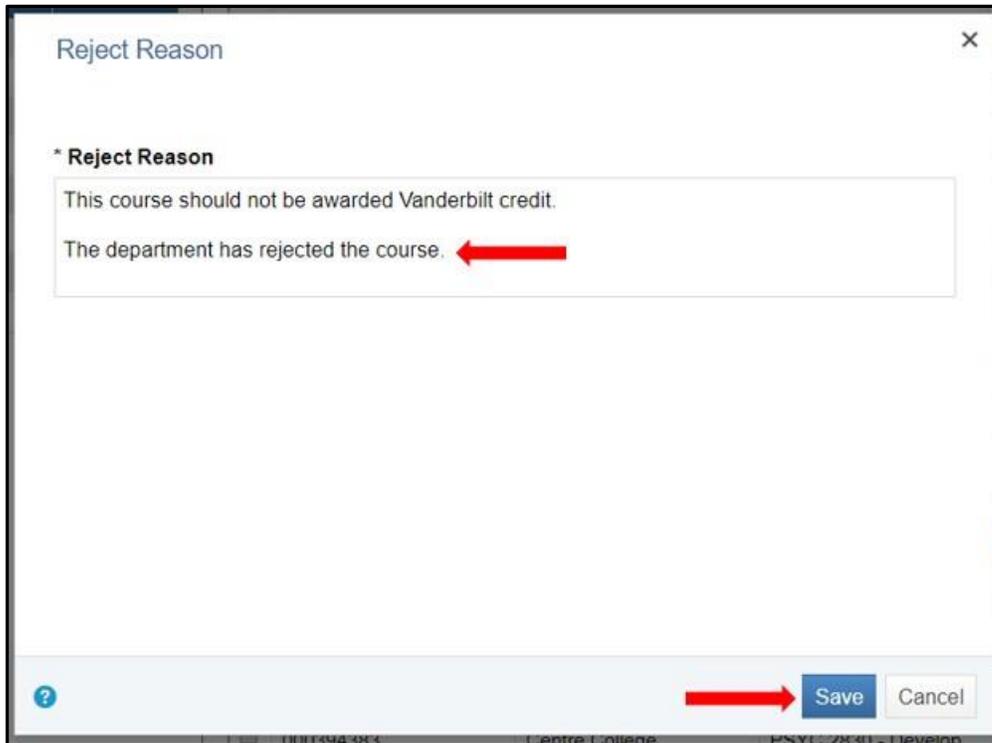
Note
This request was rejected during an earlier course evaluation review.

Request Reject Reason
This course should not be awarded Vanderbilt credit.

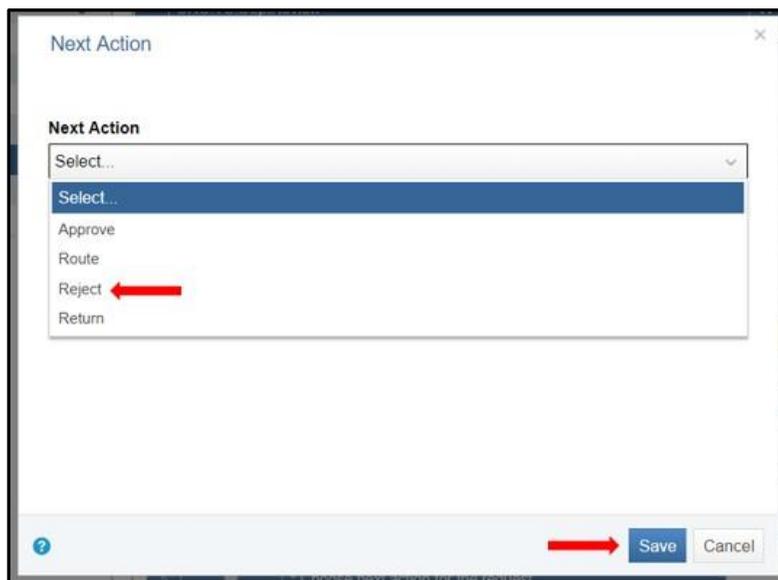
* Review and evaluate external credit request

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- d. Select **Reject** as the next action for the request.

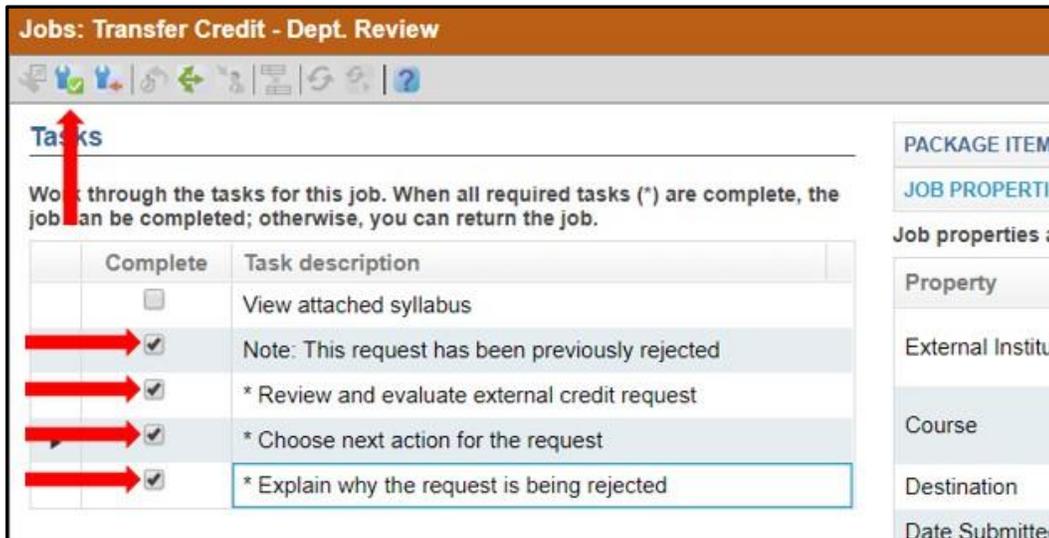


- e. You will be prompted to view the rejection reason again and add any comments of your own (e.g., the department has rejected the course). **Save.**

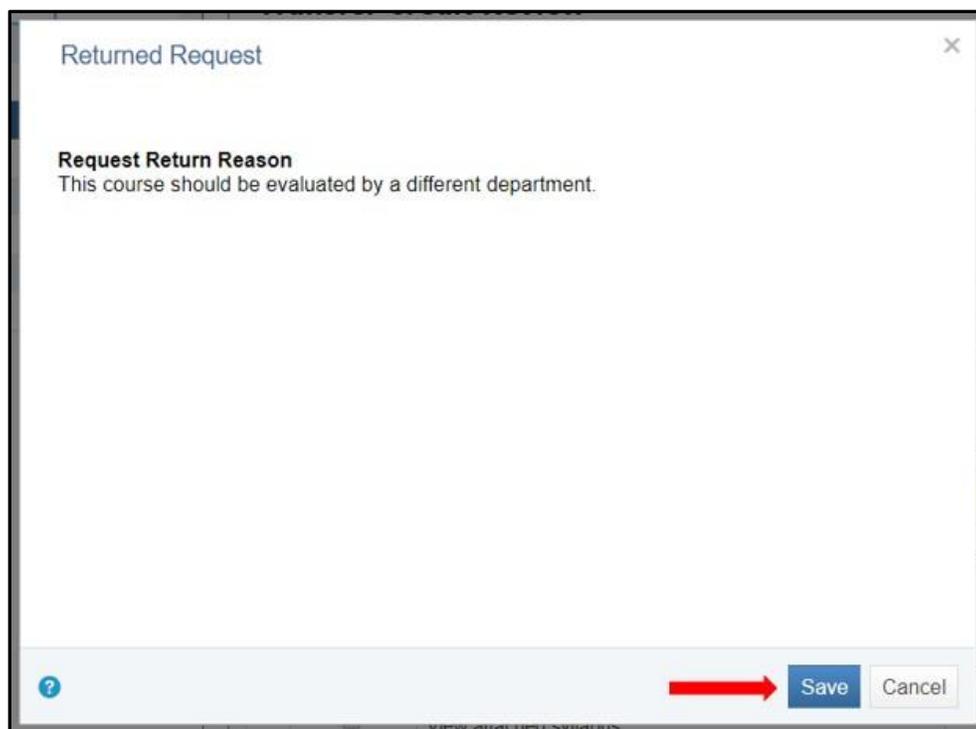


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- f. Once each required (designated by asterisk) task has been completed, select the wrench icon with the green check mark to complete the job.



- 2. If the department has returned the course, review the return reason pop-up and select **Save**.



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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	
		<input type="text" value="Select..."/>	
Extra Credit	Apply	Credit Hours	
	<input type="text" value="Select..."/>	<input type="text" value="0"/>	

←

3. Review the form to ensure no determination has been made, scroll down and select **Save Changes**.
4. Select **Route** as the next action for the request.

Next Action

Next Action

Select...

Select...

Approve

Route ←

Reject

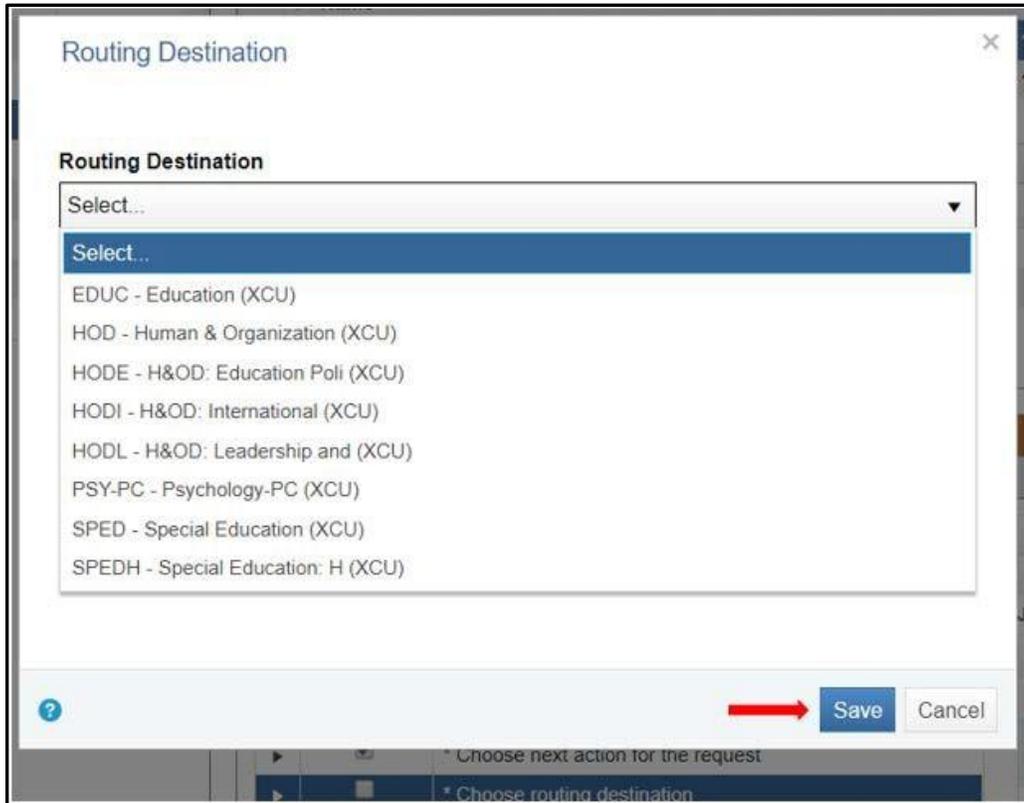
Return

Save Cancel

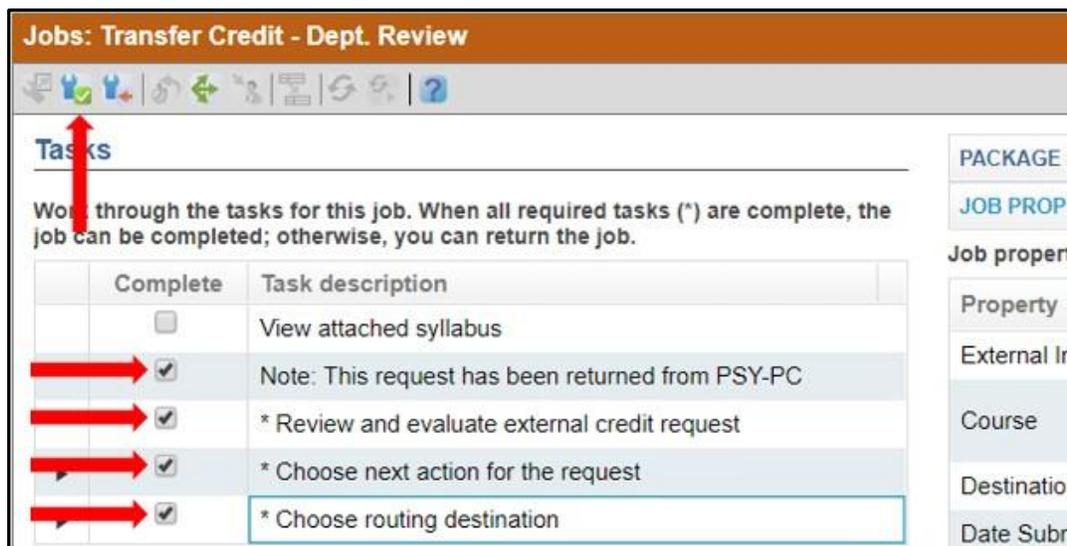
CHOOSE next action for the request

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5. Select a different department to route the course to.



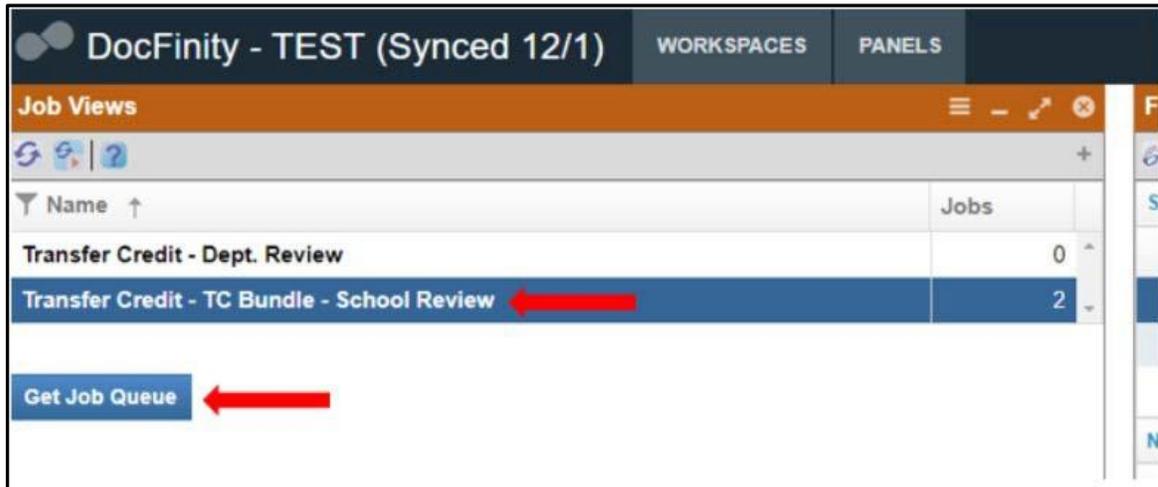
6. Once each task has been completed, select the wrench icon with the green check mark to complete the job.



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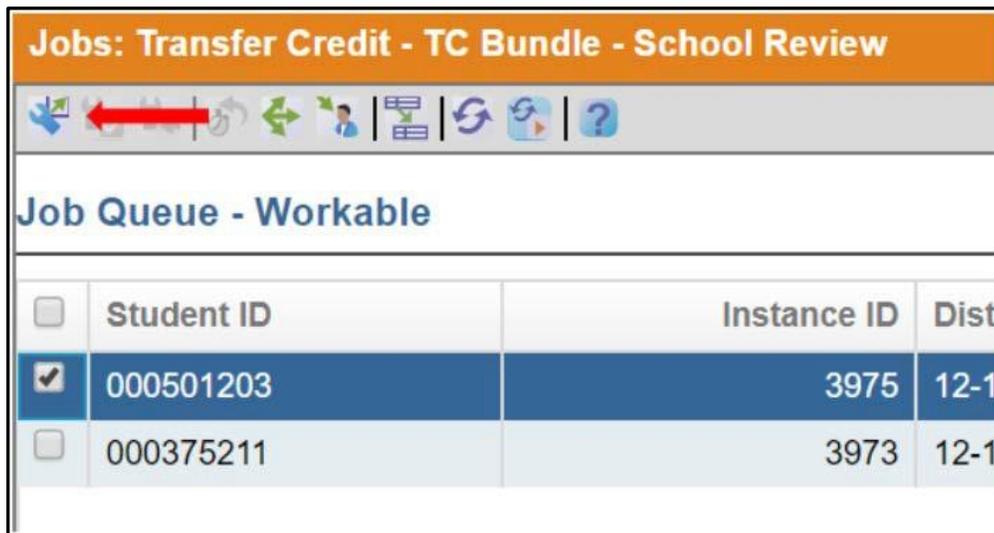
To View Bundle Queue

7. Select **Transfer Credit – TC Bundle – School Review** from the **Job Views** queue list. Select **Get Job Queue**.



To Open a Bundle

8. Select a bundle from the queue table. Using the wrench icon, open the bundle.



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To Review a Bundle

9. Open the Transfer Credit Request form and review the data provided. At the top of the form, enter the required information for **Academic Standing**, **Academic Level**, **Expected Grad Term**, and **Apply Credit Term**.

000501203 Fogel, Leah

Academic Standing Expected Grad Term

Academic Level Apply Credit Term

Institution	Term	Ext. Course No.	Ext. Course Title	VU Course No.	Hours Transferred	Count to GPA?
Syracuse University	Fall 2015	BIOL 2082	Biology of Animals	BSCI 2219	3	N
Syracuse University	Fall 2015	BIOL 2500	Evolution & The Modern World	BSCI 2205	2	N
				BSCI 2000	1	N
Syracuse University	Fall 2015	CMST 2700	Introduction to Basket Weaving	Rejected		
Syracuse University	Fall 2015	PSYC 3313	Psychology of Language	PSY-PC 3140	3	N

10. Once all the information has been entered, **Save Changes**.

Syracuse University Fall 2015 CMST 2700 Introduction to Basket Weaving Rejected

Syracuse University Fall 2015 PSYC 3313 Psychology of Language PSY-PC 3140 3 N

Courses on Request

- Syracuse University BIOL 2082 Biology of Animals
- Syracuse University BIOL 2500 Evolution & The Mo
- Syracuse University CMST 2700 Introduction to Ba
- Syracuse University PSYC 3313 Psychology of Lang

External Course Info

Institution	Term	Ext. Course No.	Ext. Course Title	Equiv.
Syracuse University	Fall 2015	BIOL 2082	Biology of Animals	3

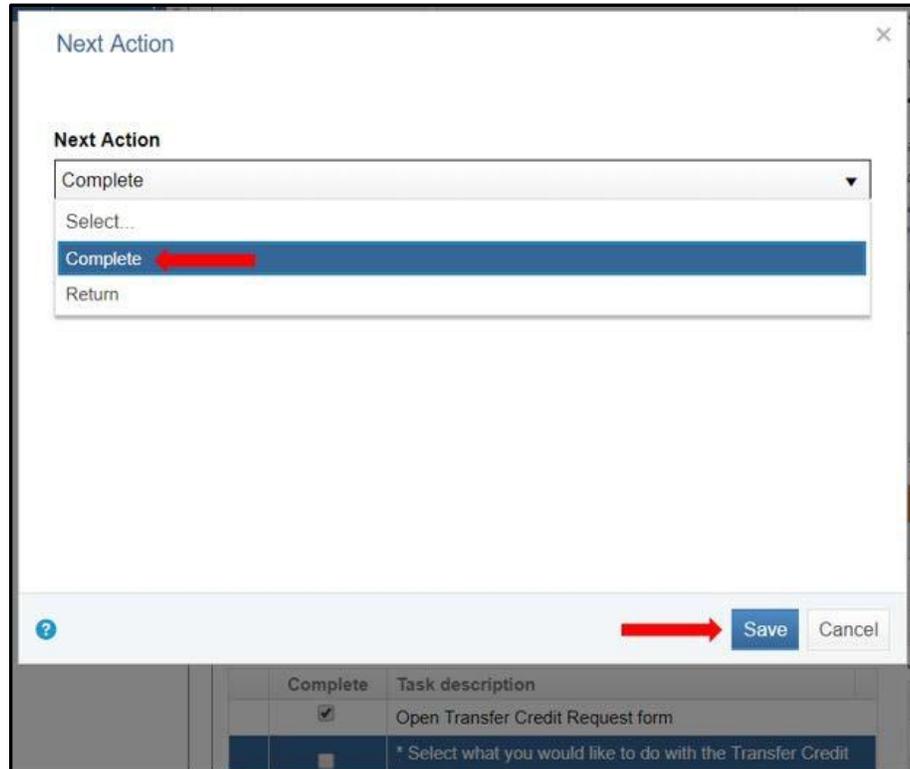
Equivalent Courses

Subject	* Course	Hours	* Count to GPA	* Grade	Requir
BSCI	2219 - Introduction to Zoology	3	N	T	Select

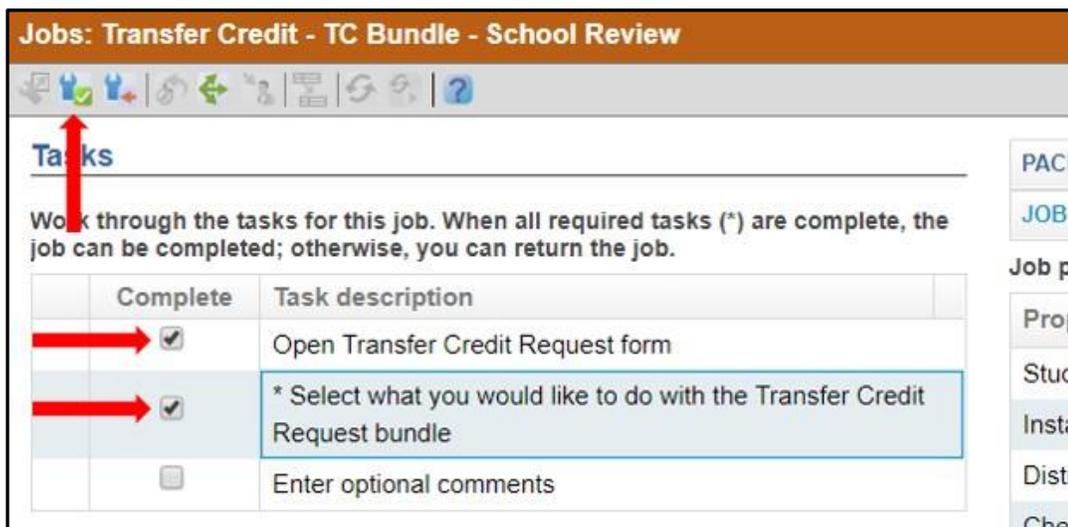
Save Changes

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11. Select **Complete** as the next step for the Transfer Credit Request Bundle.



12. Once those tasks have been completed, select the wrench icon with the green check mark to complete the job.



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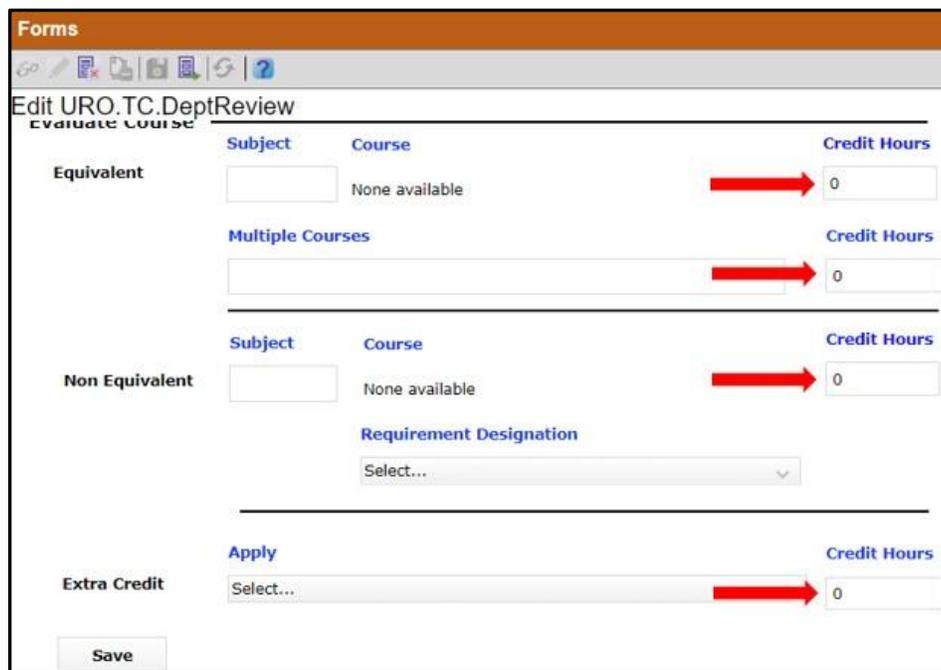
Helpful Hints:

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



The screenshot shows the 'Forms' interface with the title 'Edit URO.TC.DeptReview'. Below the title is a toolbar with several icons, including a red 'X' icon representing the exit function. A red arrow points to this icon. Below the toolbar, the 'Equivalent' section is visible, with columns for 'Subject', 'Course', and 'Credit Hours'. The 'Subject' field is empty, the 'Course' field contains 'None available', and the 'Credit Hours' field contains '0'. Below this section is a 'Multiple Courses' section with a 'Credit Hours' field containing '0'.

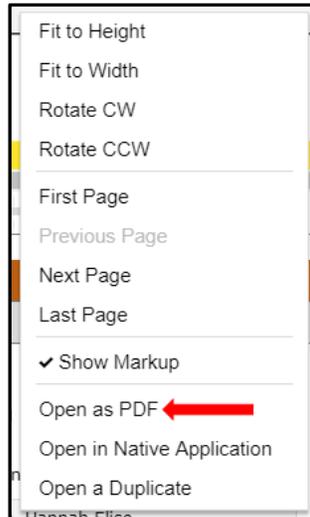
- When making your determination, a numerical value must always be displayed in order to save (e.g., 0, 3, etc.).



The screenshot shows the 'Forms' interface with the title 'Edit URO.TC.DeptReview'. Below the title is a toolbar with several icons. Below the toolbar, the 'Non Equivalent' section is visible, with columns for 'Subject', 'Course', and 'Credit Hours'. The 'Subject' field is empty, the 'Course' field contains 'None available', and the 'Credit Hours' field contains '0'. A red arrow points to the '0' in the 'Credit Hours' field. Below this section is a 'Requirement Designation' dropdown menu with 'Select...' as the selected option. Below the 'Requirement Designation' section is an 'Extra Credit' section with columns for 'Apply' and 'Credit Hours'. The 'Apply' field contains 'Select...' and the 'Credit Hours' field contains '0'. A red arrow points to the '0' in the 'Credit Hours' field. At the bottom left of the form is a 'Save' button.

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- 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.