Using the Evaluation Tracker in TES®: A Guide for Faculty and Staff Evaluators

Introduction
You are reading this because you have been asked to evaluate coursework brought to your university by a transfer student and indicate what, if any, credit would be appropriate to award in response. Your institution uses TES®, the Transfer Evaluation System, from CollegeSource, Inc. to manage the process of transfer credit evaluation and you will use a specific function within TES®, the “Evaluation Tracker,” to quickly approve, deny, change the equivalent, re-assign, and/or comment on transfer credit. This short guide is designed to quickly teach you how to use the Tracker and help you respond to evaluation requests more quickly and efficiently.

Logging In
1. Open a web browser (Firefox, Internet Explorer, Safari, etc.) and enter the following URL, http://tes.collegesource.com. Once you have arrived at the TES® login page, you may wish to bookmark it.
2. Where the screen indicates “PLEASE SIGN-IN” you may enter your username and password. You will be given this password through an email by your TES® administrator.
3. Once you are signed in, look at the gray menu bar across the top of the page.
   a. The first time you login to TES®, select “MANAGE” and “User Preferences”. Change your password to something that is easy for you to remember.
CHANGE PASSWORD

ENTER A NEW PASSWORD:  
RE-ENTER TO CONFIRM:  
SUBMIT

- Passwords must be a minimum of eight (8) characters
- Passwords must contain at least two letter characters and two number characters
- Passwords cannot contain spaces, symbols or punctuation marks

You may wish to record it here:

Username: ______________________  Password: ______________________

My TES® Administrator is: ________________________________
  (Name and phone number or email)
b. You may elect to change the default screen to always open to “TRACK” and “My Evaluations”. This is the page that will display the tasks awaiting action from you. Select “MANAGE” and “User Preferences”, select the radio button under Track and My Evaluations, and click the Submit button to set this change.
USER PREFERENCES

SET HOMEPAGE

DEFAULT
- Default Homepage

SEARCH
- Course Finder
- Course List Report
- Course Change Explorer

TRACK
- My Evaluations
- All Evaluations
- Closed Evaluations
- Send Email Reminders

MATCH
- Equivalency Manager
- Equivalency Explorer
- Equivalency Migration
- User Added Courses
- Course Tags & Outlines

MANAGE
- Usage Statistics
- Public View Management
- User Management
- Export Options

SUBMIT
4. Once you are signed in, click on “TRACK” and “My Evaluations” (if you have not changed your preferences to this screen):
Taking Action

5. The resulting screen will display the tasks awaiting action from you. Think of it as your “in box” for evaluation tasks. Click on the arrow to the left of any task to begin your evaluation.

6. The next screen will display the details of the task, including a course to be evaluated and (possibly) a suggested equivalent. Please take a moment to review the following screen depicting an equivalency in-progress and discover where all the elements that may appear on the screen will be located.
a. The “SELECT ACTION” box. This is where you will “Approve,” “Deny,” or take other actions in evaluating the proposed equivalency.
b. This section details who the task is assigned to (it will always be you on this screen), the date the task was created, and who created the task.
c. The “EVALUATION LOG” details all the actions taken to date in regards to this task. Think of it as an audit trail. Whenever you take action on an evaluation task, your name and the date/time are “stamped” into the log, as well as any comments you might have typed, so keep your username/password secret!
d. This is where the course(s) to be evaluated are displayed. You may be presented with cases that have no suggested equivalent, in which case it is up to you to choose the appropriate match. When a suggestion has been provided, you can always change it.
e. Use the Context View to display other courses from the sending institution’s data set. Click on the icon [ ]. Select [ ] to display any of the course descriptions.
7. When you are ready, use the pull-down menu in the "SELECT ACTION" dialogue box by clicking on the downward-pointing arrow. This box will give you a number of possible options:
   a. Approve. If you choose this option, you will be given the opportunity to type a comment and then Submit the task.
   b. Deny. If you choose this option, you will be required to type a comment before Submitting the task. Note that you can use the predetermined codes for denying an equivalency and thus avoid the necessity of attaching comments. (Though commenting is still an option.) The predetermined codes are:
      i. Subject: the subject of the source course is not taught at your institution.
      ii. Level: the source course is taught at a significantly different division/level.
      iii. Lab: the source course does not contain a lab.
      iv. Sequence: the source course(s) are taught in a sequence incompatible with the sequence of similar courses at your own institution.
      v. Other: comment required.
   c. Need More Information. This option will require you to comment and then Submit the task so that the person who created the task is informed as to what information you need to complete your evaluation.
   d. Re-Assign. This option allows you to forward the task to another faculty or staff member that has been designated as a transfer credit evaluator. You may check a box to send that person an email notification and type comments before Submitting.
e. Select/Change Equivalent Course. This option allows you to pick a different course or courses as the equivalent.

f. Screen shots for each action are included on the following pages.

Completing the Task

8. You always use the Submit button to complete a task. This removes it from the list of tasks waiting for you under the My Evaluations menu item. Remember to check on this list periodically to keep up with the evaluations waiting on you. You will also receive reminders from the system when you have new tasks and may be sent reminders if you have a number of pending tasks.
“SELECT ACTION” Screenshots

Approve
Choose Approve and type in the Note field, if you want to add comments. These comments will become part of the Evaluation Log. Remember to click on Submit when finished.

SELECT ACTION: Approve

NOTE: 
Need to add one credit of elective credit with this equivalency since the sending course is four credits compared to our three credit course.

ASSIGNED TO: Doe, Jane - TES Administrator for views
CREATE DATE: 1/17/2012 2:28:39 PM
CREATED BY: May, Shelly - TES Administrator

EVALUATION LOG:
1/17/2012 2:28:39 PM [May, Shelly] Proposed equivalent course: ANTH 100

UNIVERSITY OF CALIFORNIA-SAN DIEGO
CITY, ST: LA JOLLA, CA
CURRENT CALENDAR: QUARTER
CATALOG YR: 2010-2011

ANTH 101 FOUNDATIONS OF SOCIAL COMPLEXITY
Course examines archaeological evidence for three key "tipping points" in the human career: (1) the origins of modern human social behaviors, (2) the beginnings of agriculture and village life, and (3) the emergence of cities and states. (Required for all majors in anthropology.)
UNITS: 4
PREREQ: Upper-division standing
DEPT: ANTHROPOLOGY

COLLEGESOURCE UNIVERSITY (SM)
CITY, ST: SAN DIEGO, CA
CURRENT CALENDAR: NA
CATALOG YR: 2010-2011

ANTH 100 INTRODUCTORY CULTURAL ANTHROPOLOGY
Human societies and their cultural settings; variation in beliefs, social customs, and technologies; human differences in anthropological terms. Approved for nontraditional course offering:Online. (GT-SS3, AUCC 3C).
UNITS: 3
LEC HRS: 3
DEPT: ANTHROPOLOGY
Deny

Choose Deny and type in the Note field or choose “Deny: [predetermined code]” (e.g. “Deny: Subject”). These comments will become part of the Evaluation Log. Remember to click on Submit when finished.

ASSIGNED TO: Doe, Jane - TES Administrator for views
CREATE DATE: 1/17/2012 2:28:39 PM
CREATED BY: May, Shelly - TES Administrator

COMMENTS:

EVALUATION LOG:
1/17/2012 2:28:39 PM [May, Shelly]
Proposed equivalent course: ANTH 100
Request initiated. Assigned to Doe, Jane

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UNITS: 3
LEC HRS: 3
DEPT: ANTHROPOLOGY
Need More Information
Choose Need More Information and type in the Note field. These comments will become part of the “Evaluation Log” and inform the person requesting the evaluation of the information you need to complete your task. Remember to click on Submit when finished.

SELECT ACTION: Need More Information

NOTE: required
Please ask the institution or student for a master syllabi or learning outcomes statement.

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COMMENTS:

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LEC HRS: 3
DEPT: ANTHROPOLOGY
Re-assign
Choose Re-assign, select another user, and type in the Note field, if desired. Remember to click on Submit when finished.

SELECT ACTION: Re-Assign
ASSIGN TO: Doe, Jane - TES Administrator for views
NOTE: I think this was sent to me by mistake.
SEND EMAIL ALERT?

ASSIGNED TO: Doe, Jane - TES Administrator for views
CREATE DATE: 1/17/2012 2:28:39 PM
CREATED BY: May, Shelly - TES Administrator
COMMENTS: Proposed equivalent course: ANTH 100
EVALUATION LOG:

UNIVERSITY OF CALIFORNIA-SAN DIEGO
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CURRENT CALENDAR: QUARTER
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UNITS: 3
LEC HRS: 3
DEPT: ANTHROPOLOGY
Select/Change Equivalent
Choose Select/Change Equivalent Course, then choose the appropriate catalog and click on “Submit.”

| ASSIGN TO: | Doe, Jane - TES Administrator for views |
| CREATE DATE: | 1/17/2012 2:28:39 PM |
| CREATED BY: | May, Shelly - TES Administrator |
| COMMENTS: | |

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- DEPT: ANTHROPOLOGY
Use the pull-down menu of departments to select the correct area in which the desired credit to be awarded is taught. At the bottom of the list is “See All Courses,” if you need to pick from multiple departments.

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Place a check in the box next to the desired course and Submit.

The new course or courses have been selected. The fact that you changed or selected new courses will be noted in the Evaluation Log. Remember to Approve your evaluation task, now that you have corrected the equivalent credit and click on Submit when finished.