

REMOVING EXCESS LOWER DIVISION UNITS

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REVISION HISTORY

Version	Date	Name	Description
1.0	1/10/16	Emily	Version with Training Committee Approval/Feedback

INTRODUCTION AND PURPOSE

Follow the process below to remove excess lower division units from transfer student records to adhere to the 105 quarter unit-cap.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

- Students will be granted up to 70 sem/105 qtr units of credit for lower division coursework completed at any institution or any combination of institutions. For units beyond the maximum, subject credit for appropriate coursework taken in excess of this unit limitation will be granted and may be used to satisfy requirements
- Units earned through AP, IB and/or A-Level examinations are not included in the limitation and do not put applicants at risk of being denied admission.
- Units earned at any UC campus (extension, summer, cross/concurrent and regular academic year enrollment) are not included in the limitation but are added to the maximum transfer credit allowed and may put applicants at risk of being denied admission due to excessive units.
- There is a limit to the number of units for which UC grants credit in the following areas:
 - English as a Second Language courses (a maximum of 8 semester (12 quarter) units.
 - Physical Education activity courses (a maximum of 4 semester (6 quarter) units.
- Duplicative credits is prohibitive. UC will not grant credit for college courses in which the content duplicates material of a previously completed course or examination for which credit has already been granted, with the exception of the repeat of deficient (D/F) course grades.
- The college office is authorized to remove units if the student's transferable units exceed the 105 quarter unit-cap.
- More information regarding transfer credits can be found at the following website: <http://admission.universityofcalifornia.edu/counselors/transfer/advising/transferring-credits/>

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

- College Offices
- Registrar's Office
- Undergraduate Admissions

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbx.ucr.edu) to follow along.

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.)
SHATERM	Term Sequence Course History	<p>The purpose of this form is to provide a tool to be used by advisors to determine the student's progress on a term-by- term basis. This form is query-only, and displays the student's current status and GPA information. Scrolling institutional, transfer, and overall GPA totals are displayed on this form each time the term changes. Institutional and transfer work are displayed separately. The form permits the entry of a specific beginning term which is other than the first term the student attended.</p> <p>Transfer work which has been flagged to be included in the transfer GPA is displayed by term, transfer institution, and transfer attendance period. The primary sort order for coursework is by term. Within term, the sort order is by institutional coursework first then by transfer coursework second. For transfer coursework, the sort order is by transfer institution number and then by attendance period.</p>
SHATAEQ	Transfer Articulation Evaluation	This form allows for the creation and maintenance of the student's transfer articulation information for a transfer institution.
SHQTRIT	Transfer Institutions by Person Query	This form is only accessible from the SHATAEQ form and allows a person to view transfer institutions attended for an individual student record.

PROCEDURES

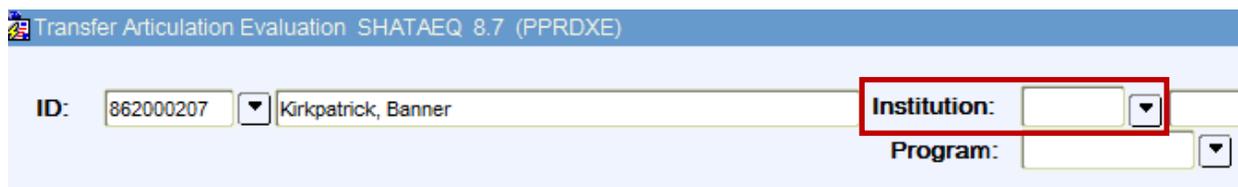
VIEWING INSTITUTIONS AND TRANSFERABLE COURSES

Prior to physically removing units from a student’s record, be sure to review the student’s entire academic history on SHATRNS/SHATERM. This will need to be completed in order for the advisor to make a determination regarding which excess lower division units to remove from the student’s record.

REMOVING EXCESS LOWER DIVION UNITS

STEPS

1. From Banner Main Menu, go to: **SHATAEQ**
2. Type in SID number (student’s record will automatically generate)
3. Select the College/University you wish to view using the Institution function. Select the  search icon to view the student’s schools of attendance.



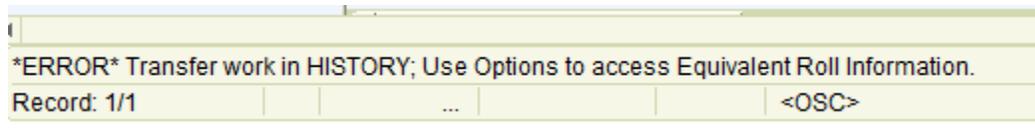
Transfer Articulation Evaluation SHATAEQ 8.7 (PPRDXE)

ID: 862000207  Kirkpatrick, Banner **Institution:** 
 Program: 

4. From pop-up window, select option “View student institutions (SHQTRIT)”
5. Place cursor in the sequence number institution for the school you wish to view and double-click

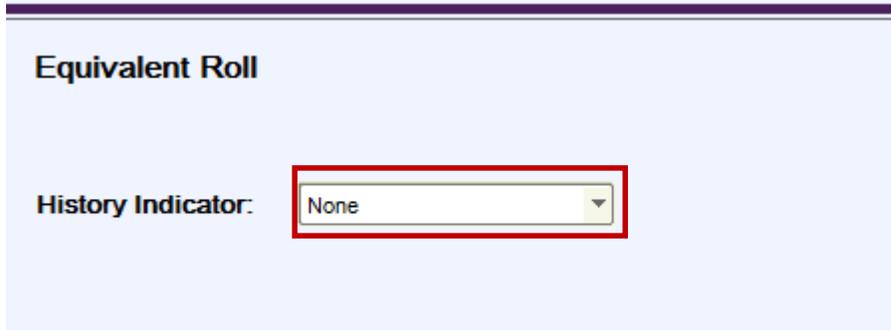
Sequence Number	Institution	Description
 1	002830	Santiago Canyon College
 2	004501	Mount San Jacinto College

6. Next Block 
7. You will receive the following error message at the bottom of your Banner Window



ERROR Transfer work in HISTORY; Use Options to access Equivalent Roll Information.
 Record: 1/1 ... <OSC>

8. Go to **OPTIONS** and select **EQUIVLANET ROLL INFO** from drop down menu
9. In Equivalent Roll block, select "Delete From History" from the History Indicator menu



10. Save 
11. Pop up box will appear saying "GPA Calculation Complete" click OK. -This will pull the student transfer data from academic history and put back on SHATAEQ so that the units can be overrode
12. Find course(s) that units need to be adjusted/removed from on student record

Transfer Articulation Evaluation SHATAEQ 8.7 (PPRDXE)

ID: 862000207 Kirkpatrick, Banner Institution: 002830 Santiago Canyon College Program:

Attendance			Transfer							Equivalent				
Period	Term	Level	Group	Ind	Subject	Course	Credit Hours	Grade	Articulate Ind	Level	Subject	Course	Credit Hours	Grade
1	201240	U			ANTH	100	3.000	A	Successful	U	ANTH	001	4.500	TA
1	201240	U			BUS	100	3.000	A	Successful	U	BUS	010	4.500	TA
1	201240	U			HIST	126	3.000	C	Successful	U	HIST	----	4.500	TC
1	201240	U			WMNS	101	3.000	C	Successful	U	WMST	001	4.500	TC
2	201320	U			CMPR	100	3.000	D	Successful	U	CS	008	4.500	TD
2	201320	U			ENGL	101	4.000	B	Successful	U	ENGL	001A	6.000	TB
2	201320	U			SPAN	101	5.000	B	Successful	U	SPN	001	7.500	TB
3	201340	U			ENVR	200	3.000	C	Successful	U	ENSC	001	4.500	TC
3	201340	U			MATH	105	3.000	C	Successful	U	MATH	015	4.500	TC
3	201340	U			NUTR	115	3.000	A	Successful	U	BCH	010	4.500	TA

13. Using the Articulate Ind select "**Override Edit**" from the drop down menu for the course(s) that need to have a unit adjustment
14. In the Credit Hours column, adjust units accordingly for the course(s).
15. Save 

Transfer Articulation Evaluation SHATAEQ 8.7 (PPRDXE)

ID: 862000207 Kirkpatrick, Banner Institution: 002830 Santiago Canyon College
Program:

Attendance			Transfer						Articulate	Equivalent				
Period	Term	Level	Group	Ind	Subject	Course	Credit Hours	Grade	Ind	Level	Subject	Course	Credit Hours	Grade
1	201240	U			ANTH	100	3.000	A	Successful	U	ANTH	001	4.500	TA
1	201240	U			BUS	100	3.000	A	Successful	U	BUS	010	4.500	TA
1	201240	U			HIST	126	3.000	C	Successful	U	HIST	---	4.500	TC
1	201240	U			WMNS	101	3.000	C	Override Edit	U	WMST	001	.000	TC
2	201320	U			CMPR	100	3.000	D	Override Edit	U	CS	008	1.500	TD
2	201320	U			ENGL	101	4.000	B	Successful	U	ENGL	001A	6.000	TB
2	201320	U			SPAN	101	5.000	B	Successful	U	SPN	001	7.500	TB
3	201340	U			ENVR	200	3.000	C	Successful	U	ENSC	001	4.500	TC
3	201340	U			MATH	105	3.000	C	Successful	U	MATH	015	4.500	TC
3	201340	U			NUTR	115	3.000	A	Override Edit	U	BCH	010	.750	TA

- Go to menu and select **OPTIONS** and **Equivalent Roll Info**
- In Equivalent Roll block, select "Roll to History" from the History Indicator menu
This step is critical to ensure the student's transfer academic history is saved in the student's record.
- Save 
- Pop up box will appear saying "GPA Calculation Complete" click OK
- Updated unit information will now be viewable and applied to student records
- Repeat steps outlined above to adjust lower division units being transferred in from other institutions

FINAL QUIZ

- Under what circumstances is the college office allowed to removing transfer units from a student's record?**
 - Whenever an advisor thinks it is appropriate as long as it is in the student's best interest.
 - If the student has exceed 105 quarter lower division units.
 - If the student has exceeded 105 quarter total units.
 - Never.

Answer: (b) – Advisors are permitted to remove units in excess of the 105 quarter unit cap. See the "Related Policies, Regulations, Guiding Principles and Common Practices" section for more specific details. If in doubt contact Undergraduate Admissions for further guidance.

- What should be completed prior to removing any excess units from the student's record?**
 - Talk to the student to ask them which units he/she would like to have removed.
 - Calculate the student's transfer GPA.

- c. Review the entire student's record on SHATRNS/SHATERM to get the full picture of the student's transfer history.
- d. Count how many upper division courses the student has completed.

Answer (c) – Prior to physically removing units from a student's record, be sure to review the student's entire academic history on SHATRNS/SHATERM. This will need to be completed in order for the advisor to make a determination regarding which excess lower division units to remove from the student's record.

3. What step is critical to ensure is completed after excess coursework has been removed by the Advisor?

- a. Ensure the student's transfer coursework is rolled back to academic history by selecting "roll to history" in the "equivalent roll" block.
- b. The "save" button is selected
- c. Exit Banner
- d. Count the lower division course units

Answer (a) – Completing this step is critical to ensure the student's transfer academic history is saved in the student's record.