TES Evaluation Workflow Guide

The following is a guide to help you understand the work flow within the Transfer Evaluation System (TES). You will see instructions on how the work flow will function, as well as gain an understanding on the full process from start to finish.

General Work Flow

1. Faculty/Staff will need Evaluation Tracker rights in order to review evaluation tasks. Please check your access and if you have issues with your username/password, contact the Office of the Registrar (OTR).
2. Search for courses using COURSE FINDER

SEARCH
- Type in the name, partial name, or an abbreviation of the institution from which you would like to find courses in COURSE FINDER.
  o Once you’ve selected an institution, search for the course by entering in the Course Code or the Course Title
- If the course has an equivalency already created, the PUZZLE piece icon will be the color gray. If it is gold, no equivalent has been established yet.
- If the course needs to be evaluated for a new equivalency, click on the FOOTSTEPS.

a. Once the course is found, select the FOOTSTEPS tracker icon which will take you to the ADD EVALUATION TASK page

TRACK
If a course needs to be evaluated, an EVALUATION TASK must be created.
- An evaluation task will send an email alert to the reviewer that there is a course to be reviewed. All evaluations are housed under MY EVALUATIONS.
- Here is where the evaluation task is assigned to the appropriate college office/evaluator:
  o Please note: Only SINGLE MODE evaluation tasks will be utilized. BATCH MODE is only used for evaluations of 10+ courses at one time.
b. You will always send an email alert to the reviewer so that they know to check their My Evaluations Queue for an evaluation task – Found under TRACK → My Evaluations → Assigned to Me.
   i. The email you receive notifying you of a pending evaluation will show up to your Outlook as “On Behalf of [senders name]”

3. Once you enter your My Evaluations Queue, you will need to click on the icon below to open up the task:

4. Your next step is to select an action in the drop down menu:
a. **Approve**: After you’ve selected an equivalent course, please approve and it will send the evaluation task back to the originator of the task.
   i. Approve then re-assign

b. **Deny**: If someone has recommended an equivalency to you and you disagree that the 2 courses are equivalent, select Deny.
   i. There are 5 sub-choices in the DENY category in order to establish a deeper understanding of why the course is denied.
      1. *This option will be used seldom, if at all as equivalent courses will not be recommended in the original evaluation task.*

c. **Need More Information**: If you receive an evaluation task but need more information in order to make a decision, click this option.
   i. There will be a required field for you to enter in the information you require in order to select an equivalent course.

d. **Re-Assign**: There are two options that can occur under this category.
   i. First option- If you receive an evaluation task in error, you can re-assign the task to the appropriate person. They will then receive the task to complete in their queue.
   ii. Second option- If a transfer course has more than one equivalent course, the original evaluator can choose an equivalent course and then re-assign the task to another person/department. The log that is attached to each evaluation task will keep a record of all courses that were chosen as equivalents. Final review will be done by OTR to ensure TES and CTS are updated correctly.
      1. Re-assign will only be used once you’ve chosen the SELECT/CHANGE EQUIVALENT course function. This will record the course you want in the activity log so that OTR can adjust the equivalency once the task is back in OTR’s queue.

e. **Select/Change Equivalent Course**:
   1. *This is the option you will use EVERY time an evaluation task is received.*
   ii. You will be prompted to select what catalog version to choose from. Use the most current version.
iii. On the bottom right of your screen, you will see that a drop down list has populated. The courses are listed by department.

iv. You will always have the option to decline credit:
   1. Under the *NO MARQUETTE EQUIVALENCY/AWARD-(NONE) option is where you can find NONE 9201 as an option.

f. Add/Edit Support File
   i. This function allows you to add course syllabi or any other PDF that you deem necessary to attach to the course for review.

g. Close
   i. This function simply closes out the evaluation task. This option won’t be used often since you’ll want to create the equivalency and then approve, re-assign the task, or request more information.
   ii. Closed tasks will live under CLOSED EVALUATIONS.
   iii. OTR will be primarily responsible for closing out tasks.

Helpful Tips

5. Since courses will not be suggested as equivalents from the sender to the reviewer, the most common and frequently used ACTIONS will be:
   a. Need More Information: Reviewer must submit notes as to what they need from the sender in order to evaluate the course. This will then send the task back to the original sender.
   b. Re-Assign: The reviewer can send the task to someone else, whether that is another department or another reviewer. Send an email alert so the person knows the task has been given to them.
      i. This option can be used if more than once course is deemed equivalent. You can select an equivalency, then re-assign as many times as you’d like. Once the final course has been chosen, re-assign the evaluation task to the OTR. This will ensure that OTR has the ability to manipulate TES behind the scenes to that it reflects the multiple equivalents correctly.
   c. Select/Change Equivalent Course (USED MOST FREQUENTLY): Used to select a course that is deemed equivalent. Once you’ve established the course, scroll to the bottom and hit submit.
      i. The next action needs to be selected, which will primarily be APPROVE so that the proposed equivalent task is re-routed back to OTR to create the equivalency in TES.

Next Action Required: You will receive a warning telling you to choose your next action, should almost always be APPROVE.

Select/Change Equivalent: The activity log shows what action was taken and what course was selected. Needed about 4 to find more information (See Picture)
i. INSTITUTIONAL PROFILE ICON: This button will provide more detailed information that TES has collected regarding the institution
ii. GLOBE ICON: This button will open up the institutions webpage so that you can access department webpages or catalogs, bulletins, etc.
iii. DEPARTMENT LINK: Can view all other courses within that specific department
iv. VERSION HISTORY: This allows you to see all past versions of the course and their descriptions

b. Once a task is approved, the task will flow back into the original sender’s queue, which in all cases should be OTR.
   i. Close: Clear it out of the queue
   ii. Close/Create Equivalency: Only users with equivalency manager user rights can create equivalency. Users without those rights will not see this option under Select an Action. (If you see this option, please contact the OTR know, as your rights for TES need to be adjusted.)

7. Batch Mode Example
   a. Can be used when you have multiple courses from the same college to go out to be reviewed by the same person
   b. 10 or more courses automatically go to BATCH mode and will notify you with a red note at the top of the page
   c. If you are searching for all 10 courses, you must select the data set to choose the course, not look up individual courses.
For Example: If you have 10 courses that need to be evaluated from UW Milwaukee, you will select all courses, begin an evaluation task and then 10 individual evaluation tasks will be waiting in the evaluators queue.

1. Example is about 14 minutes into the Evaluation Tracker-Sender video.

8. Watch for the Gray Colored Puzzle Piece
   a. If an equivalent course has already been determined, the puzzle piece icon in the bottom right of the course description will be the color gray. Click on this icon to see what courses have been deemed equivalent.

9. Send Email Reminders
   a. Reminder emails can be sent to outstanding evaluation tasks that have been sitting for longer than they should.
   b. You can filter the tasks by institutions and age of the evaluation task.

10. Final Equivalent Established
    a. Once an evaluation task has been created, routed to the appropriate person and sent back approved to OTR, the equivalency will be created in TES.

11. Catalogs that are not up to date in TES
    a. If you are trying to review a course and find that the institution does not have their most current catalog in TES, use their website to find the most current catalog.
    b. In the evaluation task, enter notes stating that you used the website for the current catalog so that it can be tracked and edited once TES has been updated with the current catalog.