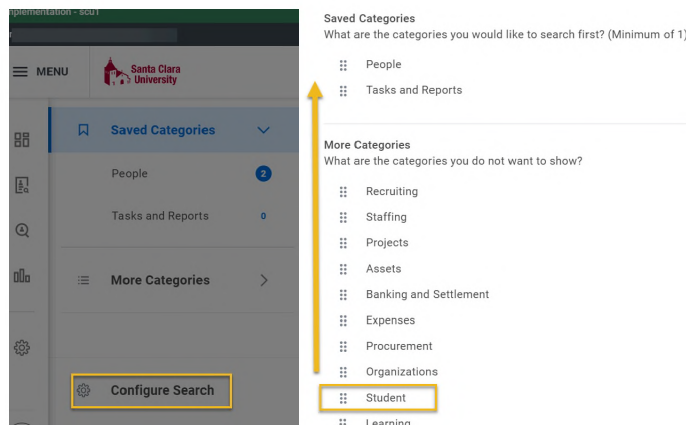


Overview

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.

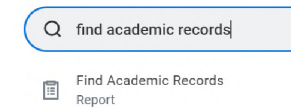
Process

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.

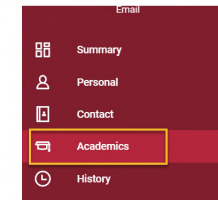


NOTE: If the student has a preferred name that differs from the legal name, the preferred name will be prioritized in searches even if you search by the legal name.

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.

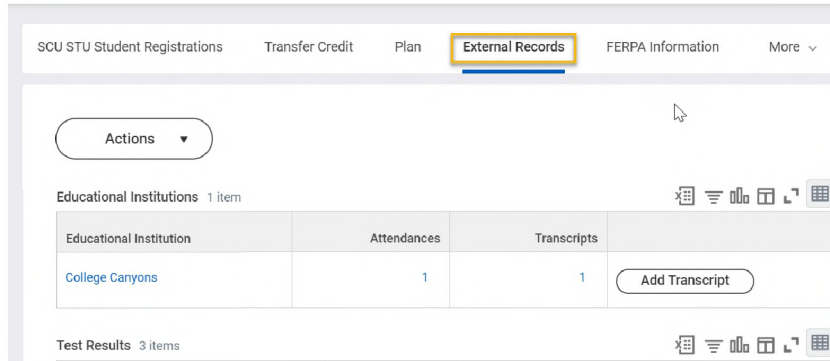


2. In the search results, click the appropriate name to access the student **Profile**.
 - o Enter the student's name in the **Search Bar** and press **Enter**.
3. From the **Student Profile**, click the **Academics** tab on the left Profile menu.

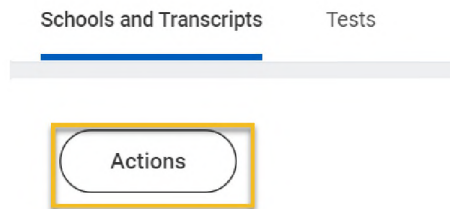


Entering Transfer Credit from an Institution

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

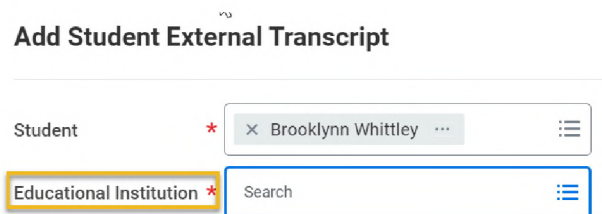


2. Click on the **Actions** button.



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

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



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.

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

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

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

Course Start Date	Course ID	Academic Area	Course Title
01/02/2019	ENGL 12 - African-American Literature		African-American Literature

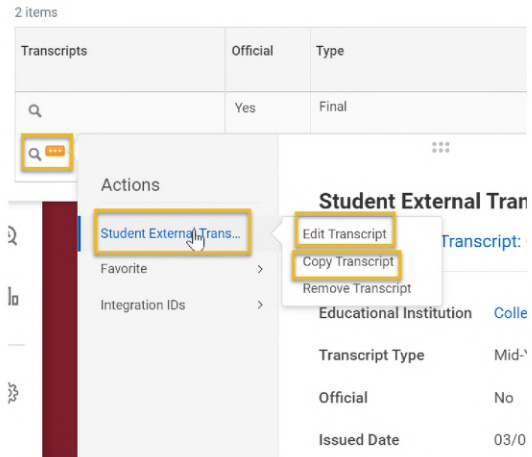
Grading Scheme	Grade	Grade Points	Additional Course ID
	A	0	

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.

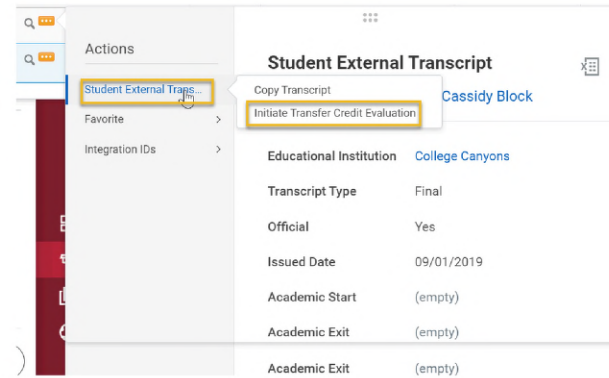
Edit Transfer Credit

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.



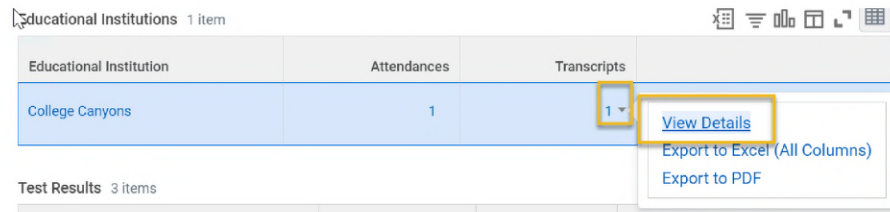
2. Hover over the magnifying glass icon and select the *Related Actions* button.
3. Click **Student External Transcript** and then **Initiate Transfer Credit Evaluation**.



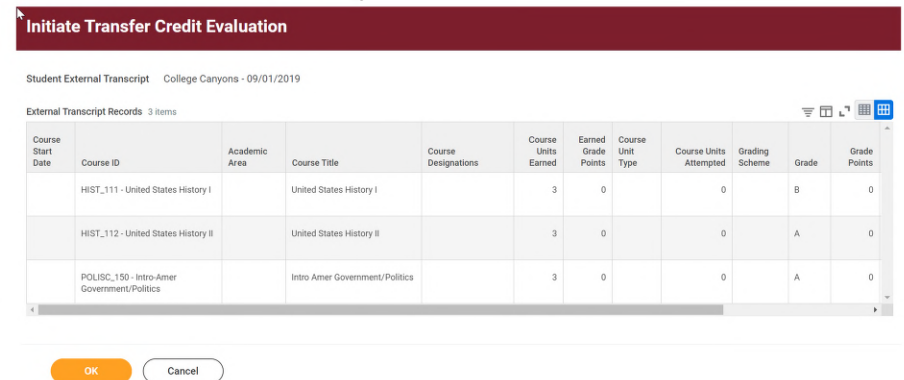
Initiate Transfer Credit Evaluation

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**.



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

- 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.

External Records	Internal Equivalent		
	Course	Grade	Units
Advanced Placement (AP); English Literature: 4 (01/01/2019)	TRCR 1 - Elective Credit	CR	Units 4 Course Unit Type Quarter Units

Add a Test Record

- To add a test record, go back to the **External Records** page in the students profile.
- Click on the **Actions** button and then select **Add Test Result**.
- 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.

- Click **OK**.
- 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.

Add Test Result for Brooklynn Whittley

Test: Academic Unit
 ACT: *
 Received Date: MM/DD/YYYY
 Test Date: * MM/DD/YYYY
 Test Administration Site:
 Registrant ID:

Drop files here
 or
 Select files

OK Cancel

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

1 item

+ *Section Name

- Complete additional information, if applicable and click **OK**.
- Verify that the test records you entered are correct on the **Add Test Result** screen. Click **Done**.

Add Test Result Brooklynn Whittley

Test: ACT - 10/01/2020 for Brooklynn Whittley
 Academic Unit: History Department
 Test Date: 10/01/2020
 Test Administration Site: (empty)
 Registrant ID: (empty)
 Official: No

Received Date: (empty)
 Updated Date: 11/07/2022
 Updated By: srichardson-scr / Sasah Richardson on behalf of 000000 Shenouda-Williams

Done

- 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**.
- Hover over the magnifying glass icon and select the *Related Actions* button.
- Click **Student External Transcript** and then **Initiate Transfer Credit Evaluation**.

2 items

Test Result

SAT - 03/10/2018 for
 SAT - 10/06/2018 for Cassidy Block

Actions

Test Result
 Favorite
 Integration IDs

Test Result

Edit
 Initiate Transfer Credit Evaluation
 Delete

Student Name: Cassidy Block

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

Test Result SAT - 03/10/2018 for Cassidy Block Official

Test Date 03/10/2018

3 items

Section Name	Score	Percentile	Omission Cor
Total	1280	0	
Evidence-Based Reading and Writing Section	660	0	
Math Section	620	0	

Initiate Test Credit Evaluation

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

Assign Student Transfer Credit

Student *

External Records

Official External Transcript

Create Official External Transcript

Official External Education Test Results

OK **Cancel**

- 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.

Assign Student Transfer Credit

Student [Cassidy Block](#)

Lock All Credits **Yes**

Transfer Credit 3 items

External Records	Internal Equivalent		
	Course	Grade	Units
Advanced Placement (AP): English Literature: 4 (01/01/2019)	TRCR 1 - Elective Credit	CR	Units 4 Course Unit Type Quarter Units

Done [\(AP\): English Language](#) [TRCR 1 - Elective Credit](#) [CR](#) [Units](#)