Transfer Equivalency System Workflow

A Step-By-Step Guide

Office of the Registrar

256-765-4316

registrar@una.edu

What is the Transfer Equivalency System (TES)?

- TES is an exhaustive course description database.

- The database contains complete course details, including course code, title, description and number of credits.

- TES also encompasses a suite of tools specifically aimed at automating and streamlining educational business processes.

- These processes include: analysis of transfer courses and transcripts, the administration and maintenance of course equivalencies, and communication of course data between staff, users, and faculty.

What is a TES Evaluation Task?

- The Office of the Registrar is now in charge of articulating transfer work for students from all across the globe. As a result, it is important that we have our faculty weighing in on the course work that comes to our office so that students receive the appropriate equivalencies for their work.

- Through TES, course descriptions can be included in **Evaluation Tasks** and then routed to advisors and faculty evaluators for their review and approval. This process is tracked within the database, eliminating the need for a paper or an e-mail trail.

Evaluation Tasks: Getting Started

- First, you will receive an invitation via your UNA email. This will include a link to the TES homepage where you will set up an account.

Dear savannah Richardson,

Your TES administrator has created your TES user account and initiated a password reset.
Please visit the link below to complete the setup process. Gain access to the premier interactive database of course data from institutions of higher education. The link will expire in 48 hours.

YOUR USERNAME: shanderson@una.edu
CLICK/FOLLOW THIS LINK TO SET YOUR PASSWORD: https://tes.collegesource.com/TES_passresetverify.aspx?vc=5153f0a0-1a5d-4e70-bfff-fa24a0ec713b

QUICK START TIP:

For a quick introduction to TES features, be sure to check out the movie demos and FAQ.
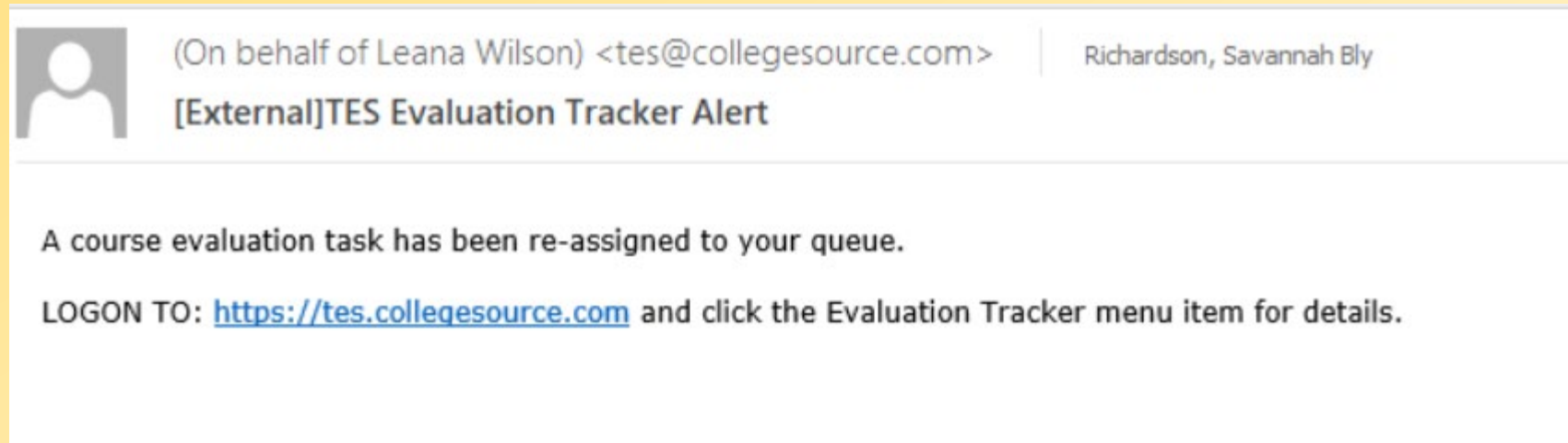Both are available on the TES home page under the support menu.

NEED HELP?:

If you encounter any problems, contact us via email at: support@collegesource.com

Sincerely,
TES Support Center
CollegeSource, Inc
(800) 854-2670 Option 4

Once you have made an account...

- You will notice emails coming from [tes@collegesource.com.](mailto:tes@collegesource.com)

(On behalf of Leana Wilson) <tes@collegesource.com>   Richardson, Savannah Bly

[External]TES Evaluation Tracker Alert

A course evaluation task has been re-assigned to your queue.

LOGON TO: https://tes.collegesource.com and click the Evaluation Tracker menu item for details.
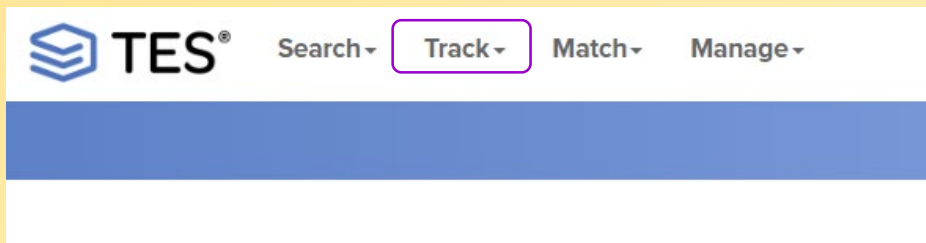
- These are your alerts! This is how you know that there is an open evaluation task waiting for your assessment.

Following the Link

- You will be taken to the homepage to log in.
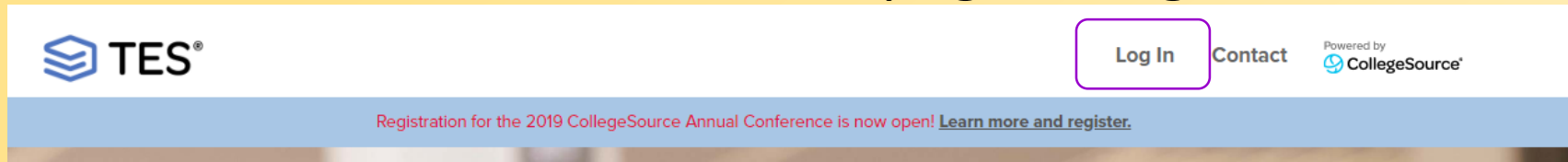
- Then… Click on the "Task" dropdown menu followed by "My Evaluations."

"My Evaluations"

- Here, you will see a queue of institutions.

My Evaluations   🔍 Search

○ Assigned to me   ○ Created by me

INSTITUTION	#COURSE	CITY	STATE
▶ JACKSONVILLE STATE UNIVERSITY	1	JACKSONVILLE	AL

- Click on the blue icon and you will be taken to a similar page listing all of the open evaluation tasks specifically associated with that institution.

Breaking Down the Evaluation List

- In the example below, you will see where our office has proposed that CBA 390 at Jacksonville State is equal to MG 395 at UNA.

My Assigned Evaluations

MY QUEUE ⇢ EVALUATION LIST

JACKSONVILLE STATE UNIVERSITY

SEND COURSE(S)	PROPOSED COURSE(S)	LAST ACTION NOTES	LAST ACTION DATE	ASSIGNEE	CREATOR	CREATED
▶ CBA 390	MG 395	Re-Assign to: Richardson, savannah - Please review for equivalent course	04/03/2019	RICHARDSON, SAVANNAH	WILSON, LEANA	06/06/2018

Click this icon for course descriptions and details.

- The item includes any notes associated with the request, a "last action date," the name of the assignee, the name of the creator, and the date in which the evaluation task was sent.

- Once you click on the blue icon, you will be taken to the course descriptions and details.

Anatomy of the Evaluation Task

Select from this menu once task has been successfully evaluated.

Both the "send" and "proposed" course descriptions appear side-by-side

My Assigned Evaluations

MY QUEUE ⟶ EVALUATION LIST ⟶ EDIT EVALUATION

SELECT AN ACTION:

[▼]

JACKSONVILLE STATE UNIVERSITY ⊞

Course code and title

CBA 390 OPERATIONS MANAGEMENT

Course description

Concepts and techniques for operational decision-making regarding the conversion of inputs to goods and services within business organizations. This course stresses the application of management principles and the utilization of quantitative methods in both the manufacturing and service sectors. (Formerly MGT 390).

Course details

Units:	3
Prerequisite:	MGT 301 and ST 261; ACC 200, 210, EC 221, 222, MS 112, and ST 260, 261
Department:	GENERAL BUSINESS ⊞
Source catalog:	Jacksonville State University 2017-2018
Course history:	View Detail ⊞

UNIVERSITY OF NORTH ALABAMA

MG 395 OPERATIONS MANAGEMENT

A survey of production-operations management functions, both manufacturing and service, which focuses on the business processes that organizations utilize to produce and deliver its goods and services.

Units:	3
Prerequisite:	MG 330, MK 360, QM 292; MG 382W
Corequisite:	MG 382W
Department:	MANAGEMENT
Source catalog:	University of North Alabama 2017-2018
Course history:	View Detail ⊞

EVALUATION DETAIL

Assigned:	Richardson, savannah - Graduation Coordinator
Create Date:	6/6/2018 7:59:03 AM
Created by:	Wilson, Leana - Registrar
Comment:	Please review for equivalency.

Any notes concerning this evaluation appear here

EVALUATION LOG:

4/3/2019 8:44:47 AM	[Wilson, Leana]	Re-Assign to: Richardson, savannah - Please review for equivalent course
6/18/2018 9:06:25 AM	[Taylor, Julie]	Add equivalent course: MG 395
6/6/2018 7:59:03 AM	[Wilson, Leana]	Request initiated. Assigned to Julie Taylor

The "evaluation log" monitors the evaluation task's progress

Once you have selected an action...

My Assigned Evaluations

MY QUEUE ⟶ EVALUATION LIST ⟶ EDIT EVALUATION

SELECT AN ACTION:

You will be prompted by the window below to confirm your decision.
You also have the option to include an additional note
and send us (The Office of the Registrar) an email alert.

TES® APPROVE

APPROVE selected. Add an optional note below.

(optional)

☑ Send email alert?

✔ Confirm   ✖ Cancel
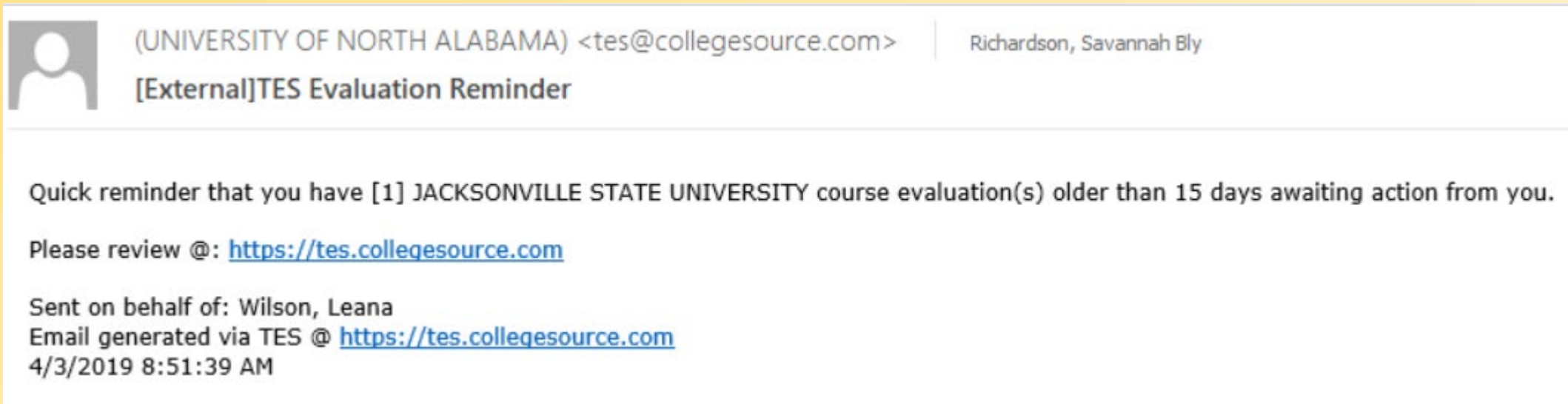
…Check the log.

Your decision will show up in the log at the bottom of the screen documenting the evaluation task's conclusion.

4/10/2019 8:32:09 AM	[Richardson, savannah]	Approve:
4/3/2019 8:44:47 AM	[Wilson, Leana]	Re-Assign to: Richardson, savannah - Please review for equivalent course
6/18/2018 9:06:25 AM	[Taylor, Julie]	Add equivalent course: MG 395
6/6/2018 7:59:03 AM	[Wilson, Leana]	Request initiated. Assigned to Julie Taylor

And that's it!

TES Evaluation Reminder

- If a significant amount of time has lapsed since the date of assignment, you will receive an email reminder.

(UNIVERSITY OF NORTH ALABAMA) <tes@collegesource.com>   Richardson, Savannah Bly

[External]TES Evaluation Reminder

Quick reminder that you have [1] JACKSONVILLE STATE UNIVERSITY course evaluation(s) older than 15 days awaiting action from you.

Please review @: https://tes.collegesource.com

Sent on behalf of: Wilson, Leana
Email generated via TES @ https://tes.collegesource.com
4/3/2019 8:51:39 AM

Questions?

University of North Alabama

Office of the Registrar

256-765-4316

registrar@una.edu

Savannah Richardson

256-765-5015

shanderson@una.edu

Wesley Gahagan

256-765-4994

cwgahagan@una.edu