### **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 1st May – 14th 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.

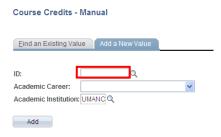
### **Transfer Course Credit**

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

1. Select the Add a New Value page.



2. You will then be prompted to state 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**.



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



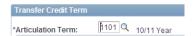
In the Target Information section, select the Academic Program and the corresponding Academic Plan that the student is transferring the credit to.



**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).



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

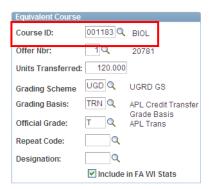


- **8.** You will then need to enter the **Incoming Course** information. This is course unit that has been taken from which you want to transfer the credit. You will need to free-text enter the following:
  - The Year the course was taken
  - The **Subject** area of the course
  - The Course Number
  - The course **Description**
  - The number of **Units Taken**

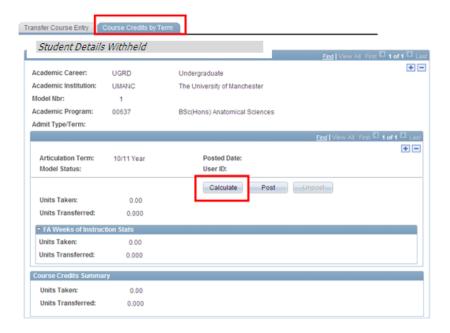


Grade Input:

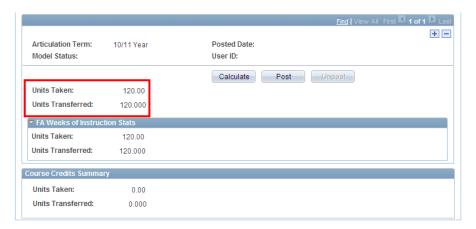
**9.** In the **Equivalent Course** section, select the University of Manchester **Course ID** that you want to transfer the credit to. Once you do this, all of the remaining fields will auto-complete.



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



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



### 12. Click Post.



**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.



This now completes the transfer of course credit.

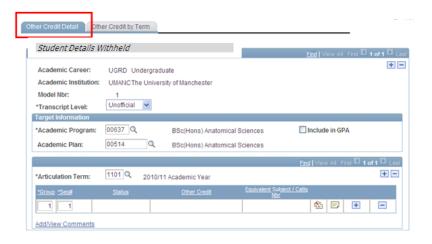
### **Transfer Other Credit**

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

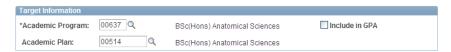
- 1. Within the **Add a New Value** page.
- 2. Enter the ID number of the student for whom you wish to transfer the credit.
- 3. Select the student's **Academic Career** from the system options and click **Add**.



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



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

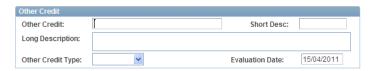


**6.** Select the **Term** for which you wish the transfer to be valid and then click on the **Equivalent Course Information** icon.



**7.** 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** 

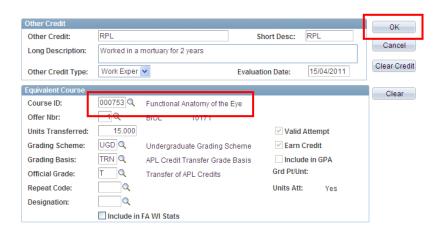


**8.** In the **Other Credit** and **Short Description** fields, enter **RPL** (Recognized Prior Learning). Then enter a **Long Description** of the other credit being applied. Select the **Other Credit Type** (either Work Experience or Life Experience) from the system options. The **Evaluation Date**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

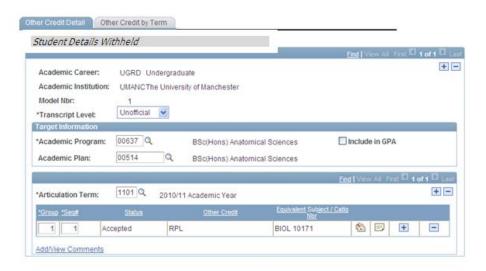
**Equivalent Course Information** 



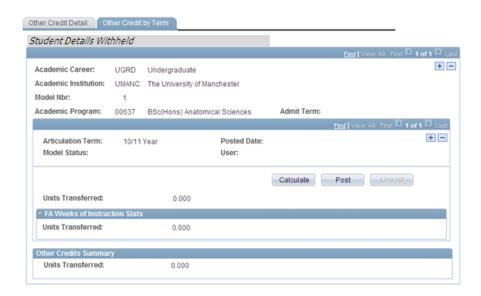
**9.** In the **Equivalent Course** section, select the University of Manchester **Course ID** that you want to transfer the credit to. Once you do this, all of the remaining fields will auto-populate.



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



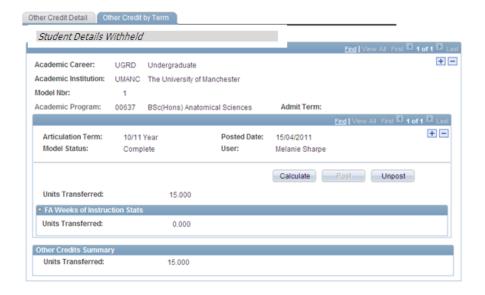
11. Select the Other Credit by Term page.



- **12.** Click **Calculate** to work out the number of units to be transferred.
- 13. Click Post to confirm.



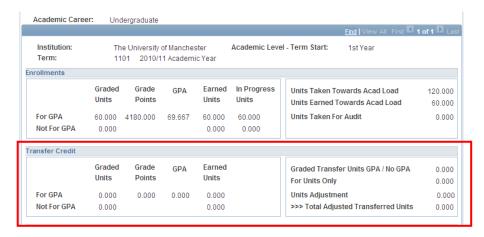
**14.** This should then update the information in the **Other Credits Summary** section, along with the date of the transfer (Posted Date) and the User ID (name) of the user who did it.



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



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