

WHITEPAPER

Automating the Transfer Credit Process at Your School



Introduction

Estimations from the U.S. government's General Accounting Office suggest that transfer students lose an average of 43% of their credits.¹ The credit transfer journey is so daunting and mysterious, that Inside Higher Ed once referred to it as the “Bermuda Triangle” of the academic experience.²

And it's a journey that far more than just a handful of students embark on—over a third of college students move schools during their higher-education career³, with more than a million transfer students struggling through this process in 2021 alone.⁴

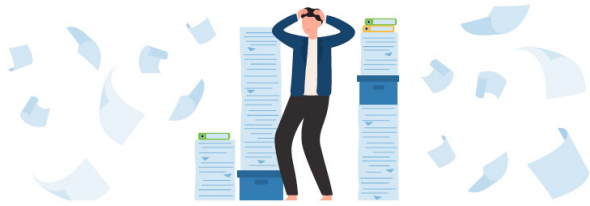
But at many institutions, this process is fraught with manual bottlenecks. To assess an incoming request, faculty

reviewers must review course catalogs, academic records, and program requirements to determine which credits will be accepted—and which ones won't. This can lead to frustration, delays in registration, and possibly, extra semesters for students whose credits wouldn't transfer.

A manual and ambiguous transfer process has greater implications than posing as an administrative hurdle. Empowering your school with tools to make rapid, accurate decisions on the worthiness of incoming credits can affect retention rates and your institution's reputation—both of which have a significant impact on your bottom line.



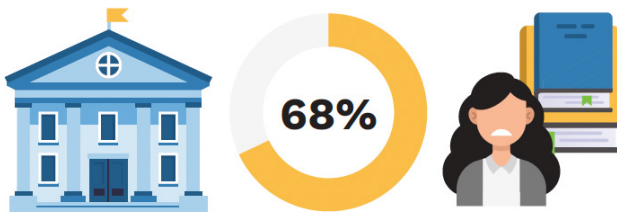
Students who receive limited credits for their previous academic experience are **2.5X LESS LIKELY** to graduate from your school.⁵



The average student loses **TWO SEMESTERS OF CREDITS** (with the average college semester costing \$6,000) due to roadblocks in the credit transfer process.⁶



A regrettable **57% OF STUDENTS** say they changed schools again because their credits didn't properly transfer.⁷



68% SAID THEY WOULD HAVE STAYED WITH THEIR SCHOOL if they could have received full recognition for their previous work.⁸



43% OF STUDENTS say they were not given a clear reason why their credits didn't transfer.⁹

With this perspective in mind, it's no surprise that colleges and universities are taking a fresh look at their processes. Tech-savvy schools are looking for ways to eliminate administrative red tape and accelerate the credit transfer journey for incoming students.

How? Over one-third of colleges still lack any structure in their course-matching rules—each class is manually evaluated by faculty once a student submits a

transcript.¹⁰ For those with articulation rules in place, slightly over half are using **trackable, repeatable process automation**.¹¹ An effective automation strategy not only unyokes your school's faculty and staff from administrative toil, but provides students with a clear roadmap to maximize their credits, allowing them to finish their degree faster and at a lower cost.

In a survey of over 200 institutions, AACRAO found that credit transfer practices are “extraordinarily complex”¹²

Due to inefficient processes, students are losing college credits in higher education—and it's costing them. The average transfer student can pay an additional \$19,000 in tuition and fees to complete their degree.¹³ Many abandon the ship entirely, unable to afford the added time or expense of retaking non-transferable courses.¹⁴

The process is filled with difficulties like researching course descriptions and routing courses to faculty for evaluation. Many review processes can involve up to 14 different decision-makers, adding even more challenges when coordinated manually.¹⁵

Bachelor's Degree Completion Rates 6 Years After Transfer ¹⁰		
4-Year Institution Type	Share of Transfer	Transfer Completion Rate
Public	72%	65%
Private nonprofit	20%	60%
Private for-profit	8%	35%

How do outdated manual processes lead to lost credits?

There are many reasons why students lose college credits when transferring. The main culprits are manual, disorganized processes or rules that lack standardization:

- Time spent waiting for staff to review transcripts manually
- Delays in transferring college credits due to incomplete/missing information
- Incorrect guidance, resulting in unnecessarily repeated courses
- Little record-keeping of course equivalencies, forcing faculty to examine each and every transfer request by hand
- COVID shifted many graded courses over to a pass/fail system; a no-no for pre-existing transfer rules
- Time spent tracking down missing/incomplete transcript information from other schools



Average credits lost for 3 popular transfer types¹⁶

Transferring across state lines	Transferring from private nonprofit to public school	Transferring from a for-profit school
14-18 credits	18 credits	17-25 credits

At some schools, students may find that a credit earned at one university does not transfer to another school in their current learning system; others will discover that the credits they've earned don't count toward their degree program.

Every school has different requirements and historical processes for evaluating and accepting transfer credit, some more stringent than others. For example, perhaps one school requires that students take an exam to demonstrate mastery to receive credit for their prior coursework. In contrast, another school only requires that students achieve a certain grade point average or a pass rate in their coursework.

With so much lost time and potential revenue, is it any wonder that colleges and universities are looking for ways to automate this process?



How one four-year college used automation to transform their credit transfer process

<1 day

median course
evaluation
turnaround time

Fully remote

Students can submit
requests online,
and faculty

5,500

unique courses
evaluated

“We were sending students that were new to our campus all over. We would send them a map, we gave them a directory, the form, and then we said, ‘Okay, now go find them.’ Even when they did find faculty, sometimes those members weren’t around due to scheduling matters or common advising days on campus,” –Transfer Evaluation Coordinator

Prior to 2019, staff and students at one east coast college contended with a paper-based credit transfer process. Students were given a four-page form with instructions to wait in long lines to visit faculty offices. It often took students several weeks (even months!) to finalize the paperwork. In some cases, students were not notified about the status of their credits until it was time to enroll for the next semester. Incomplete forms languished, with no way to track their progress. It wasn’t an uncommon process; 68% of the school’s students are transfer students, charging a significant majority of the student body with the daunting, multi-step process.

To put an end to the tedious back-and-forth and free faculty from slow manual steps, this college turned to automation. The staff quickly realized why many top universities and Fortune 100 companies use ProcessMaker to transform their core business processes digitally.

The new transfer process was fully remote—ending the need to wait for an opening in faculty schedules to discuss in person. With a fully online system, students could submit requests from home, and faculty could quickly review on the go. Faculty gained a fresh insight into the status of each and every request, so forms no longer fell through the cracks. The new electronic process is significantly less stressful for students. And for faculty, it decreases turnaround time from weeks down to a single day.

Introducing automation: focus on a new strategy for credit transfer

Most schools are still using a system designed to handle a small number of students transferring credits between just a few other schools. But today's students have access to thousands of different institutions—with nuanced requests coming in from every state.

An automated system can streamline the entire process by helping you manage your registrar's office more efficiently and effectively. With automation, you can:

- **RESEARCH THE TRANSFER WORTHINESS OF ANOTHER SCHOOL'S COURSE** by creating a formal process to gather the needed information before sending it to a faculty reviewer.
- Use **AUTOMATIONS** to send relevant information between your team and other schools.
- Automatically **MATCH** courses to equivalents at your institution and route nonequated courses to faculty for review.
- Leverage a **BUSINESS RULES ENGINE** to codify faculty decisions so systems can automatically approve or deny the course next time—without human interference.
- **CREATE TRANSFER CREDIT REPORTS** and automatically send notifications to Admissions and the student.

By eliminating manual processes, automating critical tasks, and providing clearer visibility into the status of tasks and projects, teams can improve their ability to provide the level of service that students need during such a necessary time in their lives.



4 ways automation can improve your transfer credit journey

You want to ensure that your college has the information on hand to assess whether a student is eligible for transfer credit. Business process automation can help. It can take over the tedious job of collecting and validating all of the information you need from your students, the registrar's office, and other schools.

Build a knowledge base

With a knowledge base, you can begin to take the guesswork out of which courses will transfer and which won't. A knowledge base can help you save time by standardizing the factors you weigh when evaluating incoming transcripts.

A knowledge base is especially advantageous because you can update it automatically with new information as needed. This means your staff would not have to spend hours searching through various websites or calling different schools to obtain course descriptions from the academic catalog.

Through a knowledge base that acts on business rules, you can make a decision once and then set it and forget it. Next time your system sees that particular course on a transcript, it will automatically know which of your own classes it

satisfies. Turn Articulation Agreements into instructions that a rules engine can leverage. This reduces the need for faculty members to review courses from those institutions.



Think end-to-end

Business process management makes your entire process more efficient and accurate, no matter where you are in the journey. From the initial intake of transcripts to the final approval of a student's degree plan, business process automation can streamline your workflows with easy-to-use technology and time-saving tools.

By automating the transfer credit process, schools can make rapid-fire decisions on course transfer eligibility. Automation increases the transparency of the entire process. Students and staff can log in to the student portal to see how their credits are moving through the evaluation

process. They can easily view which courses have received approval, check the reasoning behind denied courses, and see which ones are still awaiting review. When a faculty member makes their decision, the system can distribute instant notifications to the student and the Office of Admissions.

This increased visibility reduces anxiety and worry for students and allows them to focus on other areas of their lives while they wait for results. In addition to these benefits, colleges will see improved productivity as employees will no longer need to spend hours manually processing each evaluation request.

Track the approval process from start to finish

Automation smoothens the communication process between professors and other subject matter experts who need to review the validity of an incoming course credit. When using manual methods, faculty must physically exchange paperwork or sift through email threads to track the approval process. Requests languish in inboxes for weeks or get lost in the stack.

An automated system performs the tracking legwork for you. It can automatically pass requests up the rungs for approval and record faculty member decisions. When there's a delay, you can send reminders and nudges from the workflow or even escalate or reassign to another user.

Design a transfer process that scales with your current IT system

An efficient transfer credit process should be designed to scale with your institution. It should also work seamlessly with your existing SIS, Transfer Evaluation, and degree audit systems.

An automated transfer credit process is built specifically to work in tandem with your current student information system. In addition, it also works with other systems that need to be informed, such as the admissions office and financial aid department. The goal is to flatten the roadblock presented by credit transfers and create a speedier, more transparent experience for incoming students.

Platforms like ProcessMaker do not replace your systems, but work in conjunction with your current technology suite. Academic institutions worldwide use business process automation platforms like ProcessMaker to help manage their credit transfer processes. The technology offers a simple way to automate the process steps and interface with the many tools involved: reviewing applications, checking student records, and verifying transcripts.

You'll reduce the amount of time it takes to process a student's application and minimize human error, so you'll be able to evaluate more students in less time.



When the transfer credit program works well, it will give students the trust to stay with you for their entire degree programs

When students are happy with the transfer credit program, they tend to feel more confident about their educational choices, leading to higher satisfaction and retention rates. An efficient transfer credit process will also help them get through their degree programs faster.

For successful transfer credit programs, communication is vital.

That's because students rely on schools to guide them through the process of transferring previous learning toward their new degree program. If a school isn't able to provide clear and timely information about how a student's past credits will apply—or if they struggle to process those credits quickly—students may lose trust in the school and seek out another institution.

A faster turnaround makes your institution look more agile in your student's eyes. It helps them make better decisions about whether or not to finish their degree at your college.

Don't let transfer credit slow you down. Find out how you can supercharge this vital higher-ed process through the power of automation.

[SEE HOW IT WORKS ›](#)

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About ProcessMaker

ProcessMaker is a low-code business process management and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.

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ProcessMaker has maintained its rating as a top leader in enterprise business process management software and received a 4.4+ score on both G2 Crowd, Gartner Peer Insights, and Capterra. ProcessMaker has grown its brand through a global network of strategic partners and product footprint, white label & OEM network, and training events all over the world. ProcessMaker makes it easy for citizen developers to quickly create a workflow with a process development interface that is very instinctual and simple to use.



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