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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 the 2nd 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 Minervan 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.
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](mailto: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.
Home Menu

To do administrative tasks, you will need to go to 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 Confirmations function is only for 2nd Reviewer(s). After the 1st Reviewer has taken a look at the request, it will be accessible for the 2nd Reviewer to make the final decision.
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.

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 1\textsuperscript{st} or 2\textsuperscript{nd} Reviewer. If you see more than one ‘Final’ status, it means that a decision was modified by Enrollment Services Administrator.
   c. **Preliminary decision**: a decision has been made by the 1\textsuperscript{st} Reviewer and is waiting for the 2\textsuperscript{nd} 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

The role of the 2nd Reviewer is to take a look at the request that the 1st Reviewer deems to be equivalent and then you will have make the ‘final’ decision. As soon as the 1st Reviewer finished the assessment of the request, it is immediately available to you. However, you will get a reminder email the next day if you did not have a chance to access your outstanding requests.

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 Confirmations

This function is only available for the 2nd Reviewer(s).

1. Click View Pending Confirmations 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.
3. Click on the request to see the details.

4. You will see the Assess Request page containing the equivalency details of the request. Review the request.
a. **Equivalency**: it displays what the 1st Reviewer assessed on 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 the justification. 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, Email.

d. **Preliminary Decision Details**: it displays the name of the 1st Reviewer, date of review, email and decision.

5. You will need to decide the following actions:

   a. **Confirm**: means you agree with the 1st Reviewer and the request status will be set to ‘Final’.
   
   b. **Modify**: means that you will make changes to the request (e.g. typos)
   
   c. **Incomplete**: means that the request is missing document(s) or information is not useful in making a decision.
   
   d. **Cancel**: brings you back to the previous page.

Go to the appropriate section below.

**Confirm**

After you have reviewed the request and you agree with the 1st Reviewer changes/decision, click on the **Confirm** button.

Now, the request status will be ‘Final’ and the requestor will receive a notification email on the same day. The request is now added to the Course Equivalency database.
Modify

After you have reviewed the request and if you want to make changes (e.g. fix typos) to the Equivalency section, do the following steps:

1. Click on the Modify button. You can make changes to:
   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).

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
ii. Start typing the Subject and the system will generate possible results
iii. Enter the Course name
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**

After you have reviewed the request, you want to reject this request because of missing documents/information.

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

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

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**Incomplete:**

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.

**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 record in the database for the same subject.

**Adding Additional Host Courses:**

While it is recommended that a 1<sup>st</sup> Reviewer attaches a course syllabus for any additional course they attach to a request, uploading a syllabus is not required by the 1<sup>st</sup> Reviewer. This means that it is possible that you may not be prompted to download/view a PDF file when pressing ‘View PDF’ button.
View List of Faculty Administrators

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.