

Transfer Portal – Quick Start Guide

Getting Started

Portal Access

- Create a student profile in your Transfer Portal. Transfer URL: xxx.transfer.degree
- Email EAB's Partner Support Team at TransferTechSupport@eab.com to request your student profile be upgraded to a staff profile.
- Log back into your Transfer Portal for staff access.

Site Setup

- Transfer Portal Site Setup Training: [Site Setup Training](#)
- Access your institutions Transfer Portal Planner for specific site configurations and decisions. The Transfer Portal Planner is stored in your **shared EAB Box Folder**.
 - If you need assistance accessing this, email TransferTechSupport@eab.com

Student Facing

Learn how a student interacts with the Transfer Portal: [Transfer Portal Demo](#)

- What happens if a student enters a course that we don't have an equivalency set up for?
 - Learn the Pending Course Workflow: [Pending Course Workflow Demo](#)
- How can I adjust the content a student sees?
 - Transfer Portal Content Management: [Transfer Portal Content Management Guide](#)

Staff Facing

- Understand Lead Management Workflow using the Transfer Portal exports: [Lead Management Workflow](#)
- Knowledge Center & Support Access through the Portal Get Help "?" icon.
 - Help center articles
 - Live program registration
 - On-demand program access
 - Submit a support question