Transfer Portal Office Hours
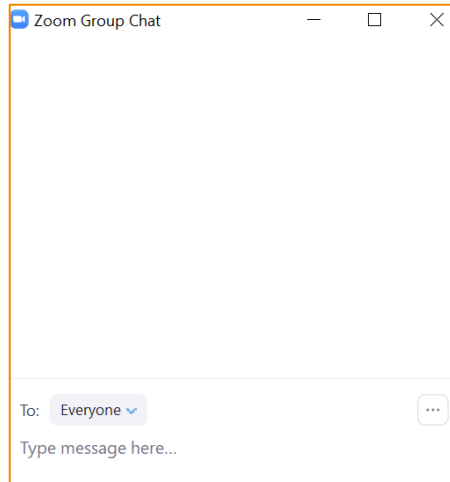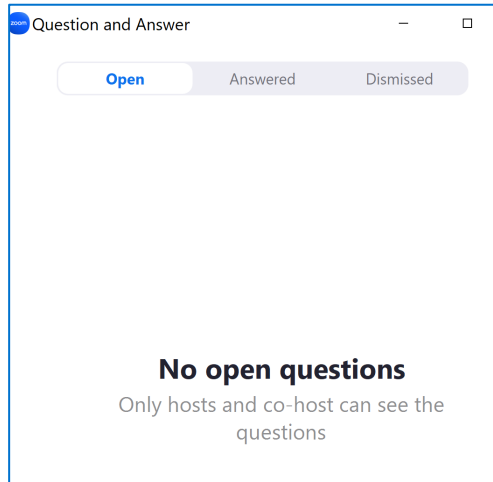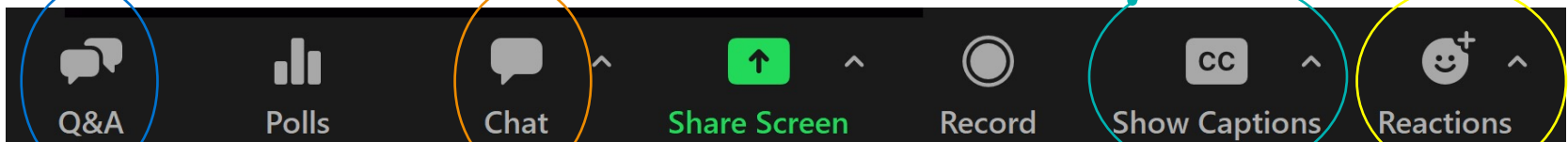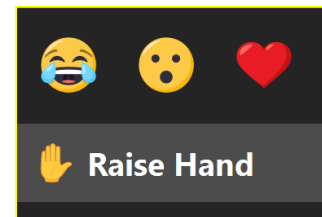
November 13, 2024

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

😂 😮 ❤️

✋ **Raise Hand**

Q&A | Polls | Chat | Share Screen | Record | Show Captions | Reactions

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AGENDA

1 – Pictures from National Transfer Week

2 – Release Walkthrough

3 – 2025 New Session Format

4 – Open Q&A

EAB

National Transfer Week!!

Send photos from your campus fun!!

Celebrating National Transfer Student Week!

Winthrop University

Flyer for National Transfer Student Week Calendar of Events!

Georgia State University

Northern Illinois University
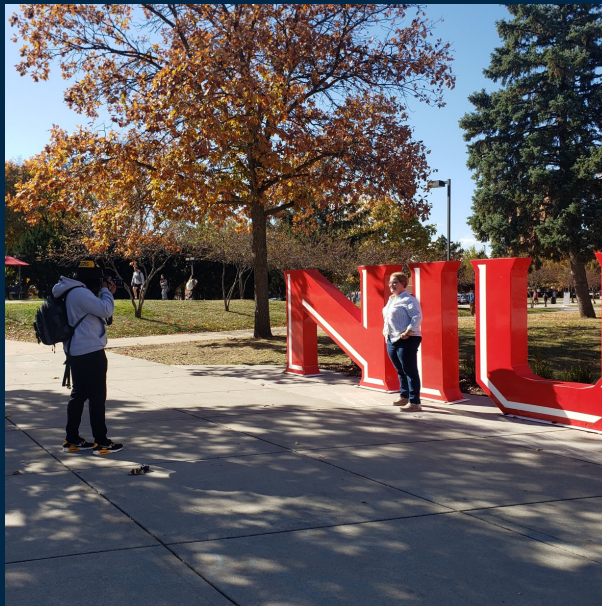
NIU Today

Release Walkthrough

Course Equivalency

Feature Highlights

- On both the Student and Staff Portal sites, if Course Equivalency is turned on, the equivalent course match will display on the student's profile.
- Email EAB Transfer Tech Support at TransferTechSupport@eab.com to turn this new feature on!

Poll:
Do you want us to turn on Course Equivalency once released?

Release Resources in the **Help Center**
- Release Notes
- Release Video Walkthrough
- New Help Center Article

Eye on Impact!

Download the Toolkit, Worksheets, and Templates Online

Dedicated EAB.com Page

The toolkit and its accompanying resources have their own eab.com page, which can be found on the Transfer Resource Center.
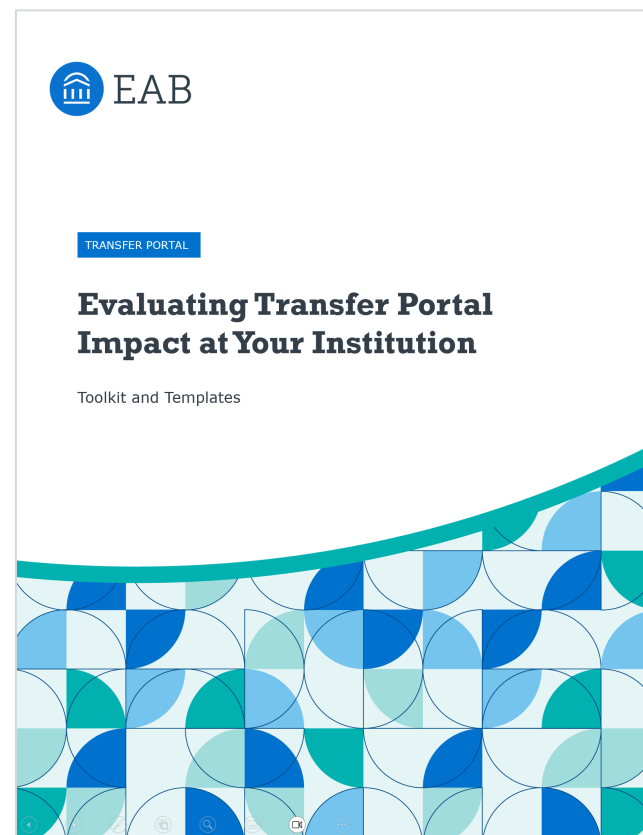
Templates

Download Impact Templates, the Transfer Impact Report Template, and Impact Story Templates to gather data and share your work.

Worksheets

Download and complete worksheets, such as a worksheet to help you understand your data story's goals, audience, and such.

EAB

TRANSFER PORTAL

Evaluating Transfer Portal Impact at Your Institution

Toolkit and Templates

Templates linked for each in **Transfer Help Center**

1

Transfer Portal Utilization

Foundational data available through Transfer Portal Analytics dashboard, which includes session activity and pipeline details. These reports should be used as a baseline in portal health analysis.

2

Automated Course Evaluations and New Course Equivalencies

The Transfer Portal streamlines course equivalency discovery, automating evaluations for time-saving benefits to students and staff. New course evaluation requests are funneled through Portal enabling faster credit evaluations and improves the database for future students.

3

Transfer Pre-Advising

The Transfer Portal provides prospective students the convenience of obtaining instant degree completion estimates for various academic programs, streamlining the process and reducing the need for staff to generate these estimates.

4

Student Feedback

Transfer Portal should be utilized as an engagement and yield tool for prospective students. Understand from your students if the portal was helpful in their decision-making process.

5

Transfer Enrollment and Revenue

In combination with your transfer enrollment data, use the Transfer Portal data to understand how these students progressed through your funnel and tuition that can be attributed to these students. Transfer Portal Analysis Tool Template

6

Other

- Process and Change Management
- Transfer Maturity Curve
- Student Success Metrics

EAB

2025 New Session Format

In 2025, Office Hours will become **Transfer Feature Focus** sessions!

Why the change?

We want users to know to attend as these sessions deliver content vs. traditional office hours where it is an open space for questions.

Topics we plan to cover:

- Transfer Portal Utilization

- Lead Management through Portal

- Pending Course Workflow

- Deriving Impact from the Analytics Dashboard

Discussion:
What other topics should we cover?

Previous Topics

Pending Course Workflow

Analytics Dashboards

Content Management

Transfer Impact Stories

Portal Updates

Catch recordings of our past sessions here.

Our **Transfer Onboarding Program** will guide new admins through the portal and its functions.

Questions?

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