UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

TO BEGIN USING APPLICATION

1. Click **Continue without signing in** to get started right away.
2. Log in with previously created account credentials. This option applies only to those users who have account credentials. If you do not currently have an account, follow the steps outlined under CREATE AN ACCOUNT.

   STEP 1: Click **Have an account? Log in** and supply the following previously created account information:
   - Email address
   - Password

   NOTE: Mandatory fields are marked with an asterisk (*).

   STEP 2: Click **Log in** to begin transfer articulation.

IF YOU DON'T HAVE AN ACCOUNT, YOU'LL NEED TO CREATE ACCOUNT CREDENTIALS BEFORE PROCEEDING.

   STEP 1: Click **Create an account** and supply the following information:
   - Email address
   - Name (First and Last)
   - Password (requires confirmation)

   NOTE: Mandatory fields are marked with an asterisk (*).

   STEP 2: Click **Sign Up** to begin transfer articulation.

   NOTE: You may be able to sign in with Facebook.
   If this feature is enabled, you can use your Facebook account credentials to perform a transfer articulation audit. This access method allows you to save your work during the transfer articulation process. Likewise, you can then log in later and continue with the transfer articulation. **This option only applies to those with an active Facebook account.**

   STEP 1: Click Sign in with Facebook and supply your Facebook account credentials:
   - Email or Phone
   - Password

   STEP 2: Click Log in to begin transfer articulation.

TO LOG OUT

   STEP 1: If at any point during your session you want to stop working, click Log Out.

   NOTE: If the system detects any unsaved work, you will be prompted to save your data or risk its loss.

UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

SET ENROLLMENT GOALS

This action in the Transfer Equivalency process allows you to set key degree related goals. The transfer articulation audit is processed using a combination of these basic degree goals:

- Planned enrollment date
- Intended level
- Intended degree and major

During data selection, the **Your Answers** space tracks and stores your choices (for later use).

STEP 1: From the drop down lists, select the appropriate response to each of the required goal questions :

NOTE: Some drop-down lists may not be configured for display at your institution. That is, you may not see all of the options below listed. That's okay. Complete the options provided on your screen. You may see options including:

- When do you plan to enroll? *
- What is your intended level? *
- What degree will you pursue? *
- What is your intended major? *
- What is your intended minor?

NOTE: Mandatory fields are marked with an asterisk (*). Also, each stored item listed in the **Your Answers** space offers a return link to that particular goal question.

STEP 2: When you've made a selection for each of the mandatory questions, you have the option to either:

- Click the **Transfer** button to continue directly to the **Transfer** page.
- Continue making selections for any remaining non-mandatory questions.

NOTE: When the last non-mandatory question is satisfied, you are automatically guided to the **Transfer** page.

UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

DEFINE YOUR RECORD

The next area in the transfer equivalency process enables you to define all classes and records for audit consideration.

You will identify the classes and exams you would like to transfer during this step. During data entry, the application will track and stores your entries (for later use).

When all classes and exams are identified, click the **calculate results** button to continue to the final step in the articulation process, **Results**.

- <u>Class Information Entry</u> – see PAGE 4 or more information about this task. This button will allow you to specify details for one or more classes.

- <u>Exam Information Entry</u> – see PAGE 5 for more information about this task. This button allows you to specify details for one or more exams.

UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

ENTER CLASSES USING THE ADD CLASS BUTTON

The **Add Class** button allows you to specify details for classes you wish to transfer.

You will need to identify the following:

- School
- Class
- Class Information

Classes entered successfully are listed in the **Classes** area of the **My Transfer Work** space.

Note: The **My Work Space** area also offers edit and remove features for stored items.

STEP 1: Click the **Add Class** button.

STEP 2: In the **Search** field, enter the schools name or select the school from the list. When you enter characters in the **Search** box, the displayed list is automatically sorted (and shortened). Matching names rise to the top of the list. Non-matching names are removed from the list.

STEP 3: In the **Search** box, enter a class name or scroll through the list and select the name of the desired class.

STEP 4: Enter class details in each of the categories listed.

Note: Mandatory fields are marked with an asterisk (*). The current term will be the only option you can choose in the "What was the term?" category. Selecting the current is the appropriate action for all classes entered. Classes entered successfully are listed in the **Classes** area of the **My Transfer Work** space.

STEP 5: Options:

Option	Description
Proceed	Continue entering data (Class or Exam)
Add another class from this school (and click Proceed)	Continue entering class details from this school (returns you to step 3)
Calculate Results	Continues to Results page

UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

ENTER EXAM DATA USING THE ADD EXAM BUTTON

The **Add Exam** button allows you to specify details exams you wish to transfer.
You are expected to identify the following:

- Test Name
- Test Score
- Test Date

Exams entered successfully are listed in the **Exams** area of the **My Transfer Work** space.

Note: The **My Work Space** area also offers edit and remove features for stored items.
Procedure

STEP 1: Click the **Add Exam** button.

STEP 2: Enter exam related information in each of the following categories:

- Test Name *
- Test Score *
- Test Date

Note: Mandatory fields are marked with an asterisk (*).

STEP 3: Click **Done** when the individual exam's information is entered.

Note: Exams entered successfully are listed in the **Exams** area of the **My Transfer Work** space.

STEP 4: Options:

- Click **Add Class** to enter class information
- Click **Add Exam** to continue entering exam information
- Click **Calculate Results** to move to the **Results** page

UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

THE RESULTS PAGE

The **Results** page offers a set of options to guide your next steps. Your **Degree Audit Worksheet** displays. Elements identified are:

- Degree Audit definition (Level, Degree, Academic Year, and Major)
- Degree Progress (requirements and credits expressed as percentages)
- Requirements (Unmet conditions)
- Degree
- Transfer
- Course Equivalencies

Your next steps are:

- **Download PDF** (your customized Transfer Equivalency information)
- Select any **Additional options** (choices external to the Transfer Equivalency Self-Service application)

Note: The **Download PDF** button may or may not be configured to display by the institution. Any available **Additional options** represent one or more external choices, customized by the institution, to meet additional processing needs.

VIEW THE AUDIT REPORT

The audit report shows how the courses you took at other institutions will apply at the target school, along with the courses still needed to complete your intended degree at the target school.

The first section of the audit report displays the intended degree and major. The overall progress towards the intended degree that the articulated classes and test scores contribute to, is also displayed in terms of the percentage of requirements met and credits completed.

The other sections of the audit details the credits and classes that are still needed to complete specific requirements for the intended degree, major and minor.

The following audit provide status categories help to interpret your report:

- Complete
- Not Complete
- Complete except for classes in-progress
- Nearly complete - see advisor
- Transfer Class
- Any course number

UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

DOWLOADING YOUR REPORT

Choose where your customized degree audit information is saved for review.

STEP 1: Specify a desired location and save the file.
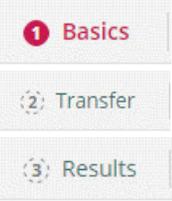
STEP 2: Navigate to and open the new PDF file.

STEP 3: Review the information to understand how the classes you defined compare to essential classes at UIndy and how those classes may apply to degree requirements.

STEP 4: Save a copy of your results on your personal computer or on a jump drive so have them for reference for future meeting with your UIndy Admissions Enrollment Counselor.

UNIVERSITY OF **INDIANAPOLIS**

Transfer Equivalency Application Instructions

UI component	Description
	The **Help** button accesses the application online help.
	The **Log out** button ends the current session. **Note:** This icon is only displayed when you are actively logged into a session. **Note:** To avoid data loss, make sure to save your session's work before choosing to exit the session.
	The **Save** button saves your work at anytime during the session. You must be logged in to save your work. If you have not already created an account, you will be prompted to do so before you can save your session.
	The **Start Over** button removes previously defined values at any time during your session.
❶ Basics ② Transfer ③ Results	Numbered steps (**Basics**, **Transfer**, and **Results**) mark your progress through the transfer articulation process. Solid colored circles (with similarly colored text) identify individual segment completion. Gray segment titles (dashed, gray circles and gray text) are considered incomplete stages.
	The **Check box** selects the associated option (Class or Exam) or complete (Audit Report).
	The **Delete** button removes a previously selected item(s). **Note:** One or more items (Class or Exam) must be selected for this action.
	The **Edit** button modifies the item in the cell. You are guided to the item's previously entered data (Class or Exam).