



# TRANSFER PORTAL

## USER GUIDE

OCTOBER 2018



The Transfer Portal is an NCAA application to manage the transfer process for Division I and II student-athletes. The portal is the first step in the application of the Division I notification of transfer and Division II permission to contact.

Students are entered into the portal by a compliance administrator or designee. The student's record is then managed by the compliance office, including the transfer tracer. The transfer portal also features search navigation, email notifications and integration with other NCAA systems.

A single-source sign-on (SSO) administrator can provide edit or view only privileges for transfer portal users. When providing access to the transfer portal for coaching or staff members, by default, the individual will have view only privileges. Edit privileges should only be provided to individuals who will enter and update the student's record.

This User Guide supplements other educational resources located in the transfer portal resources section.

# TABLE OF CONTENTS

page

1

## **NOTIFICATION OF TRANSFER**

- enter student - NCAA ID lookup - submit notification - receive email



page

6

## **MY TRANSFERS**

- transfer list view - completing the transfer tracer - withdraw request



page

16

## **OTHER TRANSFERS**

- transfer list - filter and search - add student to transfer watch list



page

19

## **TRANSFER WATCH LIST (TWL)**

- transfer list - view student record - receive update emails



# TABLE OF CONTENTS

page

24

## **MATRICULATE**

- action after the student transfers



page

27

## **MOBILE VIEW**

- compatibility with mobile devices



page

29

## **CONFERENCE OFFICE VIEW**

- view transfers from member institutions



page

31

## **COACH VIEW**

- other transfers - transfer watch list



HOW DO I SUBMIT A  
NOTIFICATION OF TRANSFER



# NOTIFICATION OF TRANSFER

NOTIFICATION OF TRANSFER | MY TRANSFERS | OTHER TRANSFERS | TRANSFER WATCH LIST | RESOURCES CONTACT US

Notification of Transfer

Student NCAA ID:  [Lookup Student NCAA ID](#)

Student First Name:

Student Last Name:

Student Email:

Student Mobile Phone:  Domestic Int'l

Student wishes to be contacted by other institutions:  Yes  No

No additional email contacts to notify

## Enter NCAA ID

- If you do not have the student's NCAA ID, click the lookup (see page 3).

## Student's name populates

## Enter student's email

- The portal sends emails to this email address.

## Enter student's mobile phone

- Select Domestic or International phone number.
- Phone number is not visible to other institutions.

## Student wishes to be contacted by other institutions

- Defaults to Yes. Select No if student does not want to be contacted by other coaches.

## Enter sport(s)

- Drop down list of sports sponsored at your institution.
- Discontinued sport(s) listed if discontinued in last four years.
- No Sport option available.
- Sports at multidivisional institutions are noted with the division the sport is sponsored.

## Enter comments, if necessary

## Enter email contact list

- Any individual(s) on the email contact list will receive emails when the notification of transfer is submitted and will receive future emails specific to this student.

# NCAA ID Lookup

The screenshot shows the 'NCAA ID Lookup' interface. At the top left is the NCAA logo. Below it is the title 'NCAA ID Lookup'. The main area is titled 'Search for Student-Athlete' and contains several input fields: 'First Name', 'Last Name', 'Date of Birth' (with a calendar icon), 'United States Of America' (a dropdown menu), 'Select State' (a dropdown menu), 'Select High School Graduat' (a dropdown menu), 'Hometown', and 'Any Account Type' (a dropdown menu). There is also a 'Select Sports' dropdown menu and a checkbox labeled 'Only Show Students on IRL or NLI'. At the bottom of the form are two blue buttons: 'Search' and 'Clear Filters'.

- Any Account Type
- Certification
- Profile

If you do not have the student's NCAA ID, click the lookup.

You may have a student without an NCAA ID in cases of club sports, non-NCAA sports, students with a limited tryout, etc.

The student can create a profile account with the NCAA Eligibility Center. There is no fee for a profile account since it is not a certification account.

If the student has a profile account, you can select the profile under the account type in the NCAA ID Lookup.

# Ready to **Submit** Notification of Transfer

Notification of Transfer

Student NCAA ID: 1507234718  
[Lookup Student NCAA ID](#)

Student First Name: SKIP

Student Last Name: PASS

Student Email: pass@gmail.com

Student Mobile Phone: Domestic Int'l  
317-867-5309

?\_Student\_wishes\_to\_be\_contacted\_by\_other\_institutions: Yes No

?\_Sport(s): Men's Basketball x

?\_Comments: Comments

?\_EmailContactList:

+ Add Email Contact

Email	
coach@victory.edu	 
AD@victory.edu	 

Submit



EMAIL IS SENT TO THE STUDENT, INDIVIDUALS ON THE EMAIL CONTACT LIST AND THE INDIVIDUAL SUBMITTING THE NOTIFICATION OF TRANSFER.

# NOTIFICATION OF TRANSFER EMAILS

## Student Email



Victory College has submitted your notification of transfer. Your information is now visible on the NCAA Transfer Portal. Please contact your institution's athletics compliance office if you have any questions, if you want your notification of transfer withdrawn, or to designate that you do not want coaches to contact you.

## Institution Email



The compliance office for Victory College has submitted a notification of transfer for:

Student Name: **SKIP PASS**  
NCAA ID: **1507234718**  
Sport(s): **Men's Basketball**  
Institution: **VICTORY COLLEGE**

The student-athlete's information is now visible on the NCAA Transfer Portal for any NCAA coaches to contact the student-athlete about transferring. As a reminder, the student-athlete should contact the compliance office if the student-athlete wants the notification of transfer withdrawn or for the compliance office to designate if the student-athlete does not want contacted by coaches.

HOW DO I COMPLETE THE  
TRANSFER TRACER



# MY TRANSFERS

NCAA ID	Student Name	Initiated Date	Sport	
1507234718	SKIP PASS	10/22/2018	Men's Basketball	<a href="#">Transfer Tracer</a>

After submitting the notification of transfer, the student appears on the MY TRANSFERS list.

This list includes only your institution's transfers.

All students submitted will show on MY TRANSFERS.

Students are listed in order by the initiated date (past to present). The initiated date is the date the student's notification of transfer was submitted. This initiated date is automatically populated when you click submit.

List can be reordered by sorting each column.

# Transfer Tracer

Tracer Information ?

The student must sign the NCAA compliance form to give consent to disclose the student's information in the Transfer Portal pertaining to NCAA eligibility.

General Information Eligibility Participation Exceptions

Reason for Transfer: [Dropdown Menu]

Comments: [Text Area]

Did the student-athlete only attend a summer term or participate in preseason practice prior to initial full-time enrollment? Yes No

Initial Full-Time Enrollment: Any institution: [Select Term] [Select Year] This institution: [Select Term] [Select Year]

Full-time Terms Completed: [Dropdown Menu]

Is the student-athlete currently receiving athletically related financial aid? Yes No

Did the student-athlete previously transfer from another collegiate institution? Yes No

NLI Status:

Signed National Letter of Intent (NLI)			
Signing Date	Status	Institution	Release Status (if any)
11/09/2016	VALID	Victory College	

Save General Information

The transfer tracer can be completed by the compliance office at anytime or if requested by another institution.

The student must sign the NCAA compliance form to give consent to disclose the student's information pertaining to NCAA eligibility.

Reason for Transfer is a drop-down list. This is not visible to other institutions and is for data research purposes.

If the student is a previous transfer, a box will appear to enter previous two or four-year institutions.

NLI information populates from the NLI Portal.

Each time the tracer information is saved, the date and time of last update will show on each screen next to the save button.



Option to print transfer tracer

# Transfer Tracer

▼ Tracer Information ?

The student must sign the NCAA compliance form to give consent to disclose the student's information in the Transfer Portal pertaining to NCAA eligibility.

General Information **Eligibility** Participation Exceptions

Eligibility Center Academic Certification:

Div I	Div I Waiver	Div II	Div II Waiver
Final Qualifier	Early Academic Qualifier	Final Qualifier	Early Academic Qualifier

Eligibility Center Amateurism Certification:

Division I	Division II	Sport
Final: Certified	Final: Certified	Men's Basketball

Is the student-athlete currently in good academic standing?  Yes  No  
Comments

? Is the student-athlete meeting all progress-toward-degree requirements?  Yes  No  In Progress  
Comments

? Student-athlete would be academically eligible if he or she remains at the institution?  Yes  No  In Progress  
Comments

Student-athlete has graduated from the current institution?  Yes  No  
Comments

Save Eligibility

Initial eligibility information populates from the Eligibility Center Portal.

In progress is an option if academic status is not complete.

If the student received an undergraduate degree, the text field to enter date will appear.

Division I Football - Additional eligibility question will show only if football was selected as the student's sport.

↓

? Did the student-athlete earn nine credits and the APR eligibility point during the most recent fall term?  Yes  No  In Progress  
Comments

# Transfer Tracer

Tracer Information ?

The student must sign the NCAA compliance form to give consent to disclose the student's information in the Transfer Portal pertaining to NCAA eligibility.

General Information Eligibility **Participation** Exceptions

Has the student-athlete participated in intercollegiate athletics (practiced and/or competed) beyond a 14 consecutive-day tryout period? Yes No

Sports Participation ?

+ Add Participation

Sport	Term(s)	Academic Year	Practice?	Season Used?	Hardship Waiver?	Received Athletic Aid?
Participation has not been entered						

Add Participation

Sport

? Term(s)

? Academic Year

Practice?

? Season Used?

Hardship Waiver?

Received Athletic Aid?

Close Save

Include all known intercollegiate participation history, including that at previously attended institutions and in-progress seasons, if applicable.

Participation by term or academic year will be in list order. You can add as many rows as necessary.

# Transfer Tracer

Tracer Information ?

The student must sign the NCAA compliance form to give consent to disclose the student's information in the Transfer Portal pertaining to NCAA eligibility.

General Information Eligibility Participation **Exceptions**

Has the student-athlete been disqualified or suspended for disciplinary reasons? Yes No Unsure  
Comments

Has the student-athlete's sport been discontinued (or publicly announced it will be dropped)? Yes No  
Comments

Has the student-athlete's academic program been discontinued? Yes No  
Comments

? Does the institution object to granting the one-time transfer exception? Yes No Not Applicable  
Comments

Does the student-athlete meet the two-year non-participation exception? Yes No  
Comments

Do any other four-year transfer exceptions apply? Yes No  
Comments

Save Exceptions

The most common transfer exceptions are listed in the transfer tracer.

If the applicable transfer exception is not listed, see the last question and include what exception applies in the comment box.

If your institution does not object to granting the one-time transfer exception, but restrictions apply for specific institutions or conferences, add the restrictions to the comment box.

# REMINDERS



The transfer tracer is a tool for institutions to share a student-athlete's academic and athletic history to determine the student-athlete's eligibility status.

The transfer tracer can be completed by the compliance office at anytime or if requested by another institution.

The student-athlete's information can be updated and saved independently (by question or section) without completing the full transfer tracer.

The transfer tracer is not verified through the transfer portal. It is the institution's responsibility to verify any information and/or seek more clarification.

HOW DO I WITHDRAW A STUDENT  
WHO DECIDES TO NOT TRANSFER



# Withdraw Request

SKIP PASS NCAA ID: 1507234718

Print Preview **Withdraw Request**

Are you sure?

This withdraw is at the student's request if the student wishes to not continue with the transfer process.

**Withdraw** Cancel

Notification of Transfer

Student NCAA ID: 1507234718  
[Lookup Student NCAA ID](#)

Student First Name: SKIP

Student Last Name: PASS

Student Email: pass@gmail.com

Student Mobile Phone: Domestic Int'l  
317-867-5309

Student wishes to be contacted by other institutions:  Yes  No

Sport(s): Men's Basketball

Comments: Comments

Date Initiated: 10/22/2018 3:06 PM

Email Contact List

[Add Email Contact](#)

Email	
coach@victory.edu	<a href="#">Edit</a> <a href="#">Delete</a>
AD@victory.edu	<a href="#">Edit</a> <a href="#">Delete</a>

WITHDRAWN: 11/12/2018 10:31 AM

If the student later decides to not transfer and the student requests the notification of transfer be withdrawn, the withdraw request is visible under MY TRANSFERS by clicking on the transfer tracer.

Click on the withdraw request button and confirm the student's request to withdraw the notification of transfer.

The withdraw action is only available to an individual with edit privileges and by the institution who entered the student in the transfer portal.

The withdrawn date and time will show in the student's notification of transfer.



Emails will be sent to the student, individuals on the email contact list, individual submitting the withdraw and anyone tracking the student on their transfer watch list.



# WITHDRAWN EMAILS

## Student Email



Victory College has withdrawn your notification of transfer as you have requested. Please contact your institution's athletics compliance office if you have any questions.

## Institution Email



Student Name: **SKIP PASS**  
NCAA ID: **1507234718**  
Sport(s): **Men's Basketball**  
Institution: **VICTORY COLLEGE**

The notification of transfer has been withdrawn as requested by the student-athlete. The student-athlete's record is noted as withdrawn in the NCAA Transfer Portal.

HOW DO I VIEW  
OTHER TRANSFERS



# OTHER TRANSFERS

NOTIFICATION OF TRANSFER		MY TRANSFERS		OTHER TRANSFERS		TRANSFER WATCH LIST		RESOURCES CONTACT US	
Other Transfers -- Includes ALL other institution's transfers									
Show 10 entries		Sport Filter:			Search:				
TWL	NCAA ID	Student Name	Initiated Date	Division	Institution	Sport	Conference		
★	1601102587	TEE SHOT	11/28/2018	I	Triumph University	Women's Golf	Great Nation Conference	Transfer Tracer	
☆	1502139400	CLAY COURT	11/28/2018	I	Achieve State	Men's Tennis	Conference Collegiate	Withdrawn	
☆	1402135587	▲ WIDE OUT	12/13/2018	I	Champion Institute	Football	Conference Collegiate	Transfer Tracer	
☆	1711659371	TRIPLE TUCK	01/05/2019	II	Leader College	Women's Gymnastics	Big 50 Conference	Matriculated	



Select star to place the student on your Transfer Watch List (TWL).



Student does not want to be contacted.

Select OTHER TRANSFERS to view other institution's transfers in the list.

Student's name appears on the list if the notification of transfer (Division I) or permission to contact (Division II) was entered.

Narrow list by sport in the Sport Filter and/or sort list by column.

Click on the Transfer Tracer to see the student's academic and athletic history if the information has been entered. (View Only)

Student's record shows Withdrawn if the student's decision changed to not transfer. (see page 23)

Student's record shows Matriculated once the student has transferred and attended the first day of class. (see page 25)

# OTHER TRANSFERS

NOTIFICATION OF TRANSFER	MY TRANSFERS	OTHER TRANSFERS	TRANSFER WATCH LIST	RESOURCES CONTACT US				
Other Transfers -- Includes ALL other institution's transfers								
Show 10 entries	Sport Filter: Women's Golf	Search: Great Nation						
TWL	NCAA ID	Student Name	Initiated Date	Division	Institution	Sport	Conference	
★	1601102587	TEE SHOT	11/28/2018	I	Triumph University	Women's Golf	Great Nation Conference	Transfer Tracer

Sport Filter – Select the sport to only show the sport you want to view.

Search – All columns can be searched. For example, select a sport in the sport filter and type a conference name. Only students from that sport and conference will appear.

# TRANSFER WATCH LIST

?	TWL	NCAA ID	Student Name	Initiated Date	Division	Institution	Sport	Conference	
★		1601102587	TEE SHOT	11/28/2018	I	Triumph University	Women's Golf	Great Nation Conference	Transfer Tracer

The TRANSFER WATCH LIST includes only the transfers selected in the TWL column on the OTHER TRANSFERS screen.

The Transfer Watch List is an individual list and not an institutional list.

Each individual logged into the transfer portal can create his or her own watch list.

If updates occur in the student's record, emails are sent to all individuals who have the student on their watch list. (see page 22)

Click the student's star in the TWL column if you want to remove the student from your watch list.

## Division I Student's Notification of Transfer

▼ Permission to Contact

Student NCAA ID:	1601102587	ⓘ Sportist:	Women's Golf x
Student First Name:	TEE	ⓘ Comments:	
Student Last Name:	SHOT	Date Initiated:	10/22/2018 3:06 PM
Student Email:	tshot@gmail.com		
ⓘ Student wishes to be contacted by other institutions:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		

If the student is transferring from a Division I institution, the student's record will show the Notification of Transfer.

If the student is transferring from a Division II institution, the student's record will show the Permission to Contact.

These are both NCAA rules that apply to communication with the student.

Since Division II applies the Permission to Contact legislation, check the comments box to see if the Division II institution included restrictions related to communication with the student.

The Division I Notification of Transfer and the Division II Permission to Contact does not identify if the student is granted a transfer exception for immediate eligibility. This information would be included in the transfer tracer exceptions.

## Division II Permission to Contact

▼ Permission to Contact

Student NCAA ID:	1711659371	ⓘ Sportist:	Women's Gymnastics x
Student First Name:	TRIPLE	ⓘ Comments:	
Student Last Name:	TUCK	Date Initiated:	1/5/2019 11:30 AM
Student Email:	tuck@gmail.com		
ⓘ Student wishes to be contacted by other institutions:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		

HOW WILL I KNOW WHEN A  
STUDENT'S RECORD IS UPDATED



# STUDENT RECORD UPDATE EMAILS

(See withdraw email on page 15)

## Institution Email



Student Name: **SKIP PASS**  
NCAA ID: **1507234718**  
Sport(s): **Men's Basketball**  
Institution: **VICTORY COLLEGE**

You are receiving this email because updates have occurred in the student's transfer portal record.

## Transfer Watch List Institution Email



Student Name: **SKIP PASS**  
NCAA ID: **1507234718**  
Sport(s): **Men's Basketball**  
Institution: **VICTORY COLLEGE**

You are receiving this email because this student is on your Transfer Watch List (TWL). When updates occur in the student's transfer portal record, you will receive this email notification. Please check the record for any updates. If you no longer want to include this student in your TWL, you can uncheck the star in the TWL column.

# Withdraw Request Other Transfers View

SKIP PASS NCAA ID: 1507234718

Print Preview

## Notification of Transfer

Student NCAA ID: 1507234718

Sportist: Men's Basketball x

Student First Name: SKIP

Comments:

Student Last Name: PASS

Student Email: pass@gmail.com

Date Initiated: 10/22/2018 3:06 PM

Student wishes to be contacted by other institutions:

Yes No

WITHDRAWN: 11/12/2018 10:31 AM

If a student's notification of transfer is withdrawn, the transfer tracer button will change to a red withdrawn button.

You can click on the withdrawn button located on the OTHER TRANSFERS to see the date and time in the student's notification of transfer.

It is permissible for the student to communicate with other coaches during the time period between the initiated date and the withdrawn date.

WHAT ACTION IS TAKEN  
AFTER THE STUDENT TRANSFERS



# Matriculated

SKIP PASS NCAA ID: 1507234718

Print Preview Matriculate

Are you sure?

By clicking the Matriculate button, you are confirming that the student has transferred and is now attending classes at your institution.

Matriculate

Cancel

## Notification of Transfer

Student NCAA ID: 1507234718

Sports:

Men's Basketball x

Student First Name: SKIP

Comments:

Student Last Name: PASS

Student Email: pass@gmail.com

Date Initiated: 10/22/2018 3:06 PM

Student wishes to be contacted by other institutions:

Yes No

Matriculated: 01/10/2019 11:09 AM

The matriculate action is the responsibility of the institution where the student transferred.

The compliance office will identify the student as matriculated once the student has matriculated by attending the first day of class.

The matriculate button can be accessed by clicking on the student's transfer tracer in the OTHER TRANSFERS view.

Click on the matriculate button and confirm that the student matriculated at your institution.

The matriculated date and time will show in the student's notification of transfer.



Emails will be sent to the student, individuals at previous institution, individual submitting the matriculate and anyone tracking the student on their transfer watch list

# MATRICULATED EMAILS

## Student Email



Your record in the NCAA Transfer Portal has changed to show that you have now transferred. Please contact your institution's athletics compliance office if you have any questions.

## Institution Email



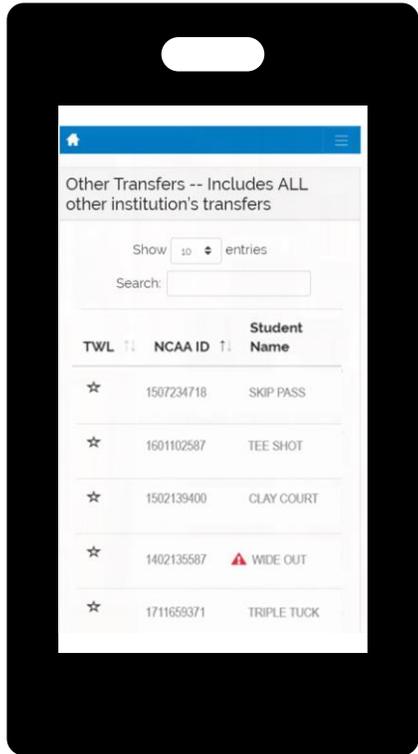
Student Name: **SKIP PASS**  
NCAA ID: **1507234718**  
Sport(s): **Men's Basketball**  
Institution: **VICTORY COLLEGE**

The student-athlete's record is noted as matriculated in the NCAA Transfer Portal. This means the student-athlete has transferred and is attending classes at another institution.

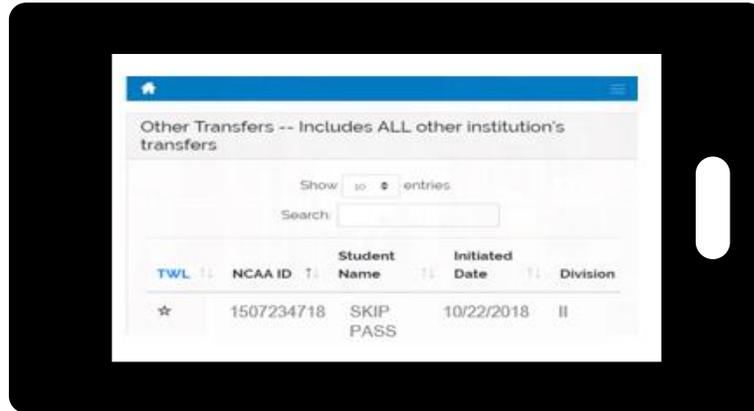
CAN THE TRANSFER PORTAL  
BE USED ON A MOBILE DEVICE



# MOBILE VIEW



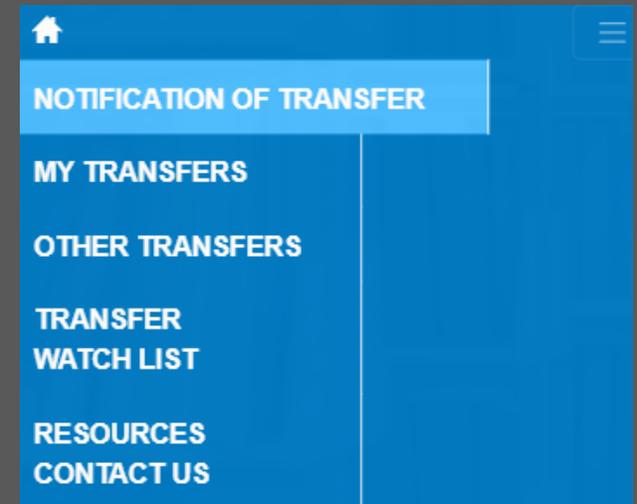
Scroll across screen →



Scroll across screen →

The Transfer Portal can be viewed on a mobile device.

Click on the  to show the menu of tabs.



CAN THE CONFERENCE OFFICE  
VIEW THE TRANSFER LIST



# CONFERENCE OFFICE VIEW

My Transfers -- Includes only YOUR institution's transfers

Show 10 entries Search:

NCAA ID	Student Name	Initiated Date	Institution	Sport	
1502139400	CLAY COURT	11/28/2018	Achieve State	Men's Tennis	<a href="#">Transfer Tracer</a>
1402135587	WIDE OUT	12/13/2018	Champion Institute	Football	<a href="#">Transfer Tracer</a>

Conference office administrators have access to view their member institutions' transfers in MY TRANSFERS.

# HOW WILL COACHES USE THE TRANSFER PORTAL



# OTHER TRANSFERS

?	TWL	NCAA ID	Student Name	Initiated Date	Sport	Conference	
★		1601102587	TEE SHOT	11/28/2018	Women's Golf	Great Nation Conference	Transfer Tracer
★		1502139400	CLAY COURT	11/28/2018	Men's Tennis	Conference Collegiate	Withdrawn
★		1402135587	▲ WIDE OUT	12/13/2018	Football	Conference Collegiate	Transfer Tracer
★		1711659371	TRIPLE TUCK	01/05/2019	Women's Gymnastics	Big 50 Conference	Matriculated

The most frequent view for a coach is OTHER TRANSFERS and TRANSFER WATCH LIST.

When a coach logs into the transfer portal and clicks on OTHER TRANSFERS, the coach will see all students in all sports in the transfer portal.

A coach can narrow the list to only his or her sport by selecting the sport in the sport filter. A more narrowed search can also occur by searching any column. For example, select a sport in the sport filter and type a conference name. Only students from that sport and conference will appear.

A coach can also add students to his or her TRANSFER WATCH LIST by clicking on a student's star in the TWL column from the OTHER TRANSFERS list.

If updates occur in the student's record, emails are sent to all individuals who have the student on their watch list.

Click the student's star in the TWL column if you want to remove the student from your watch list.

# TRANSFER WATCH LIST

?	TWL	NCAA ID	Student Name	Initiated Date	Division	Institution	Sport	Conference	
★		1601102587	TEE SHOT	11/28/2018	I	Triumph University	Women's Golf	Great Nation Conference	Transfer Tracer

**NCAA  
TRANSFER  
PORTAL**

**[transfer@ncaa.org](mailto:transfer@ncaa.org)**

