

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. 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:

Show

Re-enter to confirm:

Show

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

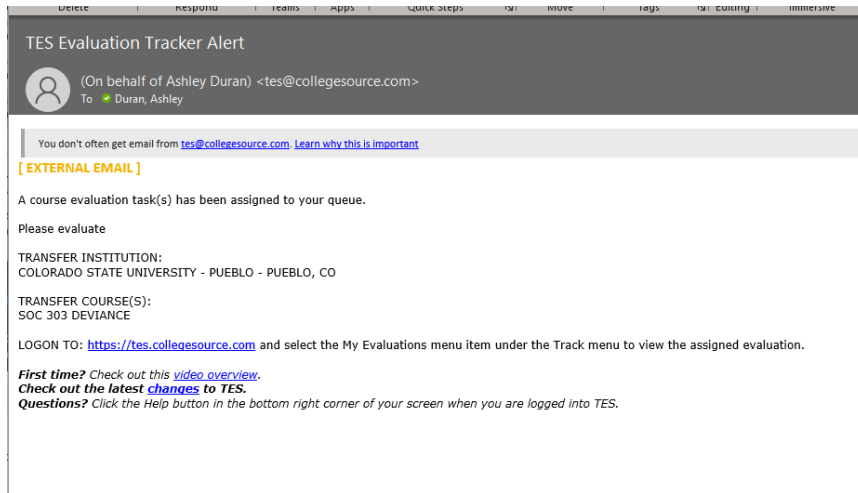
☐ Export Options

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

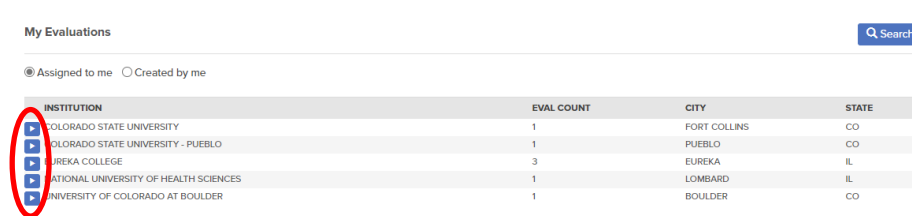
Transfer Evaluation Tracker Process

The Evaluation Process

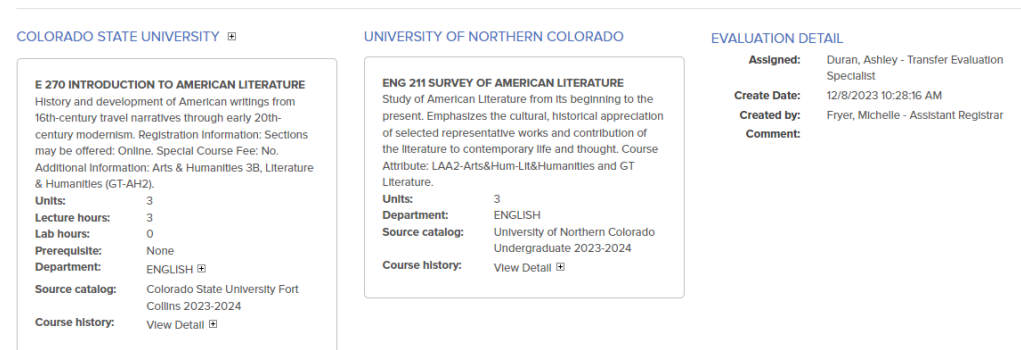
1. The Transfer Evaluation Team will set up your account to automatically show your department.
2. An email notification will be sent to your email address, alerting you an evaluation is needed to establish an equivalency.



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

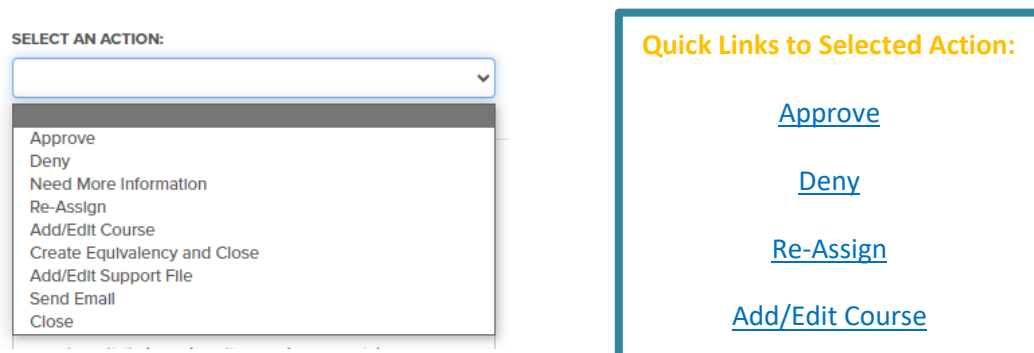


4. The Transfer Evaluation Team will select the most appropriate equivalency or recommend as a departmental elective.



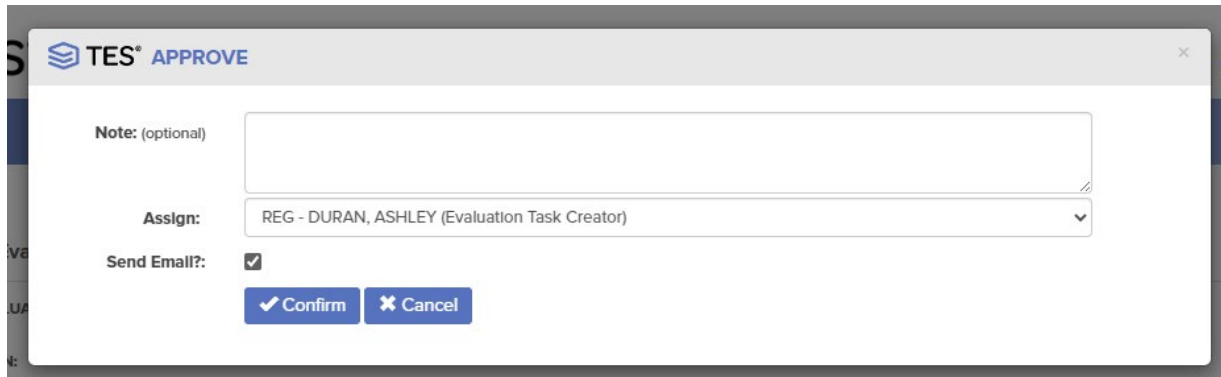
Select An Action for Evaluation

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



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.

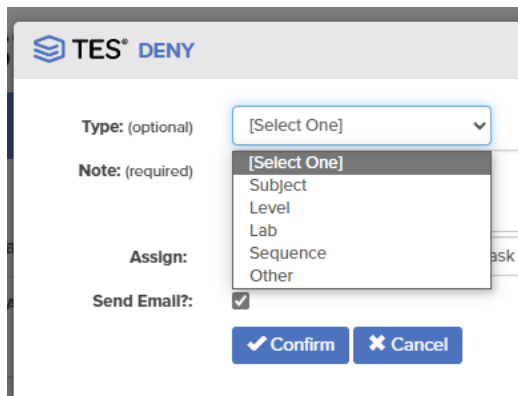


The screenshot shows a dialog box titled "TES APPROVE". It contains a "Note: (optional)" text area, an "Assign:" dropdown menu with the selected value "REG - DURAN, ASHLEY (Evaluation Task Creator)", and a "Send Email?:" checkbox that is checked. At the bottom are "Confirm" and "Cancel" buttons.

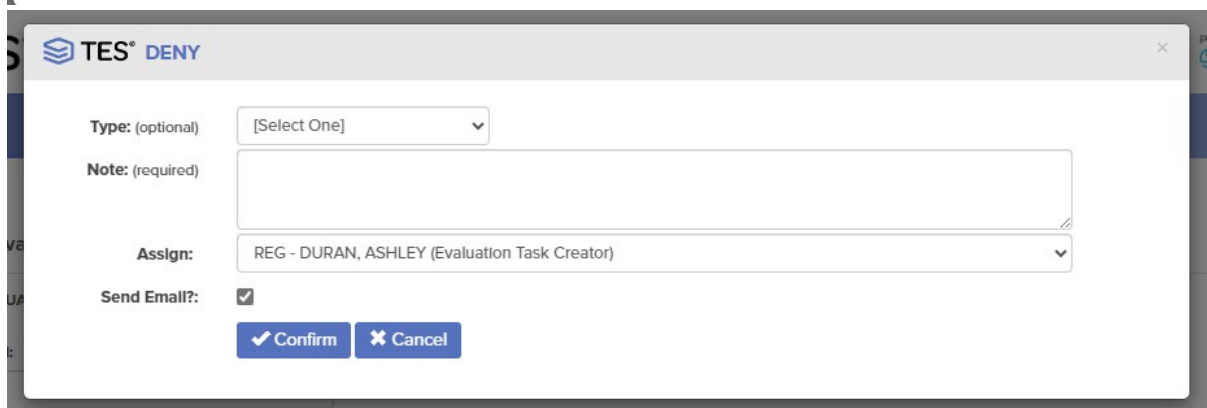
3. Select Confirm.
4. The Transfer Evaluation Specialist will create the approved equivalency and be available for future students.

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.



The screenshot shows a dialog box titled "TES DENY". The "Type: (optional)" dropdown menu is open, showing options: "Subject", "Level", "Lab", "Sequence", and "Other". The "Note: (required)" text area is empty. The "Assign:" dropdown menu is set to "REG - DURAN, ASHLEY (Evaluation Task Creator)". The "Send Email?:" checkbox is checked. "Confirm" and "Cancel" buttons are at the bottom.



The screenshot shows the same "TES DENY" dialog box, but the "Note: (required)" text area is now filled with text. The "Type: (optional)" dropdown menu is closed. The "Assign:" dropdown menu remains set to "REG - DURAN, ASHLEY (Evaluation Task Creator)". The "Send Email?:" checkbox is checked. "Confirm" and "Cancel" buttons are at the bottom.

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.

The screenshot shows the 'TES NEED MORE INFORMATION' form. It has a title bar with the TES logo and the text 'TES NEED MORE INFORMATION'. Below the title bar, there is a 'Note: (required)' field with a text input area containing the text 'Please request a syllabus from the student.'. Below the note field is an 'Assign:' dropdown menu showing 'DURAN, ASHLEY (Default Assignee)'. Below the assign field is a 'Send Email?:' checkbox which is checked. At the bottom of the form are two buttons: 'Confirm' with a checkmark icon and 'Cancel' with an X icon.

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.

The screenshot shows the 'TES RE-ASSIGN' form. It has a title bar with the TES logo and the text 'TES RE-ASSIGN'. Below the title bar, there is a 'Note: (optional)' field with a text input area. Below the note field is an 'Assign:' dropdown menu showing 'REG - DURAN, ASHLEY (Evaluation Task Creator)'. Below the assign field is a 'Send Email?:' checkbox which is checked. At the bottom of the form are two buttons: 'Confirm' with a checkmark icon and 'Cancel' with an X icon.

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.

The screenshot shows the 'TES ADD/EDIT COURSE' form. It has a title bar with the TES logo and the text 'TES ADD/EDIT COURSE'. Below the title bar, there are two sections: 'TRANSFER COURSE(S):' and 'EQUIVALENT COURSE(S):'. The 'TRANSFER COURSE(S):' section shows a table with columns for course number, course name, and a count. The first row is 'ACC221 TAX ACCOUNTING I' with a count of 3. The 'EQUIVALENT COURSE(S):' section shows a table with columns for course number, course name, and a count. The first row is 'BAAC 1XX DEPARTMENTAL ELECTIVE' with a count of 3. Below these sections are two dropdown menus for selecting a college. The left dropdown is for 'EUREKA COLLEGE' and the right dropdown is for 'UNIVERSITY OF NORTHERN COLORADO'. Below the dropdowns are two lists of courses. The left list is for 'EUREKA COLLEGE' and the right list is for 'UNIVERSITY OF NORTHERN COLORADO'. The right list has a 'Done' button. Below the lists are two sections: 'PRIORITY DEPARTMENT(S)' and 'ALL DEPARTMENTS'. The 'PRIORITY DEPARTMENT(S)' section shows a list of departments with a count. The 'ALL DEPARTMENTS' section shows a list of departments with a count. A red circle highlights the 'EQUIVALENT COURSE(S):' section, and a yellow circle highlights the 'PRIORITY DEPARTMENT(S)' section.

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):

- Click Done.
- Next, the descriptions of both the transferring school and UNC catalog course descriptions will populate.

SELECT AN ACTION:

<p>EUREKA COLLEGE ⓘ</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>ACC111 PRINCIPLES OF ACCOUNTING I</p> <p>The course emphasizes basic accounting concepts and use of accounting information in administration of business firms. Key concepts include the preparation of the income statement and balance sheet using computer spreadsheets. The course will progress from an introduction to computer spreadsheets, to designing moderately complex spreadsheets.</p> <p>Units: 4</p> <p>Prerequisite: None</p> <p>Department: ACCOUNTING ⓘ</p> <p>Source catalog: Eureka College 2023-2024</p> <p>Course history: View Detail ⓘ</p> </div>	<p>UNIVERSITY OF NORTHERN COLORADO</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>BAAC 220 PRINCIPLES OF ACCOUNTING I</p> <p>An introduction to basic principles of accounting. The accounting cycle is examined in relation to recording, classifying, reporting and interpreting financial information for business. Course Fee: Differential Tuition Required.</p> <p>Units: 3</p> <p>Prerequisite: (24.0 credits required) and (BACS 101 with a minimum grade of C-)</p> <p>Department: ACCOUNTING</p> <p>Source catalog: University of Northern Colorado Undergraduate 2023-2024</p> <p>Course history: View Detail ⓘ</p> </div>	<p>EVALUATION DETAIL</p> <p>Assigned: REG - Duran, Ashley - Transfer Evaluation Specialist</p> <p>Create Date: 12/8/2023 10:26:54 AM</p> <p>Created by: REG - Fryer, Michelle - Assistant Registrar</p> <p>Comment:</p>
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- Under Select An Action, choose Approve or Re-Assign.
- Select Confirm.
- The Transfer Evaluation Specialist will take the appropriate next steps.

F. Select An Action: Create an Equivalency and Close

- 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

- 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

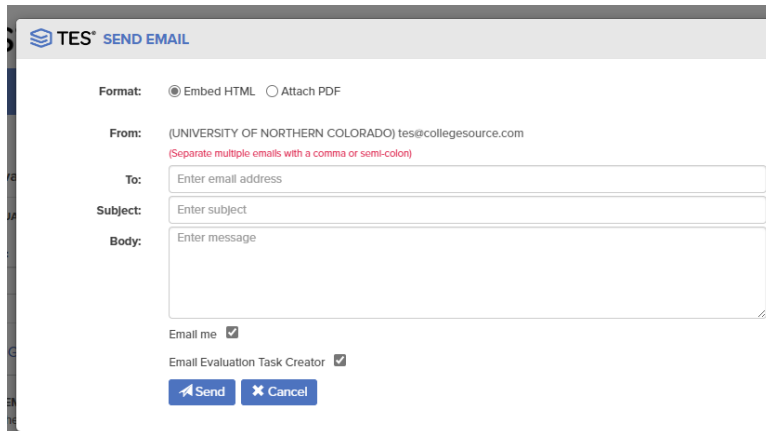
▶ Submit

↺ Reset

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

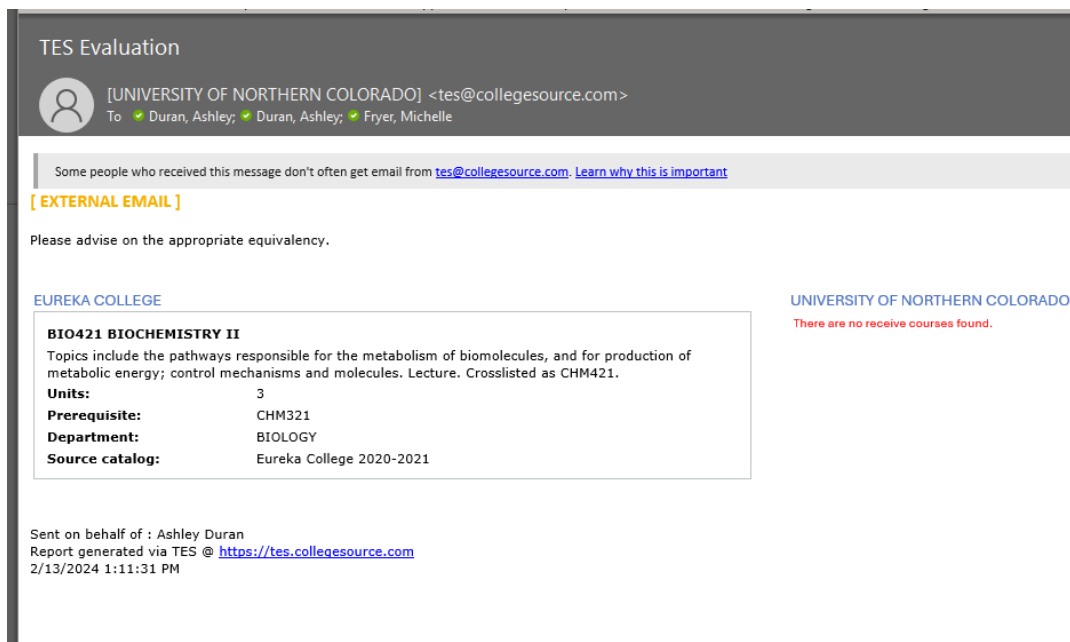
H. Select An Action: Send Email

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.



The screenshot shows the 'TES SEND EMAIL' interface. At the top, there's a header with the TES logo and the title 'SEND EMAIL'. Below this, the 'Format' section has two radio buttons: 'Embed HTML' (selected) and 'Attach PDF'. The 'From' field is pre-filled with '(UNIVERSITY OF NORTHERN COLORADO) tes@collegesource.com' and includes a red note: '(Separate multiple emails with a comma or semi-colon)'. The 'To' field is empty with the placeholder 'Enter email address'. The 'Subject' field is empty with the placeholder 'Enter subject'. The 'Body' field is a large text area with the placeholder 'Enter message'. Below the text area, there are two checkboxes: 'Email me' (checked) and 'Email Evaluation Task Creator' (checked). At the bottom, there are two buttons: 'Send' and 'Cancel'.

2. The recipient will receive the following email:



The screenshot shows an email received by the recipient. The header is 'TES Evaluation' with a profile icon and the text '[UNIVERSITY OF NORTHERN COLORADO] <tes@collegesource.com>'. Below this, the 'To' field lists three recipients: 'Duran, Ashley', 'Duran, Ashley', and 'Fryer, Michelle', each with a green checkmark. A grey banner below the header contains the text: 'Some people who received this message don't often get email from tes@collegesource.com. Learn why this is important'. Below the banner, there is a yellow box with the text '[EXTERNAL EMAIL]'. The main body of the email starts with 'Please advise on the appropriate equivalency.' followed by two columns of course information. The left column is for 'EUREKA COLLEGE' and the right column is for 'UNIVERSITY OF NORTHERN COLORADO'. The Eureka College section contains details for 'BIO421 BIOCHEMISTRY II', including a description, units (3), prerequisite (CHM321), department (BIOLOGY), and source catalog (Eureka College 2020-2021). The University of Northern Colorado section contains the text 'There are no receive courses found.' At the bottom, there is a footer with the text: 'Sent on behalf of : Ashley Duran', 'Report generated via TES @ https://tes.collegesource.com', and '2/13/2024 1:11:31 PM'.

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

I. Select An Action: Close

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