

Completing an Evaluation- Quick Guide for Faculty/Staff

My Evaluations: Tasks Assigned to Me ([//tes-support.collegesource.com/article/384-my-evaluations-tasks-assigned-to-me](https://tes-support.collegesource.com/article/384-my-evaluations-tasks-assigned-to-me)) reviews the process for accessing evaluation tasks assigned to the individual user. The below article details the actions that are available to evaluators when reviewing those tasks within My Evaluations.

When viewing evaluation tasks in TES®, evaluators can, at a minimum, select from the following actions:

- The **Approve**, **Deny**, and **Need More Information** actions move the evaluation task out of the evaluator's queue.
 - They also allow for the evaluator to add comments to explain why the action is being selected.
- The **Add/Edit Course** action allows the evaluator to add a course(s) to or remove a course(s) from the proposed equivalency.
- The **Add/Edit Support File** action allows the evaluator to attach PDF files to the evaluation task.

Select an Action

The evaluator will select a response by using the **SELECT AN ACTION:** dropdown.

- The list of available actions will vary depending on the rights assigned to the user evaluating the task.
 - See User Rights and Permissions ([//tes-support.collegesource.com/article/41-user-rights-and-permissions](https://tes-support.collegesource.com/article/41-user-rights-and-permissions)) for more information.
- Below is an example of the actions that an evaluator with the **SERVICE EVAL** user right would be able to initially choose from when an evaluation is sent without a proposed equivalent.
 - If the creator of this evaluation had proposed an equivalent course, **Approve** would appear as well at the top of the list.
 - If the user had **MANAGE EVAL** or **CREATE EQ** user rights, additional actions would also be available.

My Evaluation Tracker

INSTITUTION → EVALUATION LIST → EDIT EVALUATION

SELECT AN ACTION:

Deny

Need More Information

Re-Assign

Add/Edit Course

Add/Edit Support File

Close

COLLEGESOURCE UNIVERSITY (SH)

EVALUATION DETAIL

Assigned: Pacioli, L - Accounting - Assistant Chair

Create Date: 10/13/2022 1:08:41 PM

Created by: Hatfield, S - Curriculum & Transfer Specialist

Comment:

This is a practical accounting course that stresses the basic principles of accounting and reinforces those principles with illustrations, examples, and correlated problems. Topics given special emphasis are the accounting cycle, end of cycle procedures, payroll records and taxes, control systems, evaluations of current and fixed assets, accruals and deferrals, current liabilities, an introduction to corporate accounting, and the four primary financial statements. (Lecture).

Units: 4

Prerequisite: None

Department: ACCOUNTING

Source catalog: Minnesota North College 2022-2023

Course history: View Detail

EVALUATION LOG:

10/13/2022 1:08:41 PM	[Hatfield, S]	Request initiated. Assigned to L Pacioli
10/13/2022 1:08:41 PM	[Hatfield, S]	Propose equivalent course:

Approve

- As noted above, this action will appear at the top of the list if the creator of the evaluation has proposed an equivalent course. It will also be an option if a previous evaluator has added an equivalent course. Otherwise, for this action to appear, the evaluator needs to first select a course via **Add/Edit Course**.
- The **Approve** action does not require a Note, but an evaluator has the option to add comments; for example, the evaluator may indicate that the equivalency should only be awarded to students accepted into a particular program or that the equivalency should not be included in the Public View.
- Comments entered here can be accessed through the equivalency details in Equivalency Manager. However, they can't be seen via the Public View. They cannot be seen in the Equivalency Finder unless a user has **ACCESS EQ** or **CREATE EQ** user rights. Comments aren't searchable criteria in Equivalency Search. If the information needs to be shared or accessed, it can be copied into the Public or Private Note by the person creating the equivalency.
- The evaluator must select a person to assign the evaluation task to for the next steps.
 - Users must have **SERVICE EVAL** and (**MANAGE EVAL** or **CREATE EQ**) user rights to appear on the **Assign** drop-down. If the creator of the evaluation task has these rights, that individual will appear first on the list as the Evaluation Task Creator.
 - If the institution has established a Default Assignee for evaluation tasks, this person will appear second on the list.
 - If the creator of the evaluation task does not have the needed rights and the institution has established a Default Assignee for evaluation tasks, this person will appear first on the list.
 - If the creator does not have the needed rights and no Default Assignee has been established, the **Assign** field will be blank, and a user must be selected.

- The evaluator can select any user on the list as the next recipient of the evaluation task.

Tip: When training evaluators, it's important to discuss the business processes the institution has in place for assigning reviewed evaluation tasks. For example, should evaluators assign tasks back to the creator, the default assignee, or someone else?

In the example below, the evaluator assigns the course to the Evaluation Task Creator. The user has indicated in the **Note** field that the course covers the majority of topics discussed in CSU's (or CollegeSource University's) Financial Accounting Fundamentals.

The screenshot shows a window titled "TES APPROVE" with a close button in the top right corner. The form contains the following fields and controls:

- Note: (optional)**: A text area containing the text "Course covers majority of topics in CSU's Financial Accounting Fundamentals." with a small edit icon on the right.
- Assign:**: A dropdown menu showing "HATFIELD, S (Evaluation Task Creator)" with a downward arrow.
- Send Email?:**: A checked checkbox.
- At the bottom, there are two buttons: "Confirm" (with a checkmark icon) and "Cancel" (with an X icon).

Deny

- If an evaluator selects **Deny**, the individual will be taken to the below screen.
 - Here, the user can select the reason the course is being denied by selecting one of the following from the **Type** drop-down: Subject, Level, Lab, Sequence, or Other.
 - If a Type is not selected or Other is selected, the user must leave a Note. The additional options do not require a Note, but the evaluator can certainly add one.
- The evaluator must select a person to assign the evaluation task to for the next steps.
 - Users must have **SERVICE EVAL** and (**MANAGE EVAL** or **CREATE EQ**) user rights to appear on the **Assign** drop-down.
 - If the creator of the evaluation task has these rights, that individual will appear first on the list as the Evaluation Task Creator.
 - If the institution has established a Default Assignee for evaluation tasks, this person will appear second on the list.
 - If the creator of the evaluation task does not have the needed rights and the institution has established a Default Assignee for evaluation tasks, this person will appear first on the list.
 - If the creator does not have the needed rights and no Default Assignee has been established, the **Assign** field will be blank, and a user must be selected.
 - The evaluator can select any user on the list as the next recipient of the evaluation task.

In the below example, the evaluator is assigning the course back to the Default Assignee for evaluation tasks. The user has indicated in the **Note** field that the course is developmental in nature and cannot earn credit at CollegeSource University.


✕

Type: (optional) Level

Note: (optional) This course is developmental in nature and cannot earn credit at CollegeSource University.

Assign: ALLEN, B (Default Assignee)

Send Email?:

✔ Confirm
✕ Cancel

Need More Information

- If an evaluator selects **Need More Information**, the user will be taken to the below screen.
 - The individual will be required to enter a Note explaining what information is needed.
- The evaluator must select a person to assign the evaluation task to for the next steps.
 - Users must have **SERVICE EVAL** and (**MANAGE EVAL** or **CREATE EQ**) user rights to appear on the **Assign** drop-down. If
 - the creator of the evaluation task has these rights, that individual will appear first on the list as the Evaluation Task Creator.
 - If the institution has established a Default Assignee for evaluation tasks, this person will appear second on the list.
 - If the creator of the evaluation task does not have the needed rights and the institution has established a Default Assignee for evaluation tasks, this person will appear first on the list.
 - If the creator does not have the needed rights and no Default Assignee has been established, the **Assign** field will be blank, and a user must be selected.
 - The evaluator can select any user on the list as the next recipient of the evaluation task.
- Once the needed information has been obtained, the evaluation can be re-assigned to the evaluator.

In the below example, the evaluator is assigning the course back to the Evaluation Task Creator, indicating that a course outline is needed for further review.


✕

Note: (required) Please provide a course outline.

Assign: HATFIELD, S (Evaluation Task Creator)

Send Email?:

✔ Confirm
✕ Cancel

Re-Assign

- The **Re-Assign** action allows the evaluator to re-assign the evaluation task to another user.
 - An evaluator might re-assign a course if the user would prefer another evaluator to review it (perhaps the person was mistakenly assigned the course, or the course is outside the individual's area of expertise).
 - The evaluator might also re-assign as a way to route the course to another person for next steps.
 - For example, a faculty member might review a course but then want to pass it along to the Department Chair for additional review and the Dean for final confirmation.
- The evaluator enters an optional Note and then selects a person to re-assign to from the drop-down.
 - All users with **SERVICE EVAL** rights will appear on the re-assign list.

In the below example, the evaluator has re-assigned the course to Professor Wittgenstein, indicating the evaluator thought it was more in this person's area of expertise.

The screenshot shows a 'TES RE-ASSIGN' popup window. It includes a text area for a note, a dropdown menu for selecting a user, and a checked checkbox for 'Send Email?'. At the bottom, there are 'Confirm' and 'Cancel' buttons.

Add/Edit Course

- The **Add/Edit Course** action allows the evaluator to select the equivalent course(s) using the home institution's data set (which may also include User-Added Courses). The popup provides access to all the data sets from both the transfer and home institution.
 - If the institution's TES® Administrator has assigned a Priority Department to the evaluator, that department will be preselected from the department drop-down within the institution's most recent data set. If multiple Priority Departments have been assigned, they would appear in an alphabetized list at the top of the department drop-down. The Department whose full name appears first alphabetically would be automatically selected.
- When conducting an evaluation, the **MANAGE EVAL** user right is required to add (+) or remove (x) **TRANSFER COURSES**. Individuals who do not have this right will see the add and remove buttons grayed out on the left-hand side as depicted below. If the
 - evaluator feels an additional **TRANSFER COURSE (S)** should be included in the evaluation, this can be indicated in the Note when the original evaluation is approved.
 - If an individual has the **MANAGE EVAL** user right, these buttons will be blue.
- Select the **Done** button when the course selection is complete.

TES ADD/EDIT COURSE
✕

TRANSFER COURSE(S)

✕ PHIL 101 INTRODUCTION TO PHILOSOPHY 3

EQUIVALENT COURSE(S):

✕ PHIL 102 INTRODUCTION TO PHILOSOPHY: KNOWLEDGE AND REALITY 3

▶ Done

COASTAL CAROLINA UNIVERSITY

COASTAL CAROLINA UNIVERSITY 2020-2021

ACADEMIC COACHING EXPERIENCE - (ACED)

+ ACED 101 ACADEMIC STRATEGY DEVELOPMENT 0

COLLEGESOURCE UNIVERSITY (SH)

COLLEGESOURCE UNDERGRADUATE TITLE (DEV) 2021-2022

PHILOSOPHY - (PHIL) (Priority Department)

+ PHIL 1XX	LEVEL ELECTIVE	
+ PHIL 2XX	LEVEL ELECTIVE	
+ PHIL 3XX	LEVEL ELECTIVE	
+ PHIL 4XX	LEVEL ELECTIVE	
+ PHIL 101	INTRODUCTION TO PHILOSOPHY: ETHICS	3
+ PHIL 102	INTRODUCTION TO PHILOSOPHY: KNOWLEDGE AND REALITY	3
+ PHIL 120	INTRODUCTION TO LOGIC	3
+ PHIL 140	TECHNOLOGY AND HUMAN BEHAVIOR	3

- The next action would presumably be to **Approve** or **Re-Assign** the evaluation task after selecting the equivalent course(s).

Add/Edit Support File

- Select **Add/Edit Support File** to upload a PDF(s) related to the evaluation.
 - PDFs can be uploaded two at a time. Each file must be less than 8 MB in size and cannot exceed the combined 20 MB limit.
 - Select **Choose File** to upload a PDF; select the second **Choose File** box to upload a second PDF. Then, select **Submit**.

INSTITUTION → EVALUATION LIST → EDIT EVALUATION → FILE-UPLOAD

Add/Edit Support File (PDF Only < 10MB/File, 20MB Total)

Select File(s):

Choose File

No file chosen

Choose File

No file chosen

▶ Submit
↺ Reset

Once added, the Support File(s) will appear under the transfer course description:

<https://tes-support.collegesource.com/article/394-completing-an-evaluation>

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ALABAMA A & M UNIVERSITY 	COLLEGESOURCE UNIVERSITY (SH)	EVALUATION DETAIL									
<p>PHIL 201 INTRODUCTION TO PHILOSOPHY A study of the intellectual problems human beings face in their quest for understanding of themselves and the world. Basic problems in metaphysics, epistemology, ethics, and logic are stressed.</p> <p>Units: 3 Prerequisite: None Department: PHILOSOPHY  Source catalog: Alabama A & M University Course Descriptions 2022-2023 Course history: View Detail </p>	<p>PHIL 102 INTRODUCTION TO PHILOSOPHY: KNOWLEDGE AND REALITY Introduction to philosophical inquiry with emphasis on problems of knowledge and reality. Students are encouraged to think independently and formulate their own tentative conclusions. GE.</p> <p>Units: 3 Department: PHILOSOPHY Source catalog: CollegeSource Undergraduate Title (DEV) 2021-2022 Course history: View Detail </p>	<p>Assigned: Descartes, R - Philosophy - Professor Create Date: 2/1/2023 9:43:47 AM Created by: Hatfield, S - Curriculum & Transfer Specialist Comment:</p>									
<p>Support files: </p>											
<p>EVALUATION LOG:</p> <table border="0"> <tr> <td>3/31/2023 12:52:16 PM</td> <td>[Hatfield, S]</td> <td>Support file(s) added.</td> </tr> <tr> <td>2/1/2023 9:43:48 AM</td> <td>[Hatfield, S]</td> <td>Request initiated. Assigned to R Descartes</td> </tr> <tr> <td>2/1/2023 9:43:48 AM</td> <td>[Hatfield, S]</td> <td>Propose equivalent course: PHIL 102</td> </tr> </table>			3/31/2023 12:52:16 PM	[Hatfield, S]	Support file(s) added.	2/1/2023 9:43:48 AM	[Hatfield, S]	Request initiated. Assigned to R Descartes	2/1/2023 9:43:48 AM	[Hatfield, S]	Propose equivalent course: PHIL 102
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If the wrong file is uploaded in error, it can be deleted after upload by selecting Edit Type: **DELETE ALL** and then **Submit**.