Transfer Portal Support Office Hours

Wednesday, April 6th

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
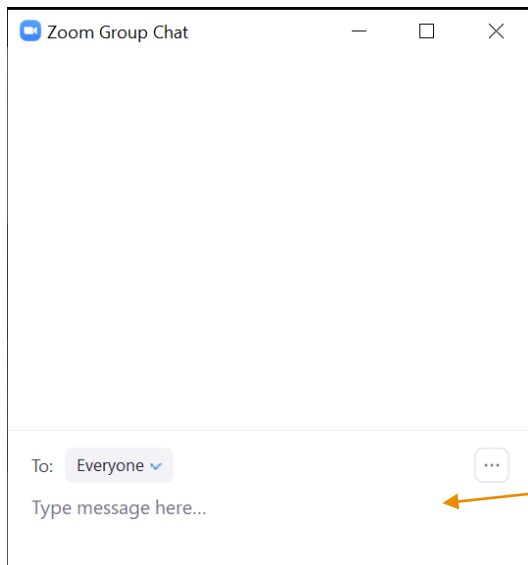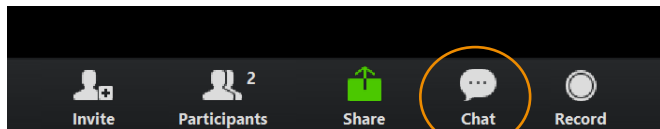   US: +16468769923,,511418667# or +13126266799,,511418667#
Or Telephone:
    Dial(for higher quality, dial a number based on your current location):
        US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782
    Meeting ID: 511 418 667
    International numbers available: https://eab.zoom.us/u/abLkP09Nci

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.
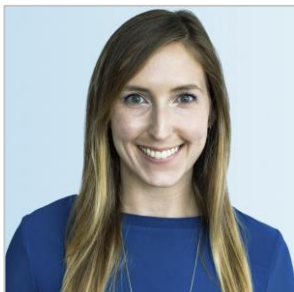
Type your question here

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)

Allison Akalonu
Transfer Portal

Gina Schorr
Partner Support
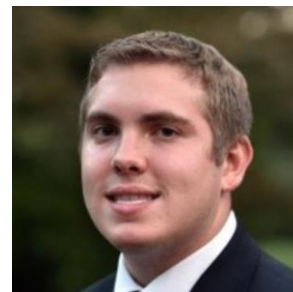
Brent Rice
Partner Support

Setting Up & Maintaining Your Transfer Portal

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

Connecting the Dots for Other Users

Includes answering questions from other users on campus, training new users, and triaging tickets to our EAB support teams.

Next Steps:
Email TransferTechSupport@eab.com the name(s) & email(s) of your App Admins

Access App Admin Role Office Hours recording: **On-Demand Resource**

Access in your shared EAB Box folder

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: Click or tap here to enter text.

Table of Contents

Planning

- Leadership Team & Functional Roles
- User Permissions
- Market Launch, Technical Readiness, & Optimization
- Promotion & Communication Plan

Workflow

- Workflow: Pending Course Review
- Workflow: Lead Management

Site Setup

- Terms
- Programs, Major Descriptions, and Degree Audit
- Checklist and Campus Resources

Access Transfer Portal Planner Office Hours recording: **On-Demand Resource**

Live Demo Training

Live and On-Demand Resources

Live Onboarding Deep Dive

Date: TBD

- Module Highlights
- Question & Answer
- Live Walkthroughs

Module 1: Intro to Transfer Portal

Feature Training Videos

Module 2: Site Maintenance & Support

Module 3: Pending Course Workflow

Module 4: Lead Management Workflow

Questions?

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

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Polls

1 How was today's session?

2 Would you like to be registered for the May 4th Office Hours session?

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