Approver eSPECIAL Credit

Overview

Academic departments authorize the awarding of special credit based on other kinds of credentials such as life experience, work, and departmental assessment tests. This process will allow an administrator to initiate an electronic request instead of using the paper form. The eSpecial Credit (eSPC) document is routed electronically to the users who are required to approve the document, which could include the student if there are fees associated with the request.

- eSPC is available through One.IU and is available for use at any time during the semester. The task in One.IU is labeled eSpecial Credit (Administrative).
- "Nodes" of approval are set at each campus. Note: If you are part of the route path for the document you initiated, you may be skipped due to the fact that you initiated the document (this setup varies by campus).
  1. Dean of Authorizing School (Dean of School authorizing the credit)
  2. Bursar (Bursar Office at the institution where the credit is being awarded)
  3. Student (Only if there are fees associated with the request. If the request does not include fees, the student node will be skipped.)
  4. Registrar (Registrar Office at the institution where the credit is being awarded)
     a. Credits Post
     b. Fees Post (if applicable)
  5. Bursar FYI Notification
  6. Once all approvals are secured, SIS will be automatically updated.

- If the student does not have an IU email account, email notifications will not be sent upon initiation, Bursar approval with a fee, or final processing, cancellation, or disapproval. Notes are added to the document indicating that student notifications were not sent. The student can still take action on the document by going to My SIS eDocs in One.
  o A separate email is sent to the Registrar’s Office when the Bursar adds a fee to a document because the Registrar needs to contact the student another way to tell the student to go to My SIS eDocs and take action on the document.

- If any approver (1-5) cancels or disapproves the document, the special credits and associated fees will not post in SIS.

- Once the document is approved and the other credit is posted in SIS:
  o Email confirmation will be sent to the initiator and to the University email address of the student.
  o The credits can be viewed on the student’s transcript for the term specified.
  o The fees are posted to the student’s bursar account for the term specified (if applicable).

Steps

Approver Action – Dean of Authorizing School

1. Log into one.iu.edu.
2. In the Search bar, type “action list” and press ENTER.
3. Click the Action List task.
4. The Action List will display. The initial sort is by document Id. You can sort this page by any of the links at the top of the list (Id, Type, Route Status, Initiator, etc). To sort, double click on the underlined title of the column and the list will sort by that column.

    The Initiator column displays the name of the administrator who initiated the document.

    The Title column contains pertinent information specific to the request, which may help in sorting and filtering a list among the workgroup. The title includes the special credit subject, course prefix, catalog number, class number, institution, career, term and program code.

5. Click on the Log icon for detail of when the request was submitted. It also provides other information related to the document.

6. In the Action List, click on the document Id to access the request.

7. If there is only one document for the student (for the same term and authorizing school) pending your action, the document selected will be displayed. If there are multiple documents for the student (for the same term and authorizing school) pending your action, you will be given the option to view all documents or view the document selected only.
• To view the document selected, click and move on to step 9.

• To view all enroute documents, click

8. Viewing all enroute documents will allow you to view multiple documents on one page with the ability to take action on each document individually. Each document will initially be closed, click the arrow to view the individual document details.
9. Once the document is retrieved, you need to review it to determine whether approval may be granted. Standards for approval/non-approval are the same as those used with the paper-driven process.

- **Approve**: Reviewer approves action and submits for next level of approval or update to SIS.
- **Disapprove**: Reviewer disapproves action and notification of that action will be returned to the initiator and any previous approvers of the document. A note should be added to explain why document was disapproved.
- **Cancel**: Reviewer has received notice from the initiator that the document should be cancelled.
- **Hold**: The document has been reviewed, but is not ready for action. If you click the hold button, the following message will be displayed: “Special Credit Request has been placed on hold! The document has been marked with your username in the action list.”
  - When a document has been placed on hold, users in the workgroup will see the networkID of the user who placed the document on hold next to the Document.
ID when they view their Action List. “Holding” a document does not lock others from accessing the document nor does it prevent anyone else from taking action.

- **Add Note** field may be used by approver. Notes should always be used if disapproving or cancelling a request to explain the reason for such action. Note that **Notes** are visible to anyone on the route path. *Do not enter any information that should not be considered part of the academic record, to be viewed by personnel in the academic departments, schools or the Registrar.* Once a note is added, the message will display: “Note Added to Document ID #.”

10. If the document is ready for approval, click **Approve**. Once the document is approved, the following message is displayed.

![Special Credit Request Approved!](image)

11. When you are finished reviewing/approving the request(s), close the browser window.

12. After all required approvals are secured, the other credit will be posted in SIS. Additionally, the fees will also be posted in SIS, if applicable. If there is an error in processing, the document will go to the super-user group for resolution.

Once the document is in **FINAL** status, the initiator and the student will receive an email message confirming the credits and fees were successfully posted.

When a document is approved, disapproved, or cancelled, a note is automatically added to the document showing the ID of the approver.

If the eSpecial Credit request is **Disapproved** or **Canceled**:
- The special credits and fees will not be posted in SIS.
- Notification will be sent to the initiator and the student.

**Approver Action – Bursar Office**

The document is routed to the bursar node to enter fee information.

1. Log into one.iu.edu.
2. In the **Search** bar, type “action list” and press **ENTER**.
3. Click on the **Action List** task.
4. In the **Action List**, click on the document **Id** to access the request.

5. If there is only one document for the student (for the same term and authorizing school) pending your action, the document selected will be displayed. If there are multiple documents for the student (for the same term and authorizing school) pending your action, you will be given the option to view all documents or view the document selected only.

- To view the document selected, click **Continue** and move on to step 7.
To view all enroute documents, click **View All Enroute Documents**.
6. Viewing all enroute documents will allow you to view multiple documents on one page with the ability to take action on each document individually. Each document will initially be closed, click the arrow to view the individual document details.

7. Select the **Fee Type**. Fee Types include: **No Fee**, **Tuition** or **Special Credit Rate**.
   - If the bursar approver selects the fee type ‘No Fee’ the item type and total cost fields are no longer displayed. **Note:** Documents with the fee type **No Fee** will not route to the student for approval. The student node will be skipped and the document will go directly to the Registrar node.
   - After selecting the fee type of **Tuition** or **Special Credit Rate**, the bursar approver should select the appropriate **Item Type** and enter the **Total Cost** (greater than $1). Only the item types associated with the student’s campus will be available to select.
   - The **Item Type Description** is displayed after selecting the Item Type.
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- Additionally, the bursar approver can add notes if necessary.

8. Once the correct options are selected, click **Approve**.

Once the document is approved, the following page is displayed. The page is view-only except for the **Notes** field, which is available to update.

![eSpecial Credit Page](image)

The fees are not posted until all necessary approvals are received and after the credits are successfully posted. When the fees are posted, the course subject and catalog information will be displayed in the reference field (i.e. ENG-W 131) and the fees will be posted to the term of the special credit.
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<table>
<thead>
<tr>
<th>ID:</th>
<th>000001111</th>
<th>Student, Inn</th>
<th>Business Unit:</th>
<th>IU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Nbr:</td>
<td>0000000000000064</td>
<td>Special Credit Fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Item Amount:</td>
<td>60.00</td>
<td>Applied Amount:</td>
<td>0.00</td>
<td>Balance:</td>
</tr>
<tr>
<td>Reference Nbr:</td>
<td>ENG-W 131</td>
<td>Item Type:</td>
<td>150200000000000</td>
<td></td>
</tr>
</tbody>
</table>

Details

<table>
<thead>
<tr>
<th>Nbr Posted</th>
<th>Effective</th>
<th>Billed</th>
<th>Due</th>
<th>GL Posted</th>
<th>Reference Nbr</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 11/17/2015</td>
<td>11/17/2015</td>
<td></td>
<td></td>
<td>ENG-W 131</td>
<td>60.00</td>
<td></td>
</tr>
</tbody>
</table>

Payments paying this Charge

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Account Nbr</th>
<th>Term</th>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
</table>

Approver Action – Student

If the student has an IU email account, the student will receive an email notification to take action on the document when there are fees associated with the request. If the request does not include fees, the student node will be skipped. A follow-up email is automatically sent to remind the student to take action after the document has been pending the student’s action for seven days. If the student does not have an IU email account, the initial and follow up notifications will be skipped.

Note: If the student does not have an IU email account, a separate email is sent to the Registrar’s Office when the Bursar adds a fee to a document because the Registrar needs to contact the student in another way to tell the student to go to My SIS eDocs and take action on the document.
1. Click on the document ID to open the document.
   - If there is only one document for the student (for the same term and authorizing school) pending action, the document selected will be displayed. If there are multiple documents for the student (for the same term and authorizing school) pending action, the student will be given the option to view all documents or view the document selected only.

2. If the document is ready for approval, click **Approve**.

   After the document is approved, the following message is displayed.
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After the document has been approved and is in **FINAL** status, the initiator will receive a confirmation email indicating the special credit was awarded and the cost associated with the credit.

**Approver Action – Registrar Office**

The document is routed to the registrar node for final approval.

1. Log into one.iu.edu.
2. In the **Search** bar, type “action list” and press **ENTER**.
3. Click on the **Action List** task.
4. In the **Action List**, click on the document **Id** to access the request.
5. If there is only one document for the student (for the same term and authorizing school) pending your action, the document selected will be displayed. If there are multiple documents for the student (for the same term and authorizing school) pending your action, you will be given the option to view all documents or view the document selected only.
To view the document selected, click and move on to step 7.
To view all enroute documents, click [View All Enroute Documents].

6. Viewing all enroute documents will allow you to view multiple documents on one page with the ability to take action on each document individually. Each document will initially be closed, click the arrow to view the individual document details.

7. Add a note, if necessary.

8. If the document is ready for approval, click [Approve].

After the document is approved, the following message is displayed.

After the Registrar’s approval, the other credits will be posted in SIS.

If the other credit is posted successfully, any associated fees will also be posted. If the credit is not posted successfully, the fees will not be posted.

Once the document is in **FINAL** status, the document will route to the bursar node as an FYI.
After the document has been approved and is in **FINAL** status, the initiator and the student will receive a confirmation email indicating the special credit that was awarded and the cost associated with the credit. If the student does not have an IU email account, a note will be added to the document indicating that an email was not sent.

If there is an error in processing, the document will go to **EXCEPTION** status and the super-user group will research and resolve the issue. A note is added to the document explaining the error that occurred. Documents in **EXCEPTION** status could be a result of one of the following errors:

- Credits were posted but the credit model is not in **Posted** status.
- A credit model already exists for a different program for the term requested on the document.

**Resolution**: Navigate to the *Other Credit* page in SIS to resolve the issue manually. If there were fees associated with the document, contact the Bursar’s Office for manual processing. Once resolved, use the super-user functions to finalize the document.

**NOTE:** When a super-user approves the document in **EXCEPTION** status with the **Perform Post Processor Logic** box checked, the document will attempt to post the credits (and fees) again. This could result in duplicate postings. It is best to resolve any issues manually in SIS. Once all issues are resolved, the super-user should **complete** the document with the **Perform Post Processor Logic** box unchecked. Taking this action will put the document in **FINAL** status but will not attempt to update SIS again.

**Other Information**

- The operator ID, creation date, and comment text are stored.
- The final approval date is stored even though it is not displayed.
- If the student’s program is updated for the term requested, the program on the document will update to the correct program. The document title in workflow will still display the program that was current when the document was submitted.
- If the document is not routed to the student for approval, the student cannot open the document until the document is in **FINAL** status.
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- Students who need to take action on their documents are re-notified after seven days. Students can also be manually re-notified by any previous approver or super-user using the Re-notify Student button at the bottom of the document.

- Documents not fully approved within 120 days of initiation will be cancelled automatically. Email notifications are not sent when the document is cancelled automatically.

- A note is automatically added to the document anytime a user takes action (approved, disapproved or canceled) or if the email notification to the student cannot be sent because the student doesn’t have an IU email account.

- Only courses with an active offering in the course catalog for the institution awarding the credit that also have the Allow Course to be Scheduled box selected can be awarded using eSpecial Credit.

- If a super-user blanket approves the document at the dean or bursar node, the fee type is automatically set to No Fee.