

ADDING TRANSFER COURSE(S) IN SHATATR

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REVISION HISTORY

Version	Date	Name	Description
1.0	9/18/18	Andre Crawford	Banner 9 Procedure

INTRODUCTION AND PURPOSE

Designated Academic staff in the College Office will have the capability of adding course and course equivalency in Banner for CSUs, International, and Out of State four-year Institutions. The course equivalency will apply for all future students transferring the same course from that same institution. **Follow the steps outline in this procedure only if you are approved to make such articulation decisions.**

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. Although UC does not have preapproved formal agreements on transferable coursework outside of the California community college system, general units or credits from a regionally accredited college or university are transferable if a course is comparable to one offered at a UC campus. If a course is not equivalent to a particular UC course, it must be appropriate for a UC degree in terms of its purpose, scope and depth.
2. However, some courses are not transferable to UC. The following types of courses, for example, will not garner credit:
 - I. Remedial English (composition courses below the first-term college level)
 - II. Mathematics below college algebra (any courses for which intermediate algebra is not a prerequisite)
 - III. Instructional/technical how-to courses, such as how to use computer software (e.g., Word, Excel, PowerPoint)
3. More information regarding non-California Community College transfer credits can be found at the following website: <http://admission.universityofcalifornia.edu/counselors/transfer/advising/transferring-credits/>

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Admissions
2. Registrar
3. Financial Aid
4. College Office

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

FORMS

The forms listed below are covered in this training.

Form	Form Name	Description
SHATATR	Transfer Course Articulation	Transfer course and equivalent SLCC course displayed
SOISBGI	Source/Background Institution Query-Only	Institution search

ADDING TRANSFER COURSE(S) IN ARTICULATION



In order to protect the integrity of our articulation agreements, no course(s) should be added that have not been approved by the appropriate channels.

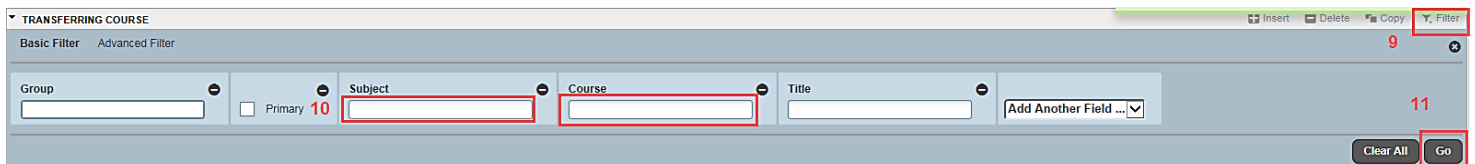
Note: You will need the course number/ title and units (quarter or semesters) along with appropriate equivalency in order to complete the process outlined below.

REVIEWING ARTICULATION LIBRARY

Follow the steps below to review existing articulation **before** entering a record (to avoid creating a duplicate record).

STEPS

1. Go to **SHATATR**
2. Select **Institution** search 
3. Select **Source Background Link (SOISBGI)**
4. **College** for **Institution Type** drop down
5. Enter **Name**
 - a. Enter **%College Name%** (Case Sensitive)
6. Select **Go (F8)**
7. Double click **Code** for the institution (redirected to the main SHATATR screen)
 - a. Leave **Program** and **Default Institution** blank
8. Select **Go (Alt+PgDn)**
9. Select **Filter** in **Transferring Course** block  or **F7**
10. Enter **Subject** and **Course** (transfer institution – not UCR)
11. Select **Go**



12. Review results
 - a. If no records found, go to [Adding Course to Course Articulation](#)
 - b. If course is part of a **group** then enter new **Filter**
 - i. **Filter** – Enter **Group** number – Select **Go** (review multiple courses required for group and **Equivalent Course Block** to view UCR's equivalency)
 - ii. If equivalency for the **Group** requires update proceed to [Adding Series Articulation](#)
 - c. If course is not part of group, locate the **newest "Term"** from results
 - i. If **Equivalent Course Block** is current, then no action needed
 - ii. If an update is needed proceed to [Adding Course to Course Articulation](#)

Example: 4 records were retrieved when MAT 11 at Riverside Community College (RCC) was filtered.

Institution: 004658 **Riverside City College** Program: Default Institution: Start Over

TRANSFERRING COURSE Insert Delete Copy Filter

Active filters: Subject: MAT Course: 11 Clear All Filter Again

Group	Primary	Subject	Course	Title	Term	Equivalent Exists	Transfer Catalog
37	<input checked="" type="checkbox"/>	MAT	11	COLLEGE ALGEBRA	200640	Yes	
	<input type="checkbox"/>	MAT	11	COLLEGE ALGEBRA	200440	Yes	
	<input type="checkbox"/>	MAT	11	COLLEGE ALGEBRA	200630	Yes	
	<input type="checkbox"/>	MAT	11	COLLEGE ALGEBRA	200640	Yes	

Record 4 of 4

Student must take MATH 11 and MATH 36 (group 37 green) at RCC to receive credit for MATH 005 (yellow)

Institution: 004658 Riverside City College Program: Default Institution: Start Over

TRANSFERRING COURSE Insert Delete Copy Filter

Active filters: Group: 37 Clear All Filter Again

Group	Primary	Subject	Course	Title	Term	Equivalent Exists	Transfer Catalog
37	<input checked="" type="checkbox"/>	MAT	11	COLLEGE ALGEBRA	200640	Yes	
37	<input type="checkbox"/>	MAT	36	TRIG (NOT TRANSFERABLE)	200640	No	

Record 1 of 2

TRANSFERRING COURSE DETAILS Insert Delete Copy Filter

Details Description Attributes

Level: U Status: A Minimum Grade: D

Credits Low: 0.000 Credits High: 4.000

Transfer: 0.000

Converted: 0.000

EQUIVALENT COURSE Insert Delete Copy Filter

And/Or	Left Parenthesis	Subject	Course	Title	Catalog Low	Catalog High	Credits Used	Right Parenthesis
None		MATH	005	PRECALCULUS	0.000	5.000	6.000	

Record 1 of 1

ADDING A NEW COURSE TO ARTICULATION LIBRARY

Follow the steps below to enter a **new** course in SHATATR after equivalency has been determined (1:1 or 1:2). You should have already filtered the results and be in the Transferring Course block.

STEPS


- In **Transferring Course Block** Select **Insert** + **Insert**
 - Subject** (as it appears on the transcript)
 - Course** (as it appears on the transcript)
 - Title** (abbreviate if needed)
 - Term** (approved as of "YYYYTT")
 - Equivalent Exist:** Yes
- In **Transferring Course Details** section, enter/update the following fields:
 - Level:** U
 - Status:** A (Active) or I (Inactive)
 - Minimum Grade:** D- (UC courses is E).
 - Credits High** (unit awarded at CSU or "Out Of State" institutions are usually semester units)
 - Converted: Credit High** will convert to Quarter units (1.5 x semester units - UC's change back to appropriate units)
- In **Equivalent Course** section, enter the following **UCR's equivalent** fields:
 - Subject**
 - Course**
 - Credits Used:** This should match **Converted: Credit High** under **Transferring Course Details**

- d. **Save**
- e. If adding multiple equivalent courses then
 - i. Select **Insert**
 - ii. Repeat steps A through C above
 - iii. Select “**And/Or**” as appropriate
 - iv. **Save**

UPDATING A COURSE TO ARTICULATION LIBRARY

Follow the steps below to update the equivalency for a course that already exists in SHATATR (1:1 or 1:2), once you have identified a single course articulates to a UCR course(s) or if an existing articulation needs to be updated. *You should have already filtered the results and be in the Transferring Course block.*

STEPS

1. In **Transferring Course**
 - a. Select **Copy** 
 - i. An **exact copy** of the Transfer Course you had just filtered will be inserted directly below the course you just “copied”
 - b. Update the following fields as needed
 - i. **Subject, Course, Title, Term**
2. Follow [Adding A New Course to Course Articulation](#) Steps 2 – 3 to update the rest of the record

ADDING GROUP ARTICULATION

If two or more courses articulate to one or more UCR courses, a group must be created. In order to enter articulation for courses that are part of a “series” or group, you must first identify which courses are required and the primary.

Group: all courses must be completed in order to receive articulation to UCR’s equivalency. If student did not complete both courses, do not use **Group**.

Important: Group Number are two characters “##”, “#x”, “x#”, or “xx” (For example; 01, 2A, B3, CC, etc.). Review results before entering a new Group Number to avoid duplicates.

GROUP EXAMPLE

If series already exists in Banner the **Group** field will have group number. Example: BIOSCI 93 at UC Irvine (004859)

1. Select **Filter**
2. Enter BIOSCI in **Subject**, 93 in **Course**
3. Select **Go**
4. Results: (Record shows that course is part of Group 06 – in **green**)
5. Select **Start Over**
6. Select **Go**
7. Select **Filter**
8. Enter “**06**” in **Group**
9. Select **Go**
10. You can scroll through the courses that are tied to the **06** Group

- a. BIOSCI 93 (**Primary** box is checked – in **green**)
- b. BIOSCI 99

Articulation Reads: BIOSCI 93 + BIOSCI 99 = BIOL 5A

Institution: 004859 UC Irvine Program: Default Institution: Start Over

TRANSFERRING COURSE Insert Delete Copy Filter

Active filters: Group: 06 Clear All Filter Again

Group	Primary	Subject	Course	Title	Term	Equivalent Exists	Transfer Catalog
UC	<input checked="" type="checkbox"/>	BIOSCI	93	DNA TO ORGANISMS	200730	Yes	
06	<input type="checkbox"/>	BIOSCI	99	MOLECULAR BIOLOGY	200730	No	

Record 1 of 2

TRANSFERRING COURSE DETAILS Insert Delete Copy Filter

Details Description Attributes

Level: U Status: A Minimum Grade: F

Credits Low: 0.000 Credits High: 8.000 Protect from Import:

Transfer: 0.000

Converted: 0.000

EQUIVALENT COURSE Insert Delete Copy Filter

And/Or	Left Parenthesis	Subject	Course	Title	Catalog Low	Catalog High	Credits Used	Right Parenthesis
None		BIOL	005A	INTRO: CELL & MOLECULAR BIOL	0.000	4.000	8.000	

Record 1 of 1

Note that only the **Primary** course will have **Equivalency Course information** (in **purple**). In this example, BIOSCI 93 has the Group number and Primary Indicator selected.

Furthermore, BIOSCI 99 has the Group number but is not the Primary. As a result, there is no Equivalency Course (in **purple**).

Important: If you are “updating” a group, you can use **Copy** to update the articulation for the group.

If a new group needs to be articulated, scroll through **all** the records (with groups) using “next page” button to identify the next available group number.

Note: While scrolling through the records, you may notice that a “Group ##” has not been used yet. For example, you will see Group 01 through Group 05 followed by Group 07. That means Group 06 has not be used, so you may use it for your new group.

Once this analysis is complete and you are ready to enter a “series” or group, follow the steps below.

CREATING A NEW GROUP

Follow the steps below to enter a **new Group** in SHATATR after equivalency has been determined (2:1 or 2:2). You should have already filtered the results and be in the Transferring Course block.

STEPS

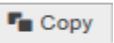
1. Select **Insert** in **Transferring Course** section, enter/update the following fields:
 - a. **Group**
 - b. **Primary** (check it)
 - c. **Subject** (as it appears on the transcript)
 - d. **Course** (as it appears on the transcript)
 - e. **Title** (abbreviate if needed)
 - f. **Term** (approved as of “YYYYTT”)
 - g. **Equivalent Exist:** Yes

2. In **Transferring Course Details** section, enter the following fields:
 - a. **Level:** U
 - b. **Status:** A (Active)
 - b. **Minimum Grade:** D- (UC courses is F).
 - c. **Credits High** (unit awarded at CSU or “Out Of State” institutions are usually semester units)
 - d. Converted: Credit High will convert to Quarter units (1.5 x semester units - UC’s change back to appropriate units)
3. In **Equivalent Course** section, enter the following UCR’s equivalent fields:
 - a. **Subject**
 - b. **Course**
 - c. **Credits Used:** This should match Converted: Credit High under **Transferring Course Details**
 - i. If series articulates to two or more UCR courses then:
 - ii. Select **Insert**
 - iii. Repeat steps A through C above
 - iv. Select “**And/Or**” as appropriate
 - d. Grand total of all Equivalent Credits Used must equal the Grand total of all Transferring Credits High “Converted”
 - For example. There are three 6.0 unit Transferring courses total 18.0 units. There are four Equivalent courses in this group. Each Equivalent course must be 4.5 units each to total the 18.0 units of the Transferring courses.
4. Select **Insert** in **Transferring Course Details** section to add **non-primary** course(s) to the group. Follow step 1 and 2 above, **DO NOT** check Primary
5. Repeat Step 4 as needed for each **non-primary** course

UPDATING A GROUP ARTICULATION

Follow the steps below to update the equivalency for a group that already exists in SHATATR (2:1 or 2:2), after you have identified the existing articulation needs to be updated. You should have already filtered the results and be in the Transferring Course block.

STEPS – UPDATE EXISITING GROUP

1. In **Transferring Course**
 - a. Select **Copy** 
 - i. An **exact copy** of the Transfer Course you had just filtered will be inserted directly below the course you just copied
 - ii. Always copy the **Primary course** first
 - b. Update the following fields as needed
 - i. **Subject, Course, Title, Term** (new term that the equivalency was approved for)
2. Follow [Creating A New Group](#) Steps 2, 4 and 5 to update the non-primary courses for the rest of the group