OFFICE OF THE
University Registrar

Approving a Graduate Transfer Credit Workflow Request

User Guide

A user guide for administrators in the Graduate School for approving or denying a request submitted through the GRAD: Transfer Credit workflow.

VANDERBILT
Office of the
University Registrar

The Kuali workflow application has been implemented for graduate students to request transfer credit. Administrators in the Graduate School will utilize the Kuali workflow application to review and approve transfer credit requests. Students and administrators should refer to the Graduate School catalog for academic regulations.

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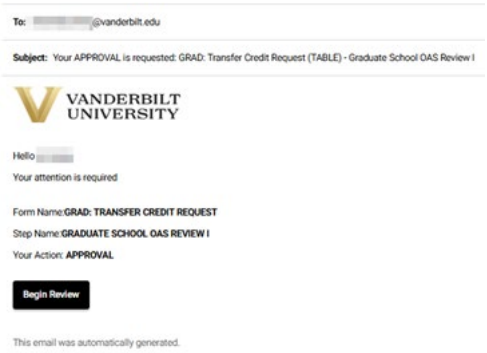
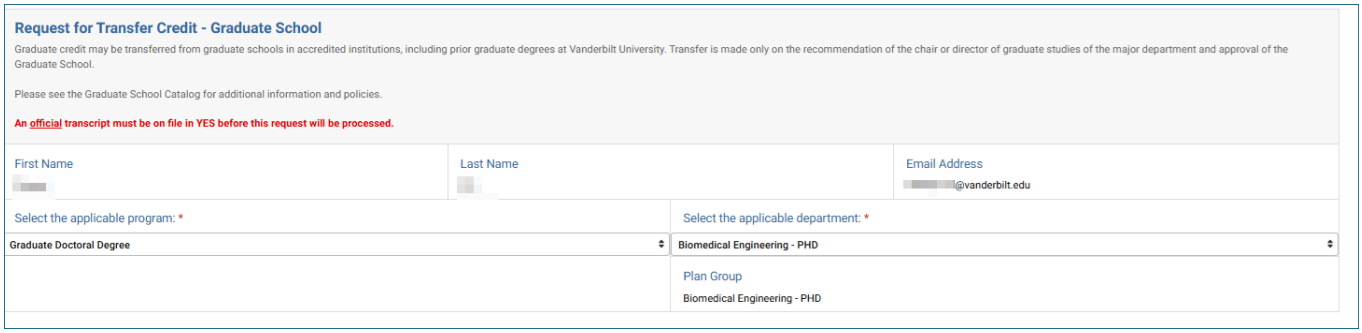
GRAD: Transfer Credit Workflow Request

1. Once a GRAD: Transfer Credit workflow request has been directed to you, you will receive an approval request via email. Click Begin Review on the approval request to access the form.

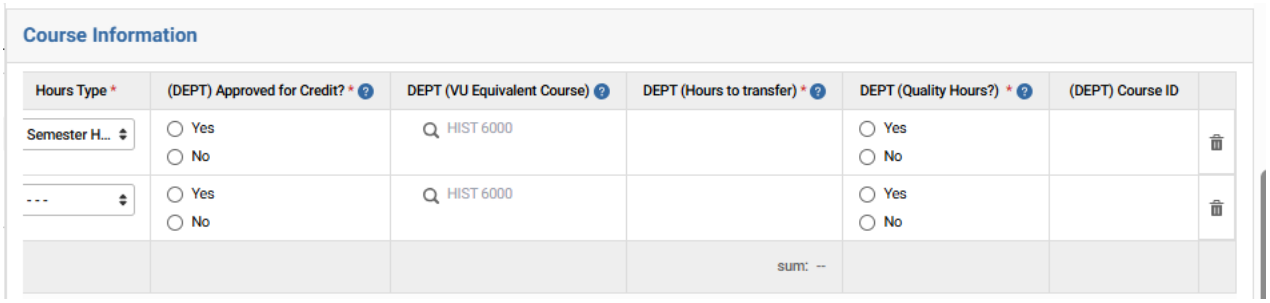


2. Information about the student appears at the top of the form.



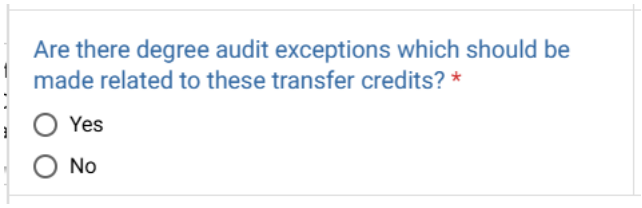
Course Information

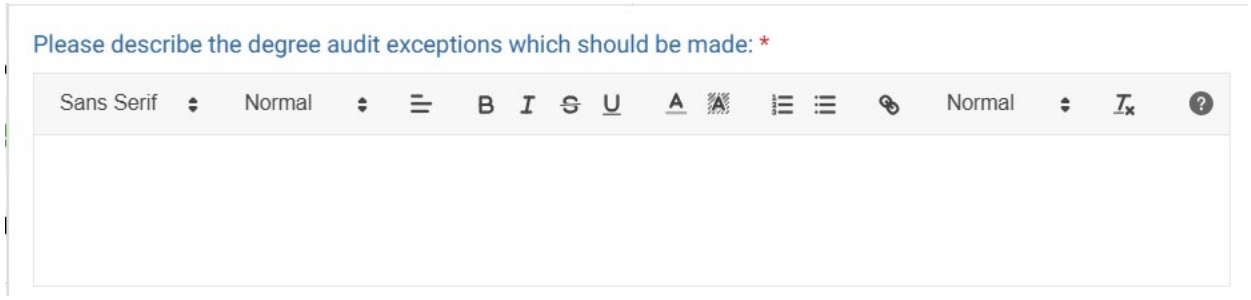
1. The student will have entered information in the first six columns. The department will have entered/approved information in all columns beginning with (DEPT). Scroll to these columns or zoom out on your browser setting to see the entire grid at once.



Department Office Use - Degree Audit Exceptions

1. During the departmental review, the DGS would have noted whether degree audit exceptions need to be made related to these transfer credits.





Approval Workflow/Timeline

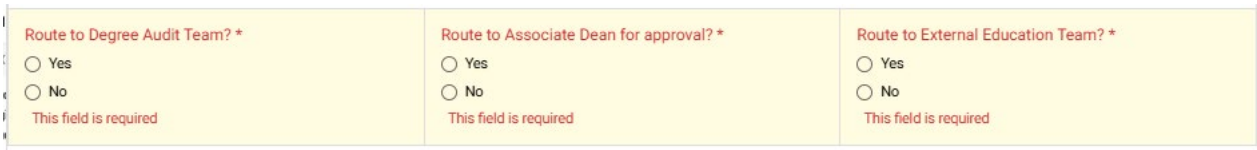
The Graduate School is the third step in the GRAD: Transfer Credit workflow. Following an initial OAS review, requests may route to the following:

1. The External Education Team in the Office of the University Registrar. After any External Education Team review, the request will route back to the OAS for a second review.
2. The Associate Dean in the Graduate School, if necessary.
3. The Data Team in the Office of the University Registrar to post the credits to the student record.
4. The Degree Audit Team in the Office of the University Registrar, if necessary, to make updates to the degree audit.

Reviewing the GRAD: Transfer Credit Workflow Request – OAS Review I

Approving the GRAD: Transfer Credit Workflow Request

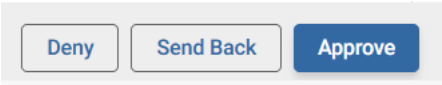
1. Select Yes or No for the routing options.



2. Depending on the selection, the form may route to the Associate Dean in the Graduate School, the External Education Team in the Office of the University Registrar, the Data Team in the Office of the University Registrar, and/or the Degree Audit Team in the Office of the University Registrar.

Denying the GRAD: Transfer Credit Workflow Request

1. Click Deny.

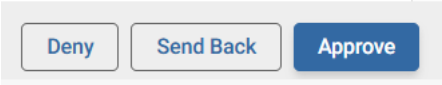


2. The student will be notified via email that the request has been denied.

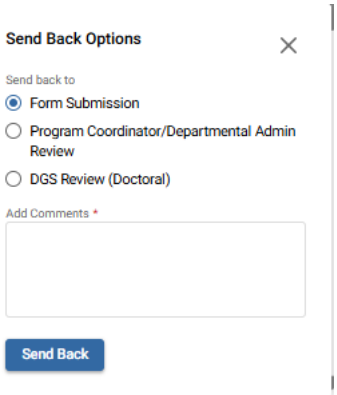
Sending the GRAD: Transfer Credit Workflow Request Back

If, during the course of your review, you notice something that requires the student or the program coordinator/manager to change the request, you can send the request back.

1. Click Send Back.



2. Select Form Submission to return the request to the student, Program Coordinator/Departmental Admin Review to return the request to the program coordinator/manager, or DGS Review to return the request to the DGS.



3. Click Send Back. The student, program coordinator/manager, or DGS will be notified via email that the request has been sent back for additional action.

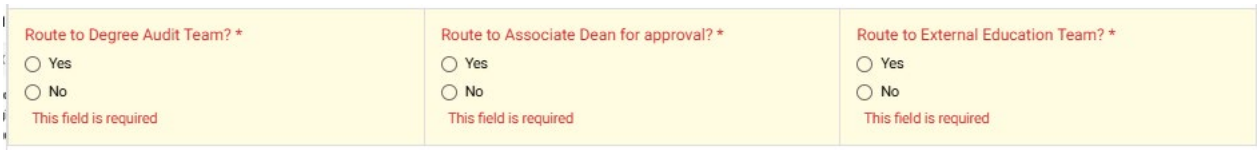
Reviewing the GRAD: Transfer Credit Workflow Request – Graduate School Post Ext Ed Review

1. For requests that route to the External Education Team, the OAS reviews the form a second time. See the instructions under OAS Review I for processing.
    a. If the form requires additional review by the External Education Team, select Send Back. The Yes/No Data Team toggle does not work at this point in the workflow.

Reviewing the GRAD: Transfer Credit Workflow Request – Associate Dean

Approving the GRAD: Transfer Credit Workflow Request

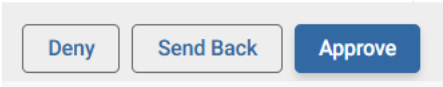
1. Select Yes or No for the routing options.



2. Depending on the selection, the form may route to the External Education Team in the Office of the University Registrar, the Data Team in the Office of the University Registrar, and/or the Degree Audit Team in the Office of the University Registrar.

Denying the GRAD: Transfer Credit Workflow Request

1. Click Deny.

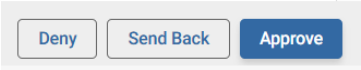


2. The student will be notified via email that the request has been denied.

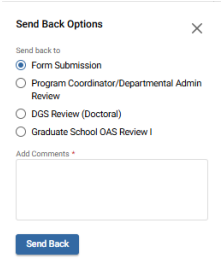
Sending the GRAD: Transfer Credit Workflow Request Back

If, during the course of your review, you notice something that requires the student or someone else to change the request, you can send the request back.

1. Click Send Back.



2. Select Form Submission to return the request to the student, Program Coordinator/Departmental Admin Review to return the request to the program coordinator/manager, DGS Review to return the request to the DGS, or Graduate School OAS Review I to return the request to the OAS.



3. Click Send Back. The user will be notified via email that the request has been sent back for additional action.

Accessing Your Work Queue

In addition to clicking on the "Begin Review" button embedded in the notification emails, you can access your work queue at the following web address: https://vanderbilt.kualibuild.com/. Click Action List.

Accessing the Documents List

To see a list of requests in your department, access the home screen at https://vanderbilt.kualibuild.com/. Click the GRAD: Transfer Credit tile and you will see a highly configurable listing of all submitted requests. By turning on and off "Columns" and using different filters, you can customize your experience with data elements you may find helpful.

1. To turn columns on and off, click Columns in the top row. A list of available fields will appear. Click on the eyeball icon to add or delete a column from your view.
2. To export data, click Export in the top row. You can select to export either what you see on your screen (Current View), or all available data (All Data).

Please contact the YES Help Line at yes@vanderbilt.edu or 615-343-4306 if you have questions or need additional assistance.