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## I. How to Grandfather an Equivalency

In most cases, there is only one equivalency for a given course and all students receive the same transfer equivalency regardless of when they took the course. This function may be used when there is a change to a transfer equivalency and the institution chooses to "grandfather" the equivalency for students who took the course prior to the change, i.e. allow those students to receive the old transfer equivalency.

The Equivalency Begin and End Year/Term fields define the effective dates for the equivalency. Usually, there is only one equivalency for a given course where the begin year/term is the first term that the course was offered and there is no end date. In cases where an institution chooses to grandfather an equivalency, the old equivalency record is assigned an end date and a new equivalency record is created with a begin date corresponding to the effective date of the change. Students taking the course prior to the end date will receive the old equivalency; students taking the course after the end date will receive the new equivalency.

Another situation where the "grandfathering" function may be applied is when an institution uses the same number for a new course that was used for a previous course. This function would be used if you want students to receive a different equivalent depending on which course was taken.

There are a few circumstances where an institution may choose to use the grandfathering function. Listed below are three cases where this function may apply:

### CASE 1 OF 3

In Case 1 the receiving institution determines that a FROM course will no longer receive the same transfer equivalency that was previously assigned. However, a decision is made to permit students who already took the course to receive the previously assigned equivalency.

The following steps are recommended to grandfather this type of equivalency:

1. Select Option 1 "Course Equivalencies" from the Maintenance Menu. (Refer to "How to Use the Maintenance Menu" [Sect. A] for help.)
2. Use the "Find Which Equivalencies" screen to retrieve the equivalency that you want to grandfather. (Refer to "How to Search for Equivalencies" [Sect. C] for help in retrieving equivalencies.)
3. This will return the "Equivalency Detail" screen for the existing equivalency (Figure I-1). To establish the new equivalency first select the "Copy this equivalency" option from the File Menu\* (Figure I-2).
4. The same "Equivalency Detail" screen will be returned with the

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message at the bottom of the screen prompting you to make the necessary changes to the new equivalency. Change the Equivalency Begin Year/Term to the effective date of the new equivalency. Update additional fields on the screen as appropriate and press ENTER. (Figure I-3) (Refer to "How to Use HELP" [Sect. B], "How to Use the Non-Course Equivalent (NCE) Field" [Sect. G], and "How to Use the Equivalency Default Fields" [Sect. H] for help in updating the fields.)

5. A "Copy Complete" Confirmation Box will be returned. This will list the effective dates for the original "grandfathered" equivalency indicating the end date, which will be automatically assigned, and for the new equivalency, which you are adding. Verify that the information is correct and press ENTER to confirm (Figure I-4).
6. The "Equivalency Detail" screen for the new equivalency will be returned with the message "The database has been updated" at the bottom of the screen (Figure I-5).

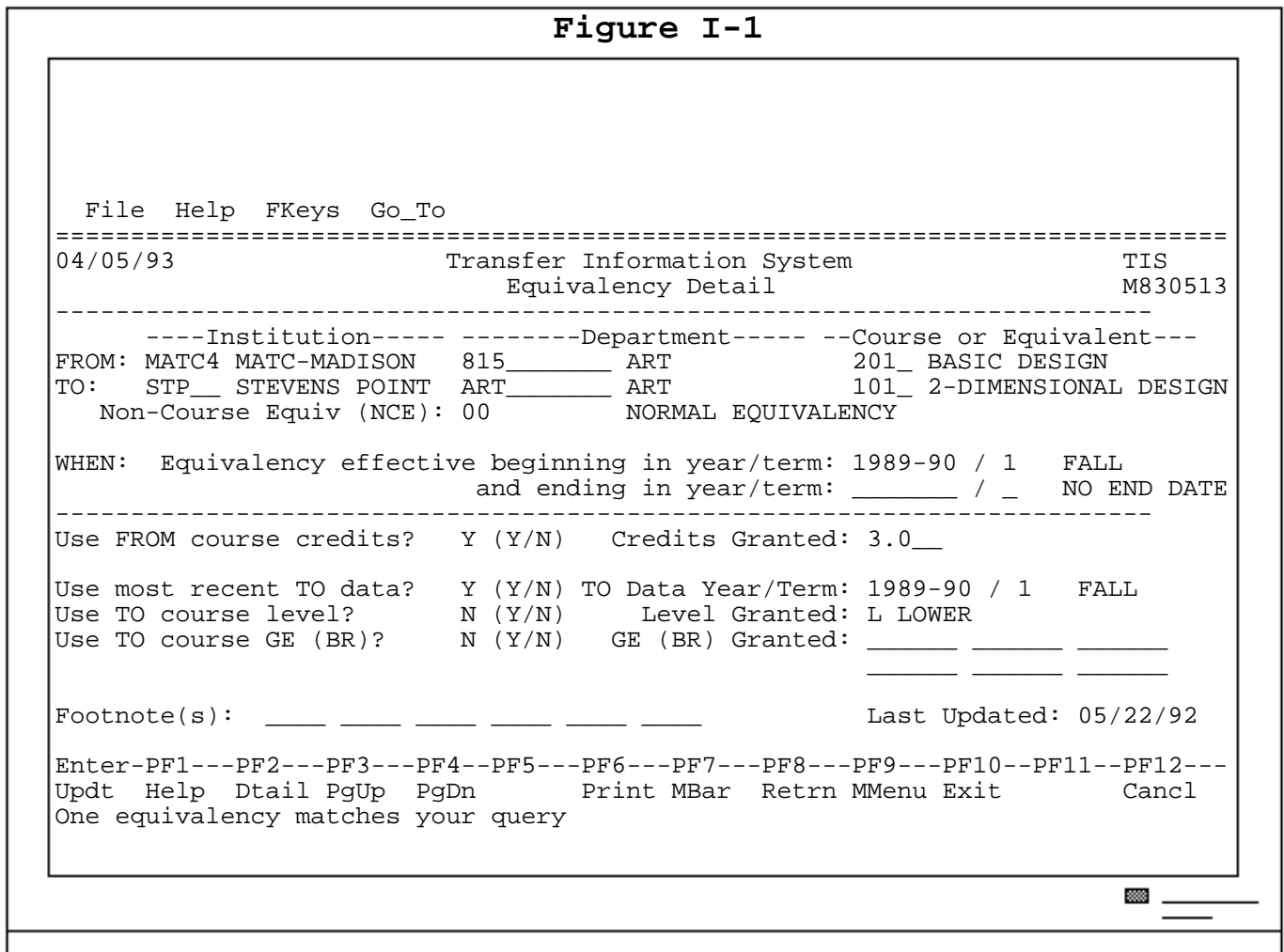
\* Use the Menubar function key (F7) or the arrow keys to move the cursor to the "File" menu item at the top of the screen and press ENTER; then move the cursor to the "Copy this equivalency" item on the list and press ENTER again.

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FIGURES I-1 THROUGH I-5 SHOW HOW TO USE THE COPY FUNCTION TO GRANDFATHER AN EQUIVALENCY:

Figure I-1 shows the "Equivalency Detail" screen for the MATC-Madison course 815-201 at UW-Stevens Point.

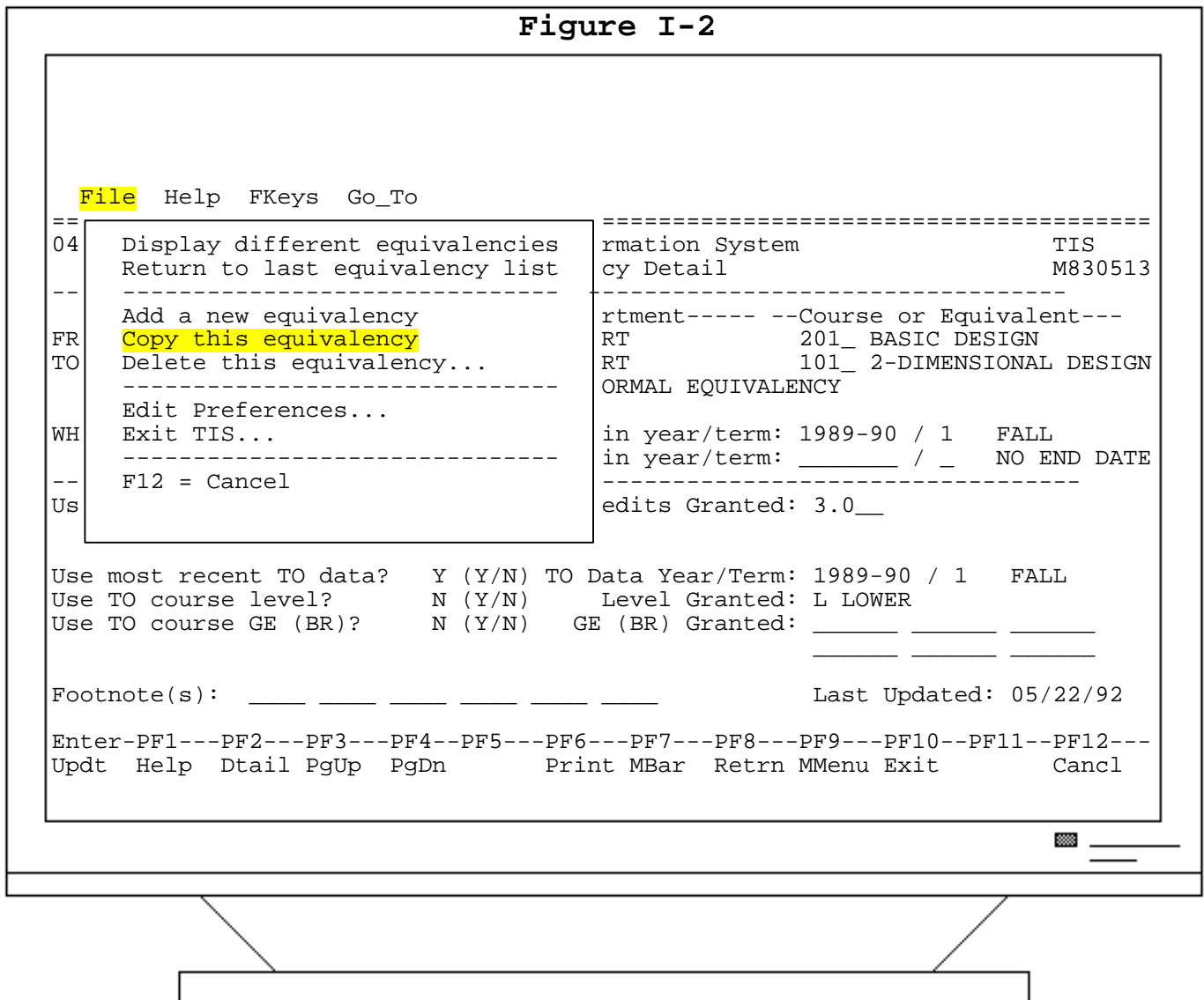
**Figure I-1**



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Figure I-2 shows how to select the "Copy this equivalency" function from the File Menu.

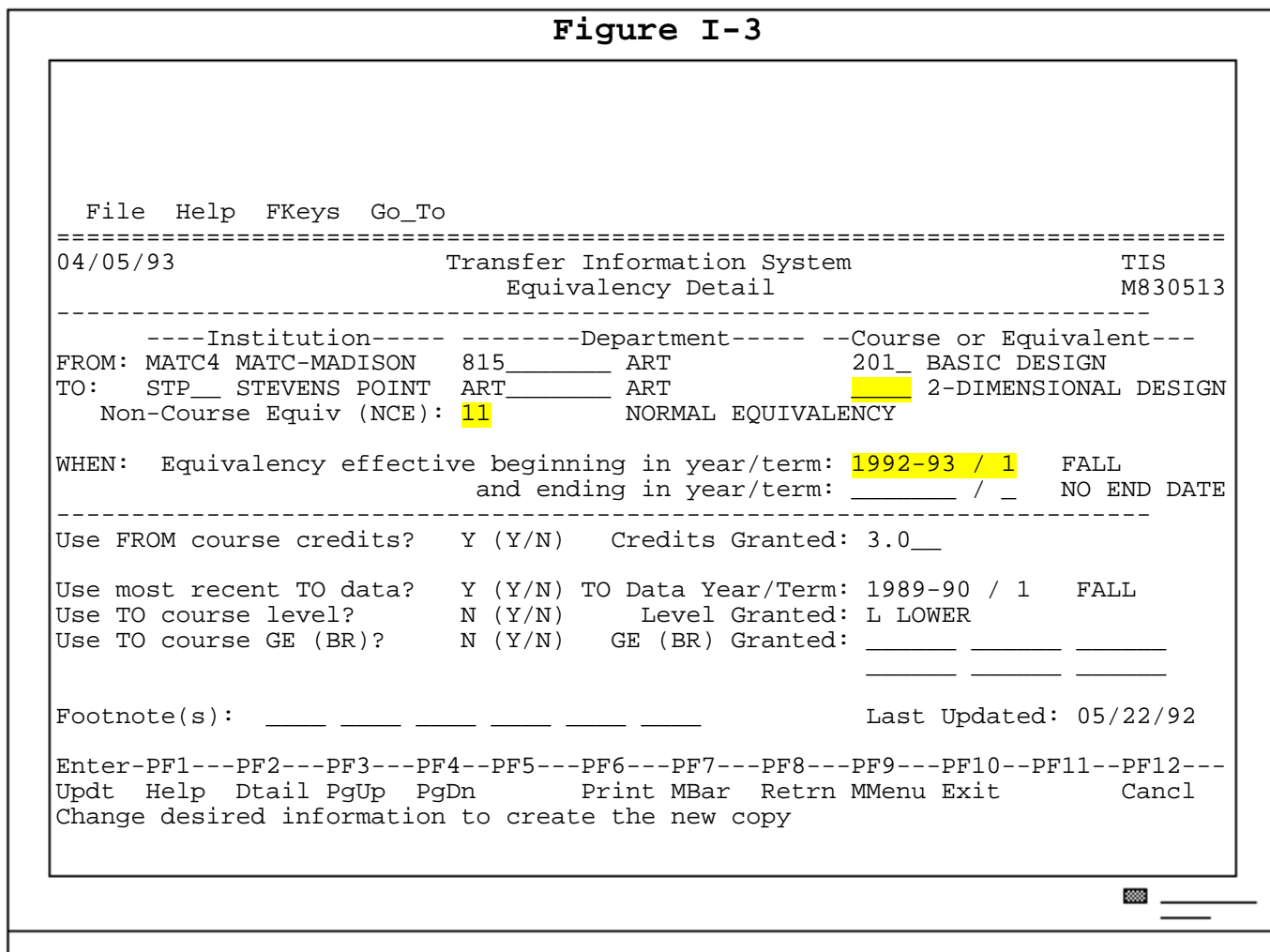
**Figure I-2**



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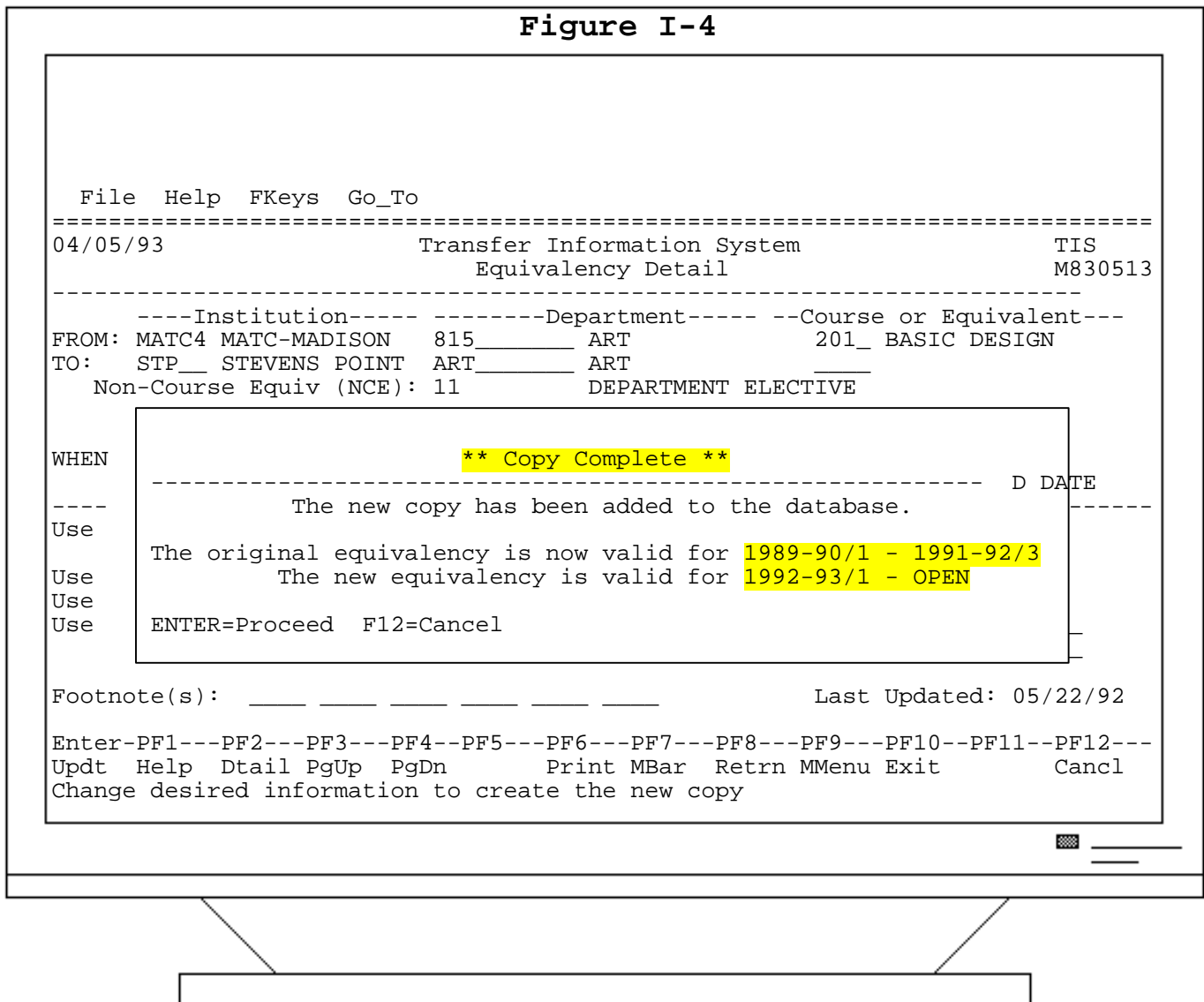
Figure I-3 shows the changes to the TO Course equivalent and Begin Year/Term for the new equivalency.

**Figure I-3**



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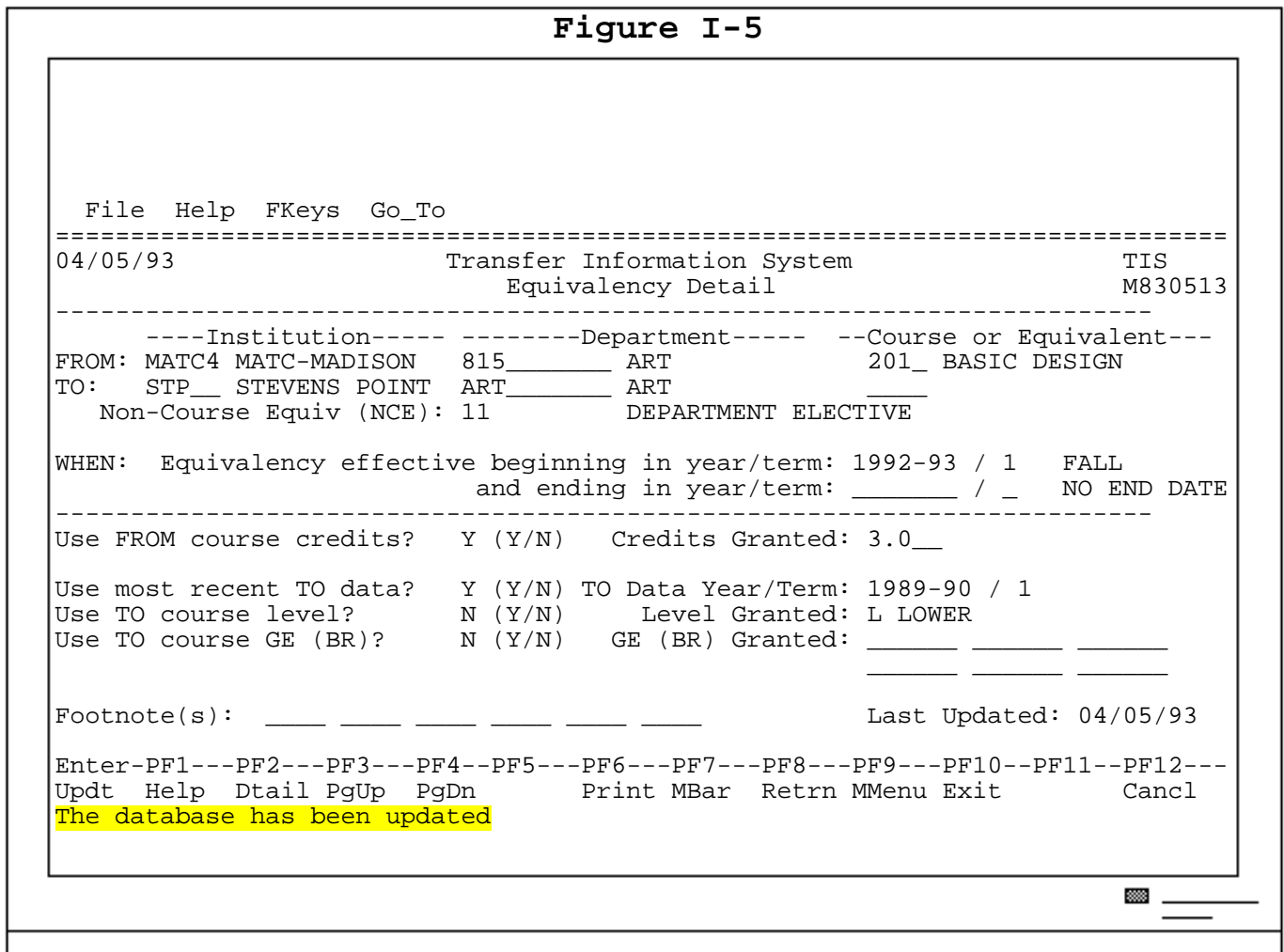
Figure I-4 shows the "Copy Complete" Confirmation Box with the begin and end dates for both the old and new equivalencies.



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Figure I-5 shows that the new equivalency has been added to the data base.

**Figure I-5**



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CASE 2 OF 3

Case 2 is similar to the previous case, but there has also been a change in the name of the receiving department (e.g. the DRAMA department has changed to the THEATRE department). The receiving institution decides to award credit under the old department name to students who took the FROM course prior to the change. The primary fields to use in this situation are the Most Recent TO Data Default field and the TO Data Year/Term fields which control the department name associated with the equivalency.

The following steps may be used to create such an equivalency associated with a previous department:

1. Select Option 1 "Course Equivalencies" from the Maintenance Menu. (Refer to "How to Use the Maintenance Menu" [Sect. A] for help.)
2. Use the "Find Which Equivalencies" screen to retrieve the equivalency that you want to grandfather. (Refer to "How to Search for Equivalencies" [Sect. C] for help in retrieving equivalencies.)
3. This will return the "Equivalency Detail" screen for the existing equivalency (Figure I-6).
4. To establish the "grandfathered" equivalency, update the Equivalency End Year/Term to the last year/term that the equivalency should be in effect. Set the Most Recent TO Data Default field to 'N' ('No') and the TO Data Year/Term fields to the year/term of the previous version of the TO Department. Update additional fields on the screen as appropriate and press ENTER. The "Equivalency Detail" screen will be returned with the message "The database has been updated" at the bottom (Figure I-7). (Refer to "How to Use HELP" [Sect. B], "How to Use the Non-Course Equivalent (NCE) Field" [Sect. G], and "How to Use the Equivalency Default Fields" [Sect. H] for help in updating the fields.)
5. Establish the new equivalency by first selecting the "Copy this equivalency" option from the File Menu\* (Figure I-8).

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6. The same "Equivalency Detail" screen will be returned with the message at the bottom of the screen prompting you to make the necessary changes to the new equivalency. Change the Equivalency Begin Year/Term and End Year/Term to the effective dates of the new equivalency. The Most Recent TO Data Default field should be set to 'Y' ('Yes') and the TO Data Year/Term fields should be blank or equal to the year-term of the most recent version of the TO Department. Update additional fields on the screen as appropriate and press ENTER. The "Equivalency Detail" screen will be returned with the message "The database has been updated" at the bottom (Figure I-9).

\* Use the Menubar function key (F7) or the arrow keys to move the cursor to the "File" menu item at the top of the screen and press ENTER; then move the cursor to the "Copy this equivalency" item on the list and press ENTER again.

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FIGURES I-6 THROUGH I-9 SHOW HOW TO USE THE "GRANDFATHERING" FUNCTION TO ASSOCIATE A PREVIOUS DEPARTMENT NAME WITH AN EQUIVALENCY:

Figure I-6 shows the "Equivalency Detail" screen for UW Colleges course COM 349 at UW-Stevens Point prior to making any updates.

**Figure I-6**

```

File  Help  FKeys  Go_To
=====
04/05/93                Transfer Information System                TIS
                        Equivalency Detail                                M830513
=====
----Institution-----      -----Department-----  --Course or Equivalent---
FROM: UWC__ COLLEGES        COM_____ COMMUNICATION    349_ CHILD THEATRE PROD
TO:   STP__ STEVENS POINT  THEA_____ THEATRE        _____
      Non-Course Equiv (NCE): 11          DEPARTMENT ELECTIVE

WHEN:  Equivalency effective beginning in year/term: 1989-90 / 1   FALL
      and ending in year/term: _____ / _   NO END DATE
=====
Use FROM course credits?  Y (Y/N)   Credits Granted: 3.0__

Use most recent TO data?  Y (Y/N)   TO Data Year/Term: 1991-92 / 1   FALL
Use TO course level?      N (Y/N)   Level Granted: L LOWER
Use TO course GE (BR)?    N (Y/N)   GE (BR) Granted: _____
                                           _____

Footnote(s):  _____                Last Updated: 02/03/93

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Updt  Help  Dtail PgUp  PgDn      Print MBar  Retrnn MMenu Exit      Canc1
The database has been updated
  
```



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Figure I-7 shows the changes to the End Year/Term, Most Recent TO Data Default and the TO Data Year/Term fields. These changes establish the "grandfathered" equivalency.

**Figure I-7**

```

File  Help  FKeys  Go_To
=====
04/05/93                Transfer Information System                TIS
                        Equivalency Detail                        M830513
=====
----Institution-----
FROM: UWC__ COLLEGES          COM_____ COMMUNICATION    349_ CHILD THEATRE PROD
TO:   STP__ STEVENS POINT    DRAM_____ DRAMA
      Non-Course Equiv (NCE): 11          DEPARTMENT ELECTIVE

WHEN:  Equivalency effective beginning in year/term: 1989-90 / 1  FALL
      and ending in year/term: 1992-93 / 3  SUMMER
=====
Use FROM course credits?  Y (Y/N)  Credits Granted: 3.0__

Use most recent TO data?  N (Y/N)  TO Data Year/Term: 1989-90 / 1  FALL
Use TO course level?     N (Y/N)  Level Granted: L LOWER
Use TO course GE (BR)?   N (Y/N)  GE (BR) Granted: _____
                                           _____

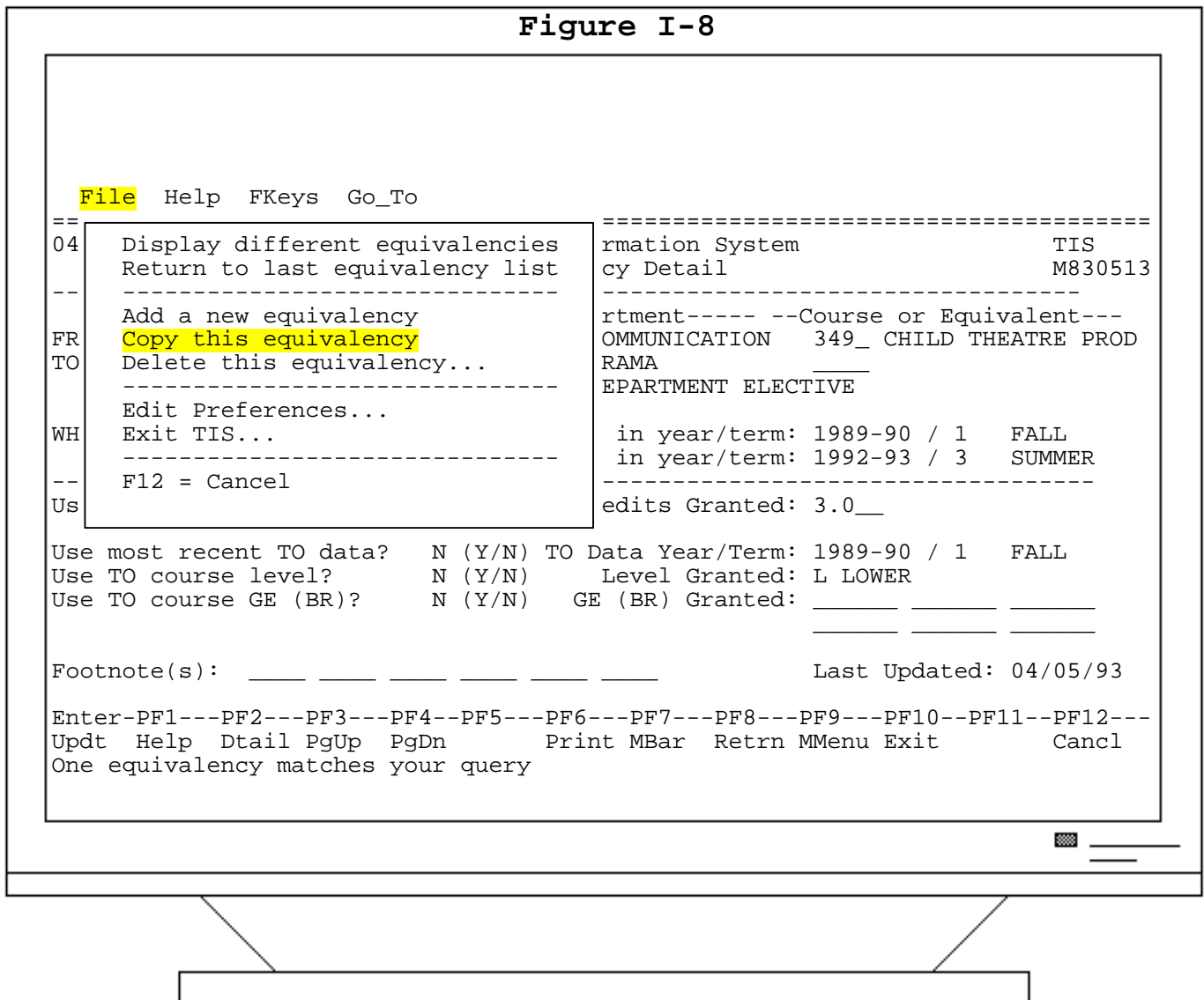
Footnote(s):  _____                Last Updated: 04/05/93

Enter-PF1---PF2---PF3---PF4--PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Updt  Help  Dtail PgUp  PgDn      Print MBar  Retrnn MMenu Exit      Canc1
The database has been updated
  
```

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Figure I-8 shows how to select the "Copy this equivalency" function from the File Menu.

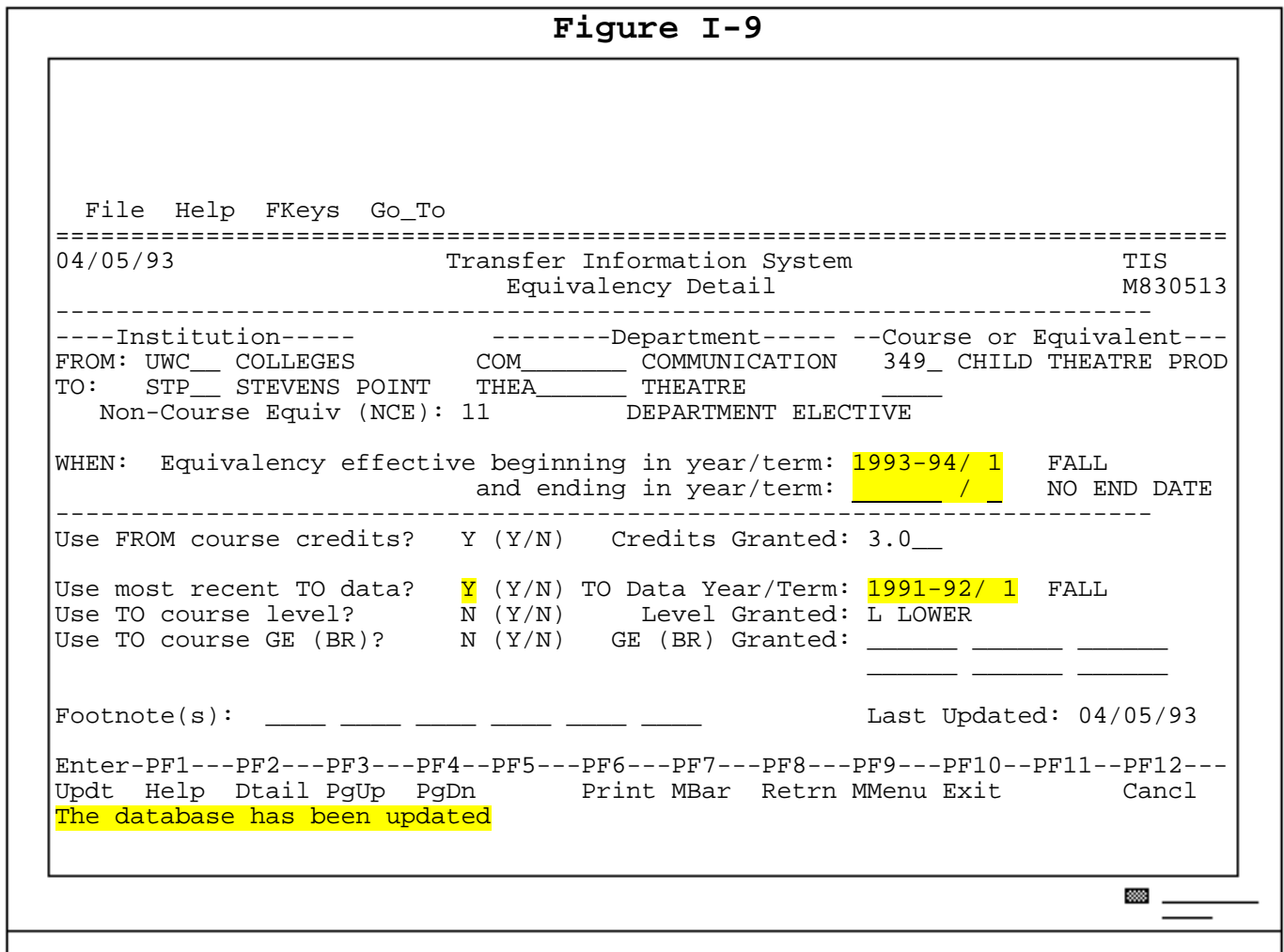
**Figure I-8**



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Figure I-9 shows the changes to the Begin Year/Term, End Year/Term, Most Recent TO Data Default and the TO Data Year/Term fields. These changes establish the new equivalency.

**Figure I-9**



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CASE 3 OF 3

In Case 3, there has been a change to the receiving course which is part of the transfer equivalency. For example, the TO Course equivalent which previously could be used in satisfying a GE (Breadth) requirement has changed so that it can no longer be used. If the receiving institution decides to grandfather the characteristics of the old version of the course to students who took the FROM course prior to the change, the steps below should be followed. The primary fields to use in this situation are the Most Recent TO Data Default field and the TO Data Year/Term fields which control the version of the course associated with the equivalency.

The following steps may be used to create such an equivalency associated with a previous version of a course:

1. Select Option 1 "Course Equivalencies" from the Maintenance Menu. (Refer to "How to Use the Maintenance Menu" [Sect. A] for help.)
2. Use the "Find Which Equivalencies" screen to retrieve the equivalency that you want to grandfather. (Refer to "How to Search for Equivalencies" [Sect. C] for help in retrieving equivalencies.)
3. This will return the "Equivalency Detail" screen for the existing equivalency (Figure I-10).
4. To establish the "grandfathered" equivalency, update the Equivalency End Year/Term to the last year/term that the equivalency should be in effect. Set the Most Recent TO Data Default field to 'N' ('No') and the TO Data Year/Term fields to the year/term of the previous version of the TO Course. Update additional fields on the screen as appropriate and press ENTER. The "Equivalency Detail" screen will be returned with the message "The database has been updated" at the bottom (Figure I-11). (Refer to "How to Use HELP" [Sect. B], "How to Use the Non-Course Equivalent (NCE) Field" [Sect. G], and "How to Use the Equivalency Default Fields" [Sect. H] for help in updating the fields.)
5. Establish the new equivalency by first selecting the "Copy this equivalency" option from the File Menu (Figure I-12).

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6. The same "Equivalency Detail" screen will be returned with the message at the bottom of the screen prompting you to make the necessary changes to the new equivalency. Change the Equivalency Begin Year/Term End Year/Term to the effective dates of the new equivalency. The Most Recent TO Data Default field should be set to 'Y' ('Yes') and the TO Data Year/Term fields should be blank or equal to the year-term of the most recent version of the TO Course. Update additional fields on the screen as appropriate and press ENTER. The "Equivalency Detail" screen will be returned with the message "The database has been updated" at the bottom (Figure I-13).

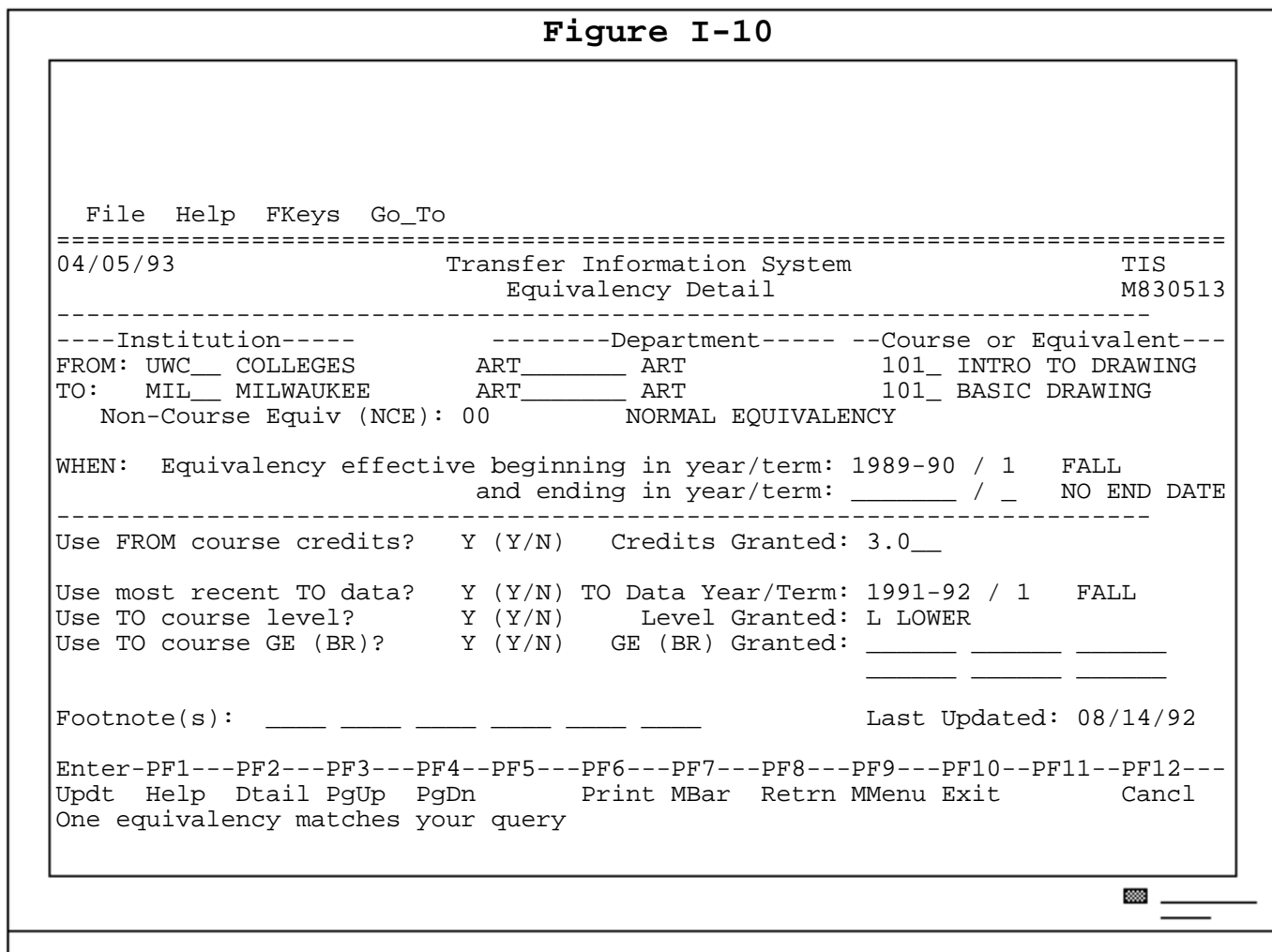
\* Use the Menubar function key (F7) or the arrow keys to move the cursor to the "File" menu item at the top of the screen and press ENTER; then move the cursor to the "Copy this equivalency" item on the list and press ENTER again.

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FIGURES I-10 THROUGH I-13 SHOW HOW TO USE THE "GRANDFATHERING" FUNCTION TO ASSOCIATE THE CHARACTERISTICS OF A PREVIOUS COURSE WITH AN EQUIVALENCY:

Figure I-10 shows the "Equivalency Detail" screen for UW Colleges course ART 101 at UW-Milwaukee prior to making any updates.

**Figure I-10**



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Figure I-11 shows the changes to the End Year/Term, Most Recent TO Data Default and the TO Data Year/Term fields. These changes establish the "grandfathered" equivalency.

**Figure I-11**

```

File  Help  FKeys  Go_To
=====
04/05/93                Transfer Information System                TIS
                        Equivalency Detail                        M830513
=====
----Institution-----
FROM: UWC__ COLLEGES      ART_____ ART          101_ INTRO TO DRAWING
TO:   MIL__ MILWAUKEE    ART_____ ART          101_ BASIC DRAWING
      Non-Course Equiv (NCE): 00          NORMAL EQUIVALENCY

WHEN:  Equivalency effective beginning in year/term: 1989-90 / 1  FALL
      and ending in year/term: 1989-90 / 3  SUMMER
=====
Use FROM course credits?  Y (Y/N)  Credits Granted: 3.0__

Use most recent TO data?  N (Y/N)  TO Data Year/Term: 1989-90 / 1  FALL
Use TO course level?     Y (Y/N)  Level Granted: L LOWER
Use TO course GE (BR)?   Y (Y/N)  GE (BR) Granted: A _____

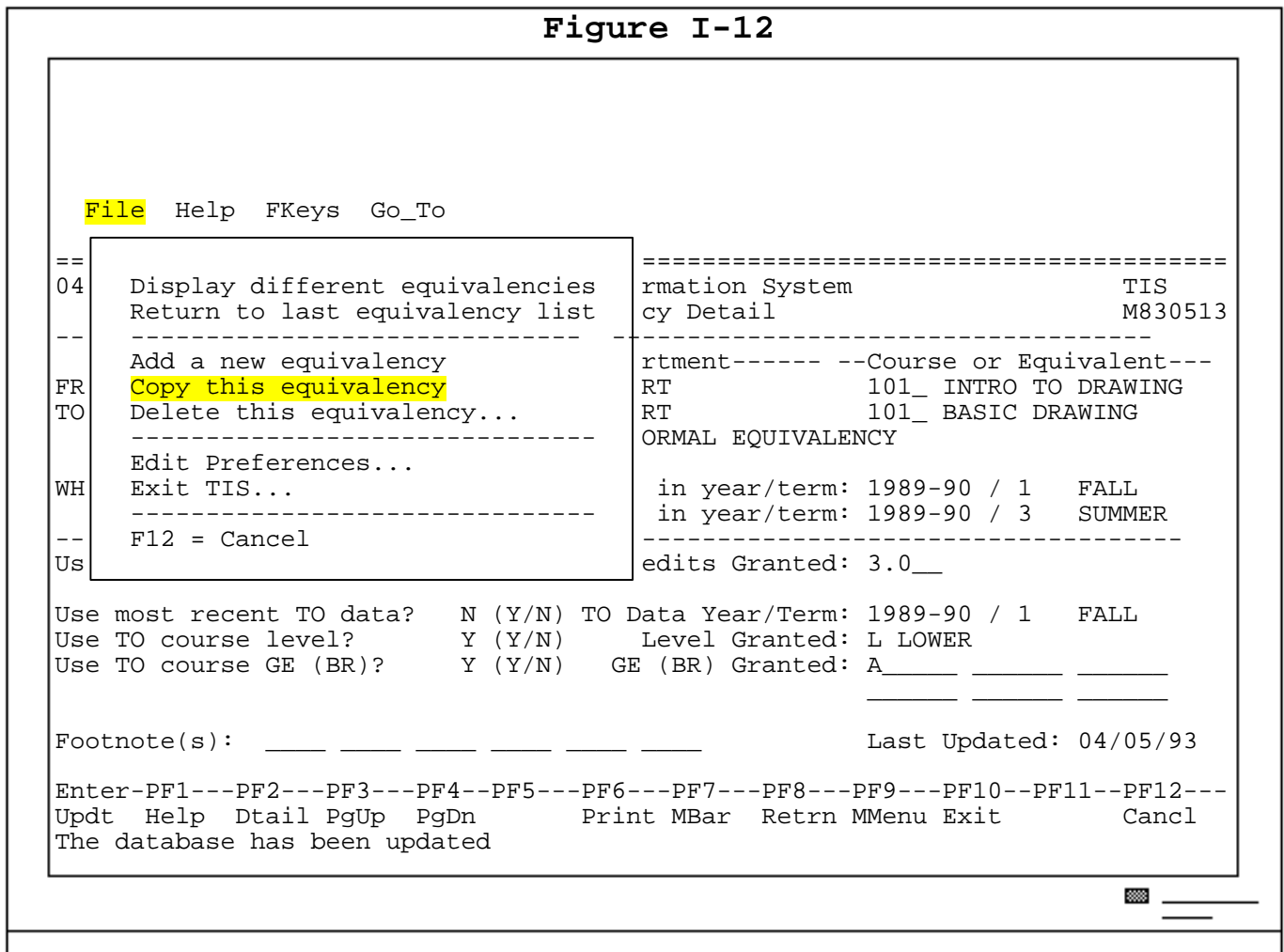
Footnote(s): _____ Last Updated: 04/05/93

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Updt  Help  Dtail PgUp  PgDn      Print MBar  Retrnn MMenu Exit      Canc1
The database has been updated
  
```

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Figure I-12 shows how to select the "Copy this equivalency" function from the File Menu.

**Figure I-12**



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Figure I-13 shows the changes to the Begin Year/Term, End Year/Term, Most Recent TO Data Default and the TO Data Year/Term fields. These changes establish the new equivalency.

**Figure I-13**

