Transfer Portal Office Hours

February 7, 2024

EAB Experiences
TRANSFER PORTAL

Connecting to Audio

Refer to the meeting confirmation email you received in your inbox.

Using Your Computer Speakers

If you select the "Computer Audio" option, please be sure that your speakers or headphones are connected.

Using Your Telephone

If you select the "Phone Call" option, please dial in with the phone number and meeting ID provided.

Date Time: Mar 31, 2020 03:00 PM Eastern Time (US and Canada)

Join from PC, Mac, Linux, iOS or Android: Click Here to Join

Note: This link should not be shared with others; it is unique to you.

Add to Calendar Add to Google Calendar Add to Yahoo Calendar

Or iPhone one-tap

US: +16468769923,,511418667# or +13126266799,,511418667#

Or Telephone:

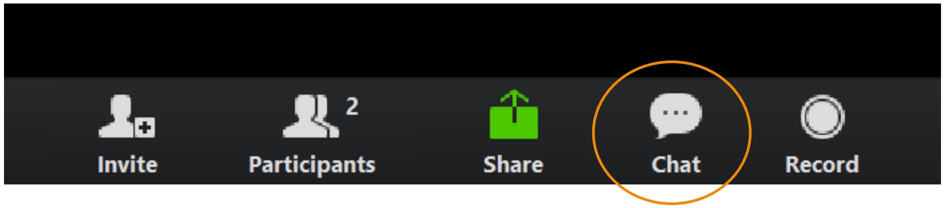
Dial(for higher quality, dial a number based on your current location):

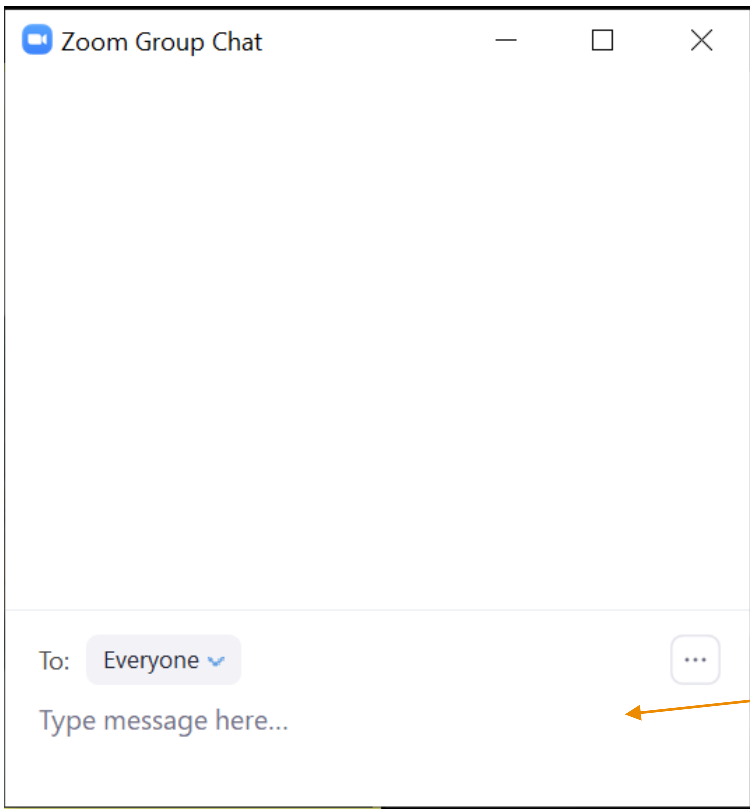
US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782

Meeting ID: 511 418 667

International numbers available: https://eab.zoom.us/u/abLkP09Nci

Using Zoom





Asking a Question

To ask a question, navigate to the chat button at the bottom of your screen and type it into the chat panel, or unmute yourself and ask your question verbally.

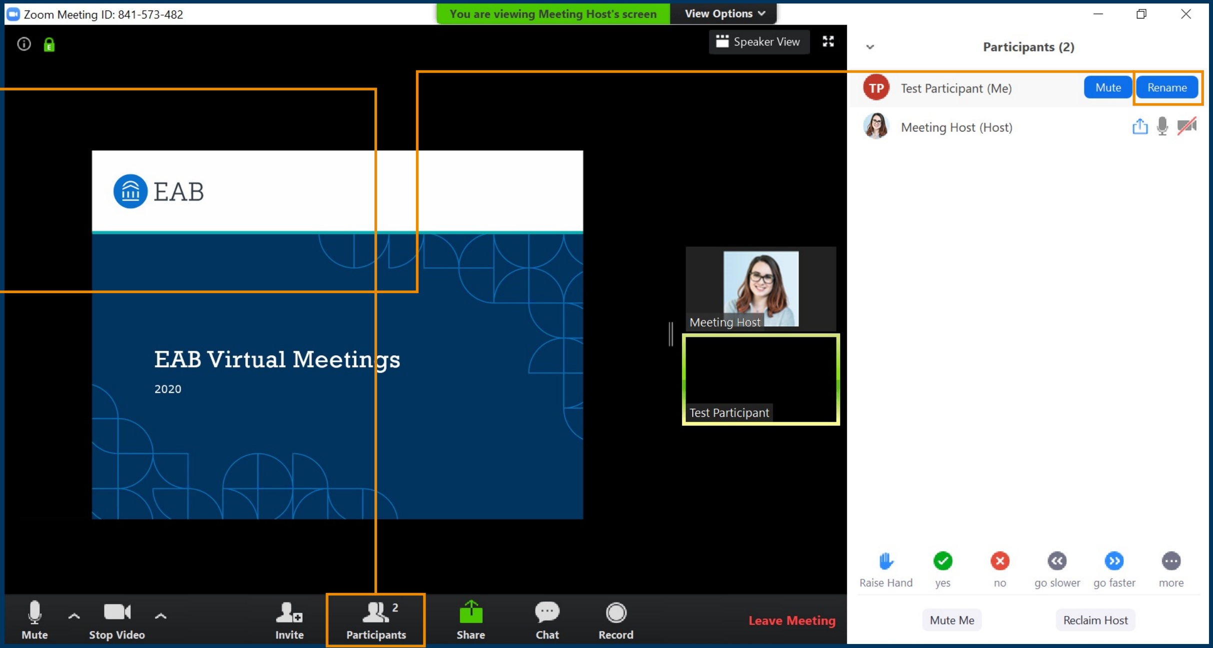
After the session, a member of our team will be in touch to follow-up on your questions individually if they were not answered during the session.

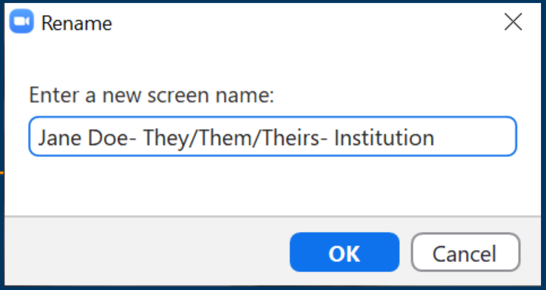
Type your question here

Update your name (and include your institution)

Update Your Name

- Click **Participants** in your menu bar.
- On the right side of the screen, hover over your name, click more, and then click **Rename**.
- Add a dash and your institution name. You may also add your pronouns if you wish (example: they/them/theirs)





Today's Presenters

Kate Manning
Transfer Portal

Gina Schorr
Partner Support

1. Analytics Dashboard Release Walkthrough
2. Analytics Template Resource Review
3. Pending Courses Workflow Deep Dive

Analytics Dashboard Updates

Further data points to showcase your Transfer efforts

Utilization Summary Dashboard
- New filter at top Distinct Users/Account Created

New dashboard: Staff Activity
Staff activity over time
- Login rates

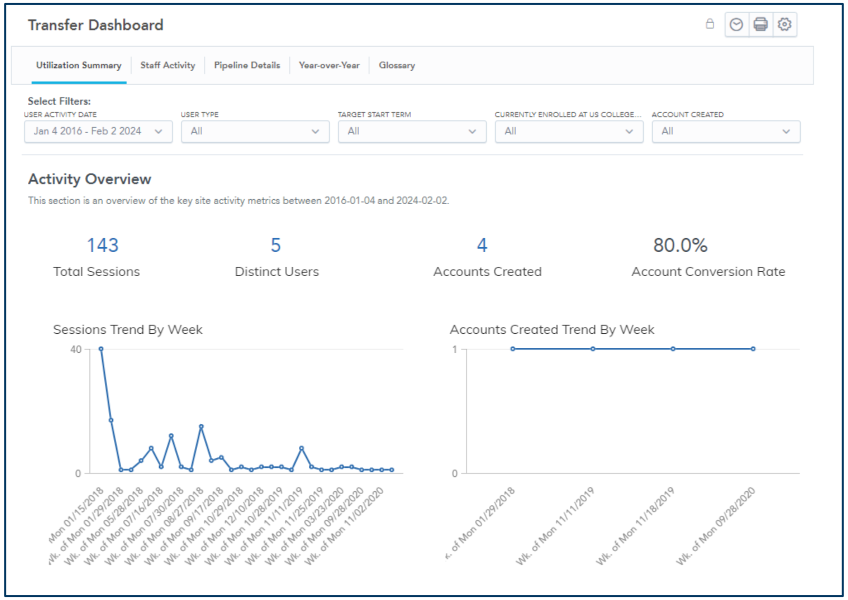
Pending Course Analytics
- Average Pending Course Resolution Time
(Time between Pending Course submitted date and resolution date)

- Pending Course Resolved Status
# of Pending Courses Resolved – Receives Credit
# of Pending Courses Resolved – Does not Receive Credit
# of Pending Courses Resolved – Without Review

Pipeline Details Dashboard
New filter at top for Distinct Users or Total Sessions (default is Distinct Users)

New Dashboard: Year-over-Year
- Session trends by year
- Accounts created trend by year

Glossary
- Updated with new data points



Upcoming:
- Staff export rate data
- Section for "Other Credits"

Analytics Templates

Transfer Portal Help Center

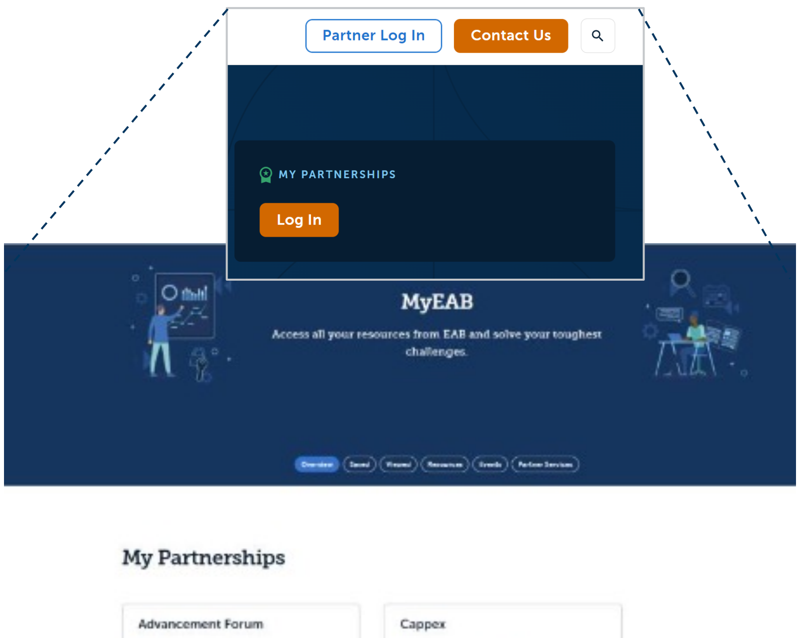
Module 5: Transfer Portal Analytics

- Transfer Analytics Dashboard Overviews
- How to Capture Your Data to Measure Impact
- 5 Templates to guide you through finding meaning in the data
- Request support to package and present findings!
- Join the March 1st Office Hours for more Analytics!
  Registration Link

Transfer Help Center Link

How to Access

1. Log into your eab.com account
2. Click Transfer Portal under My Partnerships
3. Search for “Transfer Resource Center” or “Transfer Help Center”
4. Bookmark! Or “Save for Later”



Pending Course Workflow Deep Dive

Frequently Asked Questions

1. **What is Auto-Resolve? How do I know if our Portal uses Auto-Resolve? Reasons why Auto-Resolve may not work as expected.**

   Email TransferTechSupport@eab.com to turn on auto-resolve or inquire if it is set up for your Portal. Once turned on, it will apply to any pending courses entered from that point but will not apply to courses already in Portal.

   If auto-resolve is turned on, any courses entered that have equivalencies set up in your SIS for the institution they are associated with will be automatically marked as resolved – receives credit and moved to the Resolved Courses Tab.

   If a course is not entered exactly as it appears in your SIS auto-resolve will not resolve the course.

2. **When should I manually match a course?**

   If auto-resolve does not apply to a course, someone must go in and manually match pending courses. The search will pull only courses with equivalency rules set up for the institution the course has been entered. Course rules must first be added to your SIS in order to pull into Portal’s Match search.

3. **Is Matching the same as Resolving a Pending Course?**

   No. The two actions are separate. Only once a resolution status is submitted for the course will it move to the Resolved Courses tab.

4. **How can I see all the pending courses from the same student?**

   Click on the prospective student’s profile and view the Pending Courses tab

5. **Can I export the pending courses list?**

   Yes! You can either export the entire pending course table on the table itself or select specific date ranges using the export tools. Note, data analytics on Pending Courses can be found on the analytics dashboards!

EAB Experiences – Transfer Portal

EAB Experiences
TRANSFER PORTAL

Maximize your Partnership through EAB's Experiences led by Product and industry experts.

Product Training and Support

Onboarding

Learn about the responsibilities of a Transfer Portal Administrator and the systems and resources available to you.

Click here to register.

Audience: New Application Administrators

Office Hours

Chat live with EAB Support Analysts and peers during drop-in Office Hours - come with questions!

Click here to register.

Audience: All Application Administrators

Help Center

Articles and resources to learn how to use each of the features within the Transfer Portal.

Help Center link

Audience: All Portal users

Strategies and Best Practices

Strategy Spotlights

Discussion-based webinar series with an in-depth look into the seven best practice areas that make up EAB's Transfer Maturity Curve as well as examples from Transfer Portal peer institutions.

Click here to register.

Audience: Program Owners, Application Administrators, Functional Leaders

Transfer Resource Center

Strategic resources and events for Transfer Portal partners to help successfully deploy and optimize the Transfer Portal technology.

Transfer Resource Center link

Audience: Program Sponsor, Program Owners, Application Administrators, Functional Leaders

Newsletter

Quarterly email newsletter featuring upcoming and past events, partner highlights, transfer opportunities.

Email delivery

Audience: Program Sponsor, Program Owners, Application Administrators, Functional Leaders

2024 Strategy Spotlight Series

Register for Sessions and Encourage Colleagues to Attend!

Join our series to hear directly from and on behalf of partner institutions to learn about successful practices. Sessions will align with the Transfer Maturity Curve, which focuses on three categories: foundation, awareness, and yield and support.

Building a Strong Foundation for Transfer Student Success

Featuring University of Texas Permian Basin

Learn about UTPB's wraparound advising infrastructure, including having a dual position with a community college.

February 14th

Promoting the Transfer Portal and Other Transfer Student Services

Featuring University of Alaska Fairbanks

Learn about UAF's strategies to promote transfer resources, like creating a Portal promo plan.

June 20th

Improving the Transfer Student Experience

Learn how partners have improved the transfer student experience and streamlined internal processes to support students.

October 16th

Register Online Using This Link!

1) We are in the process of confirming additional partner speakers.

Poll Session Feedback

1. How was today's session?

Questions?

We are here! Let us know if you have joined with a question!