

Step-by-Step

How to Pull a Student Transfer Evaluation

1. Log in to PeopleSoft and navigate to Transfer Credit Summary (Records and Enrollment > Transfer Credit Evaluation > Transfer Credit Summary).
2. Enter your user id (e.g., fmlast01) and select “Search”.
3. Enter the Student ID# of the student and select “Submit”.

The screenshot shows the 'Selection Criteria' tab in the PeopleSoft interface. The 'ID' field is populated with '1251014' and has a search icon. The '*Academic Institution' field is populated with 'UOFL1' and also has a search icon. A 'Submit' button is located on the right side of the form. Below the search fields, there is an 'Academic Career' section with radio buttons for 'All Careers' (selected) and 'Career/Program/Plan'. There are also input fields for 'Academic Career', 'Academic Program', and 'Academic Plan'.

4. Select “Generate Report” to request the PDF report.

The screenshot shows the 'Selection Result' tab in the PeopleSoft interface. The 'ID' field is populated with '1251014' and the 'Student Test' field is populated with 'Student Test'. A 'Generate Report' button is highlighted with a green circle. Below the search fields, there is a 'Transfer Credit Type Results' section with a table of results. The table has columns for 'Transfer Credit Type' and 'Course Credits'. Below the table, there is a 'Transfer Model Details' section with a table of details. The table has columns for 'Model Nbr', 'Institution', 'Career', 'Acad Prog', 'Acad Plan', 'Transfer Type', and 'Source School'.

Transfer Credit Type	Course Credits

Transfer Model Details	Transfer Type	Source School
Model Nbr: 1	External	Jefferson Community & Tech Col
Institution: University of Louisville		
Career: Undergraduate		
Acad Prog: Arts & Sciences Degree		
Acad Plan:		

- Then select “Report Manager”.

The screenshot shows a web interface with two tabs: 'Selection Criteria' and 'Selection Result'. Under 'Selection Result', the ID is 1251014 and the Student Test is 'Student Test'. The Process Instance is 7948376, and the 'Report Manager' link is circled in green. Below this, there are sections for 'Transfer Credit Type Results' and 'Transfer Model Details'. The 'Transfer Model Details' section includes the following information:

Model Nbr	1	Transfer Type:	External
Institution	University of Louisville	Source School:	Jefferson Community & Tech Col
Career	Undergraduate		
Acad Prog	Arts & Sciences Degree		
Acad Plan			

- It may take 1-2 minutes for the report to generate. Select Refresh to see if it is ready. You will know the report is ready when the Description is hyperlinked. Select “Student Transfer Credit Eval” to open the report.

The screenshot shows the 'View Reports For' section with various filters: User ID (KTLIBE01), Type, Last, 1 Days, Status, Folder, and Instance. A 'Refresh' button is circled in green. Below this is the 'Report List' section, which contains a table with the following data:

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	6176105	7948376	Student Transfer Credit Eval	10/22/2020 10:33:29AM	Acrobat (*.pdf)	Posted	Details