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Creating Evaluation Requests

Equivalency Manager Option

Select **Match → Equivalency Manager** from the dropdown menu at the top of the screen:

Type the name of the institution in the **Institution Search Box** and select **Search**:

Select the **button** next to the school’s name:

Select the **button** from the list:
Selecting Coursework

Leave **Single EQ Mode** checked *(NEVER CHANGE THIS).*

Select your **Catalog Year** and **Department Code** for both institutions from the dropdown menu:

![Dropdown menu](image)

**NOTE:** You can leave WSU’s side blank if you do not know the equivalent course.

Add courses to the request by pressing the **+** button next to the desired courses.

As you select courses, a course list will auto-populate above the catalog information:

![Course list](image)

Once you have selected appropriate courses, you must hit the **Preview** button at the top of the screen to proceed.
Select + Create Eval Task to request that an evaluator review your course.

Selecting an Evaluator

Select your evaluator from the dropdown menu under Assign. All evaluators are listed with their departments in front of their names.

Leave Send email alert checked.

In the Comments box, please include the student’s UID (or prospective student) and any questions you may have.

Upload the syllabus by selecting the Choose File button.

Hit Create Evaluation Task to submit your request.
Tracking Evaluations

NOTE: In TES 4.0, you will receive an e-mail when an evaluator re-assigns, approves, denies, or requests more information for your evaluation request.

Select Track ➔ My Evaluations from the dropdown at the top of the screen.

You can review evaluations that are currently assigned to you and evaluations that have been created by you by toggling the button next to the respective text.

Select the institution by pressing the ▶ button next to the school’s name:

Selecting the ▶ button will provide you with all evaluations either assigned to you or created by you for a specific school.

TES 4.0 also provides an overview of the last action, which in the example below is Approve. Other examples include Need More Information, Deny, and Re-Assigned.

Select the ▶ next to your evaluation to open the request.
The request will have an Evaluation Log at the bottom which keeps track of any actions taken on this request. As the course is re-assigned, approved, and denied, the list will grow. In our example above, the course was approved.

You may see the following in the evaluation log:

**Approved**: The courses have been approved as equivalent.

**Deny**: The courses are not equivalent. Evaluators will provide feedback as to why.

**Need More Information**: Equivalency cannot be determined. The evaluator will request specific information in the Evaluation Log.

**What do I do with Approved Courses?**

When approved, select the dropdown menu under **Select an Action** and select **Re-Assign**:
A new window will open where you can select the first name listed (will have a # in front of name – currently Marybeth Leeper):

NOTE: If you did not include the UID in your initial request, please submit it here. Failure to include a UID will result in the request being re-assigned to you, which halts the process.

Press Confirm once you are finished. The window will close automatically, but it may take a moment.

What do I do with Denied Courses?

If a course is denied equivalency, we still wish to record this vital information. Do NOT close any equivalency on your own.

Select the dropdown menu under Select an Action and select Re-Assign:

A new window will open where you can select the first name listed (will have a # in front of name – currently Marybeth Leeper):
NOTE: If you did not include the UID in your initial request, please submit it here. Failure to include a UID will result in the request being re-assigned to you, which halts the process.

Press Confirm once you are finished. The window will close automatically, but it may take a moment.

How do I add more information when it is requested?

If an evaluator selects Need More Information, they will inform you of exactly what is needed. The student is responsible for procuring additional information.

Once you have the necessary information, select Add/Edit Support File from the Select an Action dropdown menu:

At this point, you can select Choose File (some may see Browse) and upload your documentation. It MUST be a PDF, and each PDF must be under 4MB.

Once you have uploaded your document, press Submit.

Select the dropdown menu under Select an Action and select Re-Assign:
A new window will open where you can select the evaluator’s name:

Select your evaluator from the dropdown menu, input any notes or questions, and press Confirm. Leave the Send Email Alert box checked.

Once this evaluation comes back to you with an Approve or Deny, follow the steps above to finish your request.

**Finalizing the Request**

Once the course is reassigned to Marybeth Leeper, she will add the course to uAchieve, Transferology, TES, and update the student’s record.

Updated records take one day to show on the student’s transcript.

**NOTE:** Marybeth will not update a record if it is for that student only. Those must be done via exception.

If you have any questions about articulation, please contact Marybeth at marybeth.leeper@wright.edu.