



Transfer Portal Office Hours

January 17, 2024





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:

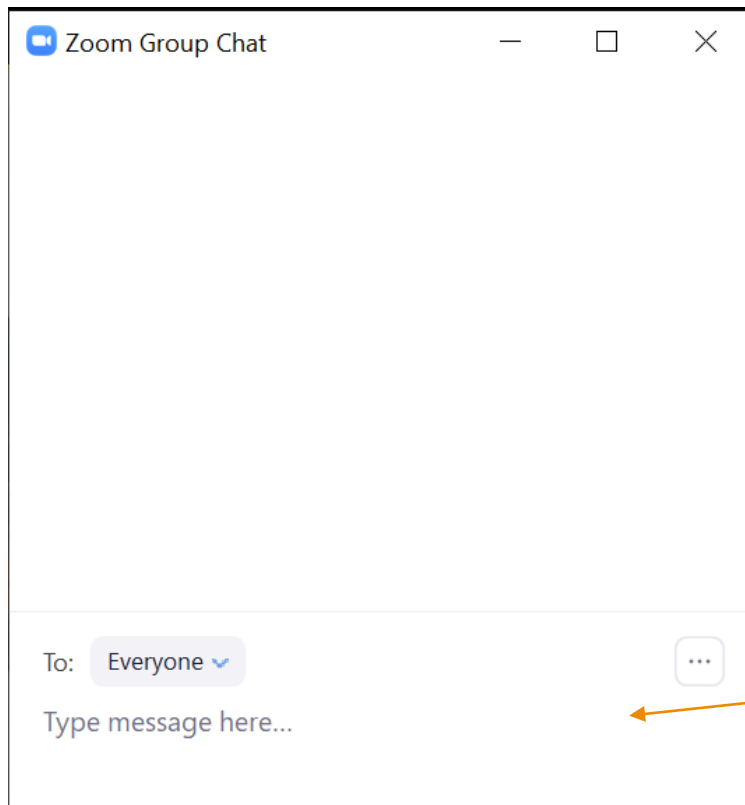
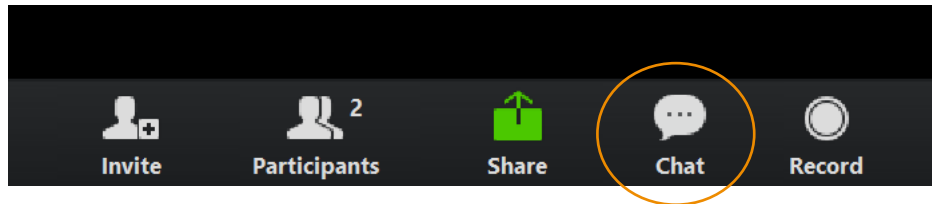
Dial(for higher quality, dial a number based on your current location):

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/j/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.

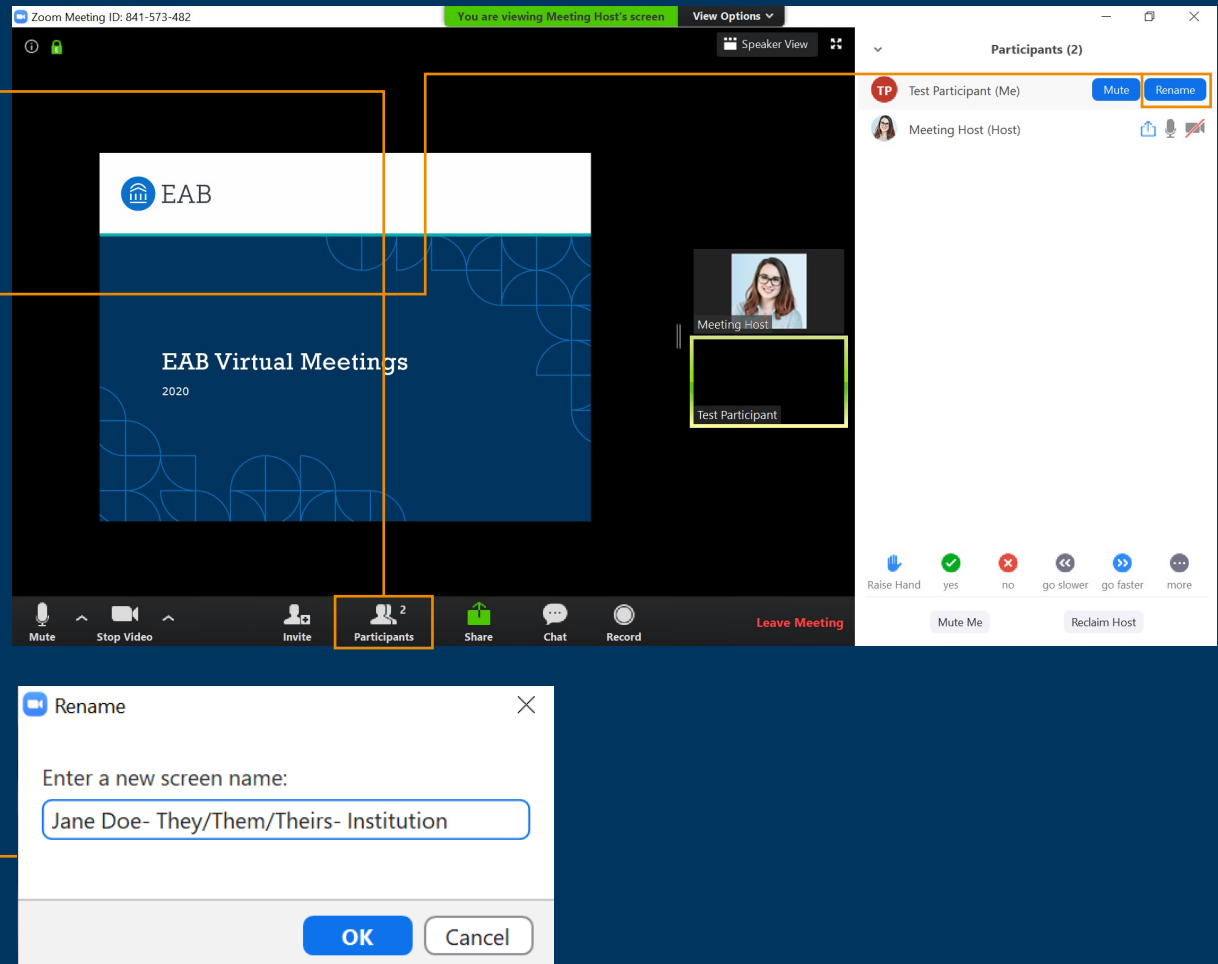
After the session, a member of our team will be in touch to follow-up on your questions individually if they were not answered during the session.

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)



Actual Ice Breaker Question!

What is your current winter wonderland state?!



Today's Presenters



Kate Manning
Transfer Portal



Gina Schorr
Partner Support



Me'Oshie Alston
Partner Support

- 1 New Release Walkthrough
- 2 New eab.com Walkthrough
- 3 EAB Support Teams
- 4 Transfer Portal Planner
- 5 Transfer Portal Roadmap

Transfer Resource Hub



EAB's Transfer Documentation Hub

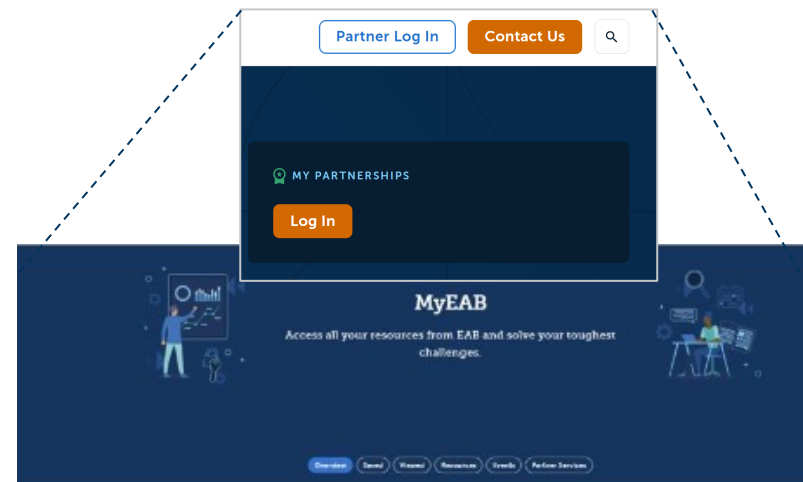
<https://eab.com/technology/resource-center/enrollment/transfer-portal-resource-hub/>

When to Use:

- ▶ App Admin resources and templates for Portal set up and workflow processes
- ▶ Strategic Resources (Transfer research, toolkits, etc.)
- ▶ Registration and materials for virtual programs (Office Hours, Intensives, Onboarding)

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"



My Partnerships



My Partnerships

Advancement Advisory Services

 [View Partnership Hub](#)

Cappex

 [View Partnership Hub](#)

Intersect

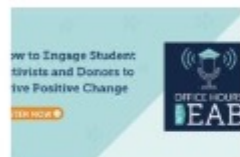
 [View Partnership Hub](#)

YouVisit Virtual Tours

 [View Partnership Hub](#)

Recently Viewed

 [See All](#)



PODCAST

How to Engage Student Activists and Donors to Drive Positive Change

Experts share strategies on ways to engage constructively with student activists and navigate difficult conversations with donors who...



BLOG

5 top priorities for advancement leaders in 2023

EAB identified 5 top priorities for advancement leaders from a survey of chief advancement officers across the U.S....



INFOGRAPHIC

105 Tactics to Improve Employee Engagement

Higher education institutions are confronting high rates of employee turnover and disengagement. To help leaders understand a range...

Strategic Advisory Services for Community Colleges • May 4, 2022

Recently Saved

 [See All](#)



TOOL

DEI3 Resource Library for Higher Ed Advancement

Advancement leaders should use this list of resources collected from their peers to help educate themselves and their...

Advancement Advisory Services • May 24, 2022



WHITE PAPER

Close the Diversity Gap in Higher Ed Advancement By Recruiting Transferable-Skills Candidates

Current efforts weren't enough to significantly increase diversity of job candidates and new hires because there is a...

Advancement Advisory Services • Nov 18, 2021



TOOL

Major Gift Lead-Generation Tool

Use this tool to establish a process for surfacing major gift prospects from engagement events and handling them...

Advancement Advisory Services • April 26, 2022

WHITE PAPER

Mapping the Enrollment Landscape

This insight paper was created to help enrollment leaders reorient to a higher education marketplace that is being...

Website Design and Development • May 9, 2023

TOOL

Employer Demand Profiles

These profiles provide a snapshot of the employer demand in each state to inform portfolio and program brainstorming...

Strategic Advisory Services • Mar 29, 2022

Defining Roles and Support Objectives

Support streams for all goals and roles



Transfer Portal Planner Document

11

Shared Decision Document for your Transfer Portal Success!

1 Portal Planner

<https://eab.app.box.com/>

2

Part of EAB?

EAB uses your network credentials to login to Box. Continue to login to Box through your network.

Continue

If you are not a part of EAB, continue to log in with your Box.com account.

Not a part of EAB

3

| Search Files and Folders | | | |
|--|-----------------------------|----------|--|
| + Delivery > Partner Support Team (PST) > Example Partner Folder | | | |
| NAME | UPDATED | SIZE | |
| Transfer Portal Planner_Template.docx | Feb 7, 2023 by Kate Manning | 320.8 KB | |
| Peoplesoft Program Load Template.xlsx | Oct 4, 2022 by Gina Schorr | | |

4

EAB

TRANSFER PORTAL

Transfer Portal Planner

Purpose: The Transfer Portal Planner is intended to capture Portal strategy and configurations for the partner institution and EAB team to reference for initial implementation and ongoing support.

Institution Name: Woodley University

5

7

Open

Download

Microsoft Word
Open this file on your desktop

Microsoft Word Online
Open this file in your browser to edit in real-time with others

Activity

2 collaborators

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 Hub

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

[Transfer Resource Hub 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!**](#)

Transfer Portal Roadmap Overview

Bold indicates a new feature

Now

- > **Transfer Hub**
- > (Completed) Release response items
 - > Degree Completion visibility
 - > Matched course list placement
 - > Username autofill at login

Next

- > Release response items
 - > Search Bar Updates
 - > Pending Course Growler Improvements
- > **Analytics Dashboard Additions**
- > **Add Course Equivalency**
- > **Allow Additional Degree Requirements**

Later

- > **Syllabus or course description collection**
- > Release response items
 - > Save the State Workflow

Poll Session Feedback

- 1 How was today's session?



Questions?



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