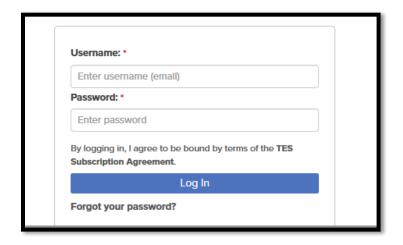
# **Transfer Evaluation System (TES) User Guide**



### Log In

Go to tes.collegesource.com

Enter your TES username and password that you received via an email from CollegeSource.

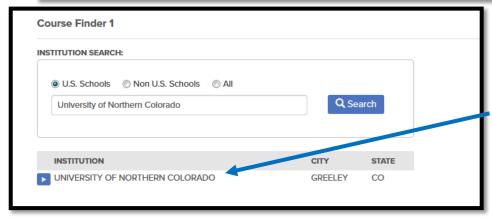
If you need your password or username resent to you, please e-mail jolson@unomaha.edu.

# **Creating Equivalencies and Viewing Course Descriptions**



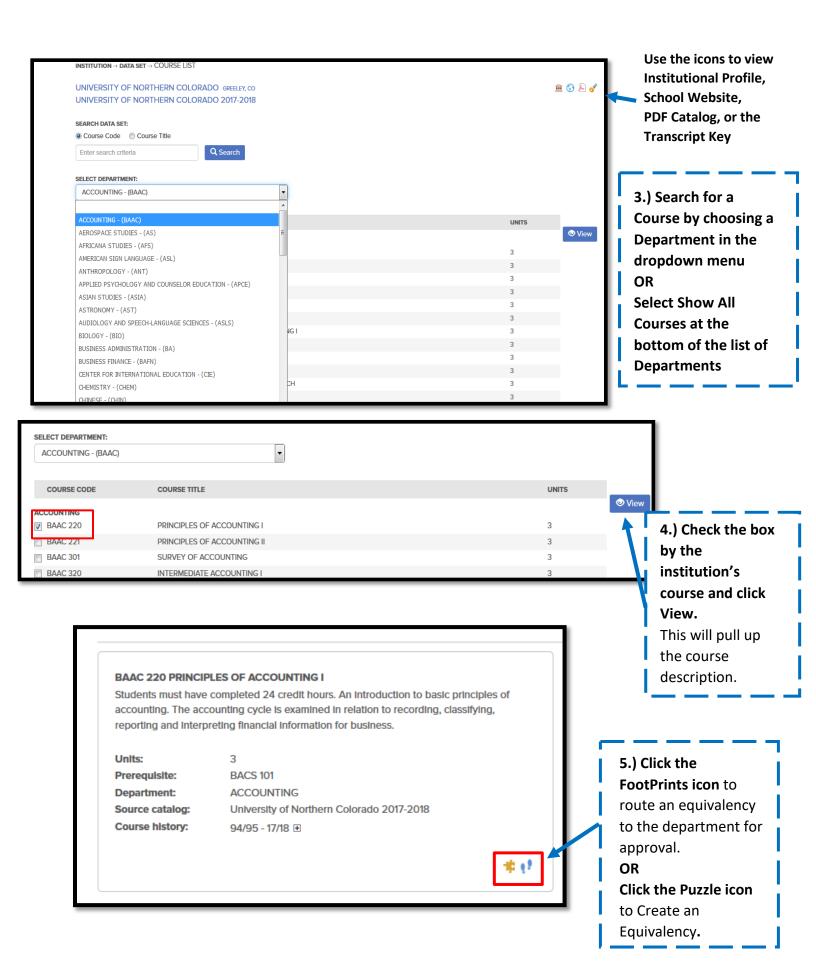
#### Search

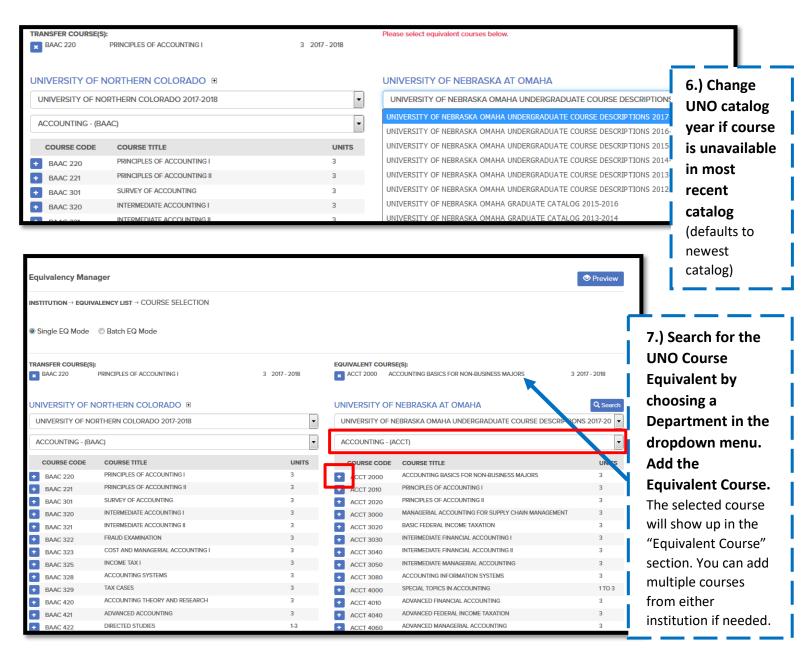
Search for course descriptions from a database containing millions of records. Access complete course details, including course title, course code, and credits. View institution profiles, including accreditation, calendar/unit, and more.

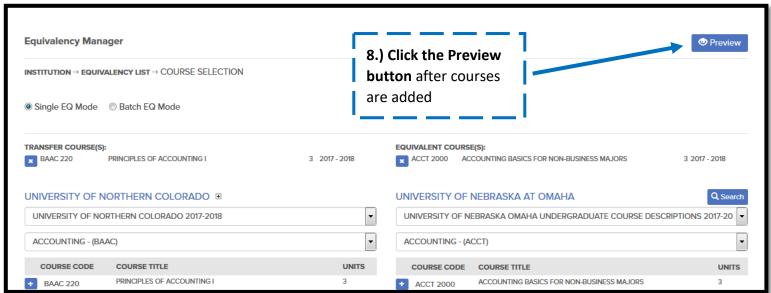


1.) Click Search-> Course Finder->Type in the Institution, Search, and Select the Institution





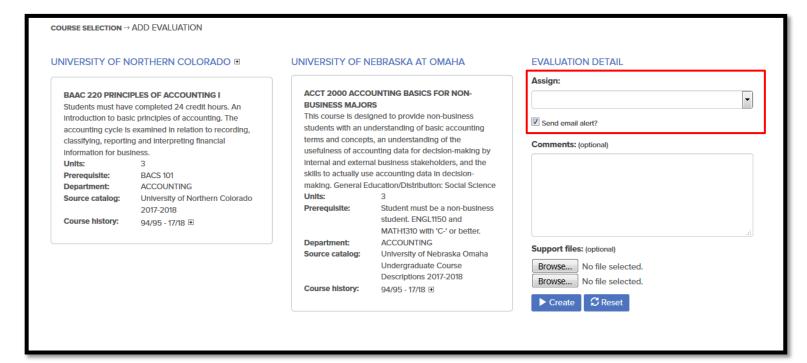




### 9.) You will be brought to one of the screens below depending on if you are:

Creating an Equivalency OR Routing an Equivalency Request to the Department for Evaluation

### A. Routing an Equivalency for Department Evaluation



## **Routing for Approval (Option A)**

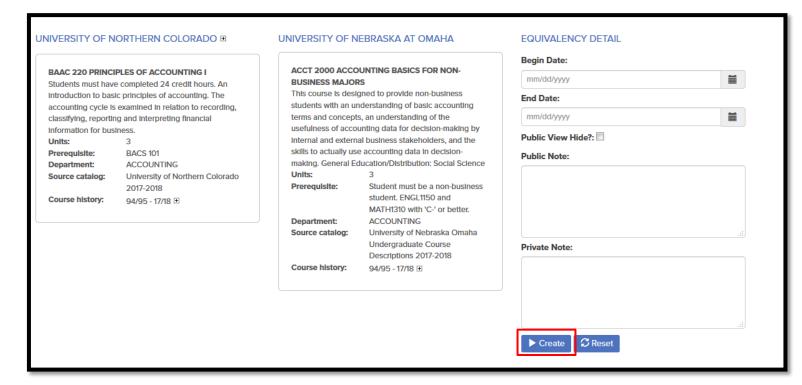
<u>Assign</u>: Use the dropdown bar to choose who you want your evaluation request to be sent to.

**Comments**: Optional to include any comments for the evaluator.

<u>Support Files:</u> Optional to include support files such as course outline, syllabus, etc.

After you click **Create**, an e-mail notification will be sent to the assigned evaluator informing them there is a course to evaluate.

### B. Creating an Equivalency



### **Creating an Equivalency (Option B)**

<u>Effective Date</u>-Leave blank unless it is determined that we will only accept that equivalency for a specific time period

<u>Public View Hide</u>-Hides equivalency from the UNO website public transfer guide. If checked, the equivalency will not display on UNO's website but will still be visible to logged in TES users.

Public Note-Notes added that are visible on public transfer guide on the UNO website

**Private Note**-Notes only visible to logged in TES users

# **Track Evaluation Requests**



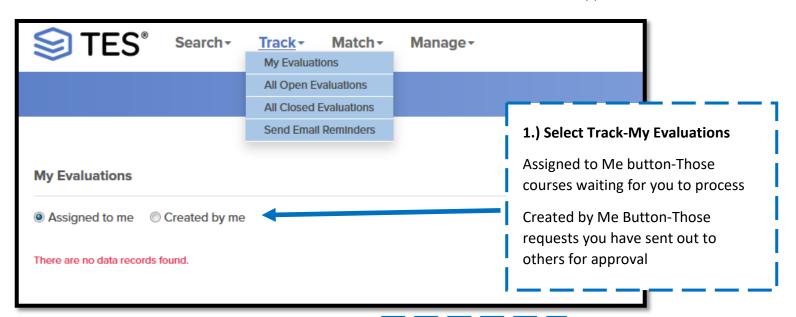
#### Track

Route course descriptions and proposed equivalencies to faculty and staff for evaluation. Track the approval process and add notes as needed. Store the results as an equivalency, if desired, and the log of evaluation activity for later review.

View equivalency requests you have sent out to see if your course has been approved

### AND/OR

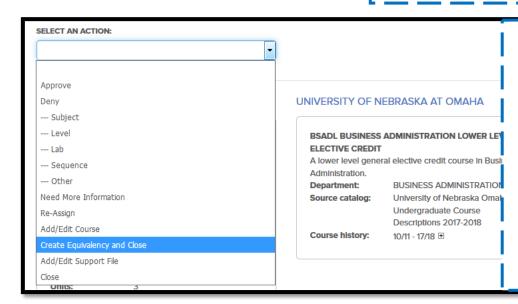
Evaluate those equivalencies that have been sent to you for approval





2.) Click the blue arrow next to an institution to view the status of your request

#COURSE	CITY
4	COON RA
2	MINNEAP
	CANAT DA

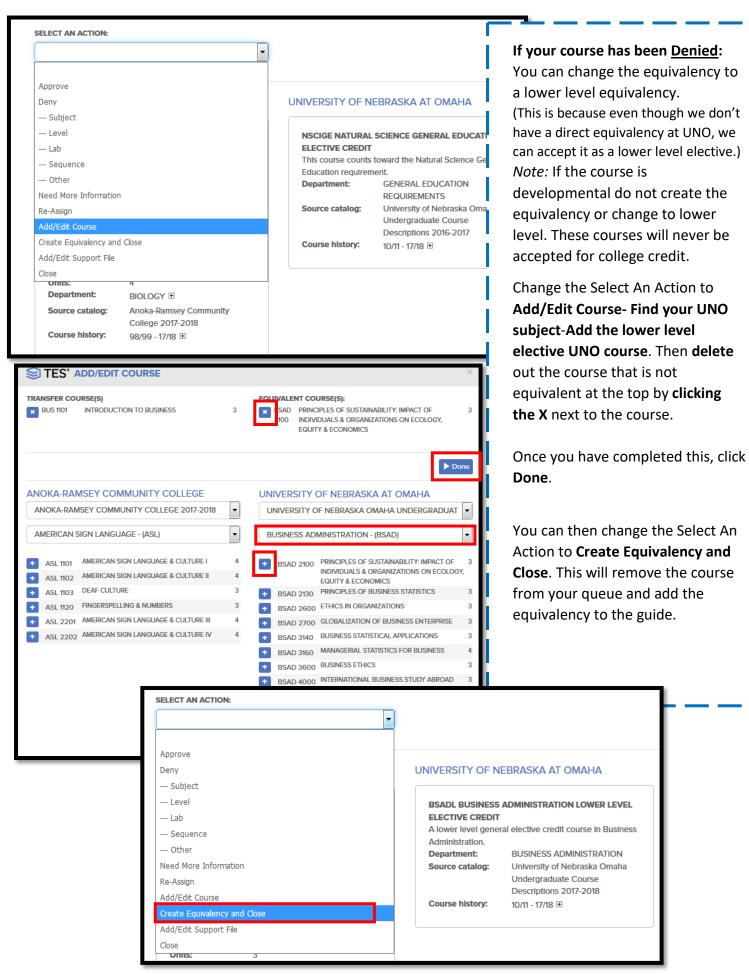


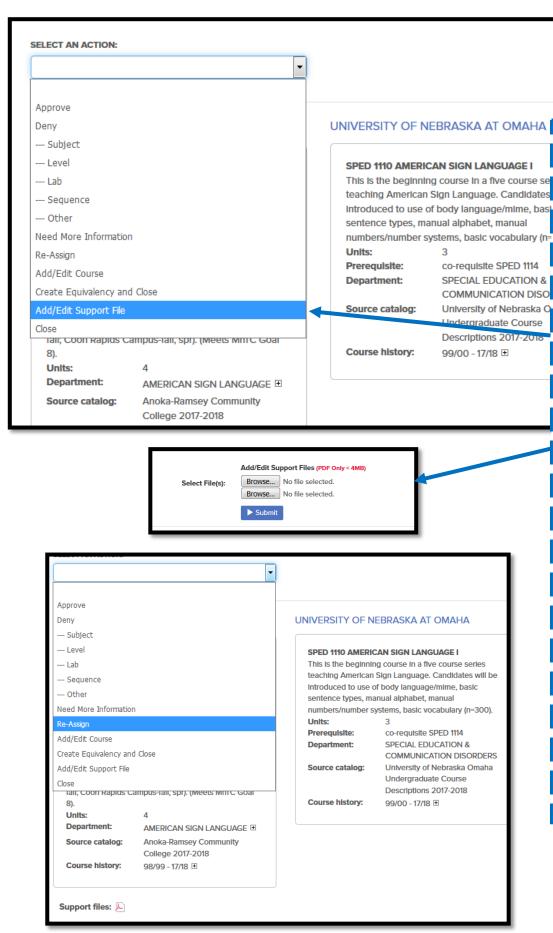
3.) Finishing the equivalency after the Evaluator has evaluated (skip to step 4 if you are the Evaluator)

# If your course has been Approved:

You will now open the course and Select An Action of "Create Equivalency and Close" from the dropdown menu.

A course will not be official or on the articulation guide until you click Create Equivalency and Close.



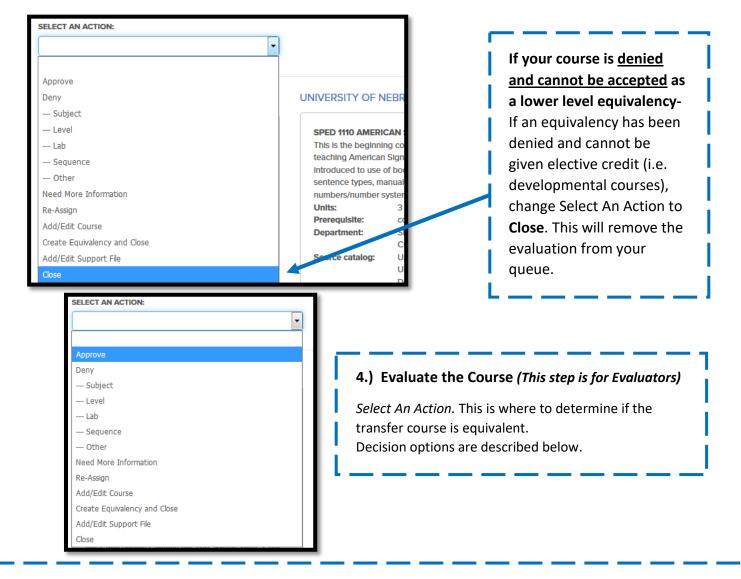


If your course comes back with Need More Information - A syllabus or other information may be needed. Get a copy of the syllabus in PDF form.

Change Select An Action to Add/Edit Support File.

Click **Browse**, select the PDF from your computer and click **Submit**.

Change Select An Action to Re-Assign- Choose the appropriate evaluator to send the equivalency back to with the syllabus now attached. The support file will be attached at the bottom of the course description when the evaluator opens their course to evaluate. They can evaluate/process like usual.



Approve-The equivalency is approved.

**Deny-** This is not a UNO equivalent. Choose an appropriate reason and enter any applicable notes to the requestor.

**Need More Information**- Use if you need a syllabus or something else before you can make your determination on the equivalency.

**Re-Assign-** Send the equivalency to someone other than yourself to make the approval determination.

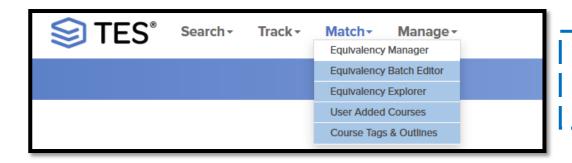
**Add/Edit Course**- If the incorrect UNO equivalency was selected, you can change it to what the correct UNO equivalency would be for that transfer course. Refer to page 7 for details on using the Add/Edit Course option.

Create Equivalency and Close- Evaluators will not use this action. Once an equivalency has been approved, it will go back to the original requestor and that requestor will complete this step. The original requestor will select Create Equivalency and Close to post the equivalency to the articulation guide and can add any needed notes. Do not Create Equivalency and Close before approving.

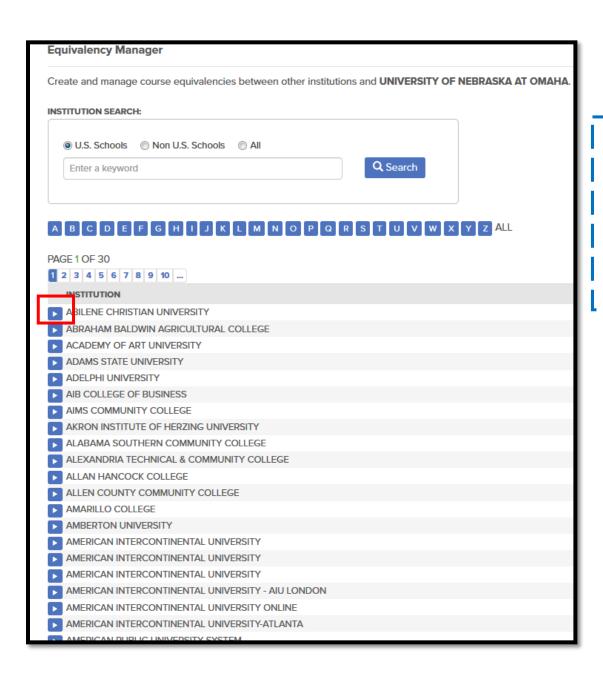
**Add/Edit Support File-**Evaluators **will not** use this action. If you use the Need More Information option, requestors will use Add/Edit Support Files to attach any necessary information back to you.

**Close-** Evaluators **will not** use this action. If an equivalency has been denied and cannot be changed to be accepted as elective credit (i.e. developmental courses), the equivalency will go back to the original requestor and that requestor will complete this step. The original requestor will select Close to remove the equivalency evaluation from their queue.

# **View Existing Course Equivalencies**



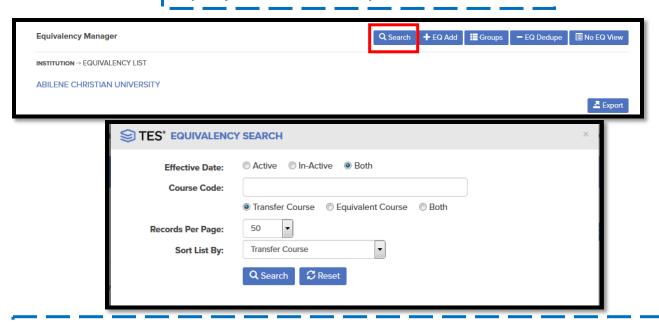
1.) Navigate to Match > Select Equivalency Manager



# 2.) Select the Institution

The established equivalencies we have for that school will be shown.

### Specify search criteria for equivalencies if desired



### **Equivalency Search Criteria**

Course Code: For searching by department subjects.

Transfer Course- You can search by the other institutions subject (i.e. ENG)

Home Course- You can search by our subject (i.e. ENGL)

Both- You can search for equivalencies by subject from either our institution or the other

institution

**Effective Date:** This is where you can search for courses based on if they are still active.

Active: Only current equivalencies will display (All courses with no end date entered will display)

Inactive: Courses that we entered with an end date as only valid/equivalent for a specific period

of time in the past will display

Show all: Displays all equivalencies

**Records per page:** Set how many equivalencies display on your page at once

**Sort list by:** Displays alphabetically by subject (Transfer Course, Home Course, Begin Date or End Date

