EAB

Transfer Portal Site Setup Guide

Demonstrated with EAB's Sandbox Environment for the fictional Woodley University

Updated October 2023

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How to Use this Guide

This guide was created to walk a partner step-by-step through setting up their Portal.

If you have questions about anything in this guide, reach out to your EAB support team.

Default Content

Default Checklist and Campuses Resources will be added to your Portal. You have the option to edit the existing content or completely overhaul it.

Icon Guide

This icon is used to signify that there is more information about a given topic somewhere else in the guide.

Used to signify this editor is a WYSIWYG and allows for formatted text.

Tip

This box is used to point out something useful when adding or editing content in Portal. This is strictly *for your information.*

EAB Best Practice

This box is used to note things EAB will likely call out during Content Validation prior to Portal Go-Live. You should be able to justify *not* following these standards, if you choose, to your EAB support team.

Logging in with Staff Credentials

- Navigate to your institution's Transfer Portal staff login page either on Google Chrome or Mozilla Firefox.

- Enter your staff credentials.

- Contact the EAB support team if you have trouble logging in.

Account Login

Email *

✉ Email

Password * 🗐

🔑 Password

[Login]

— [OR] —

Forgot Password   **Create a Profile**

Tip

Ensure you're using the most updated version of your browser by navigating to **https://www.whatismybrowser.com/**

- On the staff-facing dashboard, ensure you have access to Site Setup in the navigation ribbon in the top right corner. If you do not have access, email the EAB Transfer Portal support team adjust your account permissions.

Home   Transfer Portal Data   Analytics   **Site Setup**   User Management

Using the WYSIWYG Editor

- **WYSIWYG** Editors are used in many places throughout Portal to edit content:

  - Checklist Item

  - Campus Resources

  - Major Management

- The editor provides many ways to format content:

  - Bold, Italicize, Underline

  - Bulleted or Numbered lists

  - Hyperlinking

  - Right, Center, Left justification of text

- Using the **Format** drop down, you can also Strikethrough text, or add super-or-sub script if needed.

| Paragraph ∨ | **B** *I* U̲ S̶ | ☰ ☰ | 𝒫 ❝ | ↶ ↷ |

TIP

If copying and pasting text into the editor, always **Paste as Plain Text.** You can update formatting in the editor itself.

EAB Best Practice

Stay consistent with editing styles. Portal should look like an extension of your website.

Checklist

![EAB logo]

1

Overview & Navigation

The Checklist outlines next steps for prospective students intending to transfer to your institution.

- To add a new **Checklist item**, click **+button** above the list of Checklist items on the right side.

- To delete a **Checklist item**, select the Checklist item and the click the Delete button in the top left corner.

- To edit a **Checklist item**, select the hamburger icon (i.e., 3 bar icon) and click on Edit.

Delete a checklist item

Edit checklist item

+Add a checklist item

		TITLE	ORDERING	DETAIL	BUTTON LABEL	BUTTON URL	
☑	≡	Understand the federal aid application & gathering FA...	1	The FAFSA (Free Application for Federal Student Aid) is free to submit-and if you don't file it, you could miss	Financial Aid	https://www.eab.com/	
☐	≡	Take the SATs/ACTs and submit your score	2	We'll need your ACT or SAT scores, but we only need one of the two tests. You can decide which one would			
☐	≡	Submit your AP, CLEP, or IB credits	3	If you have received college credits through AP, CLEP or IB, see if you can transfer them as well!			
☐	≡	Submit your official transcripts	4	You will need to have all college(s) you have attended send your official transcripts submit to the Office of	More info about tra...	https://www.eab.com/	
☐	≡	Transfer-specific scholarships	5	You may be eligible for a transfer-specific scholarship. WU sets aside a few scholarships specifically for	Check out transfer s...	https://www.eab.com/	
☐	≡	This is a test	5	This is a test to show how the preview checklist item will look	Click this button for ...	http://eab.com	
☐	≡	Apply	7	It's time to submit your application to be considered for the semester! You'll be able to save your work if you	Apply now	https://www.eab.com/	
☐	≡	Attend transfer orientation	8	Welcome to Whitehurst University! Transfer Student Orientation gives you the opportunity to get to know			
☐	≡	Submit your enrollment deposit	13	If you've been accepted, congratulations! Take the next step and submit your enrollment deposit so you can	Submit Deposit	https://www.eab.com/	

Shows all **Checklist items**.

Shows **Content block** within the highlighted checklist item.

See Adding & Editing a Checklist Item for more detail

EAB Best Practice

Customize your Checklist to reflect your institution's key steps in the admission process but try to limit the quantity of steps to **8 or fewer Checklist items**.

- To add a new **Checklist item**, click **+Add a checklist item** above the list of Checklist items.
- To delete a **Checklist item**, hover over the Checklist item and click the **X** button in the top right corner. This will automatically populate a message requiring confirmation to delete that item.

Adding & Editing a Checklist Item

- **Title** – Enter the desired name of your **Checklist item**.

- You cannot link to other websites in **Checklist item** titles.

- **Order** - Choose the position in which you want this item to appear in the Checklist.

- **Body –** No limit to characters that can be added to this section. As you type, content will populate in real time in the Preview to the right of the **editor**.

- **Button label** (Optional) – Checklist allows an institution to link to the call to action of any given **Checklist item**. Keep the button label succinct and specific. If you choose to add a button to **a Checklist item**, it will be right-justified and blue in color.

- **Button URL** (Optional) – Copy and paste the destination URL for the call to action the button label references. By default, when this button is clicked by a student, it opens a new window.

- To save your content, click **Submit.** Your edits will be updated in real time in student view.

Checklist Item

Title *

Understand the federal aid application & gathering FAFSA information

Ordering *

1

Detail

| Paragraph ∨ | **B** | *I* | U | S | ≔ | ≟ | 𝒫 | 66 | ↶ | ↷ |

The FAFSA (Free Application for Federal Student Aid) is free to submit-and if you don't file it, you could miss out on the largest source of college funding available.
Learn about the FAFSA
While the FAFSA qualifies you for federal aid, many state governments and colleges also use it to award their own aid, including:
- Grants and scholarships: Money you don't have to pay back
- Work-study jobs: Paid, part-time work that's generally on campus
- Loans: Money you need to pay back, usually after you graduate
If you plan on borrowing money to pay for college, the federal government offers low-interest loans that typically provide flexible and favorable payment options that don't begin until after you graduate.
Everyone who's getting ready to go to college or career school should fill out the FAFSA!
Gather information for filing the FAFSA
When you file the FAFSA, you'll be asked for information about yourself (your name, date of birth, address, etc.) and your financial situation.
Know the documents you'll need
Depending on your circumstances, there's additional information you'll need to fill out the FAFSA:
- Your Social Security number (it's important that you enter it correctly on the FAFSA!)
- Your parents' Social Security numbers if you are a dependent student
- Your driver's license number if you have one
- Your Alien Registration number if you are not a U.S. citizen
- Federal tax information or tax returns, including IRS W-2 information, for you (and your spouse, if you are married) and for your parents if you are a dependent student
Keep these records! You may need them again. Only submit the FAFSA form. Do not mail your tax returns or other personal records.
Get additional help

Button Label

Financial Aid

Button URL

https://www.eab.com/

Submit

EAB Best Practice

Keep your Checklist Items focused to one call to action, especially if using a button to link to another page.

EAB

Campus Resources

2

Overview & Navigation

- To add a new **category**, click on the **+ new category** button on the right top side.

- To delete a **category**, select the category you'd like to remove and click the **delete** button.

- To edit a **category**, click on the hamburger icon for the category you'd like to change and click **Edit**.

See next section for more details about *adding a category.*

- You can add multiple **resources** to a **category**.

- To add a new **resource**, click the **+ new resource** button on the top right side.

- To edit a **resource**, click on the hamburger icon for the resource you'd like to change and click **Edit**.

- To delete a **resource**, select the resource you'd like to remove and click the **delete** button.

- Each resource has two sections to add content: **Contact Info** and **Description**.

See *Add a Resource* section for more detail.

This section of the Portal is an institution's opportunity to provide extra information specifically related to transfer students.

+Add new category

Delete category

Shows all **Campus Resource Categories**

Edit category

Shows all **Resources** within the highlighted Campus Resource Category.

TIP

These resources can and should be regularly updated with new content for transfer students after your Portal goes live. Think about over-arching themes to your content and use those as categories.

Add a Category

- All fields in this form are required.

- **Title:** Enter the desired name of your Resource Category

- **Order:** Choose the position in which you want this item to appear in Campus Resources.

- Click **Submit** to save your changes.

Resource Category

Title *

> I am...

Ordering *

> 1

[Submit]

TIP

Unlike the Checklist, you can manually manipulate the order of the Resource Categories by changing only order numbers for **Categories** that already exist.

Add a Resource

- **Title** – Enter what you want to call this **Resource**. This field is required.

- **Description** – No limit to characters that can be added to this section. As you type. This field is optional but will still be present in the student view regardless of content added.

- **Contact** – Add information for a student to learn more. This field is optional but will still be present in the student view regardless of content added.

- **Category** – Choose the **Category** in which you want this **Resource** to live. This field is required.

- **Order** – Relevant for instance when there are multiple Resources in a **Category**. This indicates the placement on the page when the student views this category. This field is required

- Click **Submit** to save your changes.

Resource

Title *

A New Resource

Description

Paragraph   ⌄ | **B** *I* U S̶ | ⋮≡ ⅟≡ | ⋮

Contact

Paragraph   ⌄ | **B** *I* U S̶ | ⋮≡ ⅟≡ | ⋮

Category *

I am...   ⌄

Ordering *

1

Submit

EAB Best Practice

Add as much Contact information as possible, such as an Office Name, email address, website, phone number, etc.

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Colleges/Majors/Programs

3

College Display Details

- Change if/how colleges are displayed.

- Type your search criteria in the **search** field, then click enter to display the results.

- To **edit a field**, double click the cell you want to change to put the field in **edit mode.**

  - Type your new information for the cell and hit **Enter** or click out of the box to save your changes.

  - The following fields cannot be edited: SIS Code, SIS Name, SIS City, and SIS State.

The College Details page allows Staff to edit College Details and export the data into an Excel spreadsheet. The College Details page can be accessed by clicking on **Site Setup > College Details.**

College Details

Change how colleges are displayed by double clicking on a cell to edit and then hitting enter to save.

	SIS CODE	SIS NAME	SIS CITY	SIS STATE	NAME	CITY	STATE	IS VISIBLE	IS TRANSFERABLE
☐	000001	Cumulative Tran...						Yes	Yes
☐	004942	Wenatchee Valle...	Wenatchee	WA				Yes	Yes
☐	006642	St Phillips College	San Antonio	TX	Saint Phill...			Yes	Yes
☐	C0020	American Samo...	Pago Pago	AS	American...	Pago Pago	AS	Yes	Yes
☐	C0024	California Stude...	California	CA				Yes	No
☐	C0058	Cornish College ...	Seattle	WA	Cornish C...	Seattle	WA	Yes	Yes
☐	C0081	Landmark College	Putney	VT	Landmar...	Putney	VT	Yes	Yes
☐	C0118	DeVry Calgary	Canada					Yes	Yes
☐	C0127	Covenant Life Coll	Haines	AK	Covenant...	Haines	AK	Yes	No

- To change if the **College is Visible** or **Transferable**, click into the field and change to either "Yes" or "No" accordingly.

  - You do not have to hit **Enter** when editing the "Is Visible" or "is Transferable" fields.

NAME	CITY	STATE	IS VISIBLE	IS TRANSFERABLE
Washington County ...	Washington	DC	Yes	Yes

This indicates whether a student can view this specific College. Yes = is visible, No = is not visible. Changes update in real time.

This indicates whether a student can or cannot apply courses to transfer into this College. Yes = is transferrable, No = is not transferrable. Changes update in real time.

Majors/Program Overview & Navigation

- All Programs are pulled from your institution's Student Information System (SIS).

- There are multiple ways to Search, Sort and Filter the Majors/Programs in Portal:

  - **Program Name** – *Filter and Sort* by specific program name

  - **SIS Name** – by clicking SIS Name, you *can filter and sort* in ascending or descending alphabetical order

  - **SIS Code** – by clicking SIS Code, you can *filter and sort* in ascending or descending alphabetical order

  - **Major Code** – *Filter* by specific program code

  - **Description** – ability to filter by True or False. This is also referred to as "Long Description".

  - **About Text** – ability to *filter* by True or False. This is also called "Short Description".

  - **Display** – ability to filter by Yes or No, when the checkbox is selected=Yes, is checkbox is unselected=No. A Major/Program that is not visible shows as No. A Major/Program that is visible shows as Yes. Simply click into the box to change the Display status.

The Major/Program Manager allows you to control which majors are visible or not to the student view, along with transfer specific information about each.

Filter and Sort

Filter

Majors/Programs

	PROGRAM NAME ^	SIS NAME	SIS CODE	DEGREE CODE	COLLEGE CODE	MAJOR CODE
≡	Accounting	Accounting (BBA)	B-ACCTSPAN	BBA	BA	B11A
≡	Aerospace Engineering	Aerospace Engineering…	E-BS-AE&MATH	BSASE	EN	E11B
≡	Aging Studies Field Ma…	Field Major Aging Studi…	A-BA-FLD_ST	BA	LA	A51Q
≡	Aging Studies Field Ma…	Field Major Aging Studi…	A-BA-FLD_ST	BA	LA	A11Q
≡	Anthropology	Anthropology (BA)	A-BA	BA	LA	A28A
≡	Anthropology (BS)	Anthropology (BS)	A-BS-BIOLANT	BS	LA	A28A
≡	Anthropology & Busine…	Anthropology & Busine…	A-BA-COMBIN	BA	LA	A81D

Edit program

Filter

CONCENTRATION CODE	CIP CATEGORY	DESCRIPTION	ABOUT TEXT	DISPLAY
	Business, Managemen…	True	True	Yes
	Engineering	True	True	Yes
	Social Sciences	True	True	Yes
	Social Sciences	True	True	No
	Liberal Arts & Sciences…	True	True	No
	Social Sciences	True	True	No
	Social Sciences	True	True	No
	Social Sciences	True	True	No

True / False indicate if the major has a Description or About Text.

The Display Yes / No indicates whether a student can view this specific program. Changes are reflected in real time.

Editing a Program

- **SIS Info & Display Options**

  - You can edit the **Display Name** of the **major**. This will only display in the Portal and will not make any changes to your SIS data.

  - The **Pre-Professional major toggle** should be used specifically for programs that a student cannot earn a degree in. When this is toggled On, the program remains visible in the Portal and is selectable on the Majors tab. However, it produces a warning message and a student will not be able to create an unofficial credit evaluation for this program.

- **Visible to Students toggle –** Ask yourself the below questions:

  - Is this **major** currently accepting transfer students?

  - Are the degree requirements built in the degree audit system for this **program**?

Major Details

SIS Name

Accounting (BBA)
Update the SIS to change this

SIS Code

B-ACCTSPAN
Update the SIS to change this

Display Name

Accounting

Optional. Displayed in place of the SIS name

Pre-Professional Majors

☐
Students cannot earn a degree in pre-professional programs, but they may expect it on the list of majors (e.g. pre-med, pre-law)

Visible to Students

☑
Displayed majors are visible to students

Student View of Major Tile for a major that has **Pre-Professional toggle** switched to On.

⚠   Select a different major   ✕

Pre-Chiropractic

While you can participate in this program at WU, you'll need another major to complete your degree.

Contact Counselor

Editing a Program (Continued)

- **Short Description** is displayed when a student hovers over a major/program in the **My Major** tab of Portal.

- For programs with concentrations, you can check the **Copy About the Major descriptions** box to do exactly that. This will override descriptions that may exist in those majors currently. When this box is checked, Portal looks at a combination of major+program+degree+concentration code to determine which programs should share descriptions.

- **About the Major Description** (also called Long Description) section should be used to add more information about the program and insert hyperlinks back to your website. This is an opportunity for a partner to add information about internships, exam preparation, research, etc. You can also copy this description to all concentrations within the major.

- Only **CIP Code** can be overridden. If a CIP code needs to be changed, you can search on IPEDS CIP Categories for a better fit. If you edit a CIP code, you'll need to refresh the related careers to see new jobs and subsequent data. See the next section for more detail.

Short Description

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A short major description allows students to understand what the major is about and get clarification between potentially similar majors.

-

Displays on hover on the My Majors page. Recommended 300 characters to help students understand the difference between majors

Copy Short Description

☐
Warning: this will overwrite any existing short descriptions.

Major Description

| Paragraph ∨ | **B** *I* U S̶ | ≔ ≟ | ⦿ 66 | ↩ ↪ |

A longer description about the major provides additional detail about the program, highlights unique aspects of the major, and gives them a better sense of the community and culture.
This is also a great place to specify any non-course requirements, such as:
- tests
- internships or work experience
- study abroad
- undergraduate research
Finally, this space allows departments to highlight key statistics, rankings, or other selling points. For example:
- 10:1 student to professor ratio
- 3 faculty prestigious award winners
- Ranked first in the state for job placement

Longer description about the major to sell the program/community; specify non-course requirements; highlight key statistics, rankings, or other selling points

Copy Major Description

☐
Warning: this will overwrite any existing descriptions.

Cip Category

Business, Management & Marketing

Cip Code

520301

CIP codes control what displays under related careers

[Submit]

EAB Best Practice

Short Description should only be **1-2 sentences, limited to 200-400 characters** and used to easily distinguish between similar programs. Short description supports some rich text editing (bolding, linking, headers) but not other (bullets, block quotes).

Changing a Program's Category or Related Careers

For each program, the Transfer Portal pulls from the program's **CIP code** to inform the default **Category** and **Related Careers** that are displayed to students on the front-end of the site.

The initial CIP code loaded into the Transfer Portal comes directly from the institution's SIS.

However, the CIP code can be configured in the Site Setup area to change the corresponding **Category** and **Related Careers**.

Category

•   The program's category pulls directly from the **IPEDS' CIP Category**. In the Transfer Portal, you cannot customize the category name, but you can move the program into a more suitable IPEDS category, as needed.

Related Careers

•   EAB matches the program's CIP code to the corresponding **U.S. Department of Labor ONET* database** to provide potential national or state-level labor market outcomes. Like Category, you cannot customize the specific Related Careers, but you can override the CIP code to produce a more favorable Related Career, as needed.

* Keep in mind that when you override the CIP code, the new code will affect both Category and Related Careers.

Let's use the following example: the program Chemistry: Business (BS) was in the Business, Management & Marketing program category, but that program is more of a "Chemistry" major, so we want to move to the Physical Science category.

Step 1: Navigate to IPEDS' CIP category area https://nces.ed.gov/ipeds/cipcode/browse.aspx?y=56 and determine a more appropriate CIP code for this program. Scroll through list and find a high-level category. In this instance, we know we want to move Chemistry: Business to Physical Sciences.

Step 2: Expand the category and find a more specific option and 6-digit code.

Step 3: Enter the new 6-digit code into the CIP Code section of the program's Transfer Portal Site Setup area.

Adding New Programs

During implementation and after you go-live, there will be times we need to add in programs that are not auto-loaded into the Transfer Portal Site Setup area.

To do that, EAB will need to know which programs are missing.

Specific steps for this process are outlined to the right.

Majors/Programs

	PROGRAM NAME ^	SIS ... ⇅	SIS ... ⇅	DEGREE ...	COLLEGE ...	MAJOR COD	CONCENT...	CIP CATE...	DESCRIPTIO	ABOUT TEXT	DISPLAY
☰	Accounting	Accounti...	B-ACCTS...	BBA	BA	B11A		Business,...	True	True	Yes
☰	Aerospace Engineering	Aerospac...	E-BS-AE&...	BSASE	EN	E11B		Engineeri...	True	True	Yes
☰	Aging Studies Field Ma...	Field Maj...	A-BA-FLD...	BA	LA	A51Q		Multi/Inte...	True	True	Yes

Steps to Add New Programs into Transfer Portal

- Ensure the new program is built in the SIS with degree requirements in the degree audit system (production).

- Notify EAB with list of new programs. This list should include the following for each program:

  - **Sis_code**

  - **College_code**

  - **Degree_code**

  - **Major_code**

  - **Concentration_code (optional)**

  - **Degree_title**

  - **Major_title**

  - **Concentration_title (optional)**

  - **Cip_code**

- EAB to pull in new program(s) from data and notify partner when complete.

- In Site Setup, partner loads program description information and turns **Display** to "Yes"

- Partner to turns **Display** to "No" for any programs that are no longer being recruited.

- Program immediately displayed on the front-end of the Transfer Portal.

- Partner to check that new program's **Degree Completion** page is working as expected.

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Custom Messages

4

Editing a Custom Message

- **(a) Colleges and Courses Tab** – edits the second tab in Transfer Portal, where students input prior institutions and coursework.

- **(b) Colleges and Courses Header** – edits the header of the second tab in Transfer Portal.

- **(c) Colleges and Courses Description**- displays at the top of the Past Colleges & Courses page to help students know which courses to add. *Can add link to "Contact a counselor".*

- **(d) Colleges Sub-header** – edits the text above the college list predictive search.

- **(e) Colleges Search Box** – edits the instructional text in the college list predictive search.

- **(f) Other Credits Tab** – edits the third tab in Transfer portal, where students in put prior exams or different credit types.

- **(g) Other Credits Header** – edits the header of the third tab in Transfer Portal.

- **(h) Other Credits Description** - displays at top of the Other Credits page to help students know which exams to add, how to search for exams, etc. *Can add link to "Contact a counselor".*

a

○ 1. My WU Major ● **2. Colleges & Courses** ○ 3. Other Credits ○ 4. Summary

b Colleges and courses

c For a more accurate course evaluation, only add courses with a grade of C or better.

d **Add a college or university**

e 🔍 *Find your college or university*

f

○ 1. My WU Major ○ 2. Colleges & Courses ● **3. Other Credits** ○ 4. Summary

g Other Credits

h You may receive credits for the AP, CLEP, or IB exams you've taken. If you have additional credit opportunities, like military experience
contact a counselor

AP Exams ⓘ

+ Add your credit

CLEP Exams ⓘ

+ Add your credit

IB Exams ⓘ

+ Add your credit

Editing a Custom Message, continued

- **(i) Non-transferrable Institution** – this displays when a student adds a college that your institution knows is not accredited, is considered a non-transferable institution, or is a school that you want students to find but don't want them to add credit (e.g. international schools). *Can add link to "Contact a counselor".*

- **(j) Disclaimer** – this displays under selected major tiles and should be considered as your unofficial credit estimation statement for student's when using the Transfer Portal.

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Terms

5

Editing Terms

- **Terms** data are pulled from your institution's SIS's production environment*.

- By default, we see a full list of terms setup in your SIS (including past and future terms)

- **Name** is pulled directly from your SIS and is not configurable in Portal.

- **Start** and **End** dates to the right of Name reflects the start and end date of the term setup in your SIS.

- **Display Until Date** is used to determine when a term should be available for a student to choose in the Portal.

- **Display Now** indicator works the same way as in Major/Program Manager with the Yes/No toggle. Once a **Display Until Date** has passed, students can no longer see or select this term in Portal. However, the Display Now indicator does not update in the staff-facing Site Setup area.

Specific SIS source codes:

Banner
- *table name: stvtermm*
- *column names: stvterm_code, stvterm_desc, stvterm_start_date, stvterm_end_date*

Peoplesoft
- *Table name: ps_term_tbl*
- *Column names: strm, descr, term_begin_dt, term_end_dt*

Colleague
- *Table name: terms*
- *Column names: terms_id, term_desc, term_start_date, term_end_date*

Terms are used for a student to self-report their intended enrollment term.

Terms

Transfer terms displayed to a student when creating a profile.

	NAME	START	END	DISPLAY UNTIL DATE	DISPLAY NOW
☐	Fall 2016	2016-08-08	2016-12-15	08/08/2016	Yes
☐	Fall 2017	2017-08-07	2017-12-14	08/07/2017	Yes
☐	Fall 2018	2018-08-06	2018-12-13	08/06/2018	Yes
☐	Fall 2019	2019-08-05	2019-12-12	08/05/2019	Yes
☐	Fall 2020	2020-08-03	2020-12-10	08/03/2020	Yes
☐	Fall 2021	2021-08-02	2021-12-09	08/02/2021	Yes
☐	Fall 2022	2022-08-08	2022-12-15	08/08/2022	Yes
☐	Fall 2023	2023-08-07	2023-12-14	08/07/2023	Yes
☐	Fall 2024	2024-08-05	2024-12-12	08/05/2024	Yes

DISPLAY UNTIL DATE	DISPLAY NOW
08/08/2016	Yes
08/07/2017	Yes
08/06/2018	Yes
08/05/2019	Yes

EAB Best Practices

1. Have 3-4 years worth of terms built in your SIS to pull into Portal

2. Set Display Until Date to when you are no longer accepting students for the related term

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Emails, ONet Area Code, and Short & Long Partner Names

6

Contact Emails: Counselor and Pending Course

- **Contact a Counselor** – this email address will receive all inquiries from students who click the "Contact a Counselor" button in the Portal at any time. A single email will be sent to this email address with each inquiry from a prospective student. A counselor is not able to respond to a student's inquiry in the Portal, they must utilize an institutional email address.

- **Pending Courses** - this email address will receive all pending course notifications submitted by prospective students. One email will be sent per pending course submitted.

  - A partner institution can consider **not** adding an email address here if the Pending Course dashboard will be frequently monitored by a staff member.

Contact a transfer counselor

Contact Emails

Contact a Counselor *

example@example.com

This email address will be hidden from students, but will receive messages sent from the site

Pending Course *

example@example.com

This email address will be hidden from students, but will receive a message when students enter in new pending courses

Submit

New Course   ×

Course Prefix*   Course Number*

Example: PSYC   Example: 101

Course Name*

Example: Introduction to Psychology

Credit Hours*

Example: 3

Confirm that this information exactly matches your transcript. You will not be able to edit after submission.

Add   Cancel

TIP

Consider adding an email address with shared log-in credentials so multiple staff members can check for student inquiries or pending courses.

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ONet Area Code, Partner Names & Privacy Link

- **ONet Region** is used to pull relevant career information for the major or program a student chooses. You have the choice to select National or State level information. This is applied to <u>all</u> programs.

ONet Region

ONet Region *

(WASHINGTON X)

Selecting a state for the ONet Region will provide more specific information for major's Related Careers.

Submit

TIP

Think about where your students are going after graduation. Are they staying in the area? Select State. If they are moving away, select National.

- **Long Partner Name** is your entire institution's name.

- **Acronym Name** is either your institution's acronym or some other shortened version of your institution's name.

- **Privacy Policy link** will direct users to your institution's FERPA policy webpage.

Partner Names & Privacy Link

Long Partner Name *

Woodley University

This displays across the site and in emails

Acronym Name *

WU

Acronym name displays across the site

Privacy Policy Link *

https://www.eab.com/

URL must include http://

Submit