

**NISTS 2023**

# BE A CONNECTOR FOR TRANSFER STUDENT SUCCESS

Virtual • February 1-3 | Portland, OR • February 22-24

The following presentation was given at the 21st Annual Conference for the National Institute for the Study of Transfer Students. Please cite responsibly and direct questions to the original presenter(s).

*Educational Partner/Sponsor Session*

## **2875b - Inspire Equivalency Confidence Using TES + Transferology**

Credits and Degree Pathways, Leadership and Strategic Planning

Building, maintaining, and publicizing equivalency information has never been easier with TES and Transferology. Only CollegeSource's TES, the Transfer Evaluation System, and Transferology, the nation-wide student network, are backed by a database of more than 141 million course descriptions, 172,000 catalogs, and 29 million user-created equivalencies. Integrating these tools into the transfer evaluation and recruiting functions has proven effective for countless institutions, small and large, including system-wide adoption in Minnesota, Illinois, Ohio, Nebraska, Kentucky, California, Wisconsin, Colorado, and more. See why millions of students are using Transferology, why institutions who have TES say they can't live without it and hear about the usage and successes of institutions using these solutions.

**John Panzica**, *Client Solutions Specialist*

CollegeSource, Inc.



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FOR TRANSFER STUDENT  
SUCCESS**

**VIRTUAL | FEBRUARY 1-3, 2023**

**PORTLAND, OREGON | FEBRUARY 21-23, 2023**

# NISTS 2023 Inspire Equivalency Confidence Using Transferology + TES

Nationwide Transfer Network & Recruitment  
Tool and the Premier Course Data & Transfer  
Evaluation System

John P. Panzica, Product Solutions Specialist  
CollegeSource, Inc.



Inspire Equivalency Confidence  
Using Transferology & TES



# Agenda

- 01 Introduction
- 02 Our Products
- 03 Transferology & Transferology Lab Demo
- 04 TES Features & Demo
- 05 Discussion & Questions

## Mission

Maximize human potential by expanding awareness of education and career opportunities.

# → Why CollegeSource?

- 01 We've been around for 50+ years!
- 02 Only higher education – all the time
- 03 No venture capital; no shareholders
- 04 200+ years combined Higher Ed staff experience



# Our Products



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Premier course data and transfer evaluation system



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Nationwide transfer network and recruitment tool



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Fully hosted degree audit system for student success



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Academic planning system for guided pathways to graduation



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Dynamic student scheduling platform for class schedules



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Comprehensive collection of college catalog and course data



# Transferology®

Nationwide network and recruitment tool giving students quick answers on how their college credit transfers to other in-network institutions

Transferology  
→

# Transfer Students & Transfer Credit



## ▶ Fully Hosted on Amazon Web Services (AWS)

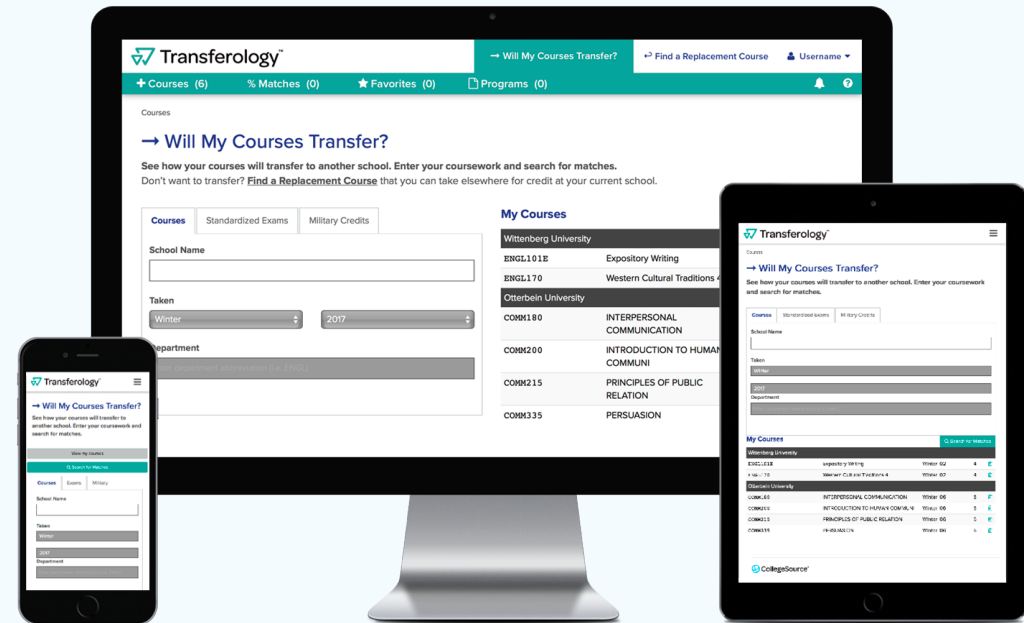
## ▶ User-friendly Design

Can easily be accessed online through its student-facing (Transferology) and staff-facing (Transferology Lab) interfaces.

Responsive application design makes information accessible across a variety of devices.

## ▶ Equivalency Data

Pull from TES nightly  
Pull from uAchieve TA twice a week  
Pull from Peoplesoft TA once a week  
Import Files – two a year



## Qualified Leads

Students can easily request information from your institution

## Transfer Pathways

Great for schools that have a robust program-to-program articulations with another institution

## More Than Courses

Transferology promotes articulations for military courses / occupations, advanced placement courses, and college-level exams



“Our admissions office uses Transferology as a recruitment for prospective transfers, and it plays a significant role in helping us meet our target goals.”

**Patty Isaac Michelsen, M.A.**

Staff Testimonial

Associate Registrar  
Academic Programs and Articulation  
Chapman University

# National Transferology Student Usage

JANUARY 2022 – DECEMBER 2022

31M Equivalencies

**120K**

Hours

**3.49M**

Courses added from over  
4K+ schools

**831K**

Logins

**957K**

Searches

**8.3 Min Avg**

Session length from 50  
states, 165 countries

**1.51M**

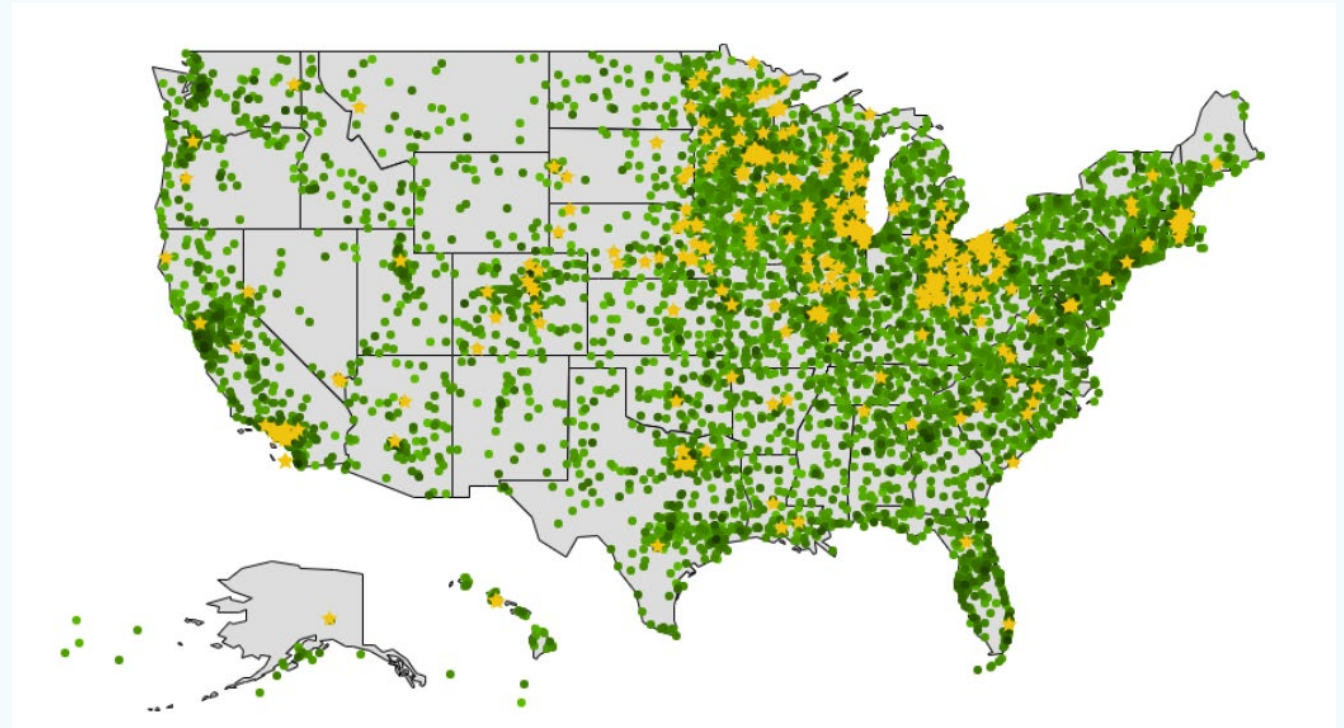
View Match  
Details

**234K**

Accounts created

**99.1%**

Found matches



## 2022 Gold Stevie Winner

“...Institutions are increasingly turning to us to help manage the complexities of transfer articulation and degree achievement to fully support student mobility. We are honored to have been named as Stevie Award winners.”

– CollegeSource CEO Kerry Cooper



Transferology has won the Education Cloud-Based Solution category in the 19th Annual International Business Awards®.



## Make transfer decisions in record time.

The premier resource for researching courses taught at colleges and universities nationwide, TES empowers users to evaluate transfer credit as well as establish equivalencies more efficiently and consistently. Users can quickly locate course descriptions, route and track evaluation tasks, manage and publicize equivalencies, and employ powerful algorithms to generate lists of likely equivalencies between institutions.



# Features & Benefits of TES



# TES, the Transfer Evaluation System

Research Courses, Track Evaluations, Empower Transfer

- ▶ Complete catalogs
- ▶ Millions of course descriptions
- ▶ Research institution & course information
- ▶ Customized reports
- ▶ Accessed remotely
- ▶ User-friendly

## Benefits of TES

Faster access to course descriptions

Track the evaluation process

Create and manage equivalencies

Display equivalencies online  
with the Public View

Efficient and significant time savings



# Multiple Support Options

- 01 Office Hours – Weekly ( Free )
- 02 TES Introduction (101) – Bi-Weekly ( Free )
- 03 TES Basic Certification – Monthly (\$)
- 04 TES Administrator Certification – Bi-Annually (\$)
- 05 Updates – As Needed
- 06 Support.CollegeSource.com (24/7)
  - *Getting Started*
  - *User Manual*
  - *Release Notes*

# FEATURES

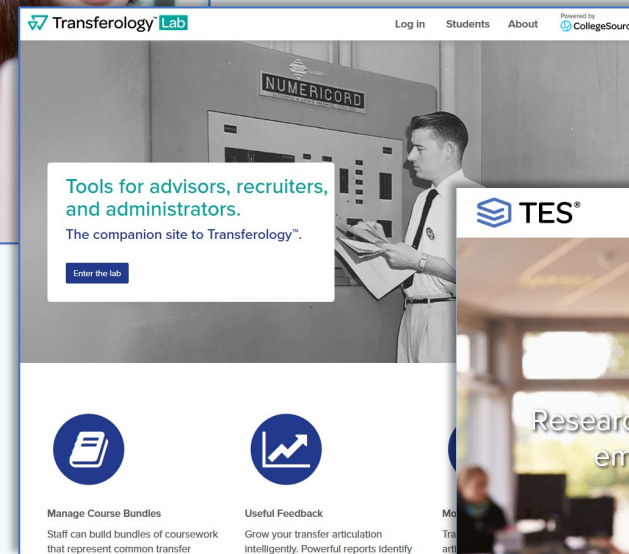
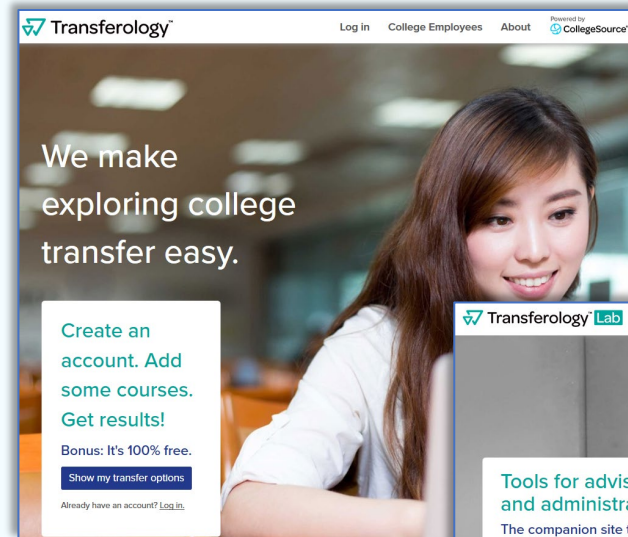
## Live Demonstration

Transferology

Transferology Lab

Transfer Evaluation System

NISTS 2023




# Thank You



For more info on Transferology, TES and other products, please visit [collegesource.com](https://collegesource.com) or email us at [info@collegesource.com](mailto:info@collegesource.com)

## Get in touch!

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 (513) 834 - 8841

Visit our Support Center at [support.collegesource.com](https://support.collegesource.com)



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**SUCCESS**

Thank you  
for attending!

**PLEASE COMPLETE  
A SESSION EVALUATION**

(via the conference app)

This  
session's  
id# is:

**2875a**