Transfer Equivalency System Workflow
A Step-By-Step Guide
Office of the Registrar
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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-fa24a06c713b

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.

• 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.

• 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.

• 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.

Course code and title
Course description
Course details

Any notes concerning this evaluation appear here.

The “evaluation log” monitors the evaluation task’s progress.
Once you have selected 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.
...Check the log.

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

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?

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