

# NAVIGATING TRANSFER HISTORY

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## REVISION HISTORY

Version	Date	Name	Description
1.0	1/17/18	Karla	New Procedure—Banner 9

## INTRODUCTION AND PURPOSE

The Navigating Transfer History Training provides guidance regarding how to view and understand transferable coursework that has been applied to an individual student’s record from transferring institutions for each term. Undergraduate Admissions should be contacted, if questions arise regarding coursework that is entered (or not entered) for individual students.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. The Academic Senate via the Board of Admissions and Relations with schools has delegated the authority to the office of Undergraduate Admissions to determine the acceptability (transferability) of courses taken at an institution other than the university. The faculty of the particular school or college in which the student plans to enroll, determines the applicability (articulation) of such coursework in satisfaction of degree requirements. This policy can be found in the UCR catalog under the header “Credits, Transcripts and Test Scores”.
2. RVW placed in the “Course Number” field is an indication that the posted course is in need of review by the college office for course/breadth determination. The RVW allows for the units to post to the student’s record, while serving as a flag to the advisor that the course is in need of review.

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Athletics
2. College Offices
3. Financial Aid
4. Graduate Division
5. Highlander One Stop Shop (HOSS)
6. Institutional Reporting
7. Registrar’s Office
8. Undergraduate Admissions

## 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
SHATRNS	Transfer Course Information	The purpose of this form is to capture and maintain information relating to transfer work. The attendance periods entered, pertain to a specific student level (undergraduate, graduate, etc.)





## PROCEDURES

### VIEWING INSTITUTIONS AND TRANSFERABLE COURSES

Follow the process below to view transferable courses applied to student's records from transferring institutions for each term. Once transferable courses have been applied to student record in the form SHATAEQ, coursework will be viewable to academic advisors and college offices.

#### STEPS

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1. Go to **SHATRNS**
2. Enter **SID**
3. Select **Transfer Institution** search 
  - a. Highlight and *Select or Double Click* **Sequence Number** (for the institution you would like to review)
4. Select **Attendance Period Number** search 
  - a. Highlight and *Select or Double Click* **Attendance Period Number** (for the Attendance Period you would like to review)
5. Select **Go** (Alt+PgDn)
6. Select **Next Selection**  (Alt+PgDn)
  - a. Select twice, until you see the **Transfer Course Detail/Equivalent Course Detail**
    - i. Use **Up** and **Down** arrows on the keyboard to review transfer course work
7. To review a different **Attendance Period** or **Transfer Institution** select **Start Over** 
  - a. Repeat steps 1-6 to complete review

## FINAL QUIZ

1. What office has been delegated the authority to determine the transferability of course work from an institution other than the university?
  - a. Registrar's Office
  - b. College Office
  - c. Undergraduate Admissions
  - d. Vice Provost of Undergraduate Education

The correct answer is c. Undergraduate Admissions. Undergraduate Admissions is responsible for determining the transferability of coursework from institutions other than the university. The faculty have been given the responsibility of determining the applicability (articulation) of such coursework in satisfaction of degree requirements.

2. What does the designation RVW mean if placed in the "Course Number" field?
  - a. Ignore the Course
  - b. Call Undergraduate Admissions
  - c. Remove the course
  - d. Course requires college office review

The correct answer is d. Course requires college office review. The RVW allows for the units to post to the student's record, while serving as a flag to the advisor that the course is in need of review.

3. What must be entered in order to fully navigate into the form?
  - a. Name, SID, DOB
  - b. SID, attendance period number, transfer institution number
  - c. SID
  - d. Nothing

The correct answer is b. SID, attendance period number and transfer institution number. Banner will not allow you to navigate into the form until all 3 of these values are populated in the key block.