



## How to View Advisee Transfer Credit Reports



Advisors can use the View Advisees' Information pages to view an advisee's Transfer Credit Report. The Transfer Credit Report includes both transfer credits from other Universities and Colleges as well as Test credits such as AP or CLEP, where applicable. Both types of credit are processed through established criteria (i.e. approved external organizations and approved test types and test scores). Transfer and test credit data are evaluated against appropriate program/plan criteria.

- Step 1.** Begin by logging on to the ISIS application by entering your ISIS User ID and Password. Navigate to the **Student Advisee Roster** page.



**SA Self Service → Learning Management → Home → Learning Management → View Advisees' Information**

The **Student Advisee Roster** page opens.

Student Advisee Roster						University of Mass Lowell	
Brian Coughlin							
Select from <b>**Student Details**</b> to view a Degree Progress Report, Enrollment Appointments, Unofficial Transcript, Transfer Credit Report, Term Grades or Class Schedule.							
						*Sort By:	Name (Last,First) ▾
						Find   View All	First 1-25 of 27 Last
ID	Name and Email	Career	Program				
	00000001	Brady, Brendon S	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000020	Jones, Elijah G	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000010	Smith, Marissa A	Graduate	Arts & Sciences	**Student Details**	Go	
	00000023	Jones, Thomas	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000013	Smith, Maria T	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000026	Jones, Dana O	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000004	Brady, Peter M	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000024	Jones, Oliver S	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000006	Brady, Marissa A	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000022	Jones, Maria F	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000005	Brady, Margaret A	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000025	Jones, Frances M	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000007	Brady, Paula S	Undergraduate	Arts & Sciences	**Student Details**	Go	
	00000014	Jones, Martin P	Undergraduate	Arts & Sciences	Class Schedule	Go	
	00000008	Brady, Jonah C	Graduate	Arts & Sciences	Degree Progress	Go	
	00000021	Jones, Brian C	Undergraduate	Health Professions	Enrollment Appointments	Go	
	00000002	Smith, Peter A	Undergraduate	Arts & Sciences	Grade Inquiry	Go	
	00000001	Jones, Brian C	Undergraduate	Health Professions	Transfer Credit Report	Go	
	00000002	Smith, Peter A	Undergraduate	Arts & Sciences	Unofficial Transcript	Go	
	00000019	Jones, Helen P	Graduate	Arts & Sciences	**Student Details**	Go	



Step 2. Locate the specific student record.

Step 3. Select **Transfer Credit Report** from the **\*\*Student Details\*\*** drop down menu for that student.

Step 4. Click **Go**.

The **View Transfer Credit Report** page for that student opens.

**View Transfer Credit Report**

Frances Jones

**Course Credits**    No Test Credits    No Other Credits

View All    First ◀ 1 of 1 ▶ Last

**Model Nbr:** 1    Posted

**Academic Institution:** University of Mass Lowell    **Credit Source Type:** External

**Academic Career:** Undergraduate    **Source Institution:** Northeastern University

**Academic Program:** Arts & Sciences

**Academic Plan:**

Transfer Term	Group	External Subject / Catalog Nbr	Units Taken	Grade Input	Status	Equivalent Subject / Catlg Nbr	Units Transferred	Grade	Reject Reason
1998 Fall	1	PHY1 PHY1 111	2.60	C	Posted	89 117	2.600	T	
1998 Fall	2	HST1 HST1 102	2.60	C-	Posted	43 107	2.600	T	
1998 Fall	3	HST1 HST1 101	2.60	C-	Posted	43 105	2.600	T	
1998 Fall	4	COM1 COM1 105	2.60	A-	Posted	91 150	2.600	T	
1998 Fall	5	CJ 1 CJ 1 112	2.60	B	Posted	44 373	2.600	T	

**Cancel**



**Note:** This page will only show credit that has been 'posted' to the student record. There may be materials that have been received by the University but are still being processed that do not appear on the report. This report will be updated if the student transfers in any more course or test credit. If you have any questions, please call the Registrars Office.



**Note:** Students with multiple transfer Institutions will have multiple 'rows' of data on the transfer credit report page. Please use the **View All**    **First** ◀ 1-11 of 11 ▶ **Last** Page Navigational Toolbar to check for multiple rows of information.

**End Procedure**



**HOW TO VIEW ADVISEE TRANSFER CREDIT REPORTS  
GLOSSARY**

<b>Academic Career:</b>	The track of all academic work by a student at an institution (e.g., GRAD- Graduate, UGRD- Undergraduate, CSCE/CNCE- Continuing Ed)
<b>Academic Institution:</b>	The highest level of academic structure. Each Institution (UMass Boston UMBOS, UMass Dartmouth UMDAR, and UMass Lowell UMLow) offers different careers and programs and processes differently than other Institutions running on the same database This value will usually default through security setup.
<b>Academic Plan:</b>	An area of study for the student (such as a major, minor, or specialization) that is within their academic program or within an academic career.
<b>Academic Program:</b>	The degree that a student applies to, is admitted to, and graduates from.
<b>Credit Source Type:</b>	The source or the credit being transferred. Values include Internal, External and Manual.
<b>Course Credits:</b>	The Test credits being applied to the students record.
<b>Equivalent Subject / Catalog Nbr: (Number)</b>	The subject and catalog number of the internal course that is equivalent to the transfer credit.
<b>External Subject / Catalog Nbr: (Number)</b>	The subject and catalog number of the external course that is being transferred.
<b>Grade:</b>	The grade given for the accepted or posted transfer coursework and/or test scores at the Institution.
<b>Grade Input:</b>	The grade received for the coursework at the external Institution.
<b>Group:</b>	
<b>Model Nbr: (Number)</b>	The transfer credit model number that this transferred coursework or test score(s) were evaluated against. Generally tied to the student's program/plan.
<b>Name:</b>	The name (Last, First) of the student record being viewed
<b>Reject Reason:</b>	The reason for which the transferred coursework or test score(s) were not accepted for credit.
<b>Status:</b>	The status of the credit(s) being transferred. Values include, pending, posted and denied.
<b>Source Institution:</b>	The Institution from which the student is transferring credit(s).



*University of Massachusetts*  
*Boston \* Dartmouth \* Lowell*



- Transfer Term:** The term in which the credit was taken at the external Institution.
- Units Taken:** The number of units taken at the external Institution.
- Units Transferred:** The number of units the student will receive for the credit(s) transferred into the Institution.