

Operations and Process Manual

TES® User Guide for Faculty

TES® allows the Transfer Evaluation Specialists to send academic unit approvers the UNC course description and the incoming course description, providing a comparison to make an easy decision on whether to approve, deny, or ask for more information on an evaluation of a transfer course.

Setting Up Default Landing Page

1. Log in to TES® at <https://tes.collegesource.com/>
2. Select User Preferences under the Manage Tab (*this is a one-time step*).
3. Your username will be your UNCO email address. Click forgot password link to reset your password.



4. Set your Home Page to My Evaluations as a default landing page. When logging into TES, the My Evaluations page will automatically populate, showing which institutions need established equivalencies.

User Preferences

CHANGE MY PASSWORD:

Please review the password guidelines below.

- Password must be new, not the same as your previous password
- Password must be a minimum of eight (8) characters
- Password must contain at least two letter characters and two number characters
- Password must contain at least one uppercase character and at least one lowercase character
- Password may contain special characters except for spaces, forward slashes, semi-colons or sequential hyphens

Enter a new password:

Enter a new password

Re-enter to confirm:

Re-enter to confirm

Please verify the following:

☐ I affirm that I am an employee of UNIVERSITY OF NORTHERN COLORADO.

☐ I have read and agree to abide by the TES and Transferology Terms of Use.

This password reset will apply to both your TES and Transferology Lab user account.

SET MY HOME PAGE:

Default

☒ Default Homepage

☐ Dashboard

Search

☐ Course Finder

☐ Equivalency Finder

☐ Course List Report

Track

☒ My Evaluations

☐ All Open Evaluations

☐ All Closed Evaluations

☐ Send Email Reminders

Match

☐ Equivalency Manager

☐ Equivalency Batch Editor

☐ Equivalency Explorer

☐ User Added Courses

☐ Course Tags & Outlines

Manage

☐ Usage Statistics

☐ Public View Management

☐ User Management

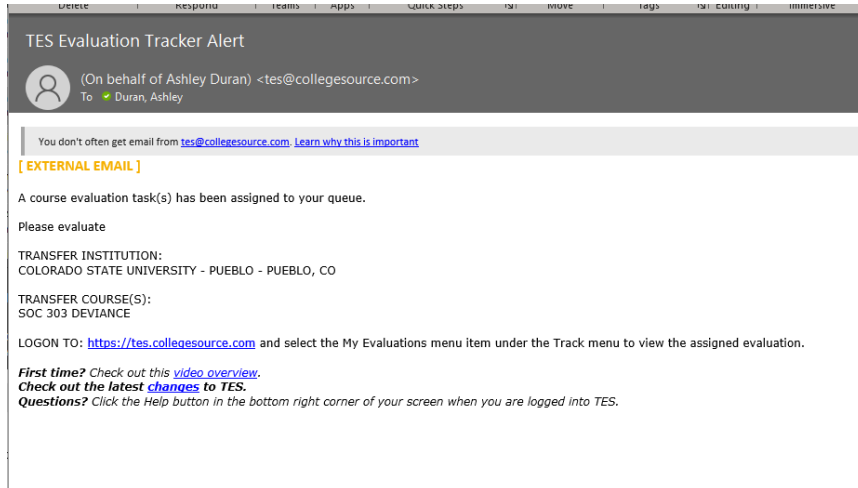
☐ Export Options

5. This page can be used to update/change your password.

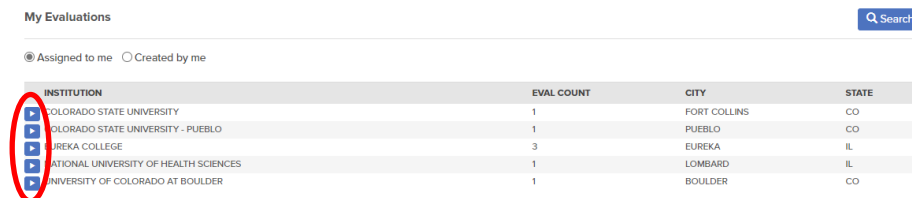
Transfer Evaluation Tracker Process

The Evaluation Process

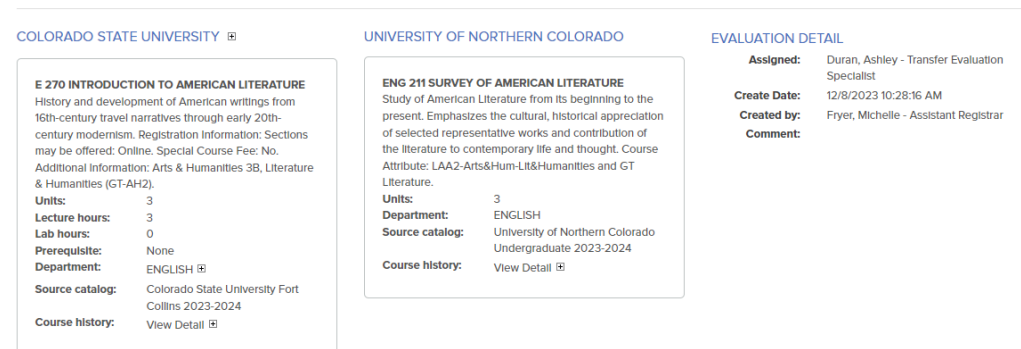
1. The Transfer Evaluation Team will set up your account to automatically show your department.
2. An email notification will be sent to your email address, alerting you an evaluation is needed to establish an equivalency.



3. Select the school(s) the Transfer Evaluation Team has requested to have an equivalency established.



4. The Transfer Evaluation Team will select the most appropriate equivalency or recommend as a departmental elective.



Select An Action for Evaluation

1. Under Select An Action, you can select the following options:

SELECT AN ACTION:

Approve
Deny
Need More Information
Re-Assign
Add/Edit Course
Create Equivalency and Close
Add/Edit Support File
Send Email
Close

Quick Links to Selected Action:

[Approve](#)

[Deny](#)

[Re-Assign](#)

[Add/Edit Course](#)

A. Select An Action: Approve

1. Will allow you to approve the equivalency the Transfer Specialist recommends.
2. Make a comment if needed in the Note Section.

TES[®] APPROVE

Note: (optional)

Assign: REG - DURAN, ASHLEY (Evaluation Task Creator)

Send Email?: ☒

Confirm Cancel

3. Select Confirm.
4. The Transfer Evaluation Specialist will create the approved equivalency and be available for future students.

B. Select An Action: Deny

1. Please mark why the suggested equivalency is denied based on Subject, Level, Lab, Sequence, or Other.
2. Provide notations in the required note section explaining the reason for the denial.

TES[®] DENY

Type: (optional) [Select One] ▼

Note: (required)

Assign:

Send Email?: ☒

Confirm Cancel

The dropdown menu for 'Type' is open, showing options: [Select One], Subject, Level, Lab, Sequence, and Other.

TES[®] DENY

Type: (optional) [Select One] ▼

Note: (required)

Assign: REG - DURAN, ASHLEY (Evaluation Task Creator) ▼

Send Email?: ☒

Confirm Cancel

3. Select Confirm.
4. The Transfer Evaluation Specialist will take the appropriate next steps.

C. Select An Action: Need More Information

1. Note what is needed to help complete the evaluation.
2. Assign will default to the Transfer Evaluation Specialist who created the request.

TES[®] NEED MORE INFORMATION

Note: (required) Please request a syllabus from the student.

Assign: DURAN, ASHLEY (Default Assignee) ▼

Send Email?: ☒

Confirm Cancel

3. Select Confirm.
4. The Transfer Evaluation Specialist will take the appropriate next steps.

D. Select An Action: Re-Assign

1. If a secondary approver or additional faculty input is required, you can re-assign to another person. Approvers are listed by their college and then by name.

2. Select Confirm.
3. An email will be sent to the secondary approver notifying them to review the request.

E. Select An Action: Add/Edit Course

1. The Add/Edit option will allow you to select another course as an equivalency or assign it as a department elective. After making the selection, you will have the option to search for another equivalency option.
2. You have been assigned a priority department based on your academic unit. If you have multiple departments, please choose the correct prefix when reassigning the equivalency.

3. Select the course by clicking on the plus sign next to the course in the UNC Catalog.
4. You can unselect our recommended course by clicking the X under Equivalent Course(s):
5. Click Done.
6. Next, the descriptions of both the transferring school and UNC catalog course descriptions will populate.

7. Under Select An Action, choose Approve or Re-Assign.
8. Select Confirm.

9. The Transfer Evaluation Specialist will take the appropriate next steps.

F. Select An Action: Create an Equivalency and Close

1. After completing the evaluation, this step closes the evaluation process. The Transfer Evaluation Specialist will do this.

G. Select an Action: Add/Edit Support File

1. Allows you to attach documentation to the course information (i.e., syllabus).

MY QUEUE → EVALUATION LIST → EDIT EVALUATION → FILE-UPLOAD

Add/Edit Support File (PDF Only < 10MB/File, 20MB Total)

Select File(s):

Choose File	No file chosen
Choose File	No file chosen

2. Click submit, and the supporting documentation will be uploaded.
3. Use Select An Action to choose your next steps.

H. Select An Action: Send Email

1. Allows you to email the course descriptions to another person or group that is not a selected approver.
 - Email Evaluation Task Creator is optional and has no impact regardless of the checked box.

TES SEND EMAIL

Format: ☒ Embed HTML ☐ Attach PDF

From: (UNIVERSITY OF NORTHERN COLORADO) tes@collegesource.com
(Separate multiple emails with a comma or semi-colon)

To:

Subject:


Body:

Email me ☒

Email Evaluation Task Creator ☒

2. The recipient will receive the following email:

TES Evaluation



[UNIVERSITY OF NORTHERN COLORADO] <tes@collegesource.com>

To ✓ Duran, Ashley; ✓ Duran, Ashley; ✓ Fryer, Michelle

Some people who received this message don't often get email from tes@collegesource.com. [Learn why this is important](#)

[EXTERNAL EMAIL]

Please advise on the appropriate equivalency.

EUREKA COLLEGE

BIO421 BIOCHEMISTRY II

Topics include the pathways responsible for the metabolism of biomolecules, and for production of metabolic energy; control mechanisms and molecules. Lecture. Crosslisted as CHM421.

Units:

3

Prerequisite:

CHM321

Department:

BIOLOGY

Source catalog:

Eureka College 2020-2021

UNIVERSITY OF NORTHERN COLORADO

There are no receive courses found.

Sent on behalf of : Ashley Duran

Report generated via TES @ <https://tes.collegesource.com>

2/13/2024 1:11:31 PM

- When ready, please select an action to continue this transfer evaluation review.
- The Transfer Evaluation Specialist will take the appropriate next steps.

I. Select An Action: Close

- After completing the evaluation, this step closes the evaluation process. The Transfer Evaluation Specialist will do this.