



Evaluating a Transfer Credit Course (DUS/DGS) DocFinity User Guide

A step-by-step guide to Transfer Credit navigation.

Table of Contents

To View Dept. Review Queue..... 3

To Open a Form..... 3

To Review a Syllabus..... 3

To Review External Credit Request Form 4

To Approve a Course 5

To Approve a Course with Multiple Evaluations 6

To Reject a Course..... 9

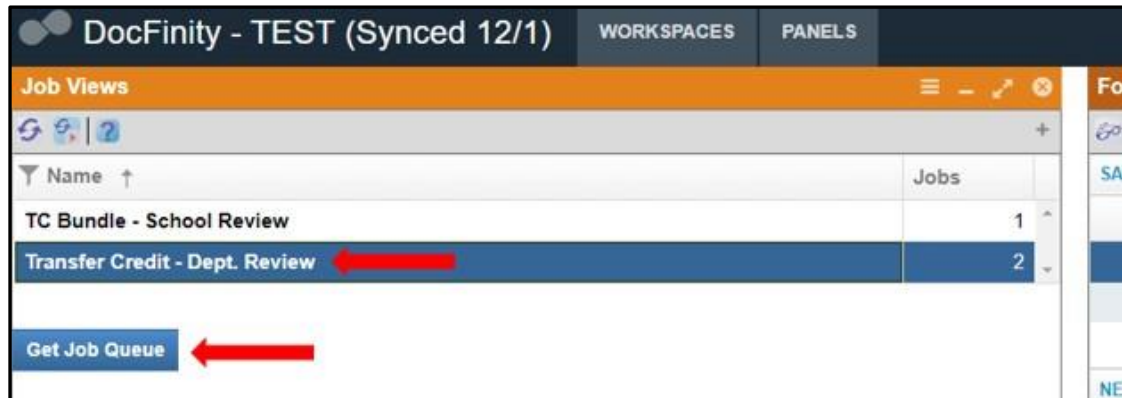
To Return a Course..... 11

Helpful Hints..... 12

User Guide: Evaluating a Transfer Credit Course (DUS/DGS) - DocFinity

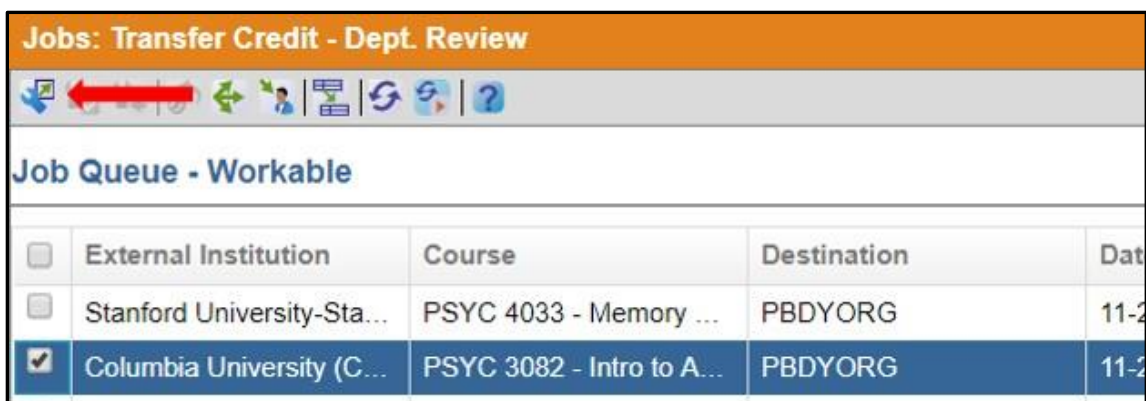
To View Dept. Review Queue

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.

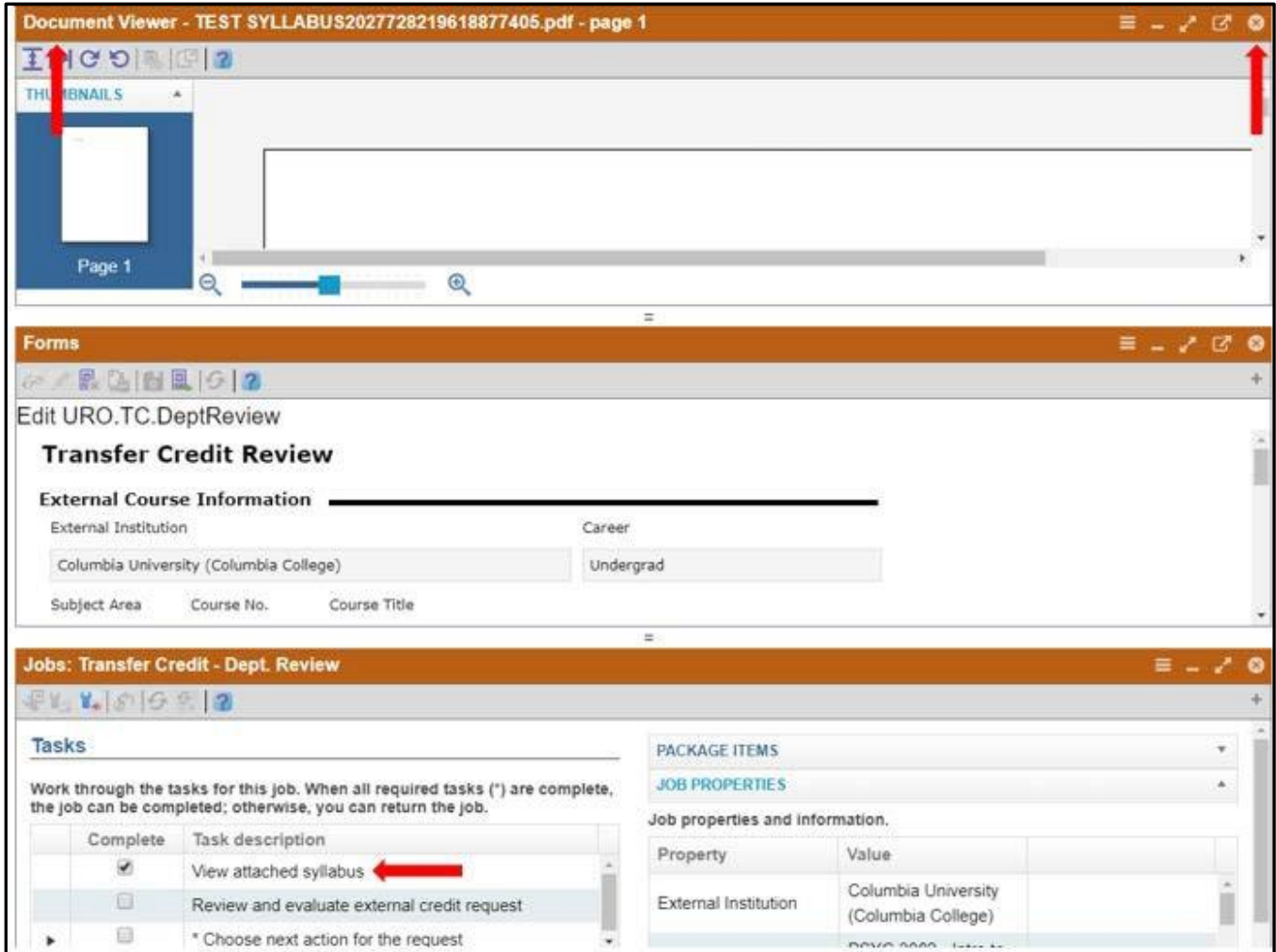


To Review a Syllabus


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

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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.

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| 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**.

Equivalent

| Subject | Course | Credit Hours |
|------------------|-----------------------------|--------------|
| PSY | :3100 - Abnormal Psychology | 3 |
| Multiple Courses | | 0 |

Non Equivalent

| Subject | Course | Credit Hours |
|---------|------------|--------------|
| | Select ... | 0 |

Requirement Designation

Select ...

Apply

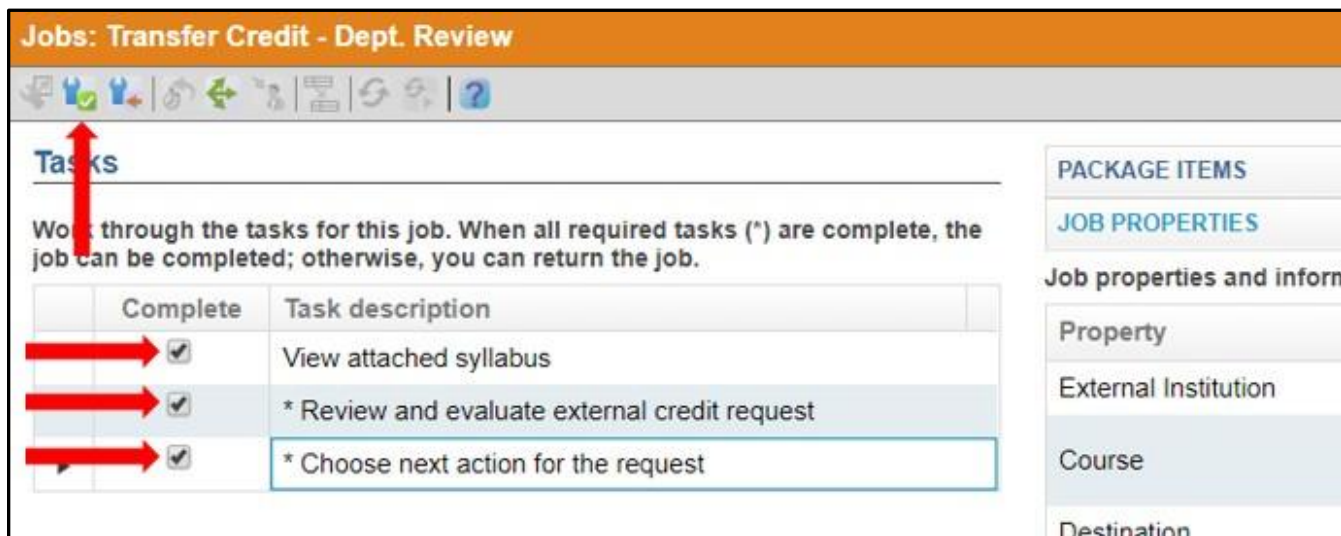
| Apply | Credit Hours |
|------------|--------------|
| Select ... | 0 |

Save Changes

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

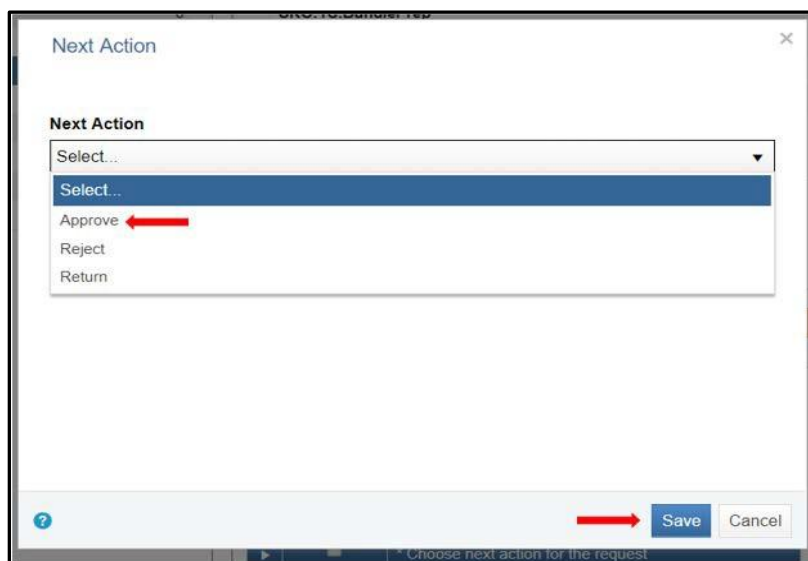
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7. Once each task has been completed, select the wrench icon with the green check mark to complete the job.



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.**



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Forms

Edit URO.TC.DeptReview

Evaluate Course

| | Subject | Course | Credit Hours |
|-------------------------|-----------|--|--------------|
| Equivalent | ECON | 3650 - Development Economics | 2 |
| Multiple Courses | | | 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.TC.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

| Select ... | Credit Hours |
|------------|--------------|
| | 0 |

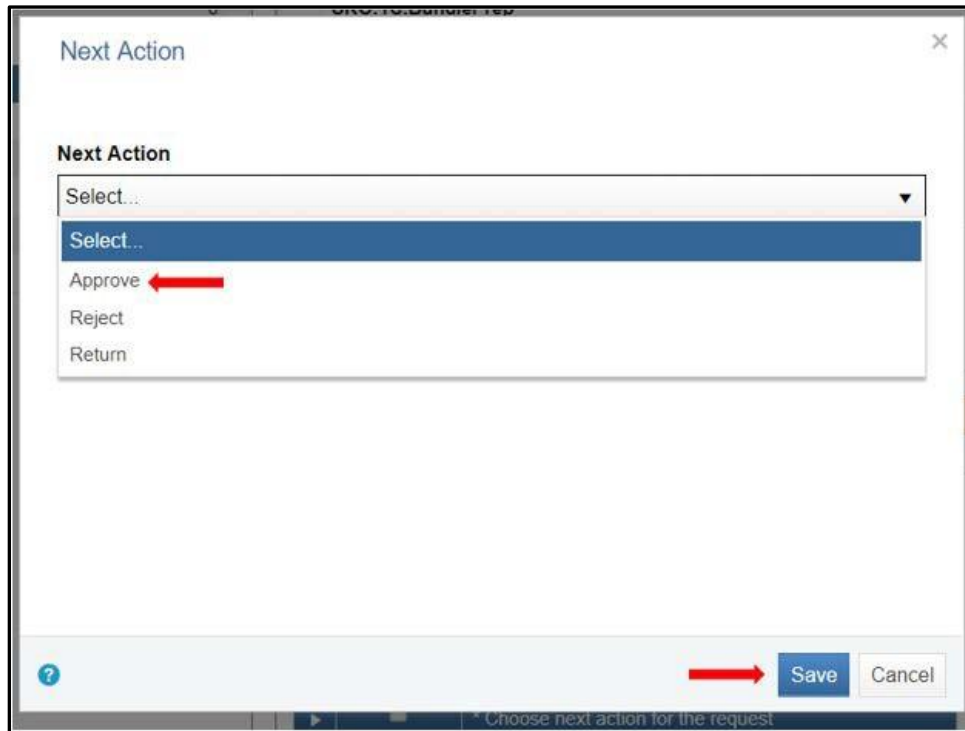
Hours Difference Reason

Reject Reason

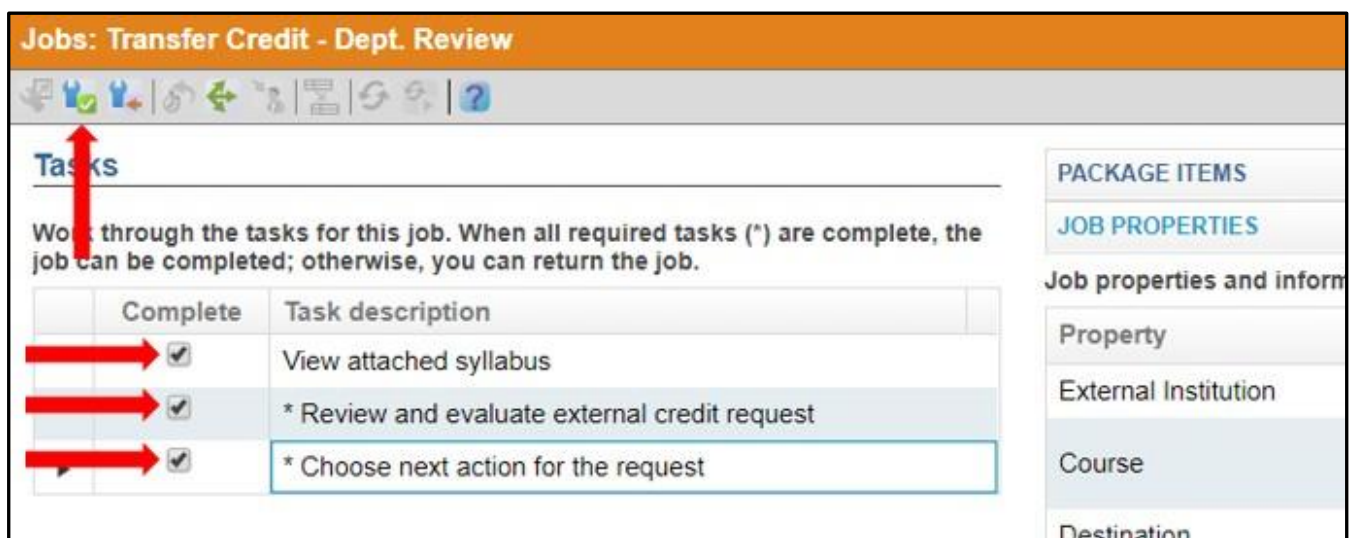
Save Changes

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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.



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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**.

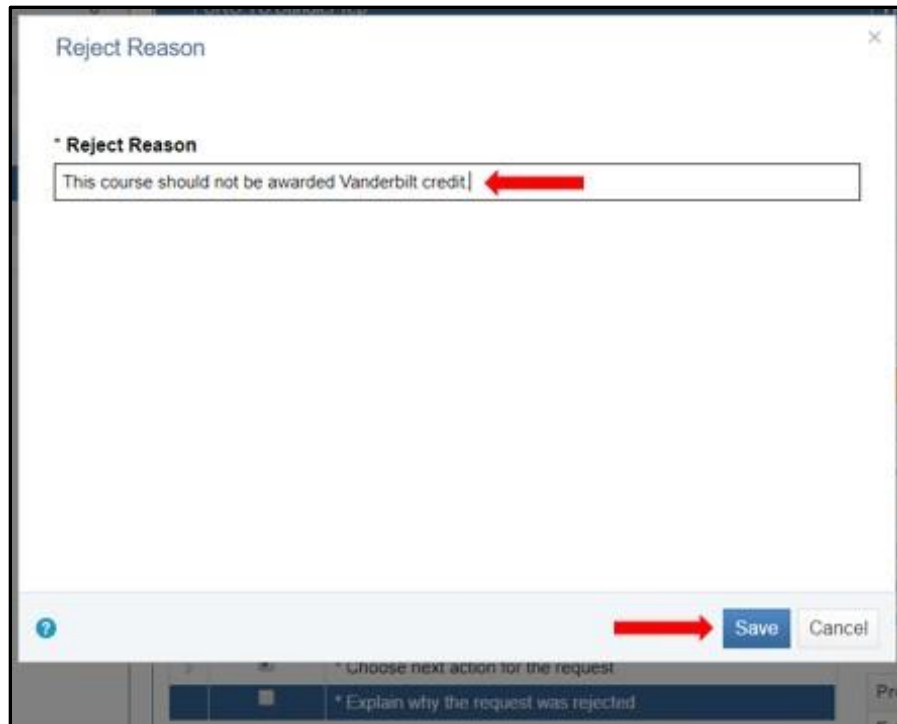
The screenshot shows a web form titled "Edit URO.TC.DeptReview" with the sub-header "Evaluate Course". The form is divided into four main sections: "Equivalent", "Multiple Courses", "Non Equivalent", and "Extra Credit". Each section contains input fields for "Subject", "Course", and "Credit Hours". The "Equivalent" and "Non Equivalent" sections have "None available" in the "Course" field. The "Non Equivalent" section also includes a "Requirement Designation" dropdown menu. At the bottom left, there is a "Save" button with a red arrow pointing to it.

14. Click on **Choose next action for the request** in the Jobs panel. Select **Reject** as the next action for the request.

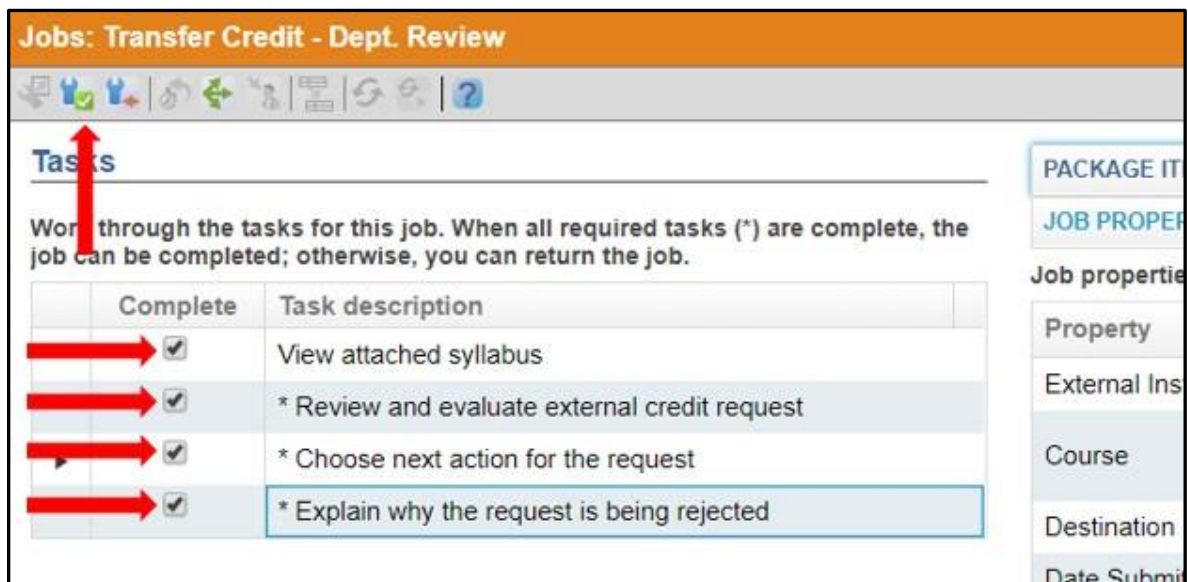
The screenshot shows a "Next Action" dialog box. It features a dropdown menu with the following options: "Select...", "Approve", "Reject", and "Return". A red arrow points to the "Reject" option. At the bottom right of the dialog, there are "Save" and "Cancel" buttons, with a red arrow pointing to the "Save" button.

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15. If rejected, you will be prompted to enter a reject reason (e.g., this course should not be awarded Vanderbilt credit).



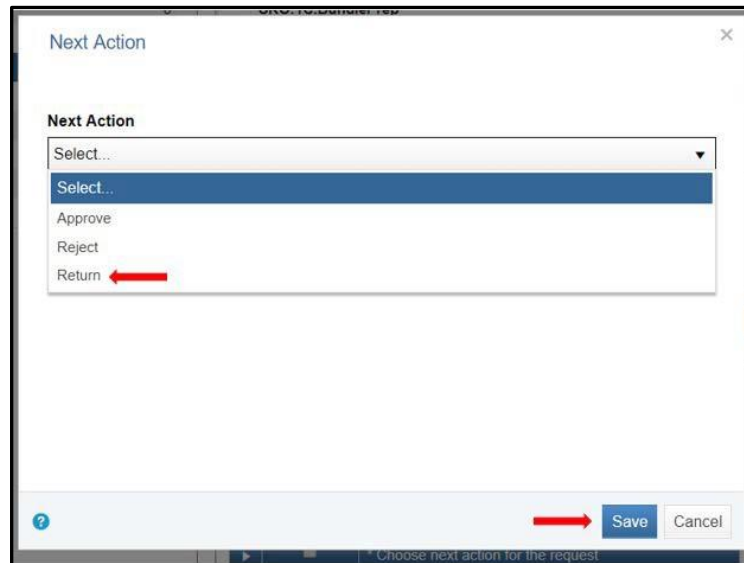
16. Once each task has been completed, select the wrench icon with the green check mark to complete the job.



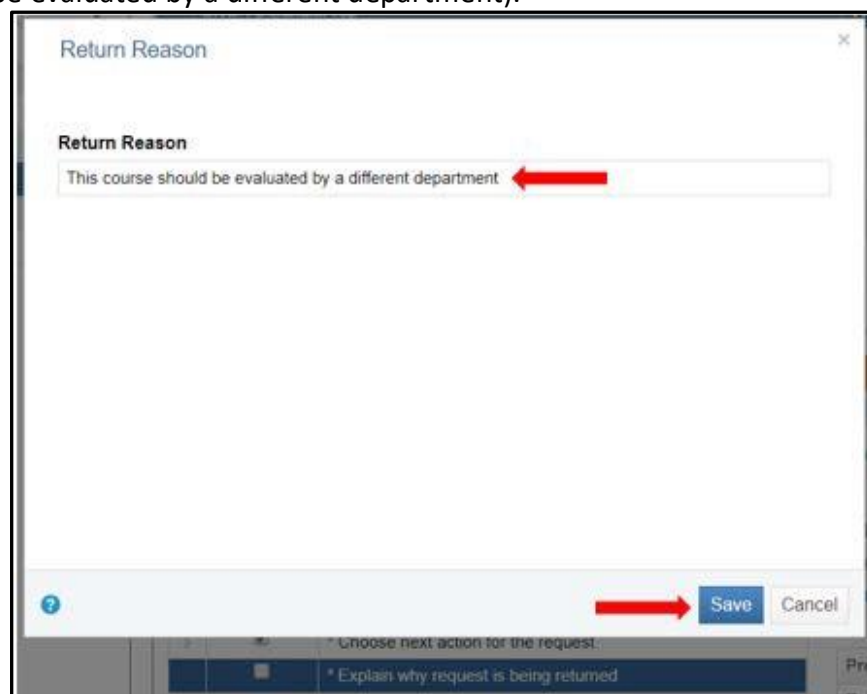
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To Return a Course

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).



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19. 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 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 UO.TC.DeptReview

Evaluate Course

| Subject | Course | Credit Hours |
|------------|----------------|--------------|
| Equivalent | None available | 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.).

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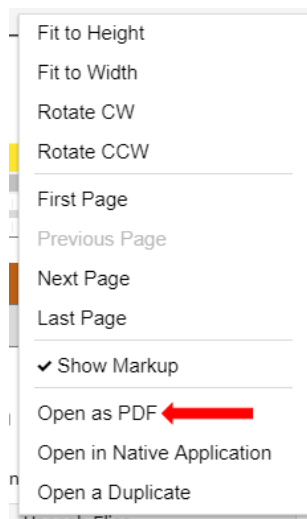
Forms

Edit URO.TC.DeptReview
Evaluate Course

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