Course Equivalency Review

Transfer course equivalencies are handled through a workflow process within Perceptive Content. The process begins with the following steps:

- *A request for a course review will start with an advisor raising a flag in Connect which will generate an email to the Transfer Credit Coordinators in the Registrar's Office.*
- *The Transfer Credit Coordinators will use the information from the Connect flag to create an eForm to be reviewed by the Academic Unit.*

Below are the procedures for Academic Unit Reviewers to complete the course equivalency review process.

Questions regarding this process should be sent to transfercredit@umkc.edu.

Note: In order to access Perceptive Experience, you must be connected to the UMKC's secured network. **This can be done via workstation on campus, or a VPN or remote desktop connection when working remotely off campus. Instructions on how to download/connect to either of these tools is available at the following links:**

- **VPN: https://www.umkc.edu/is/support/services/vpn/**

- **Remote Desktop: https://www.umkc.edu/is/support/services/homecomputing/remotedesktop/**

Procedure: Approve the Course Equivalency eForm

If there is a transfer course equivalency that needs your review, you will receive an email from transfercredit@umkc.edu to alert you to your assigned queue(s) to review the course equivalency eForm.

- Open Perceptive Experience in a web browser to open the eForm in **Perceptive Experience**.
  https://contentapps.umsystem.edu/contentapps/#login

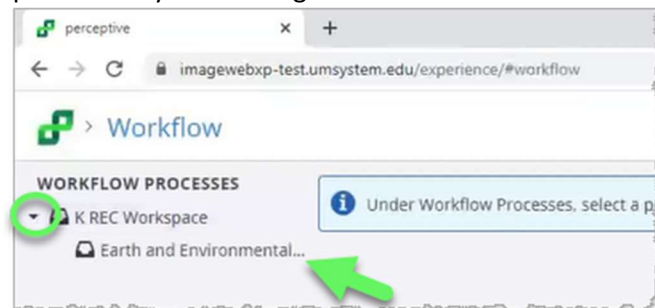 - *See the note above in red if Perceptive Experience does not open for you.*

1) Log in using your university credentials, and click the **Connect** button.
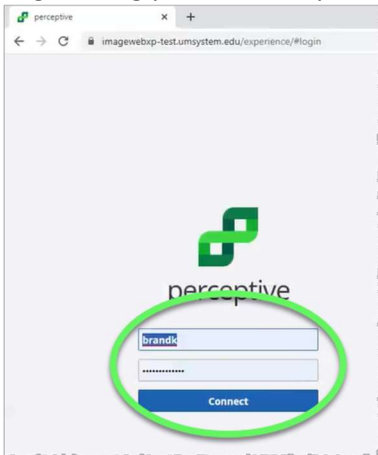

2) On the **Home** page, click the **Workflow** tile.
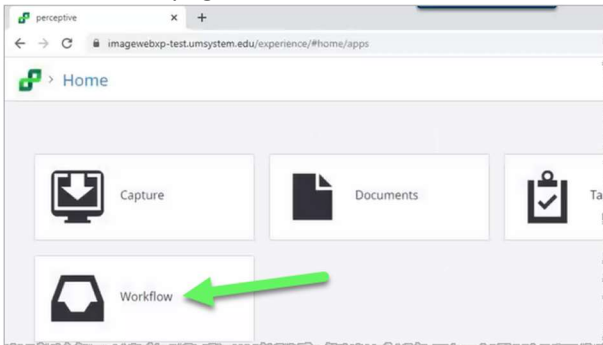
3) On the **Workflow** page, expand the **K REC Workspace** item and select the appropriate queue (only queues that you are assigned to as a reviewer will be shown here).
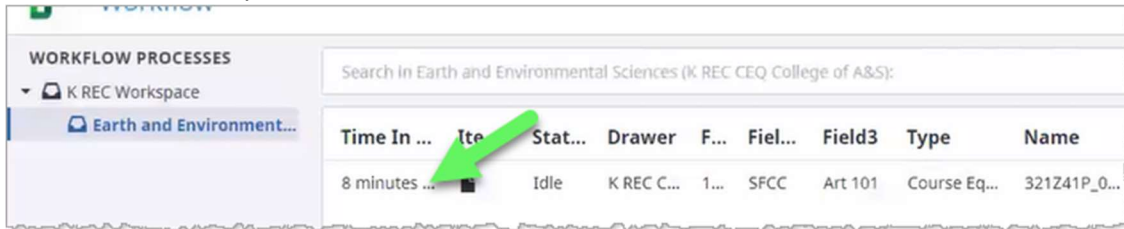

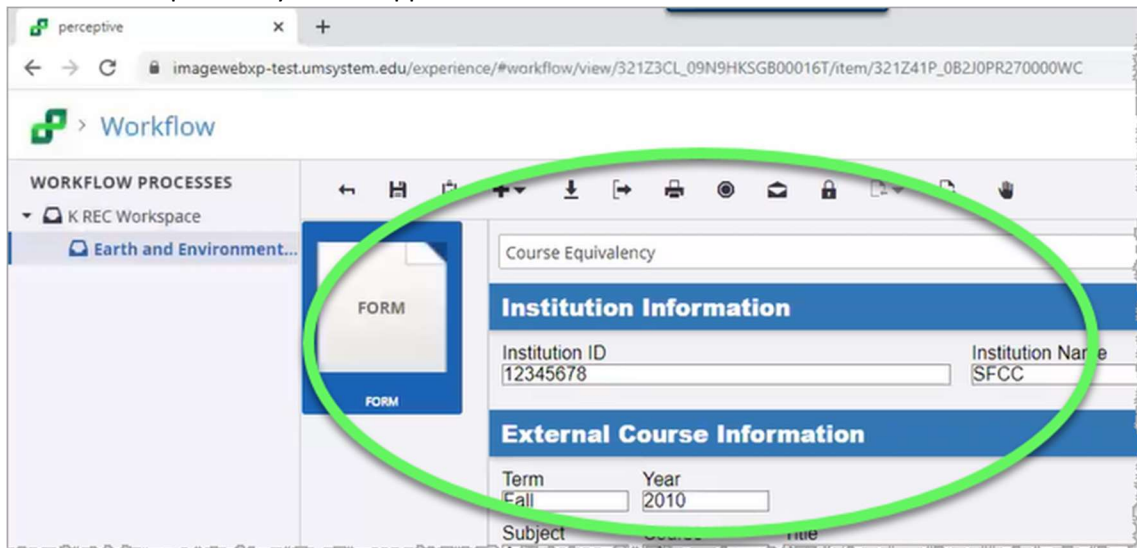*Note: The number of queues listed varies among users.*

   a) The search field for the selected queue opens in the right pane. Click the **Search** button on the far right to see the contents of your workflow queue.
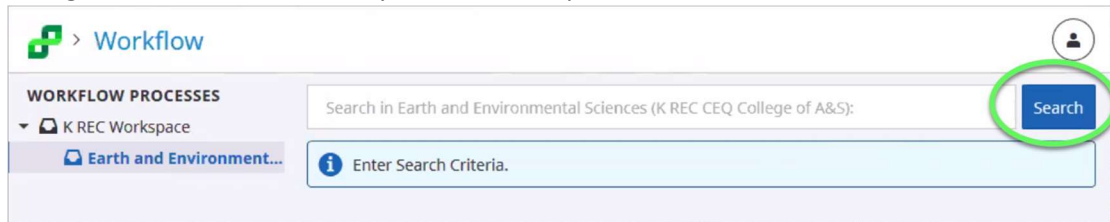
4) Click the document you wish to view.

a) The Course Equivalency eForm appears.

5) Review the form using the course description provided in the *External Course Notes*. The course description for the external course will be listed here. If there is a syllabus available for review, a link the syllabus in a shared Box account will be included with the *External Course Notes*.
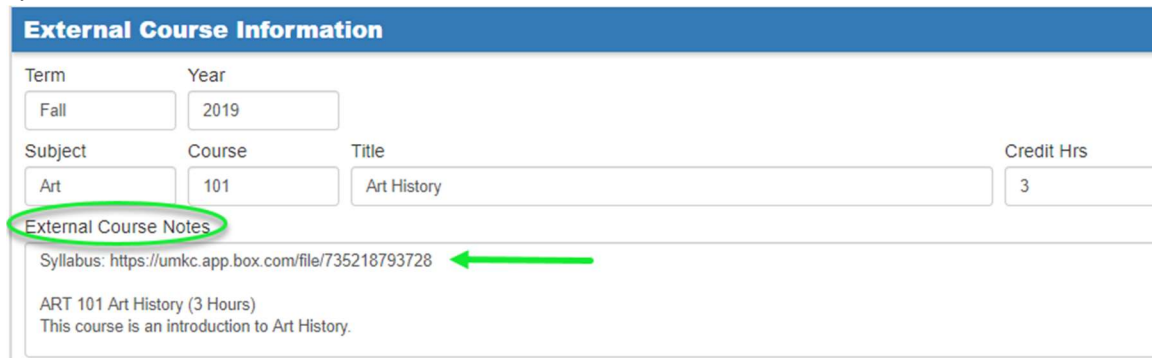
6) If you approve of the selection, check the **Match** checkbox in the Internal Course Information section.

a) If you <u>do not</u> approve the match of a course that is already listed on the eForm, use the plus sign on the right side of the course to add a row to include the equivalency that should be used.

b) If there is no direct equivalency, add a row to either indicate General Elective credit or No Equivalency.

or

7) Once the appropriate match is listed, expand the **Status** menu in the Approval Details section and select **Approve** or **Modify**. The Approver and Approval Date fields are automatically populated.


a) Choose **Approve** if the appropriate equivalency was on the eForm to begin with.
b) Choose **Modify** if you added the equivalency or result that was chosen.
   i) When choosing **Modify** you must include notes in the *Modifier Notes to Registrar Office* field before completing.

8) Click the **Route Forward** button in the menu bar above the form.

a) Click **Yes** in the Save Changes dialog box that appears. The form is then routed forward to the Transfer Articulation Officer (TAO).
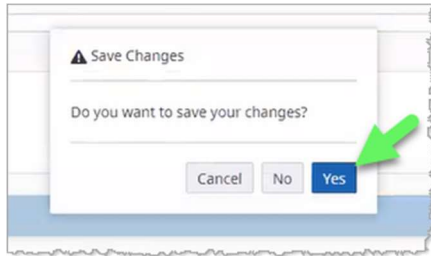
9) If there is another course in your queue for review, it will pop up automatically until the queue is empty.

Notes:

- *If a course does not have a direct equivalency in your area but should be reviewed by another department for potential direct equivalency, please make note of that and route forward. That information will be used to re-route the eForm to another academic department for review.*
- *The eForms will be auto-routed forward to the TAO after 14 (calendar) days in the queue.*
- *Depending on the outcome of the review, the TAO may re-route the eForm back to the academic unit queue for additional review.*
    - *eForms that are routed back to the unit review queue will be auto-routed forward after 14 (calendar) days.*

Next steps for the completed equivalency review:

1) *The Transfer Articulation Officer will review the approved course equivalency and confirm there are no conflicts with MOTR (CORE 42) course equivalencies and will route forward to the Registrar's Office.*
2) *The Registrar's Office will create or update any transfer rules in Pathway according to the result of the equivalency review and update student records as necessary.*
3) *The Registrar's Office will respond to the Advisor/Inquirer who started the review process with the results of the review. That person is then responsible for closing the loop with the student to ensure they know the outcome of the review.*

Questions regarding this process should be sent to transfercredit@umkc.edu.

2/10/2023