Routing a Transfer Credit Course (OAS)
DocFinity User Guide

An OAS user guide for processing a transfer credit request.
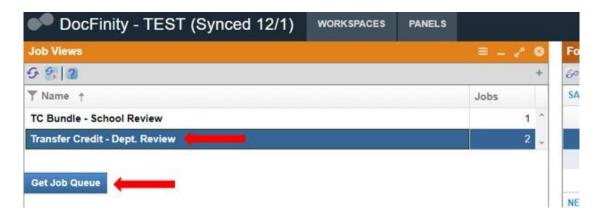
VANDERBILT
Office of the
University Registrar

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

Contents

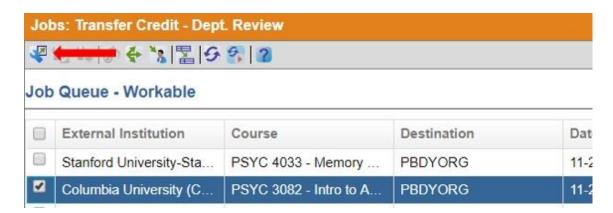# User Guide: Routing a Transfer Credit Course (OAS) - Docfinity

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**.

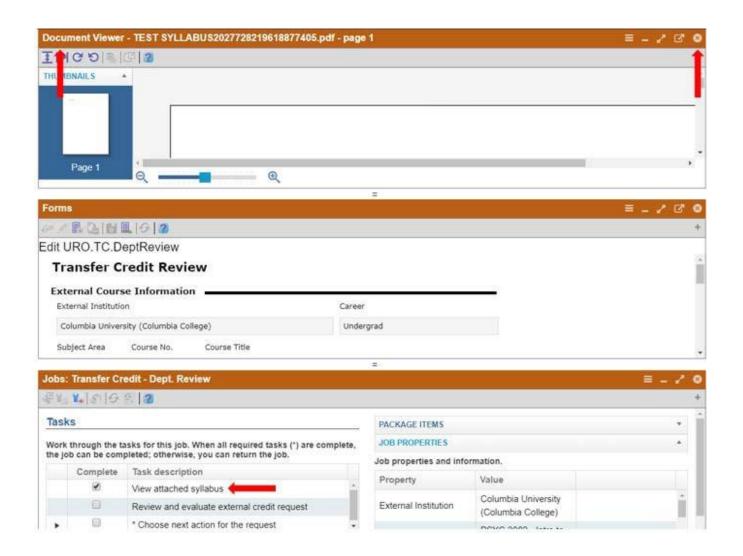## To Open a Form

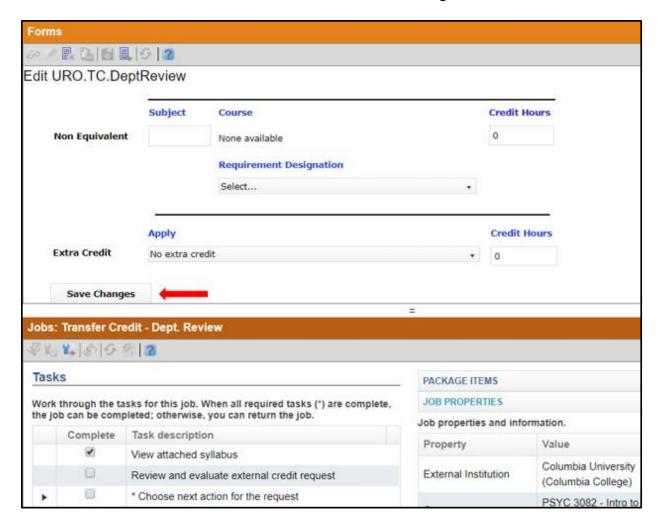3. Select a course from the queue table. Using the wrench icon, open the form.

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**.

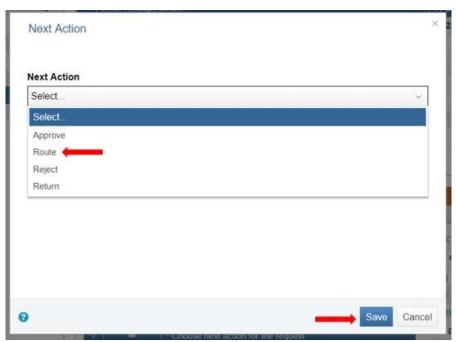# User Guide: Routing a Transfer Credit Course (OAS) - Docfinity

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**.
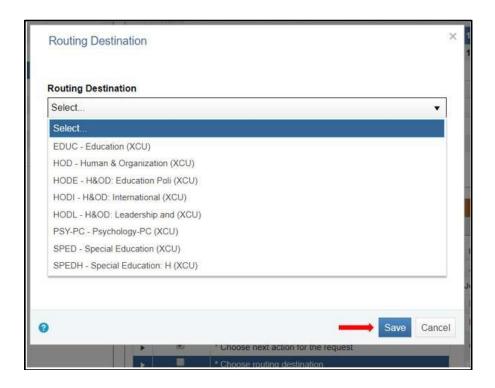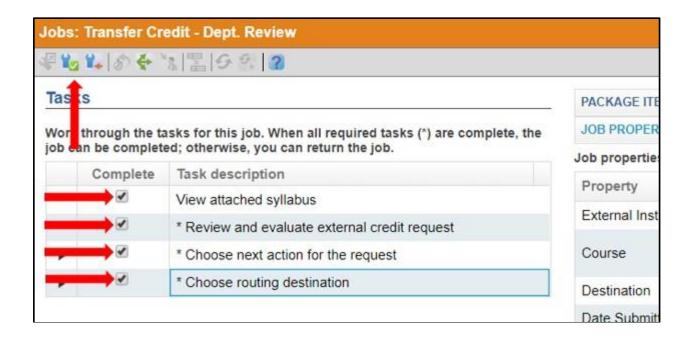

To Route a Course

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.

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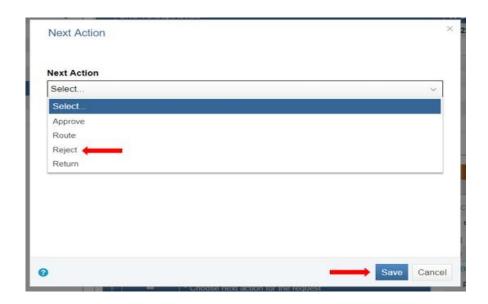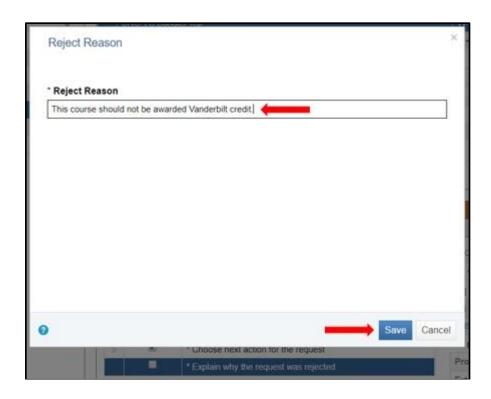

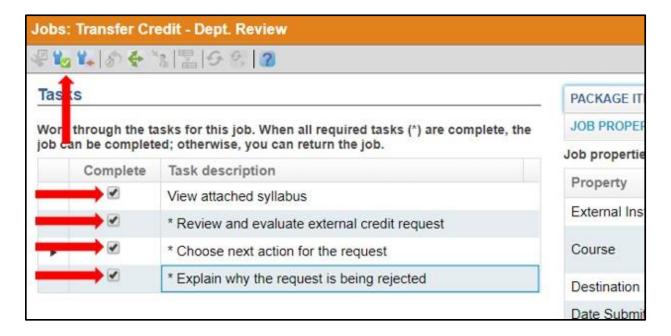9. Once each task has been completed, select the wrench icon with the green check mark to complete the job.
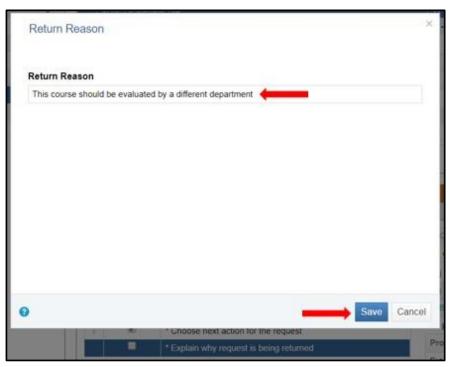
To Reject a Course

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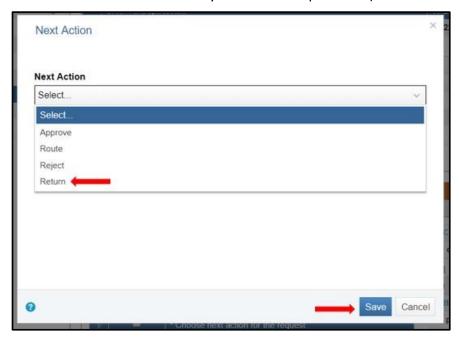
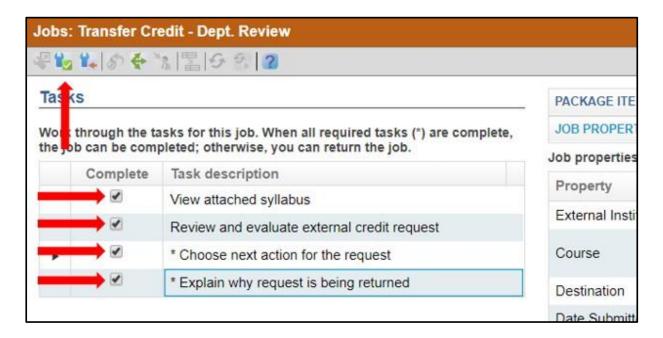11. Once each task has been completed, select the wrench icon with the green check mark to complete the job.

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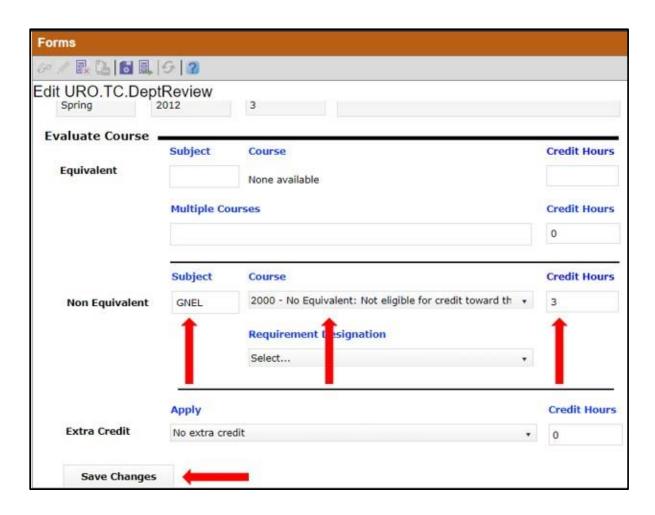
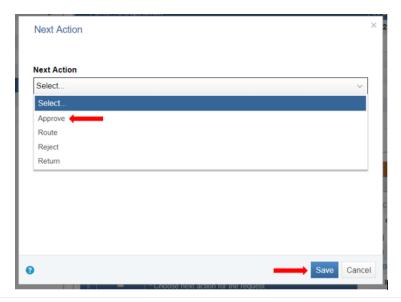13. Once each task has been completed, select the wrench icon with the green check mark to complete the job.
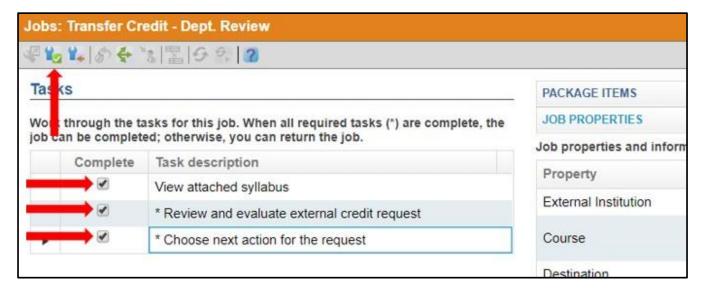

To Approve a Course

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**.

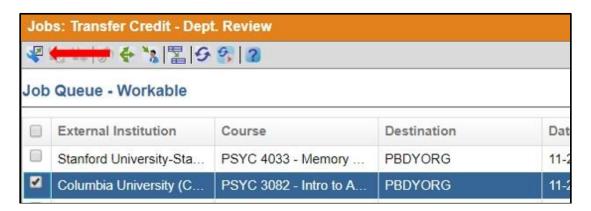**15.** Select **Approve** as the next action for the request**.**

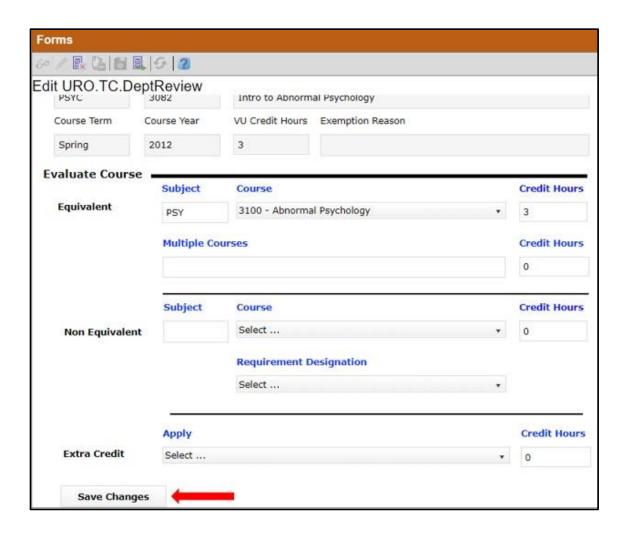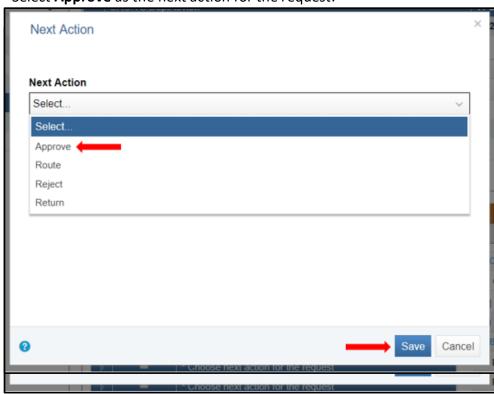16. Once each task has been completed, select the wrench icon with the green check mark to complete the job.

To Review an Evaluation

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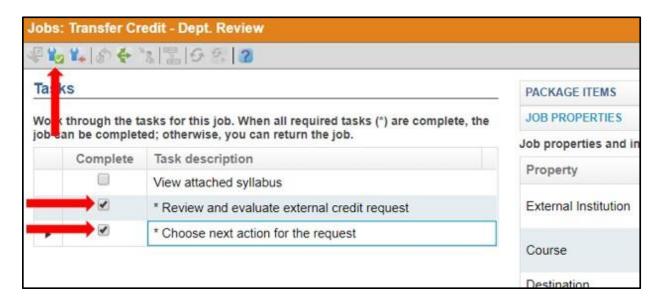
18. Open the form.

19. If the department has assigned credit, review the form to see the determination made, then **Save Changes.**
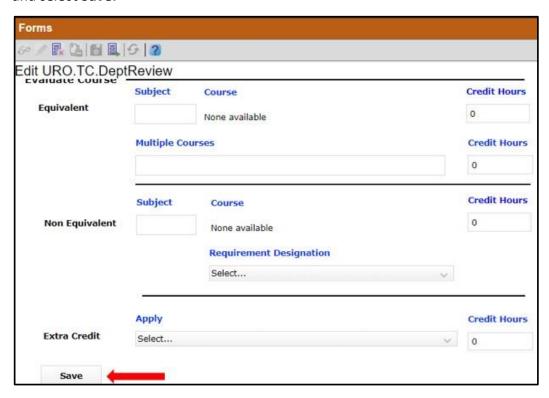
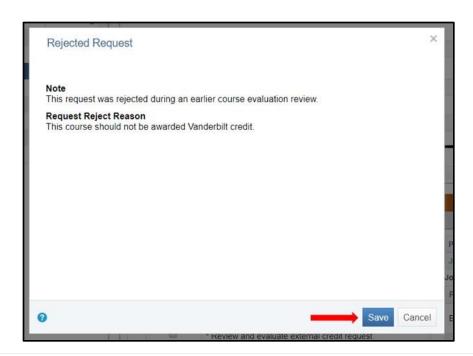a. Select **Approve** as the next action for the request.

b. Once each required (designated by asterisk) task has been completed, select the wrench icon with the green check mark to complete the job.
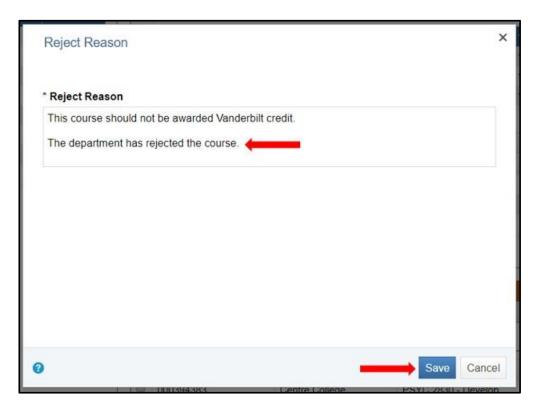
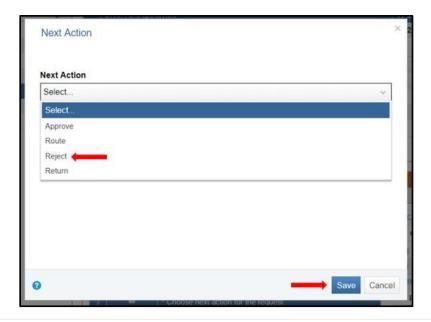1. If the department has rejected the course, review the rejection reason pop-up and select **Save.**

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

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

Reject Reason   ✕

* **Reject Reason**

This course should not be awarded Vanderbilt credit.
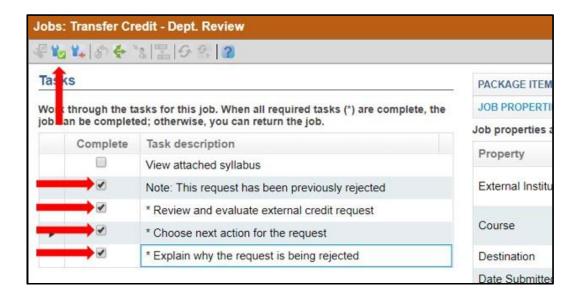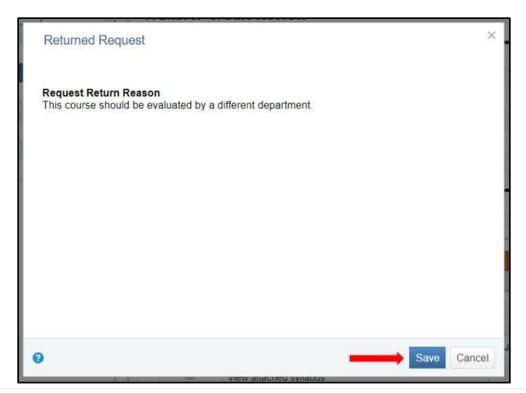
The department has rejected the course. ⟵

Save   Cancel

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.**

Next Action   ✕

Next Action

Select...

Select...
Approve
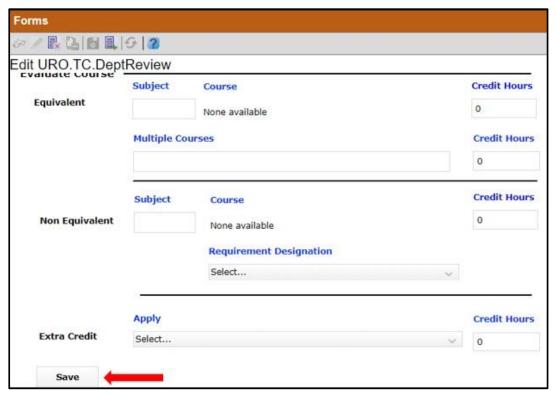Route
Reject ⟵
Return

Save   Cancel

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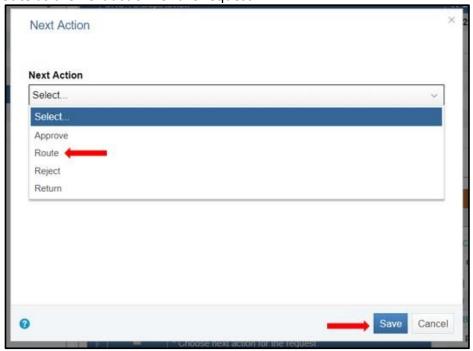

2. If the department has returned the course, review the return reason pop-up and select **Save.**
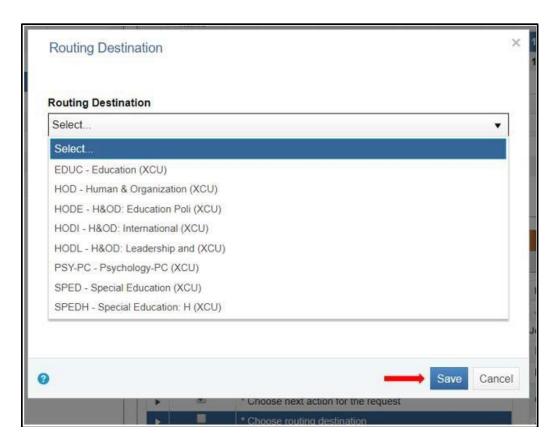
3. Review the form to ensure no determination has been made, scroll down and select **Save Changes**.
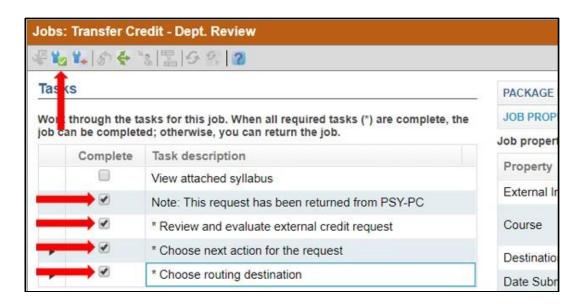
4. Select **Route** as the next action for the request.

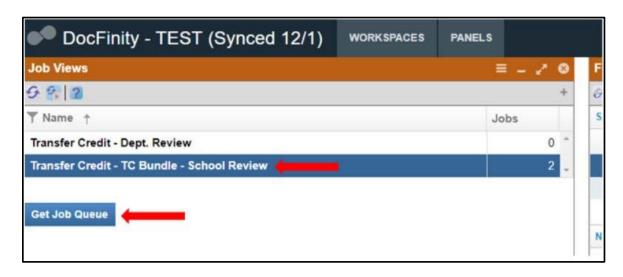5. Select a different department to route the course to.

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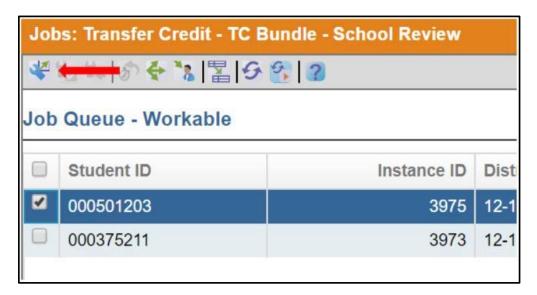
To View Bundle Queue

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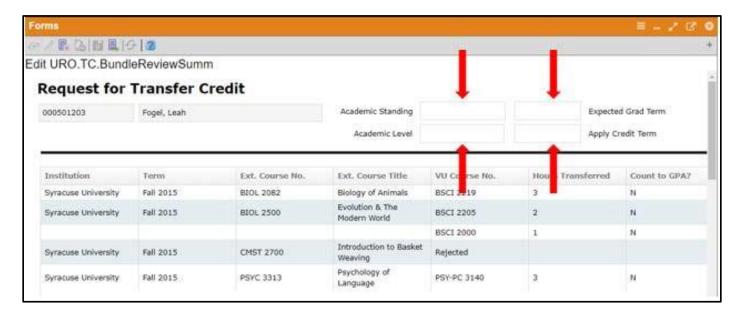

To Open a Bundle

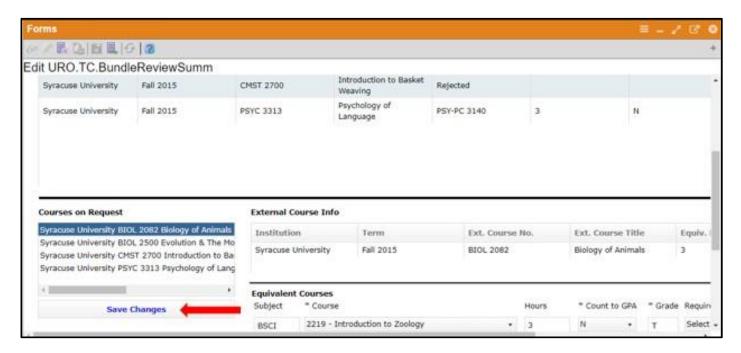8. Select a bundle from the queue table. Using the wrench icon, open the bundle.

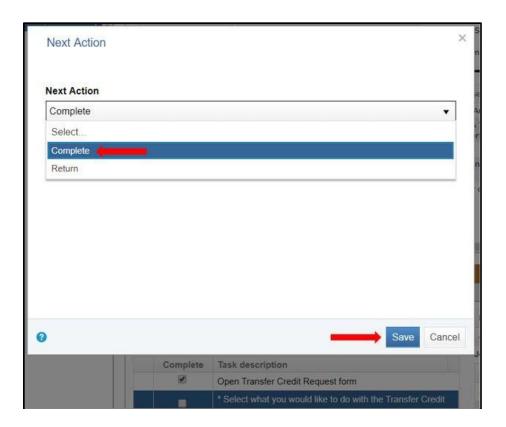# User Guide: Routing a Transfer Credit Course (OAS) - Docfinity

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**.
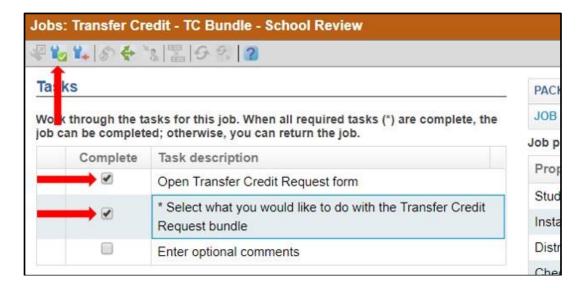

10. Once all the information has been entered, **Save Changes.**

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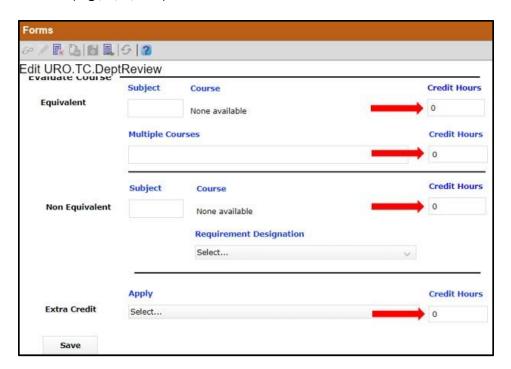
User Guide: Routing a Transfer Credit Course (OAS) - Docfinity
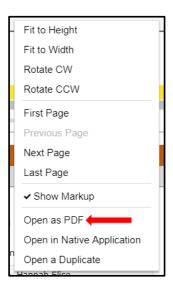
Helpful Hints:

- Click the [icon] 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.

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