

# Summary of the Portal Planner



## Used in Setting Up & Maintaining Your Transfer Portal

Includes making configuration decisions, data decisions, and other strategic decisions.



## A Reference Point for Your Institution & EAB

A shared reference guide in understanding what transfer portal decisions were made and a go-to reference to make new decisions

Name	Updated
Value Stream	Jun 5, 2021 by Allison-Matthews
Implementation	Jun 15, 2021 by Gretchen-Southaker
Transfer Portal Planner.docx	Today by Gina Schorn
Peoplesoft Program Load Templates.xlsx	Today by Gina Schorn
EAB's Recurring Support_Transfer Portal.pdf	Jul 29, 2020 by Haley Patrick



## Accessing Your Portal Planner

Your Institution's Portal Planner is stored in your shared EAB Box folder. Your Strategic Leader or the EAB Partner Support Team (PST) at [TransferTechSupport@eab.com](mailto:TransferTechSupport@eab.com) can give you access to this folder.