REMOVING EXCESS LOWER DIVISION & MAINTAINING SHATRNS RECORD

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REVISION HISTORY

Version	Date	Name	Description
1.0	1/10/16	Emily	Version with Training Committee Approval/Feedback
1.1	9/2/16	Karla	Finalized procedure with committee approval/feedback.
1.2	6/13/17	Karla	Included Resource
1.3	8/31/17	Karla	Clarified that record must be "rolled back or exited" for update to be made on student profile.
1.4	1/19/18	Karla	Validation Completion Date added to SZAUSDA

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. **(EFFECTIVE FALL 2014)**

Students will be granted up to 70 sem/105 qtr units of credit for lower division coursework completed at a **California Community College**. 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. **(POLICY PRIOR TO FALL 2014)**

1. 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.

2. 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.

3. There is a limit to the number of units for which UC grants credit in the following areas:

   a. English as a Second Language courses (a maximum of 8 semester (12 quarter) units.

   b. Physical Education activity courses (a maximum of 4 semester (6 quarter) units.

4. Duplicative credit 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.

5. The college office is authorized to remove units if the student's transferable units exceed the 105 quarter unit-cap.

6. Courses that are transferable from CSU's, International, and Four year Institutions will be labeled as **UCRV RVW** and must be updated at the College Office. To set the articulation for these please see the Adding Transfer Course(s) in SHATATR.

7. 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

1. College Offices
2. Registrar's Office
3. Undergraduate Admissions

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbxe.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	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. 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.

PROCEDURES

VIEWING INSTITUTIONS AND TRANSFERABLE COURSES

A copy of the evaluated transcript will be sent to the College Office after Undergraduate Admissions has data entered the transferable coursework. All Upper Division work will be marked **UD**, and thus all courses/credit that do not have **UD** may be reduced as necessary.

 Prior to physically removing units from a student's record, be sure to review the student's entire academic history through the student profile at https://advisorssbsb.ucr.edu. Once in the student profile, click on the Academic Transcript in the left navigation. Once you have noted the courses/units that will be reduced, follow the steps below to update Banner.

REMOVING EXCESS LOWER DIVISION UNITS

Undergraduate Admissions will calculate the number of Excess Lower Division Units that are required to be reduced. Follow the steps below to locate the number. *Note: In order for units/course titles to update on the Student Profile you need to **Exit or Roll Back** after completing the update.*

STEPS

1. Go to **SZAUSDA**
2. Enter **TERM**
3. Enter **SID**
4. Select **Fields 161 – 200**
5. **Field 177 Excess Unit**
6. **Field 179 Validation Complete Date** (data entry date)

LOCATE STEPS

1. Go to **SHATRNS**
2. Enter **SID**
3. Select **Institution** from drop down (from which credit will be reduced)
   a. **177 Excess Units** (this is the units in Quarter hours that will need to be reduced)

STEPS

4. Go to **SHATRNS**
5. Enter **SID**
6. Select **Institution** from drop down (from which credit will be reduced)
7. Select **Attendance Period** from drop down (as reflected on transcript)

8. **Next Block** three times
9. Use **Up** and **Down** (arrows on keyboard) move through course records
10. Review **Equivalent Course Detail** block

11. Locate desired course in **Subject** and **Course** (example: HIST 017A)

12. Reduce **Hours** (as needed)
13. **Save**
14. **Exit**

*In order for units/course titles to update on the Student Profile you **must** select/click **Exit** after completing each update.*

ADDITIONAL UPDATES TO	REPEAT STEPS
Institution	3-9
Attendance Period within the same institution	4-9
Reducing hours within the same **Attendance Period**	6-9

FINAL QUIZ

1. **Under what circumstances is the college office allowed to remove transfer units from a student's record?**
   a) Whenever an advisor thinks it is appropriate as long as it is in the student's best interest.
   b) If the student has exceed 105 quarter lower division units.
   c) If the student has exceeded 105 quarter total units.
   d) 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.

2. **What should be completed prior to removing any excess units from the student's record?**
   a) Talk to the student to ask them which units he/she would like to have removed.
   b) Calculate the student's transfer GPA.
   c) Review academic history on through the student profile
   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 at https://advisorssbsb.ucr.edu to note the courses that will be reduced.

MAINTAINING SHATRNS RECORD

If transfer course was awarded from a CSU, International, or Four Year Institution the Equivalent Course Detail (in **Red**) block will reflect as follows. Please note that some California Community College may also have this set. It is the responsibility of the College Office to award the correct course. You may do so on the SHATRNS record.

STEPS TO UPDATE EQUIVALENT COURSE DETAIL

1. Enter **Subject** (UCR Subject)
2. Enter **Course** (UCR Course Number)
3. Enter **Hours** (if Institution is semester school multiple Hours in **Green** x 1.5)
    i. In this example Hours will be 4.5 (3 x 1.5)
4. Enter **Grade** (update to Grade earned in **Purple**)
    i. In this example Grade will be TB (if + or - please enter)
    ii. For UC Transfer courses, update **Grading Mode** to **B** (this will allow the grade to be counted in GPA)
5. **Save**
6. **Exit**

*In order for units/course titles to update on the Student Profile you **must** select/click **Exit** after completing each update.*

RESOURCE

If there is a data entry error on the Transfer Course Detail block (section in **Blue**) please submit a WorkFront ticket.