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Introduction

The Course Equivalency System is a web-based application. It is used to simplify the process of students finding and requesting course equivalencies when researching or applying for the Course Equivalency System. This project will contribute to the University’s larger goal of increasing participation in these programs, as per the Strategic Enrolment Management Plan.

The general process starts with the student wanting to know if a course from an External institution is equivalent to a McGill course. Students can access the Course Equivalency public database. If the course(s) that the student is looking for is not in the database, the students can submit a course equivalency request(s). A request number is created and is emailed to the student, along with a contact name (reviewer). The reviewer(s) can also submit a course equivalency request on behalf of a student.

While the request is immediately available to the reviewer to start working on, the email notification is only sent to the Reviewers the next business day. If the Reviewer(s) have already processed the request on the same, then they will not get the email notification. Reviewers will take a look at the student’s request and approve or disapprove it.

Depending on the Faculty, there will either be 1st Reviewer(s), or 1st and 2nd Reviewers. If there are no reviewer(s) set up, the Faculty Administrator will need to assign reviewer(s) for that request. However, if there are no 1st Reviewers assigned for a particular subject that has a pending request, an email notification will be sent to the Faculty Administrator. If there is no Faculty Administrator, a System Administrator will assign the appropriate Faculty Administrator.

This document will take you through all the functionalities available to 1st Reviewers and you will perform one or more of the following:

1. Search for course equivalency requests by request number or requestor’s email address and view request details
2. Process and confirm the request
3. View a list of Faculty Administrators

Important Notes:

- Course equivalency decisions recorded in the course equivalency database are NOT and should NOT be made for a specific student.
- A decision as to whether an equivalency decision will apply to an individual student is done in Minervia Transfer Credit Assessment Form.
**Roles**

**System Administrator:** They are able to manage Faculty Administrators, manage reviewers, and perform system administration tasks as well as search and view requests.

**Faculty Administrator:** They are able to manage reviewers, as well as search and review request(s) for their faculty and departments.

**Reviewers:** They are assigned by their Faculty Administrator to either be the 1st or 2nd Reviewer. There could be one or two levels of reviewers in a department. Here are some examples:

- There can be many 1st Reviewers and no 2nd Reviewer. This means the first person to assess the request will make the final decision.
- A person cannot be assigned 1st and 2nd Reviewer roles for the same subject. However, they can be assigned both roles for different subjects.
- If there are 1st and 2nd Reviewers, the 1st Reviewer will take a look at the request and make a preliminary decision. This request will go to the 2nd Reviewer who will make the final decision.
Login

To log into the Course Equivalency System:

1. Open your web browser (i.e. Internet Explorer, Firefox or Safari) and enter the following URL:  [https://nimbus-ssl.mcgill.ca/exsa/](https://nimbus-ssl.mcgill.ca/exsa/)

2. Click Login link, located on the top right corner.

3. Enter your *McGill Username* ([first.lastname@mcgill.ca](mailto:first.lastname@mcgill.ca)) and *McGill Password*.

4. Click on the Submit button.


Can’t login?
Contact IT Service Desk via email at ITsupport@mcgill.ca or by phone at 514-398-3398.
Main Screen

After you have logged into the Course Equivalency System, you will be presented with:

1. **Username**: displays your username and hover your mouse to see your role (e.g. System Administrator).
2. **Logout**: allows you to exit of the system.
3. **Home**: allows you to perform administrative tasks.
4. **Help**: it will bring you to a FAQ page.
5. **Search criteria**: allows you to search for McGill or External course equivalency.
To do administrative tasks, you will need to go the Home menu.

1. Log into Course Equivalency System.
2. Click on the Home link.

3. From Home, you will have 3 sections:
   a. **Course Equivalency**: It allows you to search for any McGill or External course(s).
   b. **Search for an Equivalency Request**: It allows you to view the status of a request made by the students.
   c. **My Outstanding Requests**: View Pending Assessments function is only for 1st Reviewer(s). It allows you to assess and make changes to the course equivalency request submitted by students.
Search for an Equivalency Request

This section allows you to search for a course equivalency request.

To search for a request or an email:

1. Enter the request number or email field in the **Search for an Equivalency Request** section.

   ![Search for an Equivalency Request](image)

2. Click on the **Search** button.

   You will see the details of the request. For more information, go to the **Search for an Equivalency Request Details Page** on page 9.
1. **Request Number or Email**: It displays the request number or email. If you want to do a new search, just enter a new request number or email and click on the Search icon.

2. **Action Required**: If the status of the request is Pending or Confirm, this field displays as Assess and it shows who will be reviewing the request on the right. If the status of request is ‘Final’, it will not show the Action Required area.

3. **Request Information**: It shows you the request number, the McGill email address of the requestor, the current status and when the request was created. There are several statuses; see section 5 (History) below for definitions.

4. **Requested Equivalency**: It displays the course equivalency between the External and McGill courses: name of institution, course number and title as well as Student Comments. Click View to view the syllabus, if provided.
5. **History:** It shows you the history of the request status(es):
   a. **Pending:** no one has made a decision yet.
   b. **Final:** The first ‘Final’ status means a decision has been made by the 1st or 2nd Reviewer. If you see more than one ‘Final’ status, it means that a decision was modified by a System Administrator.
   c. **Preliminary decision:** a decision has been made by the 1st Reviewer and is waiting for the 2nd Reviewer to confirm the decision.
   d. **Incomplete:** The request did not have enough information or accurate information (e.g. wrong syllabus) to enable a reviewer to make a decision. The requestor will receive an email about it and he or she will have to create a new request with the proper information.
My Outstanding Requests

After the student submits a course equivalency request, you will receive an email notification. This section is only for the 1st Reviewer(s) and will show you how to assess the request and make a decision. A request normally takes between 5-7 business days to complete.

Keep in mind that there could be many 1st Reviewer assigned to a subject. This means the decision made by the first person who clicks on the 'Submit' is the final decision carried forward to the next step (saved in the database or sent to the 2nd Reviewer). A decision is marked as 'Final' if there is no 2nd Reviewer and it is marked as 'Preliminary_Decision' when a 2nd Reviewer is assigned to the same subject.

The system will not inform you whether there is a 2nd Reviewer after you submit the decision; you can check the request status by looking up the request number or you can ask your Faculty Administrator if there is a 2nd Reviewer for that subject. If there is a 2nd Reviewer also assigned for the same subject as the 1st Reviewer, the request will go to the 2nd Reviewer for a final decision. If there is no 2nd Reviewer assigned and it is needed, the Faculty Administrator will have to assign one.

Important Notes:

- Course equivalency decisions recorded in the course equivalency database are NOT and should NOT be made for a specific student.
- A decision as to whether an equivalency decision will apply to an individual student is done in Minerva Transfer Credit Assessment Form.
**View Pending Assessments**

This function is only available for the 1st Reviewer(s).

1. Click **View Pending Assessments** from the My Outstanding Requests section.

2. You will see all the requests. You can use the **Filter** button to search on any field. For example, you can filter to display the requests for a specific McGill Subject.

   ![Pending Assessment](image)

   **Tips**

   If you use the filter option and then you want to reset the filter, just remove the text from the text box and click on the **Filter** button again.

3. Click on the request to see the details.

   ![Assess Request](image)

4. You will see the Assess Request page containing the equivalency details of the request. Review the request.
a. **Equivalency**: it displays the course equivalency between the External and McGill courses: name of institution, course number, title and AU (accreditation units for engineering only) as well as Student Comments. Click **View** to see the syllabus, if provided.

b. **Related Equivalencies**: allows you to view all of the courses that are already submitted with the status of ‘Pending’, ‘Equivalent’ or ‘Not Equivalent’. You can also find another request by clicking the **Search other decisions** button. This brings you to the search page that you see when you first log in.

c. **Request Details**: It shows you the snapshot of the original request: Receipt Number, Requested Date, Requestor Name, and Email.
5. Decide whether you want to **Assess** this request or make it **Incomplete**.
   - **Assess** means you want to process the request.
   - **Incomplete** means that the request is missing document(s) or information is not useful in making a decision.
   - **Cancel** brings you back to the previous page.

Go to the appropriate section below.

**Assess**

You are now ready to process the request.

1. Click on the **Assess** button. You will see the Assess request page and will be able to make changes (e.g. fix typos) to the Equivalency section:
   a. **External course**: course number, title, and AU. Click **View** to see the syllabus, if provided.
   b. **McGill course**: course title and not the Subject.
   c. Now you can add additional course(s).

**Note**

You can add an External course or a McGill course. These are the only two possible combinations:

- 2 External courses equivalent to 1 McGill course
- 1 External course equivalent to 2 McGill courses.

The system will not allow you to add 2 External courses and 2 McGill courses.

In the case of a reassessment request(s), the system will allow you to remove some additional courses where you think there is equivalency.

To add additional course(s) for:

**External course:**

i. Click

ii. Enter the course number, title and AU

iii. Click **Upload** to include the syllabus, if required
McGill course:

i. Click +AddCourse

ii. Start typing the Subject and the system will generate possible results

iii. Enter the Course name

Adding Additional External Courses:

Depending on your faculty setup and use of 2nd Reviewer Role, it is recommended that you upload a course syllabus for any additional course that you add to a request to enable 2nd Reviewer to confirm your decision.

2. Decide whether this request is equivalent or not equivalent.
3. Whether you click on the **Equivalent** or **Not Equivalent** button, you will need to complete the following:
   a. Decide the **Justification** by clicking to check the appropriate justification(s).
   b. Indicate the **Expire Decision at end of term**. Note that the system defaults it to three years from now. However, you can select an earlier term.
   c. Add **Comments** (e.g. this can only be taken as a complementary course for engineering students), if needed. These comments are viewable to the public.

4. Click on the **Submit** button. You will get a success message.
Equivalent status:

When you submit the request to be ‘equivalent’, there are two possible outcomes:

- If there is a 2nd Reviewer, the 1st Reviewer will see a message about this and the 2nd Reviewer will receive a notification email the next day.
- If there is no 2nd Reviewer, the decision is final and the requestor will receive a notification email on the same day. The request is now added to the Course Equivalency database.

Not Equivalent status:

You should always try to determine an equivalent McGill course for the student request. To consider the request to be “Not Equivalent”, it means that there is absolutely no McGill course that is equivalent. This request will go to the course equivalency database and if there should be a similar request, the system will not allow it. In this case, you may wish to select a “XXX” to denote that it is not equivalent to any McGill Course.

Related Equivalencies:

The system will allow you to add many courses to a requests to form an equivalency. However, the system will not allow you to establish an equivalency if a host course has an equivalency record in the database for the same subject.
Incomplete

An action you would use when you have reviewed the request and there are missing documents or details.

1. Click on the **Incomplete** button.
2. Type the **Reason for Incomplete Submission**. You can enter up to 2000 characters.

   ![Incomplete Request Form]

3. Click on the **Submit** button.
4. You will get a success message.

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**Note**

If the request is ‘incomplete’, the requestor will receive an email with the details you provide and he or she will have to create a new request with the required information.
A Faculty Administrator is responsible for assigning reviewers to McGill subjects that are administered within their faculty. The Faculty Administrator has some knowledge of how to use the course equivalency system and can be sought after for some guidance.

To view a list of your Faculty Administrators,
1. Open Microsoft Outlook or Outlook Web Access.
2. Log in with your McGill Username/Password.
3. Click HOME > Address Book.
4. Search for the Faculty group (e.g. SAOADMIN-Faculty of Science).
5. Double-click on the selected Faculty Group. You will see the names of the people in the Faculty group.