



Transfer Portal Office Hours

March 6, 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:

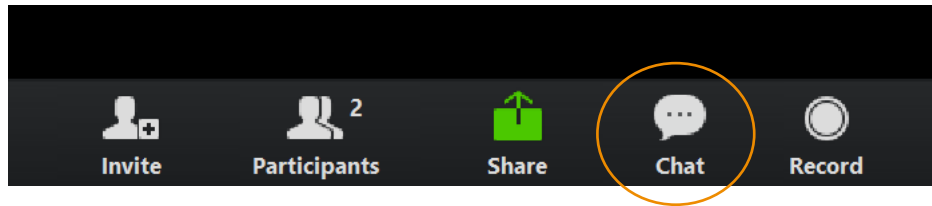
Dial(for higher quality, dial a number based on your current location):

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>

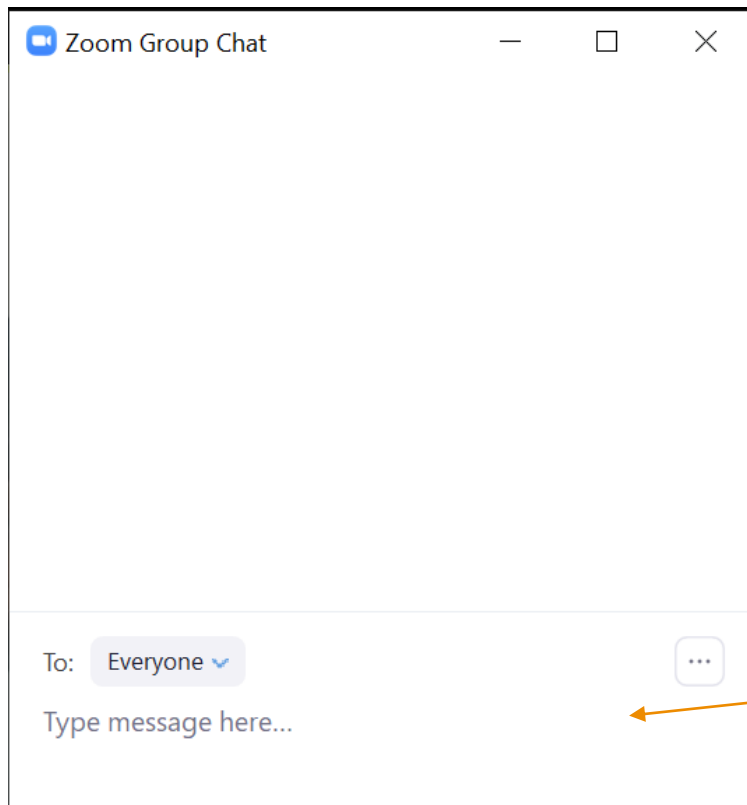
Using Zoom



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.

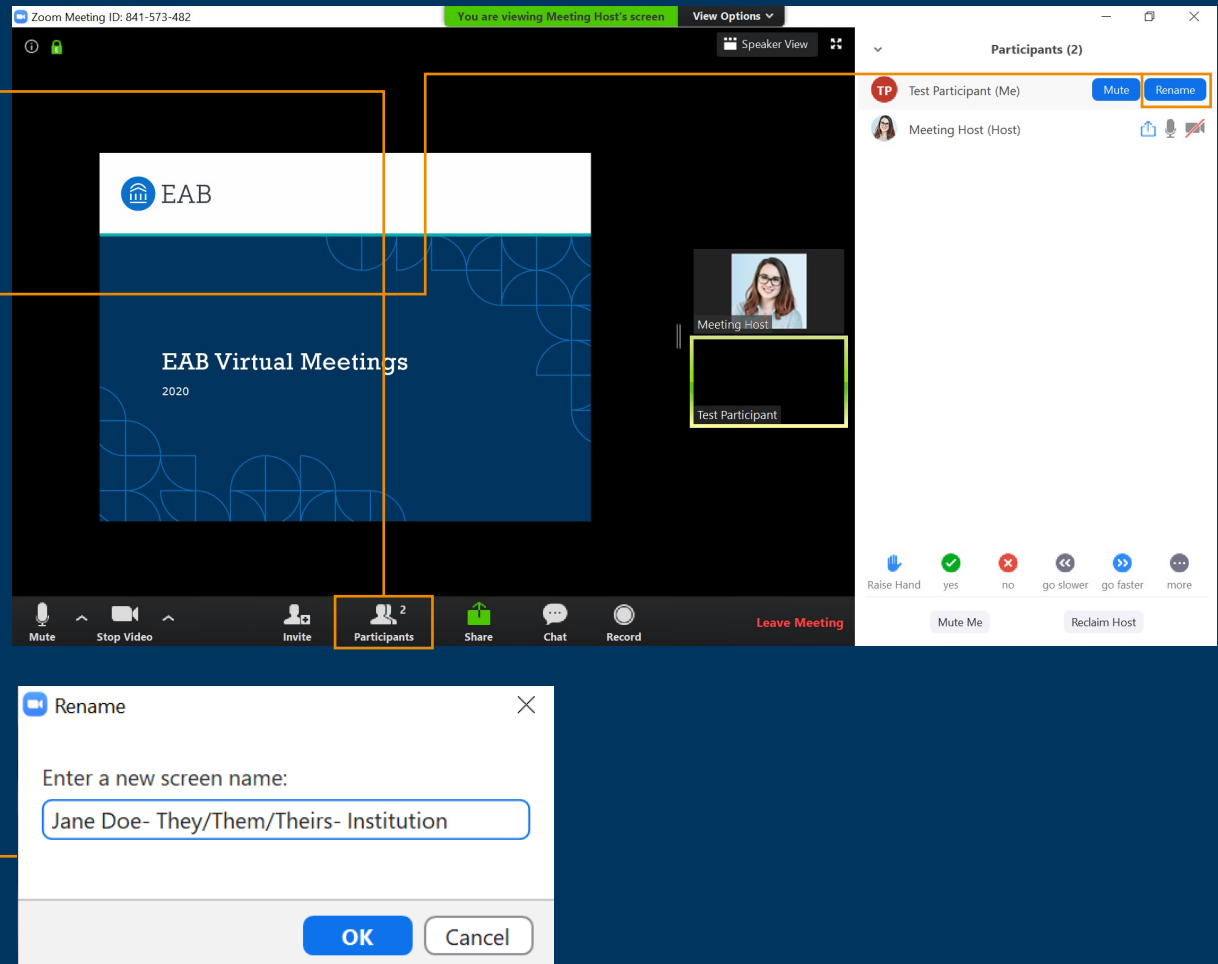


Type your question here

Update your name (and include your institution)

Update Your Name

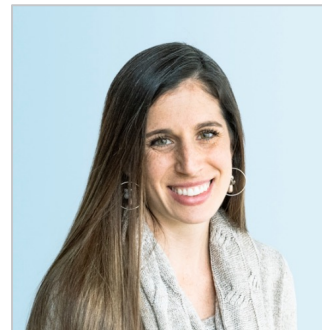
- Click **Participants** in your menu bar.
- On the right side of the screen, hover over your name, click more, and then click **Rename**.
- Add a dash and your institution name. You may also add your pronouns if you wish (example: they/them/theirs)



Today's Presenters



Kate Manning
Transfer Portal



Gina Schorr
Partner Support

Analytics Dashboard Updates

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Further data points to showcase your Transfer efforts

Utilization Summary Dashboard

- New filter at top Distinct Users/Account Created

New dashboard: Staff Activity

- Staff activity over time
- Login rates
- Average Pending Course Resolution Time
(Time between Pending Course submitted date and resolution date)
- Pending Course Resolved Status
 - # of Pending Courses Resolved – Receives Credit
 - # of Pending Courses Resolved – Does not Receive Credit
 - # of Pending Courses Resolved – Without Review

Pipeline Details Dashboard

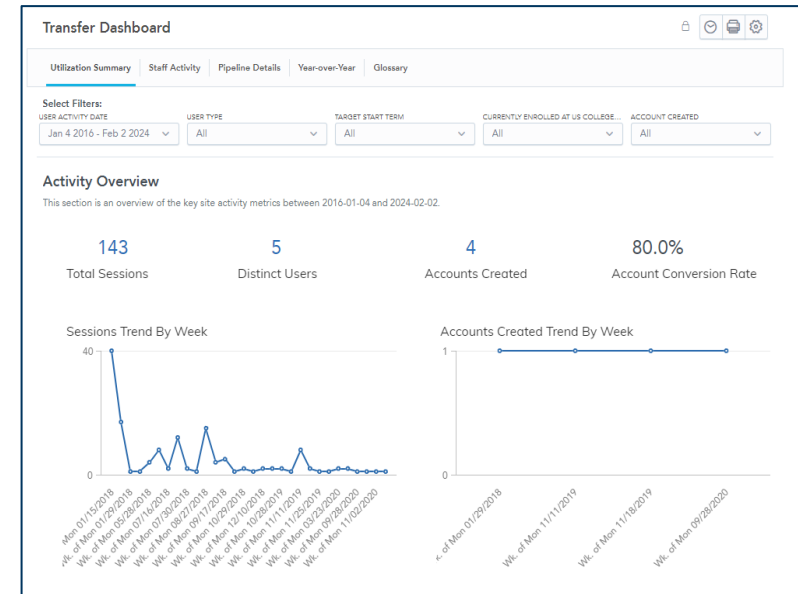
- New filter at top for Distinct Users or Total Sessions (default is Distinct Users)

New Dashboard: Year-over-Year

- Session trends by year
- Accounts created trend by year

Glossary

- Updated with new data points



Upcoming:

- Staff export rate data
- Section for "Other Credits"

[OLD] Data for New Course Equivalencies

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Process for identifying number of new course equivalencies built through portal requests

- 1 Navigate to the Exports in Portal
- 2 Set filters:
 - Export Type = Resolved Pending Courses
 - Filter Type = Empty
 - Start Date = Empty
 - End Date = Empty
- 3 Export data
- 4 Download, save, open

Woodley University

TRANSFER ADMIN Home Transfer Portal Data Analytics Site Setup User Management

Exports

Download the Transfer Portal data by selecting the Export and Filter Type, and adjusting the date range as needed.

New Export

Export Type *
Resolved Pending Courses

Filter Type
Empty

Start Date
Select a date

End Date
Select a date

Submit

Export History

Refresh

EXPORT TYPE	DATE
Prospective Students	02/16/2024 10:50 AM
Pending Courses	11/27/2023 4:33 PM
Resolved Pending Courses	11/27/2023 3:48 PM
Pending Courses	11/27/2023 3:13 PM

Export History

Refresh

EXPORT TYPE	DATE
Prospective Students	02/16/2024 10:50 AM
Pending Courses	11/27/2023 4:33 PM
Resolved Pending Courses	11/27/2023 3:48 PM
Pending Courses	11/27/2023 3:13 PM

- 5 Add filters to columns
- 6 Filter the "resolved_date" column to the same date range in Transfer Analytics and filter the "current_status" column for "Resolved (received credit)"

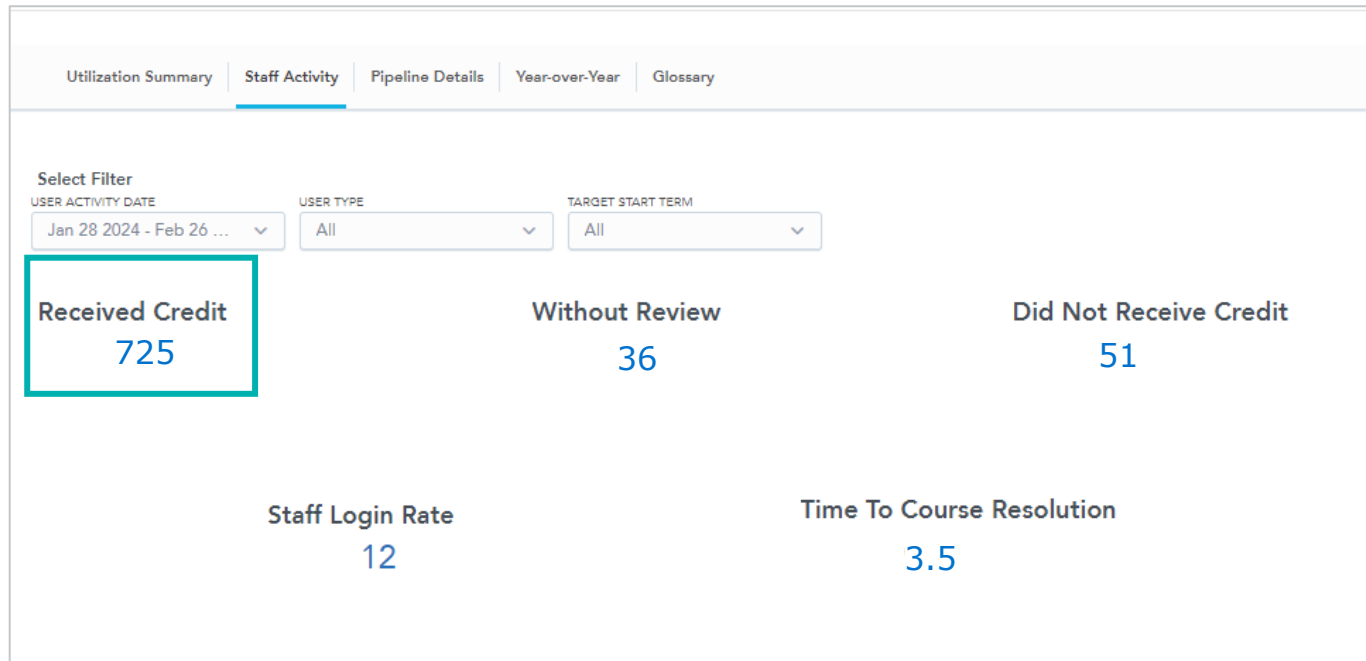
submitted_date	resolved_date	current_status
12/1/2022	10/3/2023	Resolved (receives credit)
5/11/2023	10/3/2023	Resolved (receives credit)
5/4/2023	10/3/2023	Resolved (receives credit)
6/21/2023	10/3/2023	Resolved (receives credit)
9/8/2023	10/3/2023	Resolved (receives credit)

Example export with filters applied

NEW! Analytics Highlight



Identify new course equivalencies immediately



Analytics Templates

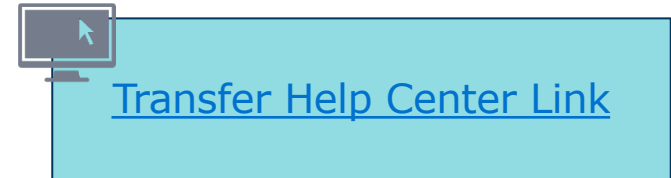


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Transfer Portal Help Center

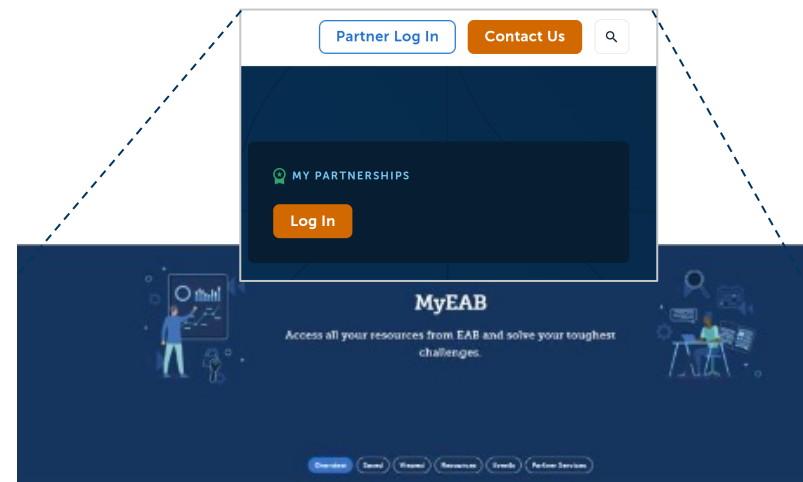
Module 5: Transfer Portal Analytics

- ▶ Transfer Analytics Dashboard Overviews
- ▶ How to Capture Your Data to Measure Impact
- ▶ 5 Templates to guide you through finding meaning in the data
- ▶ NEW! Summary impact highlight sheet [Linked here](#)



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

Advancement Forum

Cappex

Measuring and Documenting Transfer Portal Impact

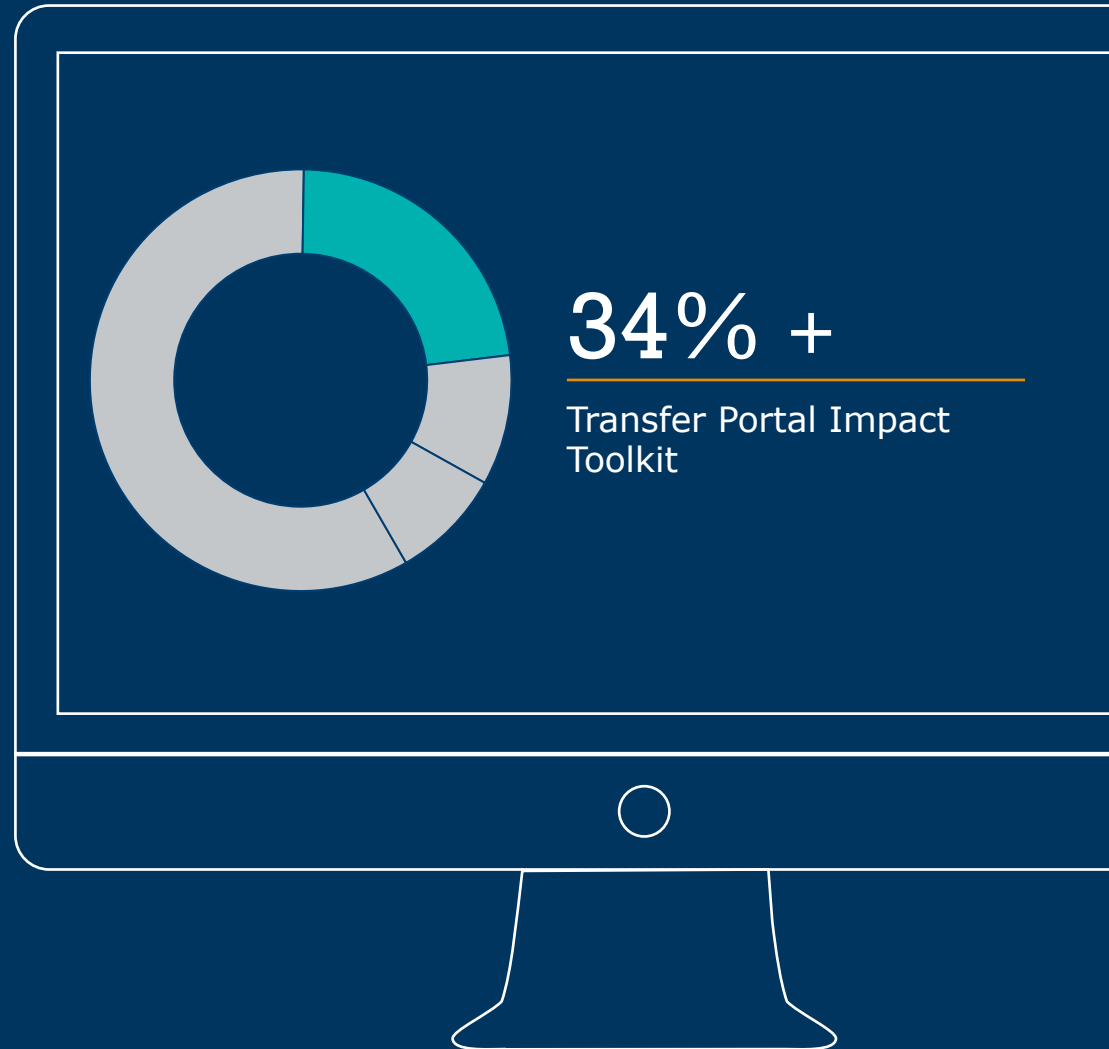
Thursday, April 18, 2024

2:00-3:00pm EST

[Registration Link](#)

In this session, we'll walk through our new **Evaluating Transfer Portal Impact Toolkit**. The toolkit consists of different tools to help you define your data story, select metrics for evaluation, gather and document data, and share your work.

Recommended Attendees: *Transfer Portal Executive Sponsors, Program Sponsors, Program Owners, and Value Leads who are interested in learning how to identify and share the impact of their transfer work.*



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 Center

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

[Transfer Resource Center 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!**](#)

Poll Session Feedback

1 How was today's session?



Questions?



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