**Transfer Portal Demo Script**

This can be used as a resource to create an internal/external Transfer Portal demo unique to your institution. We recommend creating a structured click path/story for the audience you are presenting to.

The **Transfer Portal** is a student-facing, web-based technology that provides prospects with key information around transfer credit and time-to-degree to engage them early in the exploration process and guide them through application. In this video, we will walk you through a demo version of the Transfer Portal but all the same functionality is available to your university.

To illustrate how the Transfer Portal works, let’s follow Taylor, a student who is interested in transferring to fictional Woodley University:

* Like most transfer students, Taylor visits your Admissions website as part of the exploration process. Here, Taylor sees a link to access the Portal and a brief description of the main benefits. Instead of trying to navigate through multiple links to find information, the Portal provides Taylor with a one-stop-shop to answer their questions.
* The Portal is designed to mimic the look and feel of the university’s website, providing a seamless experience to potential transfer students.

***Major Explorer:***

*Click into the Portal and click ‘Get Started’ to go to the Majors page. Type in ‘Marketing’ and scroll through the list to the business management category and select “General Business”.*

* Taylor begins by exploring the majors available on campus and selecting their entended major. The Transfer Portal pulls the list of majors from your student information system. Your dedicated EAB support team will work with you to refine the list of majors you want to display to students as part of your portal implementation process.
* If Taylor knows what major they are interested in, they can search for it using the search box. Taylor can also scroll through the list and read about the different majors offered at your institution. In the portal, students can compare up to 3 majors and return at any time to change their selection.
* You’ll notice that tiles for each major appear on the right side of the screen. There are no credits applied yet, but as Taylor enters past coursework, the tile will update **in real-time. Let’s take a look at how that works.**

***Past Colleges:***

*Click continue to move to the ‘past colleges’ page. Click ‘add college’ and type in ‘wash’ to select ‘Washington County Community College.’*

* Once Taylor has selected their majors, they are ready to enter past coursework. Taylor begins by selecting past colleges. **This list of colleges pulls from your student information system.** Again, your dedicated support team will with you to configure this list and ensure college names are displaying properly. Because we know that transfer students often take coursework from multiple institutions, portal users can easily add more than one institution.

***Adding A Course:***

Click ‘Add Course,’ type in ‘Eco 101’ and select ‘EC101 Prin:Economics I

* Taylor uses the search box to add past coursework. Any course that you have an equivalency for in your student information system will be visible to students. As Taylor selects courses, you can see that the tiles automatically update with progress-to-degree.
* Here’s what happens behind the scenes: The Portal takes information directly from your Student Information System and Degree Audit system on a daily basis. When a student adds a course, the Portal searches for the relevant equivalency and then runs that equivalency against degree rules for the selected majors to determine what degree requirements the course satisfies. In this case, maybe Taylor’s Economics 101 is equivalent to Economics 101 at Woodley, and Economics 110 satisfies a quantitative requirement for the marketing and business management degrees.
* This process takes a holistic approach to degree planning by showing students how their course sequence will apply towards their selected majors, not just one-to-one course equivalencies.

*Hover over the green icon that asks students to create an account*

* Notice the green icon that appeared when Taylor entered the first course. In our research, we found that students were hesitant to use sites that required them to create an account at the outset. Instead of forcing account creation, we prompt portal users at various points to create accounts and save their work. When students create an account, we are able to collect additional information like birthdate, currently enrolled institution, and GPA to better understand your pipeline and customize outreach.

***\*\* Switch to a logged in account for Taylor with additional courses added in \*\****

***Username: XXX***

***PW: XXX***

*Type in ‘Env’, scroll to bottom of list, and click the ‘add new course’ box.*

* At times, there will be courses that students have taken that you have not seen before. In these instances, the Transfer Portal prompts students to submit the new course for review. After an account is created, Taylor will be able to add the Environmental Science course for review. You can see that it shows up as pending review for Taylor. An email is also sent to a designated staff member and the course is added to a list for review on the Admissions-facing dashboard.

**Other Credits**

*Continue to ‘Other credits’ page. Type in ‘Span’ and select ‘Spanish Language’ from the AP exam section. Type ‘4’ into score box.*

* Students can also enter exams that may count for credit like AP, IB, and CLEP. Students often enter college with these types of credit but forget to submit them for review. Here, Taylor took AP Spanish Literature and Culture in high school. Because most exam equivalencies are score dependent, we prompt Taylor to add the score to see how it applies to their major.
* Your dedicated support team will work with you to review how this information is currently stored and ensure it is pulled properly into the Portal.

**Summary**

*Go to Summary section. Click ‘+add’ next to “International Business” and then click on ‘View Detail.’ Navigate through the tabs – hovering over Degree Completion tab and scrolling through.*

* Once all the coursework is entered, the Transfer Portal can recommend majors where students are closer to a degree. Some students have their heart set on a specific degree, but others are most interested in getting a degree as quickly as possible. This ability to recommend majors is valuable in helping students save time and convincing them of the value of transferring. We see here, that Taylor is actually closer to an International Business degree than either of the other selected majors.
* To support major exploration, Taylor can click on the majors at any time to learn more to:
  + Assess progress to degree against major requirements;
  + View information on careers related to the major, including salary ranges, hiring demand, skills needed, and common education and experience. This information further affirms the value of pursuing a 4-year degree. The information for these careers is pulled directly from ONet, a tool developed by the US Department of Labor, and can be set to display state or national

data.

**Checklist & Campus Resources**

*Return to Summary page and click ‘view checklist’. Click around on the various checklist items.*

* Once Taylor is convinced that Woodley looks like a good fit, they can move on to their Checklist and explore Campus Resources. The checklist can be customized by your team and is meant to break the complex process of transferring down into bitesize chunks. The information included in each step provides guidance and insight to keep Taylor on track. It can link to existing tools that may have been difficult for Taylor to locate on your website, reinforcing the vision of the Portal as a place to find the right information at the right time.
* As Taylor works their way through the process, Taylor can mark items as complete. This information is fed back to the Admissions team through the Admissions-facing dashboard so that transfer counselors can see where students may be getting stuck in the process and proactively nudge them along.

Click on Campus Resources tab and click through Campus Resources.

* If Taylor wants to learn more about Woodley’s value as a transfer destination and other transfer student resources available, they can click into Campus Resources to learn more.

**Submit a question**

*Click on ‘contact a counselor’ in top right corner to open the popup. Have a question copied and ready to paste into box.*

* If Taylor has a question, they can reach out to a Transfer Counselor. In this case, Taylor may wonder when their Environmental Science course will be reviewed. The email goes to a specified email address and can also be viewed through the Admissions dashboard within the portal.
* With the Portal’s help, Taylor is able to explore Woodley, select their best-fit major, and navigate the often-complex path of transferring.