# Add, Edit, and Evaluate Transfer Credit for Student

Overview

The purpose of this quick reference guide is to instruct you on how to Edit and Add a student's transfer credit in Workday. Please be aware this task is limited to those who have appropriate security.

Process

1. First, you will search for a student record. The most convenient way to do this is to configure your search in Workday. On the *Search Page*, click on **Configure Search** drag **Student** up to the top.
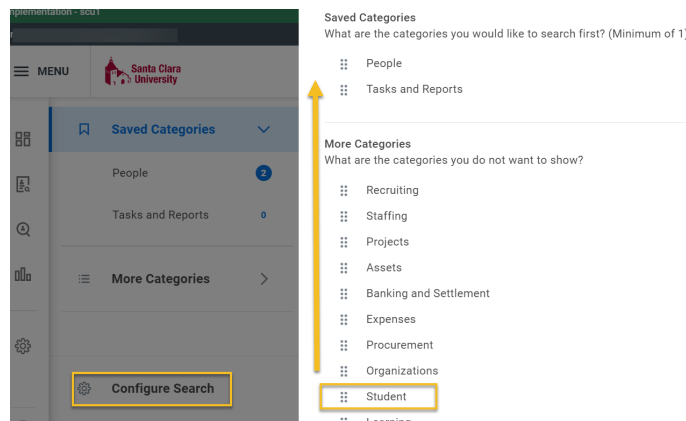

NOTE: If the student has a preferred name that differs from the legal name, the preferred name will be prioritized in searches even if you search by the legal name.

You can also enter **Find Academic Records** into the **Search Bar** and press **Enter**. This report will allow you to locate the student and click directly to their profile.
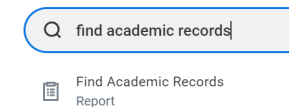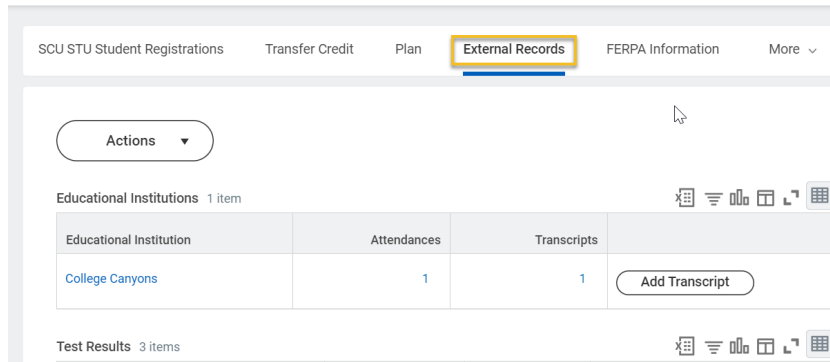

2. In the search results, click the appropriate name to access the student **Profile**.

   ○ Enter the student's name in the **Search Bar** and press **Enter**.

3. From the **Student Profile**, click the **Academics** tab on the left Profile menu.
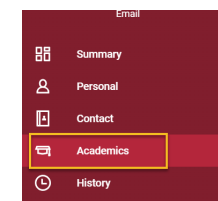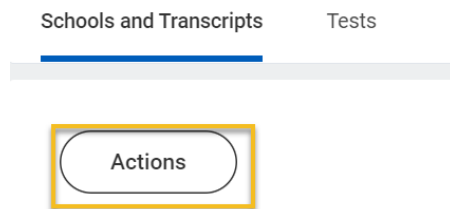
Entering Transfer Credit from an Institution

1. Click on **External Records** on the top tabs in the middle of the page.

2. Click on the **Actions** button.

3. Click **Add Student External Transcript**.

4. Type in the **Educational Institution** name, then click **OK**.

Add Student External Transcript

NOTE: Enter at least 3 characters of each word.

5. Complete the **Add Student External Transcript** form by entering the following required information:

   ○ **Academic Unit**: Undergraduate will enter SCU.

   ○ Check the box labeled **Official**.

   ○ Enter the **Issued Date** the transcript was issued/printed.

   ○ Select a **Transcript Type** (Final when there are no in progress grades and In Progress if courses are in progress).

   ○ Select a **Transcript Grading Scheme** of *01.*

   ○ Select the **Course History** tab to start entering course credit.

NOTE: Other fields are optional and may want to be captured for data purposes.

NOTE: Course Title, Course Unit Type, and Course Units Attempted may populate based on the Course ID selected if information for the course is in the catalog.

6. Click on the + symbol to add courses. Enter the following fields and click **OK**.

- o Course Start Date
- o Course ID
- o Course Title (if blank)
- o Course Units Earned
- o Course Unit Type (Semester or Quarter)
- o Course Units Attempted
- o Grading Scheme (01)
- o Grade

7. Review the data on the next screen and click **Done**.

Edit Transfer Credit

1. Back on the student profile, you can edit the transfer credit, by clicking the number next to the Transcript and then **View Details.**

2. Hover over the magnifying glass icon and select the *Related Actions* button.

3. Click **Student External Transcript** and then **Edit**.

NOTE: Transcripts cannot be edited once they are articulated. Once articulated, make a copy of the transcript and enter an issued date more recent than the older transcript.
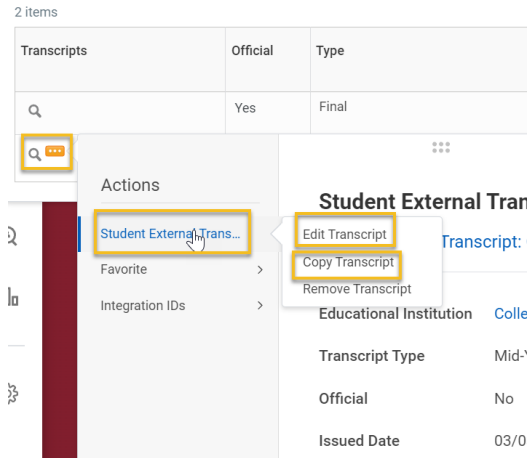
2. Hover over the magnifying glass icon and select the *Related Actions* button.

3. Click **Student External Transcript** and then **Initiate Transfer Credit Evaluation.**
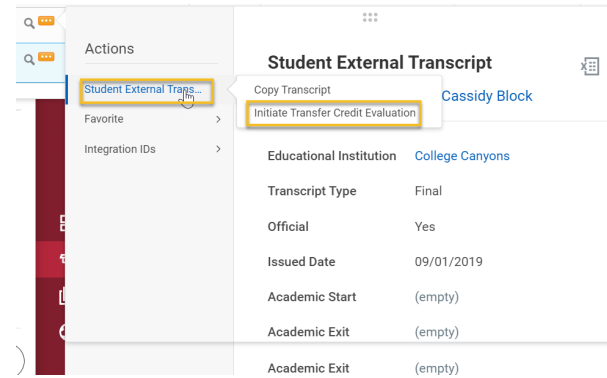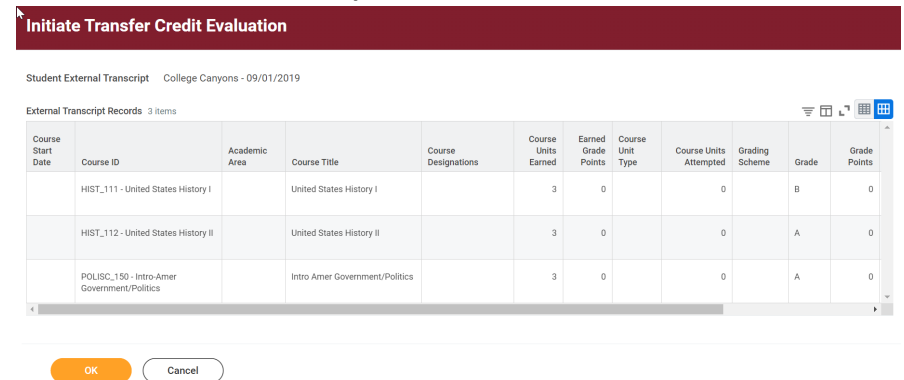

Initiate Transfer Credit Evaluation

1. To evaluate transfer and test credit after it has been added, go back to the student profile. Click the number under Transcripts and then **View Details.**

NOTE: Only official transcripts can be evaluated for transfer credit.
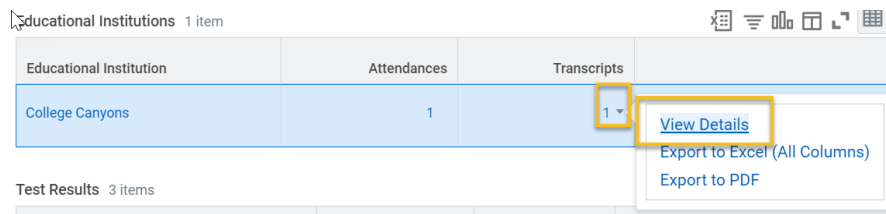
4. Review the **External Transcript** record a final time and then click **OK**.

5. Review the **Overall Transfer Credits** page. Once you are ready to assign credit, click the **Assign Student Transfer Credit** button on the button of the page.

6. On the **Assign Student Transfer Credit** page, choose the **External Record** type and click **OK**.

7. Review the following page to make sure the credit is assigned correctly and click **Done**. You can now go back to the student profile to review the assigned credit.

Add a Test Record

1. To add a test record, go back to the **External Records** page in the students profile.

2. Click on the **Actions** button and then select **Add Test Result**.

3. On the **Add Test For** screen, click in the **Test** box and scroll to choose the exam you wish to enter. You can also type the test name in this box and it will automatically populate.

4. Click **OK**.

5. Choose the **Academic Unit** the test score is being entered for and specify the **Test Date** of the test score.

   It is optional to upload a copy of the test scores to the students account. To do so, click on the **Select Files** button or drag and drop files to the grayed out area.

6. In the **Section Name** box select the test section type. Enter the test score and percentile as well.

7. Complete additional information, if applicable and click **OK**.

8. Verify that the test records you entered are correct on the **Add Test Result** screen. Click **Done**.

Initiate Test Credit Evaluation

1. To evaluate test credit after it has been added, go back to the student profile. Click the number under *Number of Attempts* and then **View Details.**

2. Hover over the magnifying glass icon and select the *Related Actions* button.

3. Click **Student External Transcript** and then **Initiate Transfer Credit Evaluation.**

4. Review the **Initiate Credit Evaluation** page and click **OK**.

5. Review the **Overall Transfer Credits** page. Once you are ready to assign credit, click the **Assign Student Transfer Credit** button on the button of the page.

6. On the **Assign Student Transfer Credit** page, choose the **External Record** type and click **OK**.

7. Review the following page to make sure the credit is assigned correctly and click **Done**. You can now go back to the student profile to review the assigned credit.