

ADDING TRANSFER COURSE(S) IN SHATATR

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REVISION HISTORY

Version	Date	Name	Description
1.0	10/03/16	Karla Contreras	First Draft
1.1	6/08/17	Karla Contreras	Updates

INTRODUCTION AND PURPOSE

Designated Academic staff in the College Office will have the capability of adding course and course equivalency in Banner for CSU's, 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 transfer 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, open Banner Training (bannertestxe.ucr.edu) to follow along.

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 CURRENT ARTICULATION

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

STEPS

1. Go to **SHATATR**
2. Select **drop down** next to **Institution** block
3. Select **Source Background Form (SOISBGI)**
4. Select **College** in Source or Background Institution column
 - a. Enter **%College Name%** under the name column; **F8**
 - b. *Name and City fields are case sensitive*
5. Double click correct **Code** for the institution (this will take you to the previous screen)
6. Leave **Program** and **Default Institution** blank
7. **Next Block**
8. Select **Enter Query**
9. Enter **Subject** and **Course**
10. Select **Execute Query** (review results)
 - a. If course is part of a group proceed to **Adding Series Articulation**
11. **Rollback**
12. Proceed to appropriate section
 - i. If articulation is current, then no further action is needed. If update is needed, follow the steps below.

ADDING COURSE TO COURSE ARTICULATION

If one course articulates to one UCR course or an existing record must be updated, follow the steps below.

STEPS

1. **Next Block** (in **SHATATR**)
2. Select **Record, Insert**
 - a. If updating existing articulation, go to **Record: Duplicate** (this will bring over course information from the previous record you were reviewing)
3. In **Transferring Course** block, enter/update the following fields:
 - a. **Subject**
 - b. **Course**
 - c. **Title**

- d. **Term** (approved as of YYYYTT)
 - e. **Equivalent Exist:** Yes
 - f. **Level:** U
 - g. **Status:** A
 - a. **Minimum Grade:** D- (some courses require a passing grade of B or C – have UCR catalog available, UC courses will have minimum grade of F)
 - h. **Credits High** (unit awarded at CSU or OOS institution; usually semester units)
 - i. **Converted: Credit High** will convert to Quarter units (1.5 x semester units - UC's change back to appropriate units)
 - j. **Save**
4. In **Equivalent Course** block, enter the **Subject** and **Course** fields (UCR's equivalent course)
 5. Check that the **Credits Used** number matches **Credits High** "Converted"
 - a. If the numbers do not match, change the **Credits Used** number so it reflects the same units
 6. **Save**

ADDING SERIES ARTICULATION

If one course articulates to multiple UCR courses, or two or more courses articulate to one or more UCR course(s) a group must be assigned. In order to enter articulation for courses that are part of a "series" or group you must first identify which course is the primary.

SERIES EXAMPLE

If series already exists in Banner the **Group** field will have group number. Example: BIOSCIE 106 at UC Irvine (004859)

1. **Next Block**
2. Select **Enter Query**
3. Enter BIOSCIE in **Subject**, 106 in **Course** (record shows that course is part of Group 03 – in **green**)
4. Select **Execute Query**
5. Select **Enter Query**
6. Enter "03" in **Group**
7. Select **Execute Query**
8. You can scroll through the courses that are tied to the **03** Group
 - a. BIOSCIE 106 (**Primary** – in **green**)
 - b. BIOSCIE 115L

Articulation reads: BIOSCIE106 + BIOSCIE115L = BIOL 6C

The screenshot shows the SHATATR interface for adding a transferring course. The 'Institution' is set to '004859 Uc Irvine'. The 'Transferring Course' section has the following data:

Group	Primary	Subject	Course	Title	Term	Equivalent Exists	Level	Status	Grade	Minimum Transferred Credits Low	High	Protect from Import
03	<input checked="" type="checkbox"/>	BIOSCIE	106	ECOLOGY AND EVOLUTION	200730	Yes	U	A	F	.000	3.000	<input type="checkbox"/>

The 'Equivalent Course' section is empty, but a purple box highlights the header area, indicating where equivalent course information would be entered.

Note that only the **Primary** course will have Equivalency Course information (in purple). In this example BIOSCIE 106 has the Group number and Primary Indicator selected.

The screenshot shows the SHATATR interface for adding a transferring course. The 'Institution' is set to '004859 Uc Irvine'. The 'Transferring Course' section has the following data:

Group	Primary	Subject	Course	Title	Term	Equivalent Exists	Level	Status	Grade	Minimum Transferred Credits Low	High	Protect from Import
03	<input type="checkbox"/>	BIOSCIE	115L	EVOLUTION LABORATORY	200730	Not Reviewed	U	A	F	.000	.000	<input type="checkbox"/>

The 'Equivalent Course' section is empty, with a purple box highlighting the header area, indicating that no equivalent course information is present for this non-primary course.

In this example BIOSCIE 115L has the Group number but is not the Primary, so no Equivalency Course information (in purple) is listed.

Note that if you are “updating” a Group you can use the duplicate option when inserting the record.

If a “new” sequence must be entered; scroll through **all** the records with groups to see what the next group number is.

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

STEPS

1. Go to **SHATATR, Next Block**
2. Select **Record**
3. Select **Insert**
 - a. If updating existing articulation, go to **Record: Duplicate** (this will bring over course information from the previous record you were reviewing)
4. In **Transferring Course** block, enter/update the following fields:
 - a. **Group** (noted group number, or next in sequence – for new group)
 - b. Select **Primary** (if it is the primary course in the series)
 - c. **Subject**
 - d. **Course**
 - e. **Title**
 - f. **Term** (approved as of YYYYTT)
 - g. **Equivalent Exist:** Yes
 - h. **Level:** U
 - i. **Status:** A
 - j. **Minimum Grade:** D- (some courses require a passing grade of B or C – have UCR catalog available, UC courses will have minimum grade of F)
 - k. **Credits High** (unit awarded at CSU or OOS institution; usually semester units)
 - l. **Converted: Credit High** will convert to Quarter units (1.5 x semester units - UC's change back to appropriate units)
 - m. **Save**
5. In **Equivalent Course** block, enter the **Subject** and **Course** fields (UCR's equivalent course)
 - a. You may enter more than one course in this block
 - b. Use the **“And” / “Or”** as appropriate
 - c. Remember that only the **Primary** will have information in this block