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

1.) Click Search-> Coursefinder-> Type and Select the Institution

2.) Select the Catalog Data Set (defaults to the newest catalog)

Or Search by Subject Course Code or Course Title

Or View the PDF Catalog
2. Check the box by the Institution’s course and click View. This will pull up the Institution’s course description.

3. Search for a Course by choosing a Department in the drop down menu OR select Show All Courses at the bottom of the list of Departments.

4. Check the box by the Institution’s course and click View. This will pull up the Institution’s course description.

5. Click the puzzle piece icon to search for the UNO equivalency.
6.) Select the UNO Catalog Dataset and click Search (defaults to newest catalog)

7.) Search for the UNO Course Equivalent by choosing a Department in the drop down menu

8.) Select the Course and click View

8.) Create the Equivalency by selecting the puzzle piece icon
9.) Click Submit to Create and Post the Equivalency

**Effective Date**--Leave the end date range blank unless it is determined that we will only accept that equivalency for a specific time period (The begin date autofills with today's date so you can delete that date out.)

**Public View Hide**--Hides equivalency from the UNO website public transfer articulation 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 to the equivalency that are visible on public transfer articulation guide on the UNO website

**Internal Note**--Notes visible only to logged in TES Users

Click the FootPrint Button in top right corner to Route the Equivalency to the Department for Approval

Use the **Assign To**: drop down bar to choose who you want your evaluation request to be sent to.

Use the Comments section to include questions or comments for the evaluator.

An email notification will be sent to the assigned evaluator when they have a course to evaluate.
Track Evaluation Requests

1.) Select Track - Select My Evaluations
- Assigned to Me button: Those courses waiting for you to process
- Created by Me button: Those requests you have sent out to others for approval

2.) Click next to an Institution to view the Status of your request

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 Action of Create Equivalency and Close.
   This will post the equivalency out on the UNO transfer articulation guide. A course will not be official or on the articulation guide until you click Create Equivalency and Close.
If your course has been Denied: You can change the equivalency to a lower level equivalency. (This is because even though we don’t have a direct equivalency at UNO, we can accept it as a lower level elective.) Note: If the course is developmental do not create the equivalency or change to lower level. These courses will never be accepted for college credit.

Change the Select Action to Select/Change Equivalent Course- Click Select to choose your UNO catalog-find your UNO subject-Click the lower level UNO course. Then once you have chose the UNO course and have adjusted to the lower level equivalency, you can change the Select Action to Create Equivalency and Close. This will remove the course from your queue.
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 Action to **Add/Edit Support File**. Click **Browse** and Select the PDF from your computer and click **Submit**. Change Select Action to **Re-Assign**- Choose the appropriate Evaluator to send the equivalency back with the syllabus now attached. The support file (syllabus) will be attached at the bottom of the course description when the Evaluator opens their course to evaluate. They can evaluate/process like usual.

If your course is denied and cannot be accepted as a lower level elective equivalency- If an equivalency has been denied and can not be changed to be accepted as elective credit (ex. developmental courses), change Select Action to **Close**. This will remove the equivalency evaluation from your queue.
4.) Evaluate the Course
(This Step is for Evaluators)

SELECT ACTION. This is where to determine if the transfer course is equivalent. Decision options are described below.

Action Options / Definitions

Approve- The equivalency is approved.

Deny- This is not a UNO equivalency-
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

Select/Change Equivalency- If the incorrect UNO equivalency was selected, you can change it to what the correct UNO equivalency would be for that transfer course.

Create Equivalency and Close- Equivalency 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.

Close- Equivalency Evaluators will not use this Action.
If an equivalency has been denied and can not be changed to be accepted as elective credit (ex. developmental courses), the equivalency will go back to the original requestor and that requestor will complete this step. The orginal 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 School
   The equivalencies we have for that school will be shown
Specify search criteria for equivalencies if desired

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**Equivalency Search Criteria**

**Course Code:** This is where you can search by department subjects
- **Transfer Course:** You can search by the other institution's subject (ex: ENG)
- **Home Course:** You can search by our subject (ex: 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)
- (Courses that are no longer offered can be seen as active equivalencies as long as we do not put an end date on them)
- **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)

View the course descriptions for articulated courses