

# INTERIM TRAINING RESOURCE

## IMPORTANT TRAINING NOTE:

This interim training resource replaces information previously contained within the *Student Records Maintenance Complete Guide v11.2* and includes updates as part of the Student Experience Project.

This interim training resource is for use between 1<sup>st</sup> May – 14<sup>th</sup> July 2023 **ONLY**.

From Monday 17<sup>th</sup> July 2023 onwards, this training resource will be replaced with a brand-new online Student Records Management training suite.

## Student Records Management

### Transfer Credit

Student Records Management  
Transfer Credit

Version: 1.0

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## Transfer Course & Other Credit

**IMPORTANT NOTE:** Credit is **NOT** able to be transferred to a student if they have had a change of Programme **AFTER** the start of term.

## Transfer Course Credit

**Navigate To:** Menu > Records & Enrolment > Transfer Credit Evaluation > Course Credits - Manual

1. Select the **Add a New Value** page.

Course Credits - Manual

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Limit the number of results to (up to 300): 300

ID: begins with

Academic Career: =

Academic Institution: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

2. You will then be prompted to state the **ID** number of the student for whom you wish to transfer the credit.

Course Credits - Manual

Find an Existing Value Add a New Value

ID:

Academic Career:

Academic Institution: UMANC

Add

3. Select the student's **Academic Career** from the system options and click **Add**.

Course Credits - Manual

Find an Existing Value Add a New Value

ID: Student Details Withheld

Academic Career: Undergraduate

Academic Institution: UMANC

Add

4. The **Transfer Course Entry** page will open by default.

Transfer Course Entry Course Credits by Term

Student Details Withheld

Academic Career: UGRD Undergraduate

Academic Institution: UMANC The University of Manchester

\*Model Nbr: 1

\*Transcript Level: Unofficial

5. In the **Target Information** section, select the **Academic Program** and the corresponding **Academic Plan** that the student is transferring the credit to.

Target Information		
*Academic Program:	00637	BSc(Hons) Anatomical Sciences
Academic Plan:	00514	BSc(Hons) Anatomical Sciences
		<input type="checkbox"/> Include in GPA

6. In the **Source Information** section, enter the **Source Institution** from which the credit is being transferred from, and select the relevant **School Type** (this will usually be Higher Education).

Source Information	
*Credit Source Type:	Manual
Source Institution:	University of Bristol
School Type:	NA

7. In the **Transfer Credit Term** section, select the **Term** for which the transfer is to be valid.

Transfer Credit Term	
*Articulation Term:	10/11 Year

8. You will then need to enter the **Incoming Course** information. This is course unit that has been taken from which you want to transfer the credit. You will need to free-text enter the following:

- The **Year** the course was taken
- The **Subject** area of the course
- The **Course Number**
- The course **Description**
- The number of **Units Taken**



Incoming Course	
Year:	2010
Ext Term:	
Subject:	BIOL
Course Nbr:	99999
Description:	Anatomy
Units Taken:	120.00
Grade Input:	

9. In the **Equivalent Course** section, select the University of Manchester **Course ID** that you want to transfer the credit to. Once you do this, all of the remaining fields will auto-complete.

Equivalent Course	
Course ID:	001183 BIOL
Offer Nbr:	1 20781
Units Transferred:	120.000
Grading Scheme:	UGD UGRD GS
Grading Basis:	TRN APL Credit Transfer
Official Grade:	T APL Trans
Repeat Code:	
Designation:	
<input checked="" type="checkbox"/> Include in FA WI Stats	

10. Select the **Course Credits by Term** page and click **Calculate**.

The screenshot shows the 'Course Credits by Term' page. At the top, there are tabs for 'Transfer Course Entry' and 'Course Credits by Term', with the latter being selected. Below the tabs is a header 'Student Details Withheld'. The main content area displays student information: Academic Career: UGRD, Academic Institution: UMANC, Model Nbr: 1, Academic Program: 00637, and Admit Type/Term: BSc(Hons) Anatomical Sciences. Below this, there are fields for 'Articulation Term: 10/11 Year' and 'Model Status:'. To the right, there are fields for 'Posted Date:' and 'User ID:'. Below these fields are three buttons: 'Calculate', 'Post', and 'Unpost'. The 'Calculate' button is highlighted with a red box. Below the buttons, there are two rows of data: 'Units Taken: 0.00' and 'Units Transferred: 0.000'. Below this is a section titled 'FA Weeks of Instruction Stats' with a dropdown arrow, containing 'Units Taken: 0.00' and 'Units Transferred: 0.000'. At the bottom is a section titled 'Course Credits Summary' with 'Units Taken: 0.00' and 'Units Transferred: 0.000'.

11. The record now displays how many course units are to be transferred.

The screenshot shows the 'Course Credits by Term' page with updated values. The 'Calculate' button is still highlighted with a red box. The 'Units Taken' field now displays '120.00' and the 'Units Transferred' field now displays '120.000'. The 'FA Weeks of Instruction Stats' section also shows 'Units Taken: 120.00' and 'Units Transferred: 120.000'. The 'Course Credits Summary' section remains unchanged with 'Units Taken: 0.00' and 'Units Transferred: 0.000'.

12. Click **Post**.

The screenshot shows the 'Course Credits by Term' page with the 'Post' button highlighted with a red box. The 'Units Taken' field displays '120.00' and the 'Units Transferred' field displays '120.000'. The 'Calculate' and 'Unpost' buttons are also visible.

13. This will update the information in the **Course Credits Summary** section, along with the date of the transfer (Posted Date) and the User ID (name) of the user who did it.

Articulation Term:	10/11 Year	Posted Date:	15/04/2011
Model Status:	Complete	User ID:	Staff Details Withheld
		Calculate	Post
Units Taken:	120.00		
Units Transferred:	120.000		
FA Weeks of Instruction Stats			
Units Taken:	120.00		
Units Transferred:	120.000		
Course Credits Summary			
Units Taken:	120.00		
Units Transferred:	120.000		

This now completes the transfer of course credit.

## Transfer Other Credit

**Navigate To: Menu > Records & Enrolment > Transfer Credit Evaluation > Other Credits - Manual**

1. Within the **Add a New Value** page.
2. Enter the **ID** number of the student for whom you wish to transfer the credit.
3. Select the student's **Academic Career** from the system options and click **Add**.

**Other Credits**

Find an Existing Value   Add a New Value

ID: *Student Details Withheld*

Academic Career: Undergraduate ▼

Academic Institution: UMANC 🔍

Add

4. The **Other Credit Detail** page will open by default.

Other Credit Detail   Other Credit by Term

*Student Details Withheld*   Find | View All   First 1 of 1 Last

Academic Career: UGRD Undergraduate

Academic Institution: UMANC The University of Manchester

Model Nbr: 1

\*Transcript Level: Unofficial ▼

**Target Information**

\*Academic Program: 00637 🔍 BSc(Hons) Anatomical Sciences ☐ Include in GPA

Academic Plan: 00514 🔍 BSc(Hons) Anatomical Sciences

Find | View All   First 1 of 1 Last

\*Articulation Term: 1101 🔍 2010/11 Academic Year

*Group	*Seq#	Status	Other Credit	Equivalent Subject / Catlg Nbr	
1	1				

[Add/View Comments](#)

5. In the **Target Information** section, select the **Academic Program** and the corresponding **Academic Plan** that the student is transferring the credit to.

**Target Information**

\*Academic Program: 00637 🔍 BSc(Hons) Anatomical Sciences ☐ Include in GPA

Academic Plan: 00514 🔍 BSc(Hons) Anatomical Sciences

6. Select the **Term** for which you wish the transfer to be valid and then click on the **Equivalent Course Information** icon.

Find | View All   First 1 of 1 Last

\*Articulation Term: 1101 🔍 2010/11 Academic Year

*Group	*Seq#	Status	Other Credit	Equivalent Subject / Catlg Nbr	
1	1				

[Add/View Comments](#)

- You will then be taken to the **Equivalent Course Information** section, where you will first need to complete the **Other Credit** section.

#### Equivalent Course Information

Other Credit	
Other Credit:	<input type="text"/>
Short Desc:	<input type="text"/>
Long Description:	<input type="text"/>
Other Credit Type:	<input type="text"/>
Evaluation Date:	15/04/2011

- In the **Other Credit** and **Short Description** fields, enter **RPL** (Recognized Prior Learning). Then enter a **Long Description** of the other credit being applied. Select the **Other Credit Type** (either Work Experience or Life Experience) from the system options. The **Evaluation Date** will default in as today's date, but this can be amended as required.

#### Equivalent Course Information

Other Credit	
Other Credit:	RPL
Short Desc:	<input type="text"/>
Long Description:	Worked in a mortuary for 2 years
Other Credit Type:	Work Exper
Evaluation Date:	15/04/2011

- In the **Equivalent Course** section, select the University of Manchester **Course ID** that you want to transfer the credit to. Once you do this, all of the remaining fields will auto-populate.

Other Credit	
Other Credit:	RPL
Short Desc:	RPL
Long Description:	Worked in a mortuary for 2 years
Other Credit Type:	Work Exper
Evaluation Date:	15/04/2011

Equivalent Course	
Course ID:	000753 Functional Anatomy of the Eye
Offer Nbr:	10171
Units Transferred:	15.000
Grading Scheme:	UGD Undergraduate Grading Scheme
Grading Basis:	TRN APL Credit Transfer Grade Basis
Official Grade:	T Transfer of APL Credits
Repeat Code:	
Designation:	
<input type="checkbox"/> Include in FA WI Stats	

OK
Cancel
Clear Credit
Clear



10. Click **OK** to be returned to the **Other Credit Detail** page, where you will now see the **Equivalent Course Information** displayed.

Other Credit Detail Other Credit by Term

*Student Details Withheld*

Find | View All | First | 1 of 1 | Last

Academic Career: UGRD Undergraduate

Academic Institution: UMANC The University of Manchester

Model Nbr: 1

\*Transcript Level: Unofficial

Target Information

\*Academic Program: 00637 BSc(Hons) Anatomical Sciences ☐ Include in GPA

Academic Plan: 00514 BSc(Hons) Anatomical Sciences

\*Articulation Term: 1101 2010/11 Academic Year

*Group	*Seq#	Status	Other Credit	Equivalent Subject / Catalog Nbr
1	1	Accepted	RPL	BIOL 10171

Add/View Comments

11. Select the **Other Credit by Term** page.

Other Credit Detail Other Credit by Term

*Student Details Withheld*

Find | View All | First | 1 of 1 | Last

Academic Career: UGRD Undergraduate

Academic Institution: UMANC The University of Manchester

Model Nbr: 1

Academic Program: 00637 BSc(Hons) Anatomical Sciences Admit Term:

Articulation Term: 10/11 Year Posted Date:

Model Status: User:

Calculate Post Unpost

Units Transferred: 0.000

FA Weeks of Instruction Stats

Units Transferred: 0.000

Other Credits Summary

Units Transferred: 0.000

12. Click **Calculate** to work out the number of units to be transferred.

13. Click **Post** to confirm.

Find | View All | First | 1 of 1 | Last

Articulation Term: 10/11 Year Posted Date:

Model Status: User:

Calculate Post Unpost

Units Transferred: 0.000

FA Weeks of Instruction Stats

Units Transferred: 0.000

Other Credits Summary

Units Transferred: 0.000

14. This should then update the information in the **Other Credits Summary** section, along with the date of the transfer (Posted Date) and the User ID (name) of the user who did it.

Other Credit Detail    Other Credit by Term

*Student Details Withheld*

Find | View All   First 1 of 1 Last

Academic Career: UGRD Undergraduate

Academic Institution: UMANC The University of Manchester

Model Nbr: 1

Academic Program: 00637 BSc(Hons) Anatomical Sciences    Admit Term:

Articulation Term: 10/11 Year    Posted Date: 15/04/2011

Model Status: Complete    User: Melanie Sharpe

Calculate    Post    Unpost

Units Transferred: 15.000


FA Weeks of Instruction Stats

Units Transferred: 0.000

Other Credits Summary

Units Transferred: 15.000

This now completes the transfer of other credit.

 Any Transferred Credits for a student can be viewed on the **Term History** component:

**Navigate To: Menu > Records & Enrolment > Student Term Information > Term History**

Academic Career:		Undergraduate				<a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a> <b>1 of 1</b> <a href="#">Last</a>		
Institution:		The University of Manchester		Academic Level - Term Start:		1st Year		
Term:		1101 2010/11 Academic Year						
Enrollments								
	Graded Units	Grade Points	GPA	Earned Units	In Progress Units	Units Taken Towards Acad Load	120.000	
						Units Earned Towards Acad Load	60.000	
For GPA	60.000	4180.000	69.667	60.000	60.000	Units Taken For Audit	0.000	
Not For GPA	0.000			0.000	0.000			
Transfer Credit								
	Graded Units	Grade Points	GPA	Earned Units	Graded Transfer Units GPA / No GPA			0.000
					For Units Only			0.000
For GPA	0.000	0.000	0.000	0.000	Units Adjustment			0.000
Not For GPA	0.000			0.000	>>> Total Adjusted Transferred Units			0.000

You should see that they now have a current row entered as an 'Administrative Withdrawal'.