# ADDING TRANSFER COURSE(S) IN SHATATR

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**INTRODUCTION AND PURPOSE**

Designated Academic staff in the College Office will have the capability of adding course and course equivalency in Banner for CSUs, International, and Out of State four-year Institutions. The course equivalency will apply for all future students transferring the same course from that same institution. *Follow the steps outline in this procedure only if you are approved to make such articulation decisions.*

**RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES**

1. Although UC does not have preapproved formal agreements on transferable coursework outside of the California community college system, general units or credits from a regionally accredited college or university are transferable if a course is comparable to one offered at a UC campus. If a course is not equivalent to a particular UC course, it must be appropriate for a UC degree in terms of its purpose, scope and depth.

2. However, some courses are not transferable to UC. The following types of courses, for example, will not garner credit:
   I. Remedial English (composition courses below the first-term college level)
   II. Mathematics below college algebra (any courses for which intermediate algebra is not a prerequisite)
   III. Instructional/technical how-to courses, such as how to use computer software (e.g., Word, Excel, PowerPoint)

3. More information regarding non-California Community College transfer credits can be found at the following website: [http://admission.universityofcalifornia.edu/counselors/transfer/advising/transferring-credits/](http://admission.universityofcalifornia.edu/counselors/transfer/advising/transferring-credits/)

**IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS**

1. Admissions
2. Registrar
3. Financial Aid
4. College Office

**BEFORE YOU BEGIN**

If this is the first time you are reviewing this procedure, go to R’ Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

**FORMS**

The forms listed below are covered in this training.

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ADDING TRANSFER COURSE(S) IN ARTICULATION

In order to protect the integrity of our articulation agreements, no course(s) should be added that have not been approved by the appropriate channels.

Note: You will need the course number/ title and units (quarter or semesters) along with appropriate equivalency in order to complete the process outlined below.

REVIEWING ARTICULATION LIBRARY

Follow the steps below to review existing articulation before entering a record (to avoid creating a duplicate record).

STEPS

1. Go to SHATATR
2. Select Institution search
3. Select Source Background Link (SOISBG)
4. College for Institution Type drop down
5. Enter Name
   a. Enter %College Name% (Case Sensitive)
6. Select Go (F8)
7. Double click Code for the institution (redirected to the main SHATATR screen)
   a. Leave Program and Default Institution blank
8. Select Go (Alt+PgDn)
9. Select Filter in Transferring Course block or F7
10. Enter Subject and Course (transfer institution – not UCR)
11. Select Go

12. Review results
   a. If no records found, go to Adding Course to Course Articulation
   b. If course is part of a group then enter new Filter
      i. Filter – Enter Group number – Select Go (review multiple courses required for group and Equivalent Course Block to view UCR’s equivalency)
      ii. If equivalency for the Group requires update proceed to Adding Series Articulation
   c. If course is not part of group, locate the newest “Term” from results
      i. If Equivalent Course Block is current, then no action needed
      ii. If an update is needed proceed to Adding Course to Course Articulation
Example: 4 records were retrieved when MAT 11 at Riverside Community College (RCC) was filtered.

Student must take MATH 11 and MATH 36 (group 37 green) at RCC to receive credit for MATH 005 (yellow)

**ADDING A NEW COURSE TO ARTICULATION LIBRARY**

Follow the steps below to enter a new course in SHATATR after equivalency has been determined (1:1 or 1:2). You should have already filtered the results and be in the Transferring Course block.

**STEPS**

1. In Transferring Course Block Select Insert (as it appears on the transcript)
   a. Subject
   b. Course
   c. Title (abbreviate if needed)
   d. Term (approved as of “YYYYTT”)
   e. Equivalent Exist: Yes

2. In Transferring Course Details section, enter/update the following fields:
   a. Level: U
   b. Status: A (Active) or I (Inactive)
   c. Minimum Grade: D- (UC courses is F).
   d. Credits High (unit awarded at CSU or “Out Of State” institutions are usually semester units)
   e. Converted: Credit High will convert to Quarter units (1.5 x semester units - UC’s change back to appropriate units)

3. In Equivalent Course section, enter the following UCR’s equivalent fields:
   a. Subject
   b. Course
   c. Credits Used: This should match Converted: Credit High under Transferring Course Details
Adding Transfer Course(s) in SHATATR

**Saving**

If adding multiple equivalent courses then

i. Select **Insert**

ii. Repeat steps A through C above

iii. Select “And/Or” as appropriate

iv. **Save**

**UPDATING A COURSE TO ARTICULATION LIBRARY**

Follow the steps below to update the equivalency for a course that already exists in SHATATR (1:1 or 1:2), once you have identified a single course articulates to a UCR course(s) or if an existing articulation needs to be updated. You should have already filtered the results and be in the Transferring Course block.

**STEPS**

1. **In Transferring Course**
   a. Select **Copy**
      i. An exact copy of the Transfer Course you had just filtered will be inserted directly below the course you just “copied”
   b. Update the following fields as needed
      i. **Subject, Course, Title, Term**

2. Follow **Adding A New Course to Course Articulation** Steps 2 – 3 to update the rest of the record

**ADDING GROUP ARTICULATION**

If two or more courses articulate to one or more UCR courses, a group must be created. In order to enter articulation for courses that are part of a “series” or group, you must first identify which courses are required and the primary.

**Group**: all courses must be completed in order to receive articulation to UCR’s equivalency. If student did not complete both courses, do not use **Group**.

**Important**: Group Number are two characters “##”, “#x”, “x#”, or “xx” (For example; 01, 2A, B3, CC, etc.). Review results before entering a new Group Number to avoid duplicates.

**GROUP EXAMPLE**

If series already exists in Banner the **Group** field will have group number. Example: BIOSCI 93 at UC Irvine (004859)

1. Select **Filter**
2. Enter BIOSCI in **Subject**, 93 in **Course**
3. Select **Go**
4. Results: (Record shows that course is part of Group 06 – in **green**)
5. Select **Start Over**
6. Select **Go**
7. Select **Filter**
8. Enter “06” in **Group**
9. Select **Go**
10. You can scroll through the courses that are tied to the **06** Group
Adding Transfer Course(s) in SHATATR

- BIOSCI 93 (Primary box is checked – in green)
- BIOSCI 99

Articulation Reads: BIOSCI 93 + BIOSCI 99 = BIOL 5A

Note that only the Primary course will have Equivalency Course information (in purple). In this example, BIOSCI 93 has the Group number and Primary Indicator selected.

Furthermore, BIOSCI 99 has the Group number but is not the Primary. As a result, there is no Equivalency Course (in purple).

Important: If you are “updating” a group, you can use Copy to update the articulation for the group.

If a new group needs to be articulated, scroll through all the records (with groups) using “next page” button to identify the next available group number.

Note: While scrolling through the records, you may notice that a “Group ##” has not been used yet. For example, you will see Group 01 through Group 05 followed by Group 07. That means Group 06 has not been used, so you may use it for your new group.

Once this analysis is complete and you are ready to enter a “series” or group, follow the steps below.

Creating a New Group

Follow the steps below to enter a new Group in SHATATR after equivalency has been determined (2:1 or 2:2). You should have already filtered the results and be in the Transferring Course block.

Steps

1. Select Insert in Transferring Course section, enter/update the following fields:
   a. Group
   b. Primary (check it)
   c. Subject (as it appears on the transcript)
   d. Course (as it appears on the transcript)
   e. Title (abbreviate if needed)
   f. Term (approved as of “YYYYTT”)
   g. Equivalent Exist: Yes
2. In Transferring Course Details section, enter the following fields:
   a. Level: U
   b. Status: A (Active)
   c. Minimum Grade: D-
   d. Credits High: (unit awarded at CSU or “Out Of State” institutions are usually semester units)
   e. Converted: Credit High will convert to Quarter units (1.5 x semester units - UC’s change back to appropriate units)
3. In Equivalent Course section, enter the following UCR’s equivalent fields:
   a. Subject
   b. Course
   c. Credits Used: This should match Converted: Credit High under Transferring Course Details
      i. If series articulates to two or more UCR courses then:
         ii. Select Insert
         iii. Repeat steps A through C above
         iv. Select “And/Or” as appropriate
   d. Grand total of all Equivalent Credits Used must equal the Grand total of all Transferring Credits High “Converted”
   ➢ For example. There are three 6.0 unit Transferring courses total 18.0 units. There are four Equivalent courses in this group. Each Equivalent course must be 4.5 units each to total the 18.0 units of the Transferring courses.
4. Select Insert in Transferring Course Details section to add non-primary course(s) to the group. Follow step 1 and 2 above, DO NOT check Primary
5. Repeat Step 4 as needed for each non-primary course

UPDATING A GROUP ARTICULATION

Follow the steps below to update the equivalency for a group that already exists in SHATATR (2:1 or 2:2), after you have identified the existing articulation needs to be updated. You should have already filtered the results and be in the Transferring Course block.

STEPS – UPDATE EXISITING GROUP

1. In Transferring Course
   a. Select Copy
      i. An exact copy of the Transfer Course you had just filtered will be inserted directly below the course you just copied
      ii. Always copy the Primary course first
   b. Update the following fields as needed
      i. Subject, Course, Title, Term (new term that the equivalency was approved for)
2. Follow Creating A New Group Steps 2, 4 and 5 to update the non-primary courses for the rest of the group