Logging in

A. Transferology Lab for advisors
   a. The link to login
      i. [https://www.transferologylab.com](https://www.transferologylab.com)
      ii. The link above can be found on the UWL webpage under the Faculty & Staff list of links in the top white ribbon.
      iii. A link to this page can also be added to your My UW System page. Directions on how to do that are posted separately.

   b. Requesting an account
      i. UWL employees should request a lab account, not a student account, by emailing Victoria Rahn in Records & Registration.
      ii. If you did not receive your introductory email with the link and password, please go to the above link and click the "log in" button at the top. On the next page, click the "cant log in" link to reset your password.
B. Transferology for students
   a. https://www.transferology.com/school/uwlax
   b. If putting Transferology on your website for students, please use the above link.

School Profile

A. This is the landing page when you first login, also called the School Management page. The Profile Preview shows the same info that the students see in their Transferology account.
B. The bar at the top has other menu items so you can navigate through the site.
C. Mostly, you will be using the links under the Advising & Recruiting menu.

Advising & Recruiting menu
A. Transfer Equivalencies

a. On the Transfer equivalency page, you can see all the current equivalencies we have for each school. It is a quick and easy way to see how a specific course will transfer to UWL.

b. Filter by state on the right. There is a default setting on this page to the state that you are in, so be sure to change it if looking for a school from out of state. The filter also includes the standardized exam equivalencies at UWL (AP, IB, and CLEP exams).

c. Find the school you are interested in by typing in the "Transferring From" field. The "Transferring to" field should already have UW-La Crosse listed. Then click the magnifying glass next to a name to select.

d. On the next page, you can filter the equivalencies by subject, either under the sending school side or the receiving school side (which is us).

e. If a course is underlined, it has a note attached. Hover over the link with your cursor to see the note. Notes are about how the course will count as an elective, toward general education, or as part of the Universal Credit Transfer Agreement in the UW System.

f. Click the "Return to Search" button to go back and try another school. The back button on your browser may not always work correctly, so it is recommended that you use the "Return to Search" button when there is one.
B. Replacement Courses
   a. Use the Replacement Courses page when your student wants to take a course at another school and transfer it back to UWL to fulfill a requirement here. Many times students do this over the summer when they are back home. This screen is a quick and easy way to see if the course they are interested in will transfer back in the way they want to UWL.

   Important: If a student is contemplating taking a course elsewhere to transfer back to UWL, they need to get the transfer approved through their college dean's office before taking the course. They must complete the "Off Campus Course Evaluation and Permit" form which can be found in their dean's office. Student may not repeat a course at another institution once it has been taken at UWL.

   b. Enter the UWL department or abbreviation for the subject in the Department field. Once you locate the course, click search (magnifying glass).

   c. The results page shows all the schools that have a similar course that we (UWL) will accept in transfer as the same course. If the list is long, you can filter by distance, state, and zip code. Remember, the filter will already be set to a specific state, so that may need to be changed.
C. Course Bundles
   a. Transfer
      i. The Transfer Course Bundles allow you to enter in all the courses a student took at their previous institution to see which of them will transfer to UWL, if any. You can add courses from multiple schools in the same bundle. It's also a good place to save frequently used equivalencies to view later. Students have the ability to create course bundles in their own accounts, so you are seeing what they would see. Using the bundle allows the viewing of multiple course equivalencies at once, rather than the one at a time approach on the other screens.

      ii. Click on "Create a Transfer Bundle" or edit an existing bundle using one of the action icons.

         1. View/Edit - view or add/remove courses from an existing bundle
         2. Create a Copy - create a copy of the bundle to rename & edit in another way; may save you some time
         3. Share - select another UWL Lab user to share the bundle with; only use this if the other is another advisor to the student or if the bundle is not student specific
         4. View Matches - go to the page that shows the matching schools
         5. Run Program - go to UWL's list of current undergraduate programs
         6. Delete (trash can)

   iii. Rename bundle to something helpful, but do not use any identifying information on the student (i.e. do not use Date of Birth, ID number, or full name). It is good practice to periodically delete out the course bundles that are no longer needed.

   iv. Filter on the school and the term in which the class was taken. There are tabs to add Courses, Exams, and/or Military Credits.

      1. UWL has Standardized Exam equivalencies listed, so you can add those and you will find information.
      2. However, UWL does not currently have its military credits listed in Transferology, except credits from the Community College of the Air Force and the United States Military Academy. If most military courses are added, they will come up as maybes, meaning the system thinks they have not been evaluated yet. If you
have a student with a Joint Service Transcript, please have that student contact Admissions for an evaluation.

v. Add the course or exam to the list using the plus sign. Click "Search for Matches" when ready.

vi. A list of schools with matches will be displayed.
   1. If using our Transferology Lab, or if the student went to their Transferology account using our school’s link, UWL will always come up at the top of the matches, even if the percentage is not the highest.
   2. After UWL, the list defaults to be ordered by percentage, then distance. You can continue to filter using one of the filters on the right. Students looking for schools with a specific program can filter for those schools using the Program/Major search field.
   3. Transferology can narrow down results to schools that are online only or that have a program that is entirely online. However, information about whether or not a specific course that is not in an online program will be offered online is not listed in Transferology. To find schedule info on individual courses, contact the other school directly.

vii. Click on the percentage to see the details on the matches and what did not match.
viii. The results can be Matches, Misses, and/or Maybes.

1. **Matches** mean the course will transfer and lists the equivalency. The notes on how the course credit affects electives and the general education program are under the info icon, if there is one.

2. **Misses** mean that the course does not transfer. It was evaluated at one point and our school will not award credit for that course. This is often the low numbered, skill-building math or English classes.

3. **Maybes** mean the course has not been evaluated yet by our school. The student should contact the Admissions Office to see if the course can be evaluated.

i. Your bundle will save so you can come back to it later, which saves you from entering in this information multiple times.
b. Replacement

i. The Replacement Bundles allow you to look up multiple replacement courses at one time. Click on "Create a Replacement Bundle" or edit an existing bundle using one of the actions.

Tip: You can save a different bundle for each frequently looked-up replacement course. Put one course in each bundle, so that when you pull the results, it shows all of the institutions that have a similar course that we accept. If you put in multiple courses in one bundle, the results will expand to include all institutions that have matches to one or more of the courses in the bundle.

ii. Be sure to name the bundle something you will remember but which does not identify a student.

iii. Look up the department(s) to find the courses you are looking for and add them to the Course List using the plus sign.

iv. The results show all institutions that have even one match to one of the courses in the bundle, but it is ordered by number of successful matches and geography. So in this
example, Viterbo and WTC are closest matches since they match all 3 courses and are both in La Crosse.

v. Filter using the options on the right to find a school in a certain area.

vi. Click on the match to see more details.

vii. If you select a school that does not have all of your matches, it will have a tab for the matches and one for the course(s) that doesn't match.

viii. You can keep your bundle to come back to again later, so you won't need to enter this information multiple times.
c. **Empty**
   i. This tab will show only if you started a bundle but never added a course to it. If you did that and got stopped in the middle, you can go back to this tab and edit the bundle or delete it.

### Additional tips:

A. To view a list of UWL's current undergraduate programs:
   a. Under the Advising & Recruiting menu, select Programs.
   b. You can filter by name or scroll through the list.
   c. Click on the "Program information" link to find more information. A click on "Program Information" on the next page should take you to the Department/Program's website.
   d. If you see any issues with the list or links, please contact Victoria Rahn at the info below.

B. Graduate student will likely not find Transferology useful as most schools do not list graduate equivalencies. Graduate students transferring should contact the school they are transferring to directly.

C. Notifications from students requesting information through Transferology will go to and be handled by Admissions.

D. Students transferring a course to UWL should also contact Admissions if that course still needs to be evaluated (i.e. it comes up as a maybe).

E. There are opportunities for additional training webinars in the "support documentation" links at the bottom of each page in the Lab. These webinars are not school specific. The pertinent one for UWL advisors are Transferology-related:
   a. Transferology®: Helping Students Know How Their Courses Will Transfer
   b. Transferology® Lab Training: Recruiter and Advisor Role

F. UWL's Transferology Lab page with our webinars is [https://www.uwlax.edu/records/faculty-staff-resources/transferology-lab/](https://www.uwlax.edu/records/faculty-staff-resources/transferology-lab/)

### Contact with questions:

A. **Scott Johns, Admissions**
   a. [sjohns@uwlax.edu; 608-785-8939](mailto:sjohns@uwlax.edu)
   b. Questions about an equivalency & how to use Transferology

B. **Victoria Rahn, Records**
   a. [vrahn@uwlax.edu; 608-785-8579](mailto:vrahn@uwlax.edu)
   b. Questions about getting an account & the program list