

## Equivalency Management

The purpose of this function is to allow staff users at participating schools to be able to Add or Edit equivalencies interactively from the Transfer Virginia and Credits2Careers portals. This functionality is only available to staff users with the assigned role of Equivalency Manager. Institution Portal Managers can assign this role as requested to staff at their institutions.

Please note that the Delete functionality shall be available in a future release in Fall 2023.

### Terminology:

The Equivalency Management function uses the following terminology that is also reflected in the labels on the web page:

- An equivalency is structurally comprised of two parts:
  1. Incoming Credentials. These are the credentials - courses, exams, certifications, etc. – that are being ‘transferred’ in. An equivalency may have a set of one or more of a group of incoming credentials for which credits will be granted.
  2. Course Credits. These are the course credits that are granted for the set of incoming credentials specified for the equivalency.
- Incoming Credential Type. This value identifies the type of credential(s).
- Equivalency Rules. These are the conditions such as effective dates, minimum and maximum score, lookback period that can be specified for each incoming credential.

### Operations:

An Equivalency Manager can Add or Edit existing equivalencies.

#### I. **Search for any existing equivalencies for an Incoming credential before you Add or Edit.**

*Important: When adding an equivalency, the first step should be to search for any existing equivalencies related to any one of the incoming credentials in the new equivalency.*

Use the following steps to select the incoming credential and search for existing equivalencies:

1. Equivalency Component: Select Incoming Credentials
2. Incoming Credential Type: Select the type of credential for which you need to setup an equivalency.
  - The Credential form will automatically configure for the selected credential type.
3. Enter Details for the type of Incoming Credential selected above.
4. Click on Search for Equivalency. This action is needed so you can see what equivalencies currently exist for that credential for your institution.

5. Review results of Search Equivalency in the panel titled 'Existing Equivalencies'. Based on the results, you have the following options:
  - A. If there are no existing equivalencies, then you can Add an Equivalency for that credential.
  - B. You can add another new equivalency for that credential. An example of such a case would be if you already have an equivalency for a course and now want to add a new equivalency that involves that course and another course. So, Course A by itself has an equivalency and Course A combined with Course B results in a different equivalency.
  - C. If there are existing equivalencies, you can edit one of the existing equivalencies. Please note that editing an existing equivalency removes the old one and recreates the equivalencies with your changes.

Then follow the steps for each of the above scenarios – 5A, 5B and 5C as provided below.

## II. 5A & 5B. Add a New Equivalency when:

- There are no existing equivalencies for the selected credential or
  - Adding another equivalency for the selected credential.
1. Click on the Add button in the panel where you entered the credential details.
    - This will create a new panel titled 'Incoming Credentials' with the selected credential displayed.
  2. If you need to add another incoming credential for this equivalency:
    - a) Scroll up and click on the green Unlock to Edit button.
    - b) The Credential form will be cleared. [Please note that an equivalency can only contain incoming credentials of the same type.
    - c) Enter details of the next incoming credential to be included in the equivalency.
    - d) Click on the Add button.  
*The new credential will be added to the Incoming Credential panel.*
    - e) Repeat Steps a) – d) if there are additional incoming credentials.
    - f) Proceed to Step 3) below once all incoming credentials have been added to the Incoming Credentials panel.
  3. Add the courses to be granted as credit for the set of incoming credentials that were entered in Step 2) above.
    - a) Scroll to the top and select Course Credits as Equivalency Component.
      - (i) The Course Credit type is set as Academic Course.
      - (ii) For entering courses, the Institution is set to be the staff user's institution.
    - b) Enter the ID of the course to be granted as credit and select from the choices shown in the drop down that will appear as you type the Course ID.
    - c) Click on Add the Course Credits button.
    - d) The Course Credits panel will now be displayed with the entered course as an entry in that panel.
    - e) If additional courses are to be granted, scroll up and click on the green Unlock to Edit button.

- f) Repeat Steps a) through d).
4. After all course credits have been entered, click on Submit the Equivalency.
5. An equivalency will be created and a confirmation message should be displayed at the top of the page.

### III. 5C. Edit an Existing Equivalency:

1. Click on the Show Details button beside the equivalency you wish to edit.
2. The details of the equivalency will be displayed in two panels titled 'Incoming Credentials' and 'Course Credits'.
3. You can now:
  - a) Remove incoming credentials or course credits.
  - b) Add replacement or additional incoming credentials or course credits by:
    - i) Scroll to the top of the page.
    - ii) Select Equivalency Component to be 'Incoming Credentials' or 'Course Credits'
    - iii) If adding an Incoming Credential to the equivalency, select the Incoming Credential Type.

*Please note: all Incoming Credentials in an equivalency must be of the same type.*

- iv) Enter details for the Incoming Credential or Course Credit as appropriate.
- v) When all changes have been entered, click Submit.

*Please remember that the Submit will replace the previous equivalency with the new set of Incoming Credentials and Course Credits that was created.*

### Notes:

1. Please ensure that any changes or additions to equivalencies made via this function are also entered in the relevant equivalency file(s) so that those changes are not lost during the next data refresh.
  - a. An export from the Live database may be available in a future release that will eliminate the need to manually update the equivalency files.
2. Since there are many ways on which actions can be sequenced, it is possible that sometimes the combination may result in an inconsistent set of data being displayed in the various sections of the page. **If at any time, the results do not look correct, and before clicking on the Submit button, click on the Clear button to start again.**