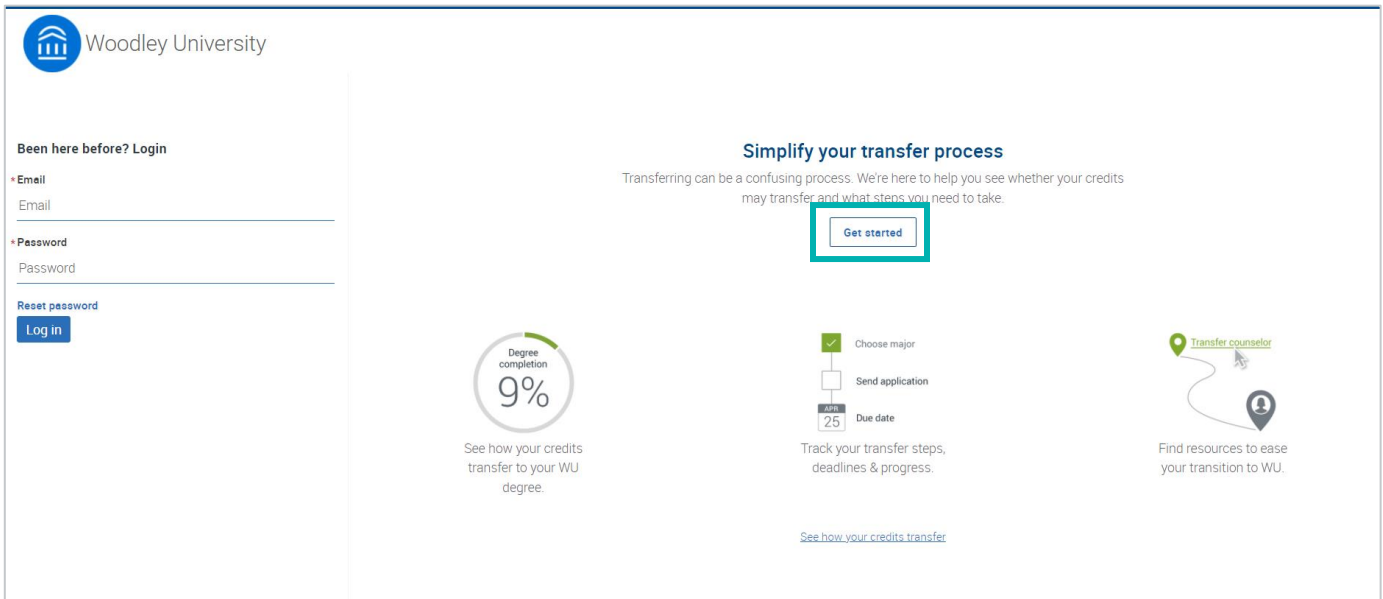# Transfer Portal – User Management

Staff Access and Removal

Set up a Student Profile

○ The new staff user needs to first create a student profile in your Transfer Portal.

1. Click "Get Started"

2. Create a profile/Login

3. User informs Application Administrator their student profile has been created

Document and Inform EAB Partner Support

o   Access your institutions Transfer Portal Planner to document the new staff user and indicate their desired permissions. The Transfer Portal Planner is stored in your **shared EAB Box Folder**.

   ▪   If you need assistance accessing this, email TransferTechSupport@eab.com

o   Email EAB Partner Support at TransferTechSupport@eab.com sharing the name, email, and which permissions the individual should receive.

o   Available Permissions:

   ▪   **Student Data** – ability to view and export prospective student data and pending courses.

   ▪   **Analytics** – ability to view site utilization data and pipeline details.

   ▪   **Site Setup** – ability to manage Transfer Portal site content.

o   EAB Partner Support will elevate their access to a Staff Role will the associated permissions and reply when complete

o   Share with the end user to log out and log back in. They will now access the Staff facing Transfer Portal.

   ▪   If they experience any access issues, have them email TransferTechSupport@eab.com

Removing Staff Access

o   Email TransferTechSupport@eab.com and share the name and email of the individual whose access should be removed.

o   Access your institutions Transfer Portal Planner to document the removal of this individual's access in the User Management tracker. The Transfer Portal Planner is stored in your **shared EAB Box Folder**.

   ▪   If you need assistance accessing this, email TransferTechSupport@eab.com