



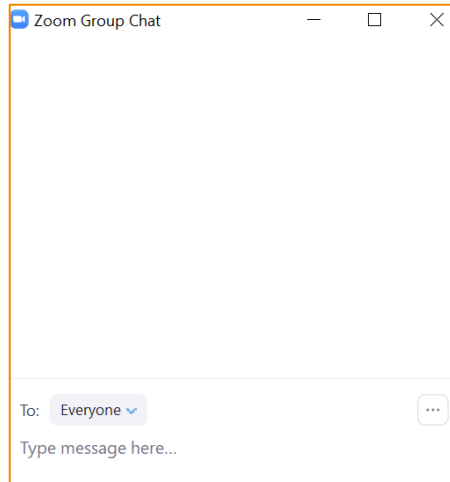
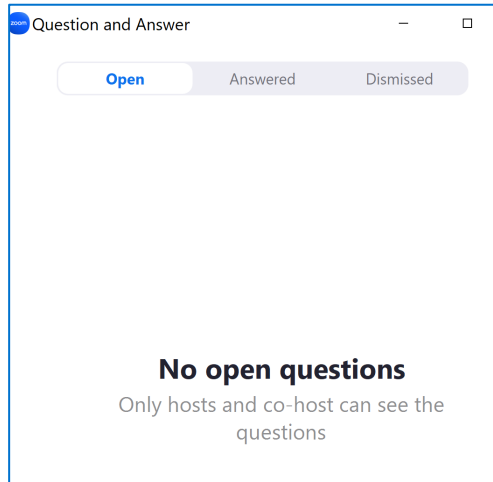
Transfer Portal Office Hours

June 5, 2024



Using Zoom

2



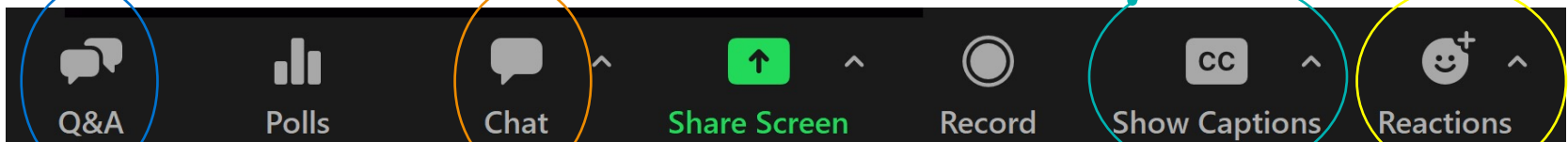
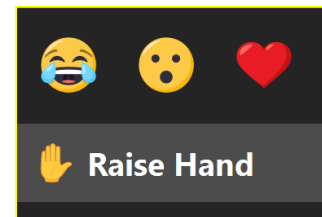
Ask a Question

Use the **Q&A** to ask a question or view previous questions asked

Join the Discussion

Use the **chat** to share your thoughts, experiences and resources

Enable Closed Captions and Show Subtitle or View Full Transcript



Today's Presenters



Gina Schorr

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Launch Consultant, Transfer

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Transfer Portal Content Management



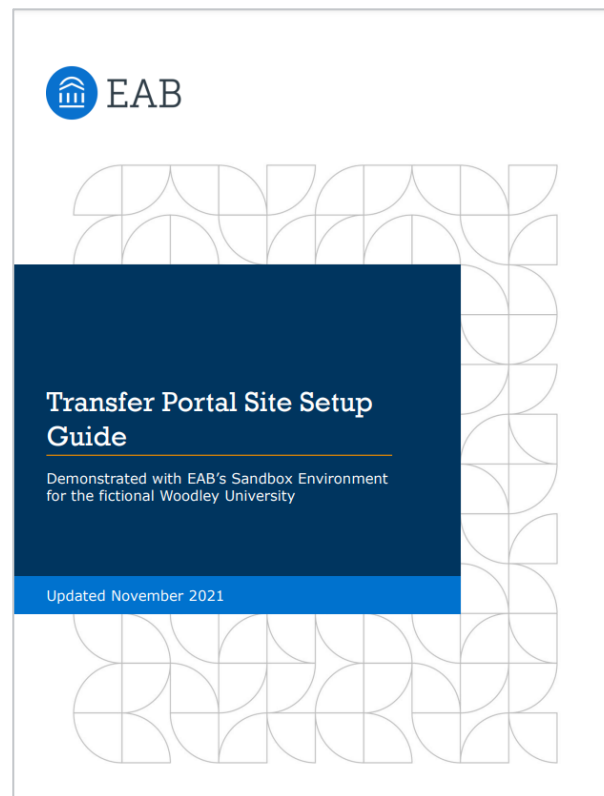
Content Management Resources



SITE MAINTENANCE				
Content Management Summary				
Portal Content	Updates to Consider	Notes	Owner(s)	Last Updated
User Permissions	Review all staff users and level of permissions	Decision on how to handle student .edu accounts:		
Terms	Extend out to new terms in your SIS, turn visibility on, and update display until dates	Decision on how many terms to display:		
Checklist	Review all checklist items for accuracy, order, and detail	Timing for updates:		
Campus Resources	Review all campus resources for accuracy, order, and detail	Timing for updates:		
Customized Messages	Review custom messages and confirm they are updated			
College Display	Review college display details (college name, visibility, and non-transferable indicator)			
New Program/Major Degree Requirements	Builds the degree requirements in the degree audit system for new programs/majors	Timing for updates:		
New Program/Major	Email EAB PST with the list of new programs/majors offered	Timing for updates:		
Program/Major Display Name	Review program/major names for accuracy			
Program/Major Description	Add new and review existing program/major descriptions			
Degree Audit Catalog Year	Email EAB PST with the new degree audit catalog year (annual)	Timing for updates:		

Reference:

- Site Setup Guide available through [this link](#)
- Site Setup Maintenance trainings available in **App Admin Module 2** through [this link](#)



- Located in your Transfer Portal Planner
- Access through your EAB.com Box folder ([template version](#))

- Site Set up Guide
- App Admin Resources on eab.com: <https://eab.com/wp-content/uploads/2022/04/PDF-Transfer-Portal-Site-Setup-Guide.pdf>

Degree Audit Updates



Catalog year needs to be updated with EAB annually!



Catalog Year Update

- Email EAB Partner Support Team (Transfertechnsupport@eab.com) with your most recent catalog year.
- Format is based on SIS

Catalog Year Format by SIS

➤ **DegreeWorks:** When new catalog is finalized and in production, partner to confirm period_start field value for latest degree requirement in dap_req_block table in DW

➤ **Colleague:** When new catalog is finalized and in production, partner to confirm latest catalog year.

➤ **PeopleSoft:** When new requirement terms are finalized and in production, partner to confirm the latest effective date used in any requirement term.

EAB uses the requirement term to dictate what rows of specific program requirement groups, requirement, course lists, etc. to pull into the degree audit process.

Example:

- There is an academic career requirement group called “General Education Requirements” and
- This requirement group has two effective dated rows: 01/01/2020 and 01/01/2023

If EAB uses “Fall 2023” as the prospective student’s requirement term, then the degree audit process will pull in the requirement group row with the effective date of 01/01/2023

User Management



Audit individuals and permissions



Export Staff Users

- Directly from User Management screen in Transfer Portal, export Staff Users
- Identify any users to remove or permissions to adjust
 - Filter based on permission type



Adjust Directly in Transfer Portal

- On the Staff Users page, click into individuals to remove completely or adjust permissions

Permission Glossary

- **Student Data Access** – view and interact with student submitted Transfer Portal data, including pending courses to review
- **Site Setup Access** – ability to adjust program display, custom messages, campus resources, checklists, etc.
- **Analytics Access** – view and download Transfer Portal utilization data
- **User Management Access** – the ability to add, remove, or adjust staff permissions



New Program Requirements

- Review the current list of programs loaded into Transfer Portal.
- Identify programs that are no longer offered for incoming students, are new to the institution (i.e., missing from portal), or have experienced any SIS code changes (i.e., program the same, but codes in portal incorrect).
- Ensure all programs loaded into portal have final degree requirements built in production for your catalog year configuration.



Email EAB PST to Update

- Provide EAB Partner Support Team with the Program Upload template for your SIS found here on the [Transfer Resource Center](#).
- Only include new programs or those with new SIS codes.
- Complete the necessary fields for upload.



Program Display

- Turn off any programs no longer offered to incoming students.
- Review the program display names for accuracy. Adjust directly in the Transfer Portal.
- Add new and review existing program descriptions. Adjust directly in the Transfer Portal.

Custom Messages and Content Management



Review each section for accuracy



Terms and College Display

- **College Display** - review visibility and details. Export from Transfer Portal available for review audit!
- **Terms** - extend out to new terms in your SIS and update visibility directly in Transfer Portal



Student Facing Information

- Customized Messages
- Campus Resources
- Checklist Items

Resources

- Help Center Articles in Transfer Portal
- Site Set up Guide
- App Admin Resources on eab.com: <https://eab.com/wp-content/uploads/2022/04/PDF-Transfer-Portal-Site-Setup-Guide.pdf>



Content Management Steps

Complete for each area of Content Management Summary table



Review Portal Content

- Export to help with collaboration
- Adjust directly in the Portal editor sections



Submit Change Requests

- Notify internal IT contact with necessary adjustments
- Email TransferTechSupport@eab.com for EAB configurations.
 - Catalog Year
 - Program Uploads



Update Portal Planner!

- Document any changes made
- Update dates to reflect latest overview

Common Update Management Questions



1 ***Which content should we focus on updating?***

The Content Management Summary Table lists each area of the Portal to review. Update each section to note the date it was last reviewed.

2 ***How can I do an audit to see which programs/majors are displaying on portal?***

In the Transfer Portal “Site Setup” go to Majors/Programs and filter by “Displaying.” Sort the programs alphabetically and then export each page to put together in Excel for collaborative auditing.

3 ***How do I add new programs/majors to the portal?***

Download the Program Load template specific to your SIS from the Transfer Resource Center, [App Admin Resources linked here](#). Complete this template and email to TransferTechSupport@eab.com for the Partner Support Team to complete.



Transfer Portal Impact Story Working Session



Fixes released

Help Center Articles

Browse the articles below to learn how to use each of the features within the Transfer Portal. Create a bookmark with [this link](#) for easy access. For any product or support questions, please email TransferTechSupport@eab.com.

Help Center Articles



Release Notes



- ▶▶ [Transfer Analytics Release Notes: April 2024](#)
- ▶▶ [Video Walkthrough: Transfer Portal Release 2024.1.0](#)
- ▶▶ [Transfer Analytics Release Notes: May 2024](#)

Transfer Portal Impact Share Out

Upcoming Working Session and Share Out

April 18th
Past Webinar

- Introduction and walkthrough of the Evaluating Transfer Portal Impact at Your Institution
- Toolkit, Impact Templates, Transfer Impact Report Template, and worksheets available on eab.com for download
- **Recording** [linked here](#)

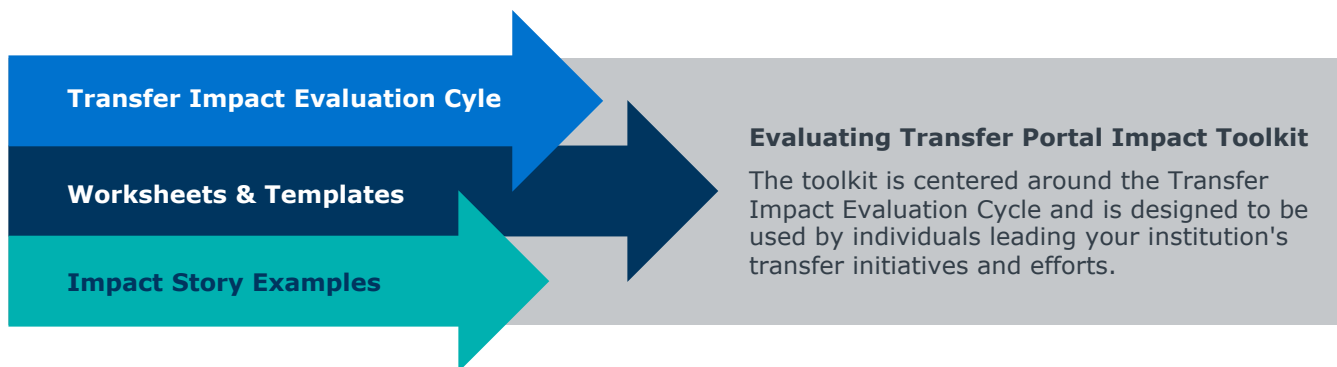
June 5th
Today's Office Hours

- Annual Transfer Portal content management review
- **Working session for impact story or slide creation**

July 10th
Office Hours

- **Impact Story Share Out!**

Evaluating Transfer Portal Impact Toolkit



Celebrate Your Work in an Impact Story

Bonus Fifth Step in the Transfer Impact Evaluation Cycle

Impact Story Creation Process



Identify Your Impact Story

Use your Semiannual or Annual Transfer Impact Report to pinpoint the specific impact story (big or small!) that you'd like to tell.



Visualize Your Story Using the Templates

Using the PowerPoint impact story templates provided by EAB, create a visual. Use the slides to update your leadership team on a semiannual or annual basis about the impactful work your office is doing.



Share Your Impact Story

Celebrate your wins! Share your Impact Story with others.

Impact Inspiration!

Partner Examples.....

Created a non-transferrable course in Banner to allow students to easily see which courses do not transfer for credit.

Launched a personalized email communication to get ahead of common transfer student questions

Established partnership(s) or a dual position with other institutions

Generated automatic course evaluations leading to time savings

New positioning of Transfer Portal leading to increased activity or accounts created

Collected feedback to adjust processes moving forward

Interactive Worksheets



Worksheet: Prepare Your Data Story

[Linked here](#)



Worksheet: Insights, Recommendations, and Value

[Linked here](#)

Create Your Own Value Story Using Our Templates




17

Five PowerPoint Templates Available


- 1 Download the Impact Story Templates [online](#).
- 2 Pick the slide template that best communicates your story.
- 3 Use the guidance in the green shaded boxes located beside or below the slide to populate the slide with your information.

Example Slide Templates


Title



Header
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.



Header
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.




Header
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa.

Add information about the WHY. For example, the challenge you sought to solve or the process before changes were made, etc.

Add information about the WHAT. For example, the initiative you implemented, changes you made, new process you set up, etc. to address the challenges described in the first text box above.


Add information about the IMPACT. For example, the impact of the new initiative or process, etc. (qualitative or quantitative)

Title




Header (e.g., The Challenge)

- Lorem ipsum dolor sit amet
- Consectetur adipiscing elit
- Maecenas porttitor congue massa.



Header (e.g., About the Initiative)

- Lorem ipsum dolor sit amet
- Consectetur adipiscing elit
- Maecenas porttitor congue massa.



Header (e.g., Impact)

▶ **Number**
Description

▶ **Number**
Description

▶ **Number**
Description

Add information about the WHY. For example, the challenge you sought to solve or the process before changes were made, etc.

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Building Community College Partnerships

Process Example



Needs Beyond Baccalaureate Degrees

- High volumes of pending courses were submitted regarding associate degrees
- These requests required manual review and comments back to the students



Community College Pipeline

▶ **15+**

Associates Degree Courses Built

- The largest volume came from a particular community college system.
- The university built associate degree courses in their student information system for all the community colleges within this system.
- The partner updated the language in their Transfer Portal in combination with these rules.



Additional Degree Evaluations Available

- Transfer Portal degree completion page is now more robust with information to guide students
- Students are now able to leverage the tool in more helpful ways for their 2- and 4-year aspirations.

ROI Achieved Through Transfer Portal Partnership



Outcomes Example



Aspirations to Improve the Transfer Student Experience

- Like many universities, this university sought to streamline the transfer student process and grow their enrollment



Use Transfer Portal to Engage Students

- The Transfer Portal serves as a student-friendly unofficial credit estimation tool
- Students receive early guidance in how credits will transfer and best-fit program offerings



Return on Investment

- Tuition revenue from students who used the Portal and enrolled
- Staff and salary savings from use of the Portal's course review functionality

450

**Transfer Students
Enrolled who Used
Transfer Portal**

\$13 M

Resulting Revenue

2.5 YR

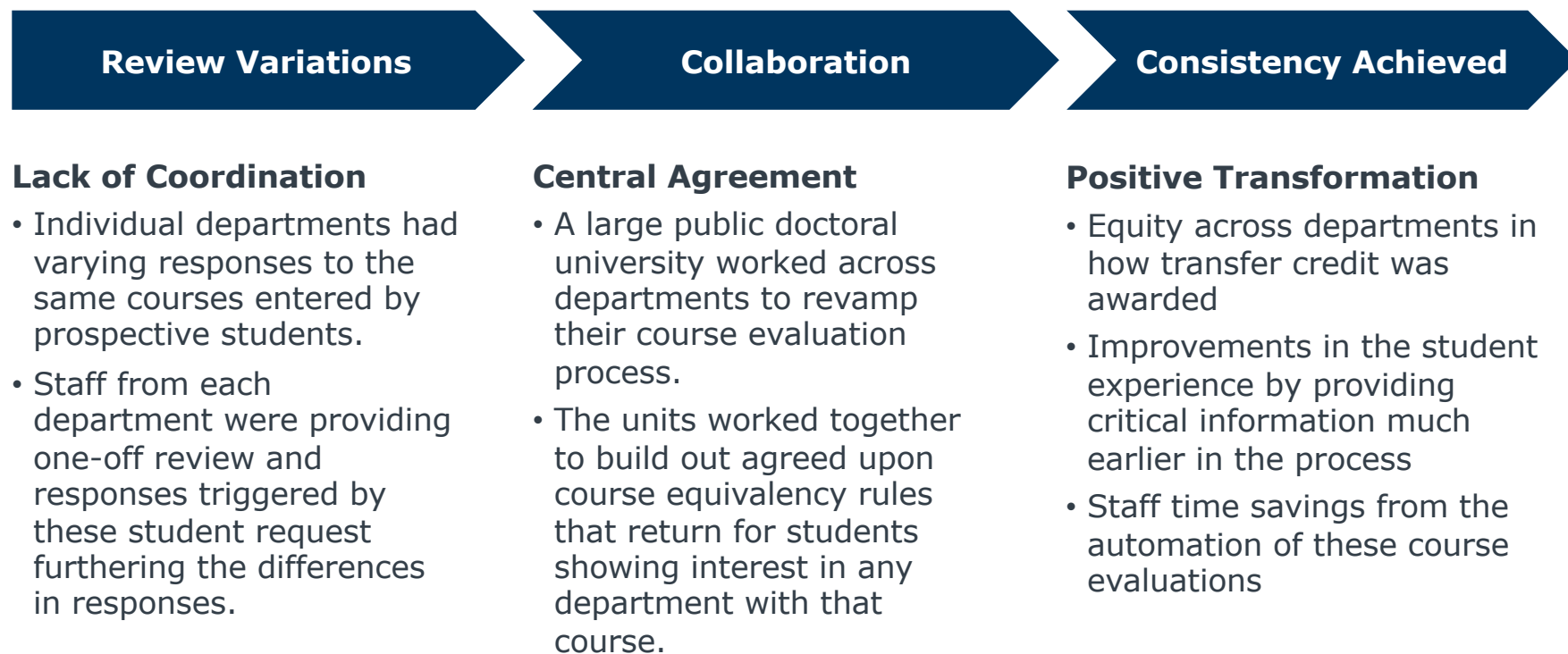
Staff time saved

\$156K

Salary saved

Improving the Course Evaluations Process

Transformative Example



Closing Poll Questions



- 1 How was today's session?**
- 2 Do you plan to present an impact story at the July 10th Office Hours?**

Thank you for joining us today!

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!**](#)

Questions?



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