

# Streamlining the Transfer Process



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1. Can you give a quick overview of how your departments are organized and where transfer credit assessments reside?

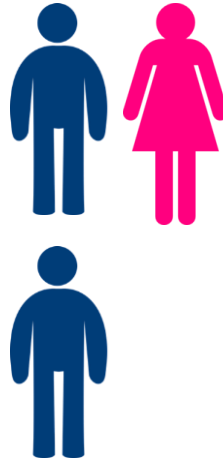
Assistant Registrar, Admissions



Senior Admissions Officer



Admissions Officer



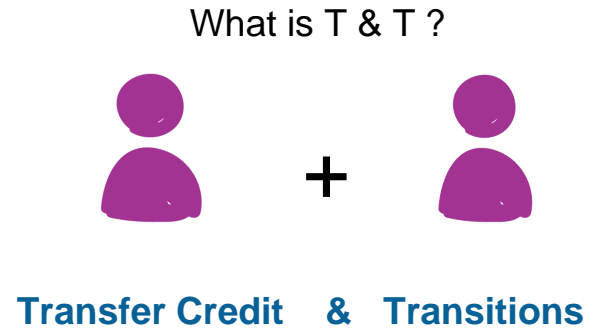
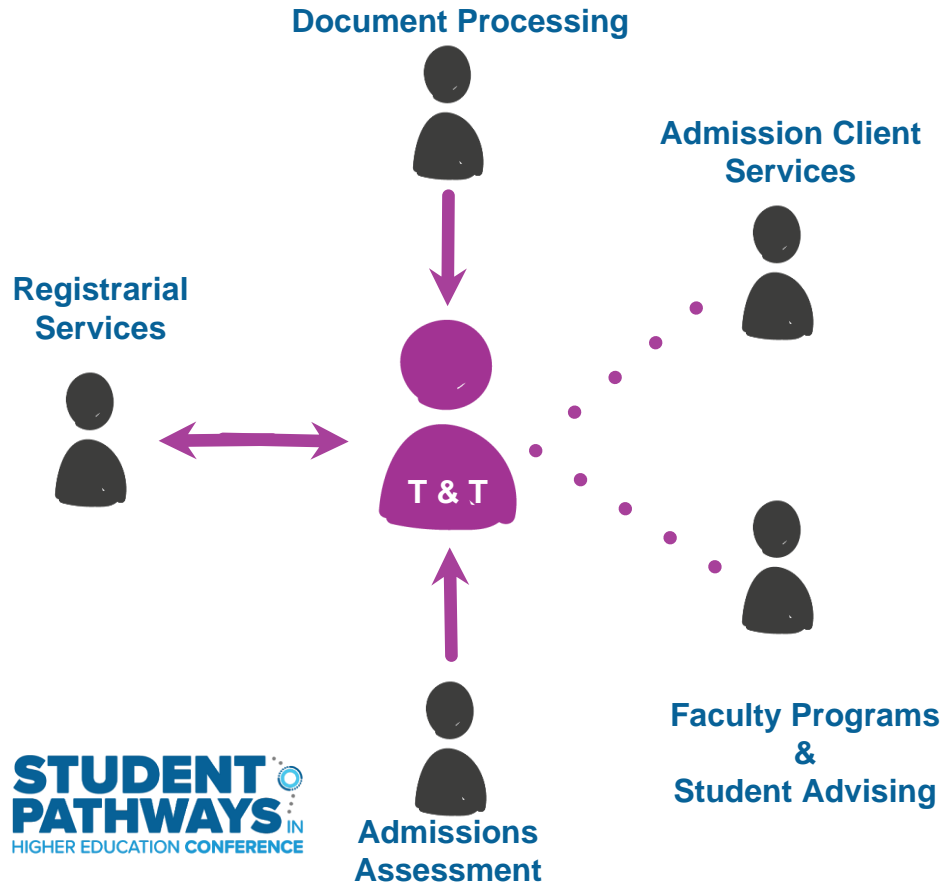
Junior Admissions Officer



Admissions Assistant



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101 Admissions Team

105 Admissions Team

Transfer Team

Document Processing Team

Preliminary assessments at the time of admission - Specific and Non-Specific Credit



- Conditional transfer credit for in-progress courses
- Tools: Transfer Credit Population - EDI's through PeopleSoft, TCMS

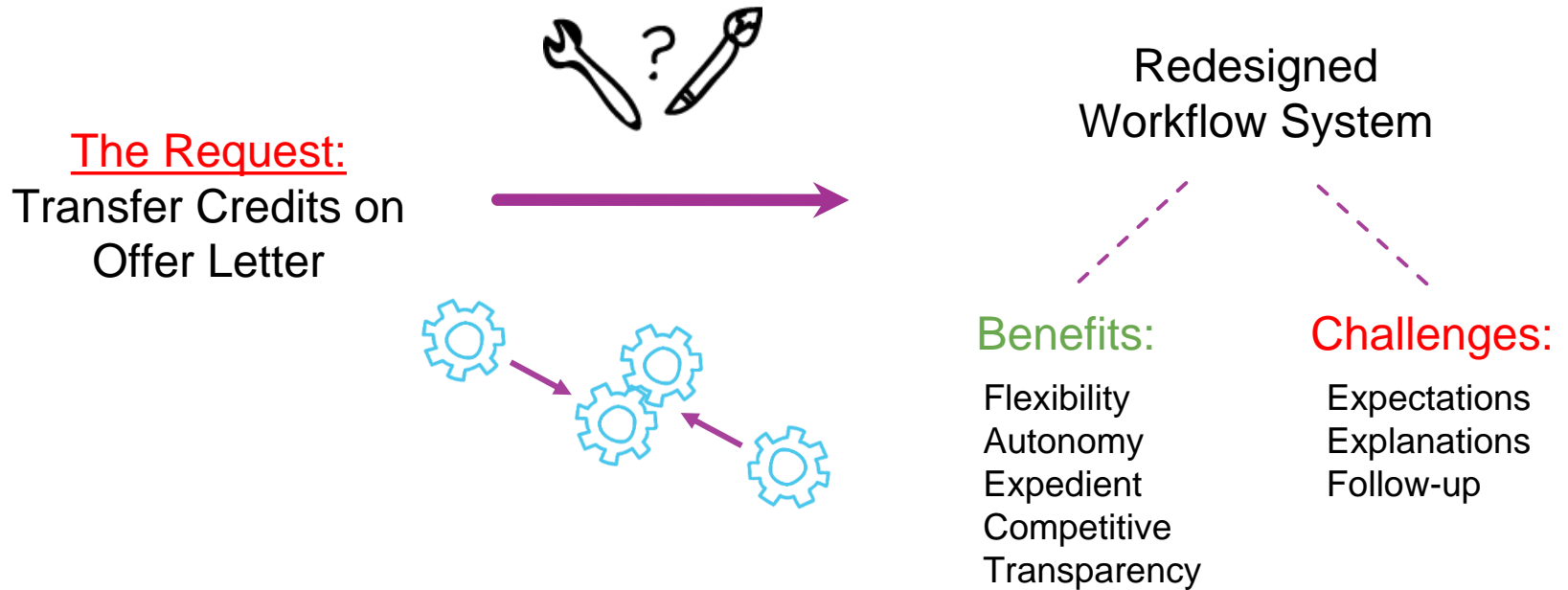
After admission: New or revised credit initiated through the Academic Counselling Offices

Academic Counselling Offices

Department Chairs



2. Can you give a quick overview of your project? What workflow solutions has your institution come up with? What are its benefits? Challenges?





651  
Institutions



17534  
Courses



7514  
Equivalencies



53  
Agreements



250  
Users

## Transfer Credit Management System (TCMS)

- Web-based application that acts as a single source for managing transfer credit at Western
- Workflow for the evaluation of courses for transfer credit **and** a central transfer credit database

### Benefits:

- **Streamlines the approval process of transfer credits**

- Department (evaluator) → Faculty (check) → Admissions (codes credit)

- **Expedites transfer credit evaluations**

- Results in quicker turnaround time; eliminates emails
  - Accountability



- **Provides a centralized storage for all transfer credit assessments**

- Courses are no longer unnecessarily reevaluated; Admissions Officers, Academic Counsellors, Undergraduate Chairs, and Western's Affiliate University Colleges all access the TCMS

## 2. Can you give a quick overview of your project? What workflow solutions has your institution come up with? What are its benefits? Challenges?

### \*Official Transfer Credit Evaluation\*

This evaluation may not reflect all of your post-secondary work. If applicable, the following courses will not be reflected in this assessment: in-progress courses, courses with no UOIT equivalent, courses pending syllabi submission, courses pending faculty evaluation and deferred evaluations.

If we require you to submit a course syllabi for evaluation, the university's course title will state "pending syllabi". You can upload your course syllabi through the [syllabus submission page](#).

Please note: if you are enrolled in a bridge program, your transfer credits will be tentatively applied to your record, pending successful completion of all bridge courses with the minimum grade requirements. For more information, please see our [Undergraduate Academic Calendar](#).

For additional information on our transfer credit policies and procedures, please visit the [transfer credit website](#).

### Transferred Courses from SENECA COLLEGE

Sending course code / credential	Sending course title	Grade earned	The universities' course code	The universities' course title	Attributes	Credit Hours
DIPL BRIDGE	OCD - PN	T	UNSP 1XXX	Unspecified credit		33.0

### Transferred Courses from UNIV OF WATERLOO

Sending course code / credential	Sending course title	Grade earned	The universities' course code	The universities' course title	Attributes	Credit Hours
BIOL 140	Fundamentals of Microbiology	T	ACST 1000U	Pending Syllabus		.0
BIOL 140L	Microbiology Laboratory	T				
BIOL 273	Princ. of Human Physio 1	T	ACST 1000U	Pending Syllabus		.0
BIOL 301	Human Anatomy	T				
BIOL 373	Princ. of Human Physio 2	T				
PSYCH 211	Developmental Psychology	T	PSYC 2010U	Developmental Psychology	<ul style="list-style-type: none"> <li>• Liberal Stds (Adv) -Fac of Eng</li> <li>• Liberal Studies - Fac of Eng</li> <li>• Liberal Stds - Energy /Nuclear</li> <li>• Liberal Stds/Non Science Elect</li> </ul>	3.0
STAT 202	Intro Stats for Scientists	T	ACST 1000U	Pending Syllabus		.0

Appear at time of offer

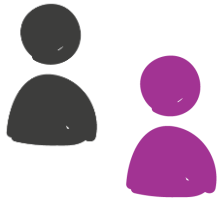
Added by admission officer

### 3. What resources were required to carry out your project?



#### Technologies Employed:

- ColdFusion programming language by Adobe
- HTML
- JavaScript
- Cascading Style Sheets (CSS)
- MS SQL Database Management system

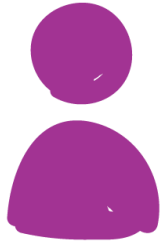


#### Staff Resources:

- Project Manager
- Software Developers with ColdFusion experience
- Functional Resources



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Transfer credit team

Faculty teams

Significant IT resources (300+ hours in Phase 1)

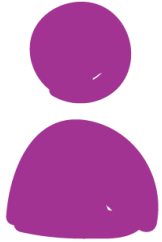


Social Research Centre

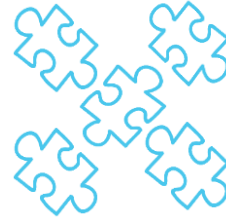


Survey Process

### 3. What kind resources were required to carry out your project?



- 1 Manager
- 2 Coordinators
- 6 Transfer Credit Assessors
- 2 Assistants
- 2 Work/Study



#### Bandwidth

- Create New Efficiencies
- Organization
- Devise Workflows

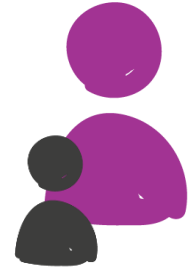


- MS Access
- Student Information System



- Training + New Hires
- Building Processes

4. What are the key takeaways or lessons learned from your project?  
What should other institutions consider when implementing a similar project on their campus?



#### 4. What are the key takeaways or lessons learned from your project? What should other institutions consider when implementing a similar project on their campus?

1. Students are happy to wait and receive an evaluation that is more **complete**
2. Innovation is great, but **function** and **communication** are key!
3. Project **success** measured on student awareness vs. value of staff time
4. Better **access** to resources during application and admissions process → student success



#### *Before you begin:*



Project Timelines	Team Resources, IT	Pre-plan usability with IT Services
Usefulness for all departments/Faculties?	Development of Workflow and Automation Solutions	Privacy (if evaluating)

\*\*What do you hope to achieve?

## Collaboration



- Collaboration is key!
- Focus groups with stakeholders: Undergraduate Admissions, Faculty Academic Counsellors, Western's Affiliate University-Colleges, Information Technology Services

## Provide Necessary Training



- Learning curve - be available
- Provide training options: face-to-face, group (i.e. faculty/department), “how-to” pdf’s, online video tutorials
- Promotion

## Room for Continued Growth:

- Continuously building on our system:
  - Prerequisite assessments
  - Forward facing database

