Strategic Articulation Management and the "Secrets" of the TCS

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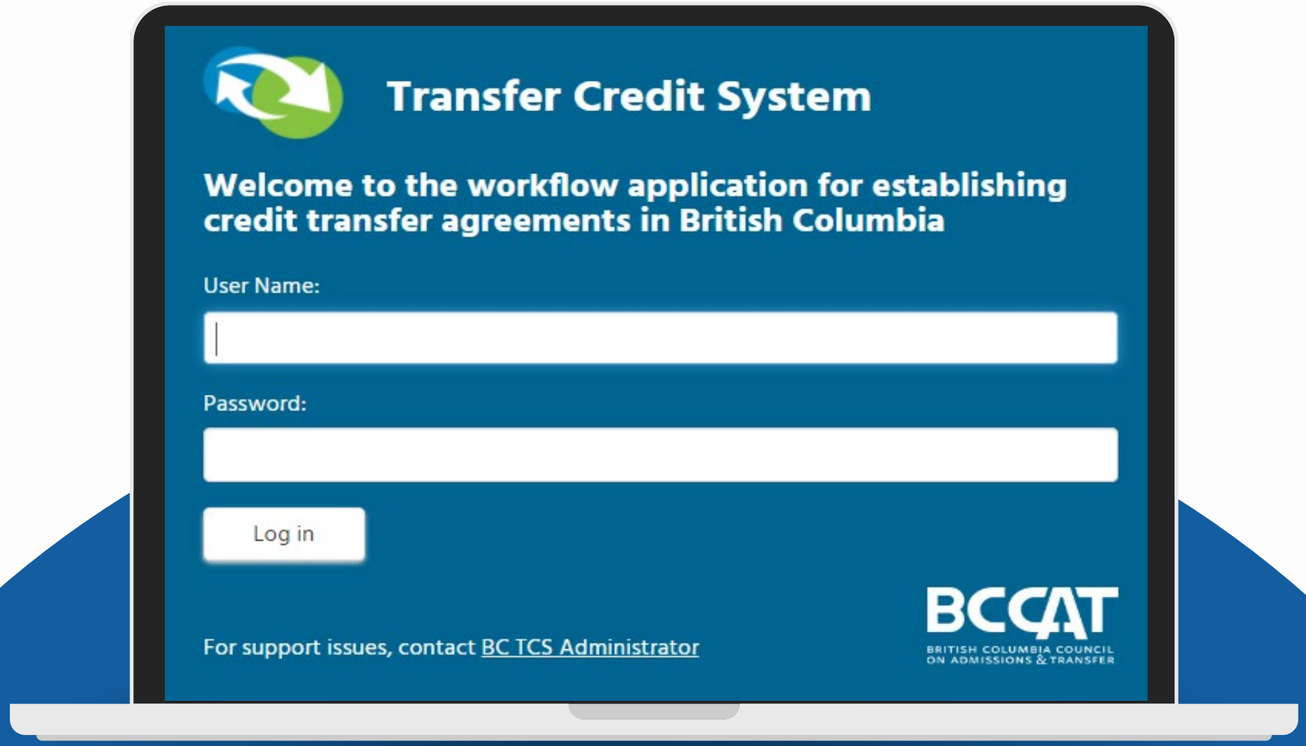
JAM 2024



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GOAL: Become a SAM!

This session is for transfer credit personnel looking to get the most out of the Transfer Credit System (TCS). This session will cover some of the most frequently asked questions about how to use the TCS for every day articulation matters.

By the end of this session, you will become* a

SAM: A Strategic Articulation Manager!

* Certification quiz at the end!

Topic Overview

- Requests 01
- Automations 02
- Agreement Building 03
- Dashboard 04
- Course Outlines/Changes 05
- External Articulations 06
- System Settings 07
- Quiz! 08

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Requests

- Requests for articulation enable institutions to create transfer agreements before a course is even offered!
- Responding to requests requires time and effort on behalf of transfer system partners.
- When submitting requests, only send requests to institutions where there are matching programs.
- Educationplannerbc.ca lists programs offered at PSIs
- STP and CDW shows where and in some cases what areas people are transferring

Scenario: Requests

Your new Dean has arrived from another Province and has learned that courses are articulated in advance rather than when students show up.

They have asked that you submit **all of the courses** from your **Criminology** program to all other transfer system partners.

What can you do?

SAM: Requests

- **Use the Courses** table to look up matching subjects
- **Only** send requests to institutions with matching programs
- **Only** send upper-level requests to institutions who are articulate upper-level courses
- You can edit or recall requests submitted in error
- **Golden Rule:** Articulation should always be based on **actual** student mobility patterns

Automations

TCS features numerous tools to help automate routine tasks. All these features can assist in more timely responses to articulation requests.

01 Address Book

02 Autoforwards

03 Bulk Forward

04 Bulk Close

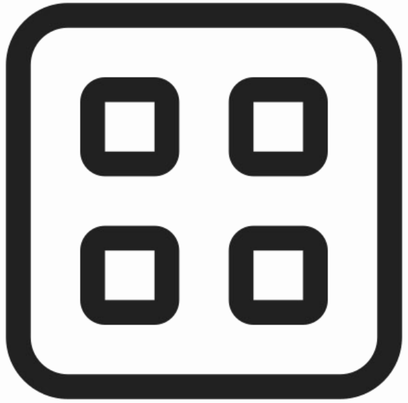
SAM: Automations

- Use the **address book** to streamline articulation
- Setup **Autoforwards** to cut down on work
- Use the **bulk forward** and **bulk close** options to reduce unnecessary articulation activities

Agreement Building

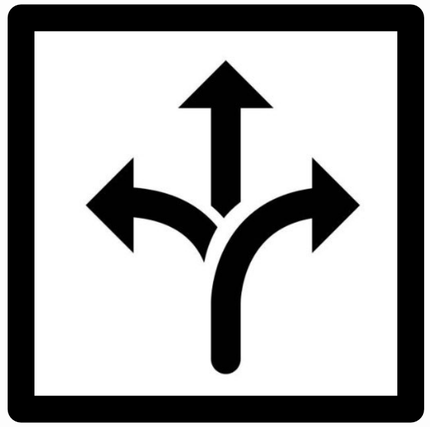
One to One

Direct equivalency between two courses.



Many to Many

Equivalencies involving permutations of two or more courses



And/Or

More complex agreements involving multiple scenarios for transfer

SAM: Agreements

- Where possible, offer direct credit
- For many to many articulations, don’t forget to consider what credit a single course should receive
- For AND/OR agreements, build each agreement separately

Dashboard

The Dashboard is your snapshot of your articulation activities.

Use the Dashboard to catch up on action items, review new requests, and track progress by your departments and evaluators.

Reviews

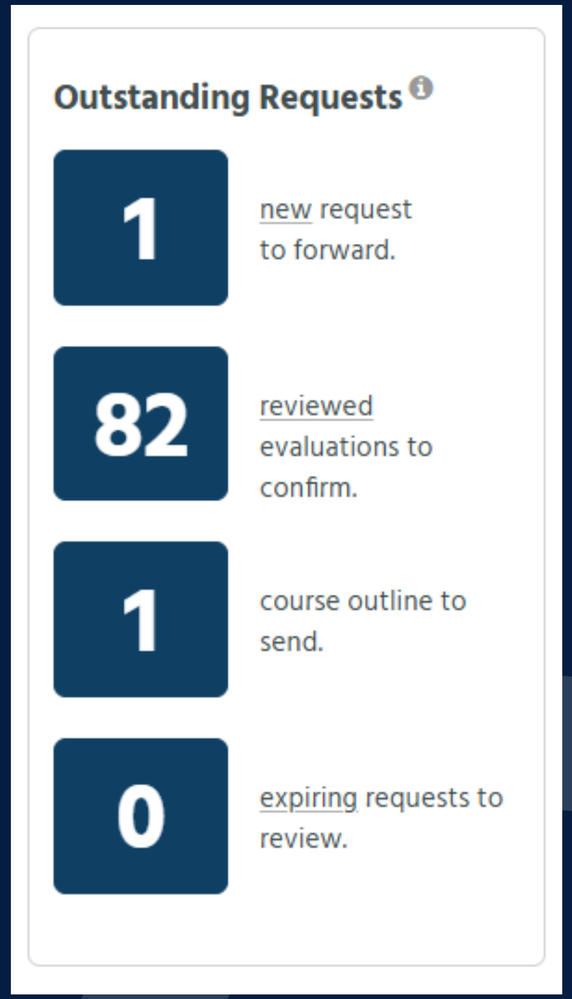
Agreements that have not been reviewed in five or more years are listed on the dashboard

Reciprocity

Reciprocity enables you to create a reciprocal agreement based on how your courses are articulated

Departments

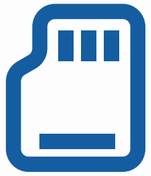
Departments can be created to track requests and articulation activities at your institution



SAM: Dashboards

- Regularly use the Dashboard to see your immediate **action** items
- Use the **Reciprocity** tool to quickly create agreements that have been articulated by others
- Setup **Departments** to enable the departmental dashboards and tracking

Courses



Outline Repository

The TCS contains over 30,000 course outlines from the past 20 years.

Course Changes

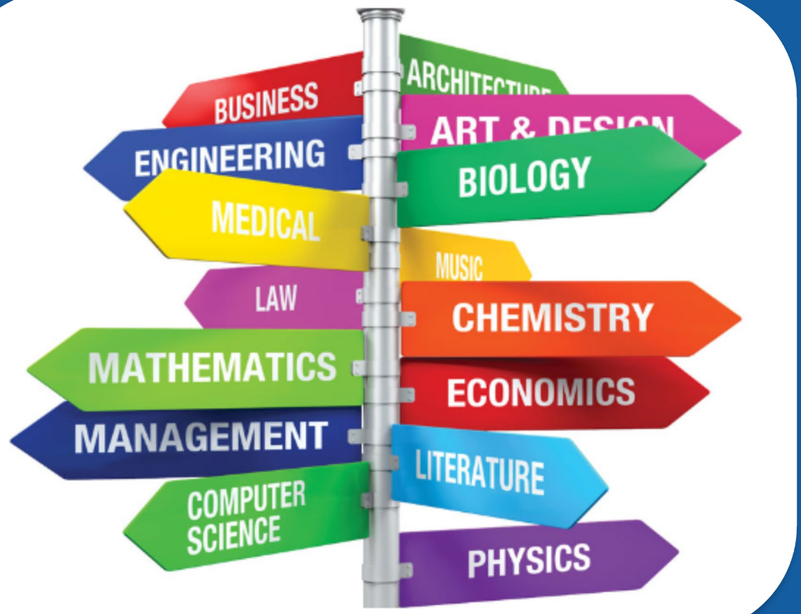
Use the Course Change screen to easily update all agreements for a course number or prefix change.

Discontinued Courses

If a course is discontinued, old agreements can be ended or replaced with unassigned credit.

Strategy: Courses

- Use the **Courses** screens to look up course outlines
- When de-activating a course, **replace** it with unassigned credit
- Use the courses screen to **update** your course numbers, prefixes, and credit values.



External Equivalencies

The TCS can be a workflow for ALL articulation activity, not just BC Transfer System equivalencies.

01 Add an External Institution

02 Create an External Articulation Request

03 Evaluate an External course

SAM: External Equivalencies

- **Use the TCS** to submit external equivalencies to subject matter experts
- Have your internal transfer tables **imported** into the TCS by contacting BCCAT
- **Prioritize** the external regions or institutions from which you receive the most student mobility

Administration

Settings

Your user settings control from whom you can receive articulation requests. Consider where you most often receive transfer students when adjusting these settings.

Users

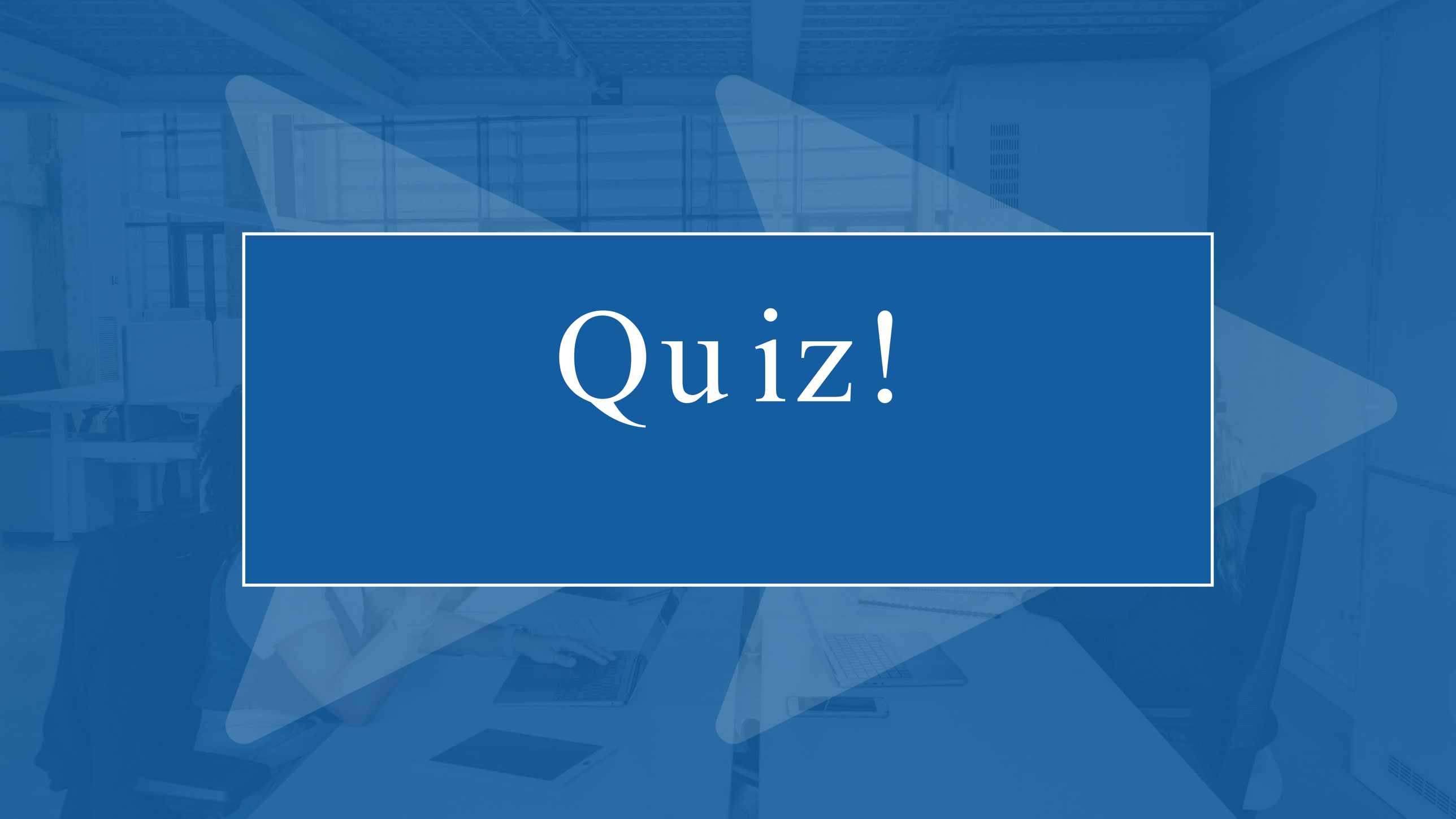
The admin user for your institution can create new user accounts for additional TCS users. The admin user can also designate roles for sending or receiving.

Downloads

Nearly all data within the TCS can be downloaded for offline use. Look for the download button at the bottom of most pages to export data from the TCS.

SAM: Administration

- Setup **each** user of the TCS with their own account
- Prioritize your **receiving settings** based on student mobility patterns
- Regularly review **notifications** for course updates
- **Download** data into Excel format



Quiz!

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What resources can be used to determine where to send articulation requests?

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The address book is used to

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You can use the TCS to create which type of agreements (select all that apply)?

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You've been asked to add an external agreement but you can't find the institution. What should you do?

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The acronym SAM stands for:

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TCS Team

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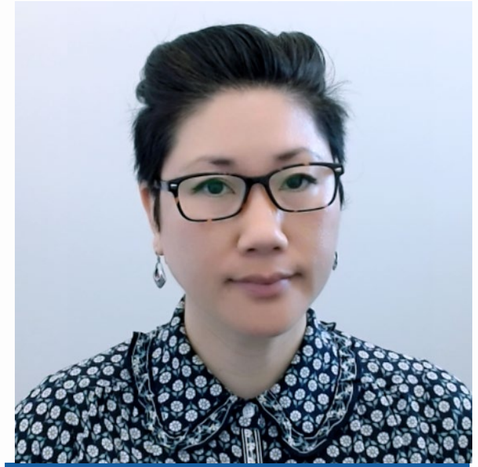

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Questions?

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#BCCATJAM2024

35 years

BCCAT

expanding learner pathways