

Transfer Portal Annual Calendar

Embedding the Portal into Your Work

The Transfer Portal allows institutions to engage prospective transfer students early in their exploration and provide them with pertinent information. Use this graphic to map activities and milestones that occur throughout the year to best understand how the Portal can support your work.

	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY
Activities and Milestones												
▶ Strategic Planning: Define transfer enrollment goals for future terms, identify potential community college partners, and solidify recruitment strategy for year ahead.												
▶ Update course equivalency and credit appeals policies. Sign program-level articulation agreements after final catalog changes are made.												
▶ Final grades due and end-of-term processing. Finalize entering class (i.e., processing applications, transcript entry).												
▶ Generate official credit evaluations.												
▶ Milestones: Final registration and classes begin.												
▶ Milestone: Provide transfer advising.												
▶ Faculty across institutions within the region meet to discuss changes to programs, course sequencing, and actively work to align course curriculum and meta-majors.												
▶ Financial aid strategy is in place and broadly promoted, financial aid counseling offered in preparation for FAFSA release.												
▶ Post-Census: Review transfer enrollment and success data to adjust business processes and strategy.												
▶ Milestones: Holidays, school closures, and vacation.												

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Activities and Milestones												
▶ Early December: Final grades due and end-of-term processing.												
▶ Milestones: Graduation (mid-December), end-of-year holidays, school closures, and vacation.												
▶ Finalize entering class (i.e., processing applications, transcript entry).												
▶ Generate official credit evaluations.												
▶ Milestones: Final registration and classes begin (mid-January).												
▶ Milestones: Spring Break holidays, school closures, and vacation.												
▶ Provide transfer advising as soon as student identifies transfer as a goal and information is shared with four-year destination.												
▶ Final grades due and end-of-term processing.												
▶ Milestones: Graduation (mid-May).												
▶ Finalize new programs and catalog.												
▶ Update course equivalency and credit appeals policies.												
▶ Collaborate on joint marketing materials with community college partners and update website and self-service resources.												

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Ongoing Activities												
▶ Use digital ads and share robust transfer information.												
▶ Maintain and update transfer guides, transfer website, and self-service tools.												
▶ Host cross-functional Enrollment Management Committee (EMC) and Student Success Committee (SSC) meetings.												
▶ Admissions Staff conducts community college visits.												
▶ Qualify and score transfer leads based on where the student is in their enrollment journey.												
▶ Centralize, automate, and coordinate communication schedules and content across units.												
▶ Empower a single point of contact to be available for students to help navigate complexities of the transfer process.												