Transfer Credit Agreement Template Guide

Transfer Credit Agreements

Transfer Credit Agreements, also known as Articulation Agreements, are developed to provide a pathway for students who complete a program or a series of courses taken at another institution (the “sending institution”) that articulate into a program at the University of Regina (the “receiving institution”).

The agreement will normally define the number of credit hours a student will receive, the minimum GPA required for admission, the minimum number of credits a student must complete at the University of Regina (the “residency requirement”) to receive a credential, and other specifics like the effective date of the agreement, the length of time of the agreement, what will happen if the sending institution’s program changes, the conditions tied to canceling the agreement, where notice of cancellation is to be delivered, and so on.

This guide and the Transfer Credit Agreement template have been developed to assist you through the process of establishing a transfer credit agreement and help you with using the transfer credit agreement template.

Why establish a transfer credit agreement?

Transfer credit agreements provide students, the sending institution, and the U of R with various benefits. Students can be recruited into upper year courses to compensate for attrition, there are community and reputation benefits, an agreement can provide for efficiencies in the transfer assessment process for programs that get a continuous intake of students from a specific school and program, and they facilitate the mobility of students who want to pursue options to further their education.

Step 1 - Informal to Formal Discussions

The first step in establishing a transfer credit agreement is to have an informal discussion with the potential sending institution. In some cases the institution will reach out to the U of R, a faculty may have identified a potential opportunity, or the Registrar’s Office will identify a potential opportunity to facilitate the transfer of students through an analysis of transfer credit volumes.

In all cases, the institution must fit within the definition of an approved institution of the Undergraduate Transfer Credit Policy. The Registrar’s Office can assist you in making this determination if needed.

The Dean or the Director of your faculty or academic unit as well as the Provost and Vice President Academic should always be kept informed about the discussions and the potential agreement. This is important because both individuals are required to sign off on the agreement once established.

The initial discussion is usually an informal one and the purpose should be to determine whether or not there is interest in establishing the agreement. Once the discussions become more formal, the terms of the agreement need to be discussed. More specifically:

- Is this a good fit for both institutions?
- How do the sending institutions courses map to U of R courses and how many credits will a student receive?
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- What is the minimum number of U of R credit hours a student must complete to be eligible to receive the U of R credential?
- What will be the minimum GPA requirement for admission to the U of R?
- Will the student need a credential for admission? If so, which credential(s)?
- Are there specific majors of the U of R program that the student will qualify for? If so, which one(s)?
- Are there any specific conditions over and above what is specified in the template that will need to be added to the agreement?
- Will all past graduates of the sending institution’s program be eligible for admission or will a specific graduation date and beyond apply to students of the sending institution?
- When will the agreement come into effect and for how long?

The formal discussions should include the appropriate academic officers from each institution (like a department chair or head, associate dean, etc.).

**Step 2 - Complete the Transfer Credit Agreement template**

The information you will need to complete the template follows:

- Full name of the institution
- Abbreviated name of the institution (SaskPolytech for example)
- Legal address of the institution
- The name and title of the Sr. Academic Officer (Provost level preferably)
- The name and title of the Dean or Director of the faculty of the sending program
- The sending institutions full program name (Diploma in Accounting, for example)
- The sending institutions abbreviated program name (DA for example and in some cases it will be the same)
- The full name of the U of R program (Bachelor of Business Administration for example)
- The abbreviated name of the U of R program (BAdmin for example)
- The agreement cancellation or notice contact name, title, and fax number of the sending institution
- The effective date of the agreement (usually the date of anticipated signing)
- The specific grad date of students from the sending instruction that the program applies to (usually no more than 5 years in the past)
- The term of the agreement (between 3 and 7 years)
- The number of credit hours the student’s will receive
- The number of credit hours required for residency
- The minimum GPA required for admission

Once you have all of the required information, open the Transfer Credit Agreement Template and enter the required information. You may get a security warning on opening of the template, click the “Enable Content” button to proceed.

Click the OK button and save your document using “Save As” and naming it as follows:

*Transfer Agreement-School Abbreviated Name-U of R Abbreviated Program Name-Current Year (Transfer Agreement-SaskPolytech-BAdmin-2018)*

The template will not save your work until you click ok so if you click cancel, you will need to re-open the template and start from scratch.
Note: You will need to edit section 2.08. List the specific majors in this section. If there is no specific major(s) type "Not Applicable".

Step 3 - Review the agreement

Review the agreement. Manual edits can be made but any changes to the language of the agreement must be reviewed by the Registrar. Major changes in language will be sent to legal for review. Use track changes for any changes to language that are made.

Step 4 - Send the agreement to the Registrar for review

The Registrar will review the agreement and advise of any changes that need to be made. This step is critical before any further discussions occur with the sending institution.

Step 5 - Send the agreement to the sending institution for review

The sending institution should be given an opportunity to review the agreement before it is signed to ensure there is clear understanding and that the agreement reflects the understanding of the sending institution. Any changes to the agreement need to be reviewed by the Registrar. Some changes may need legal approval.

Step 6 - Arrange for the signing of the Agreement

Once an agreement has been established that the parties agree to, it needs to be signed by the respective Academic Officers of the sending institution and the U of R. In some cases a formal signing event is arranged so that the agreement can have the appropriate publicity. Not always necessary but this can help promote the agreement in a positive way.

Step 7 - Send a copy of the signed agreement to the Registrar and the Associate Vice President Academic's Office

The Registrar's Office will maintain a copy of the transfer credit agreement and input the details of the agreement into the appropriate student systems. They will also send you a reminder about six months prior to the end of the agreement for review and renewal.