TRANSFER PORTAL

USER GUIDE

OCTOBER 2018

INTRODUCTION

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.

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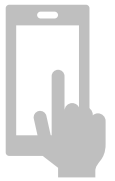

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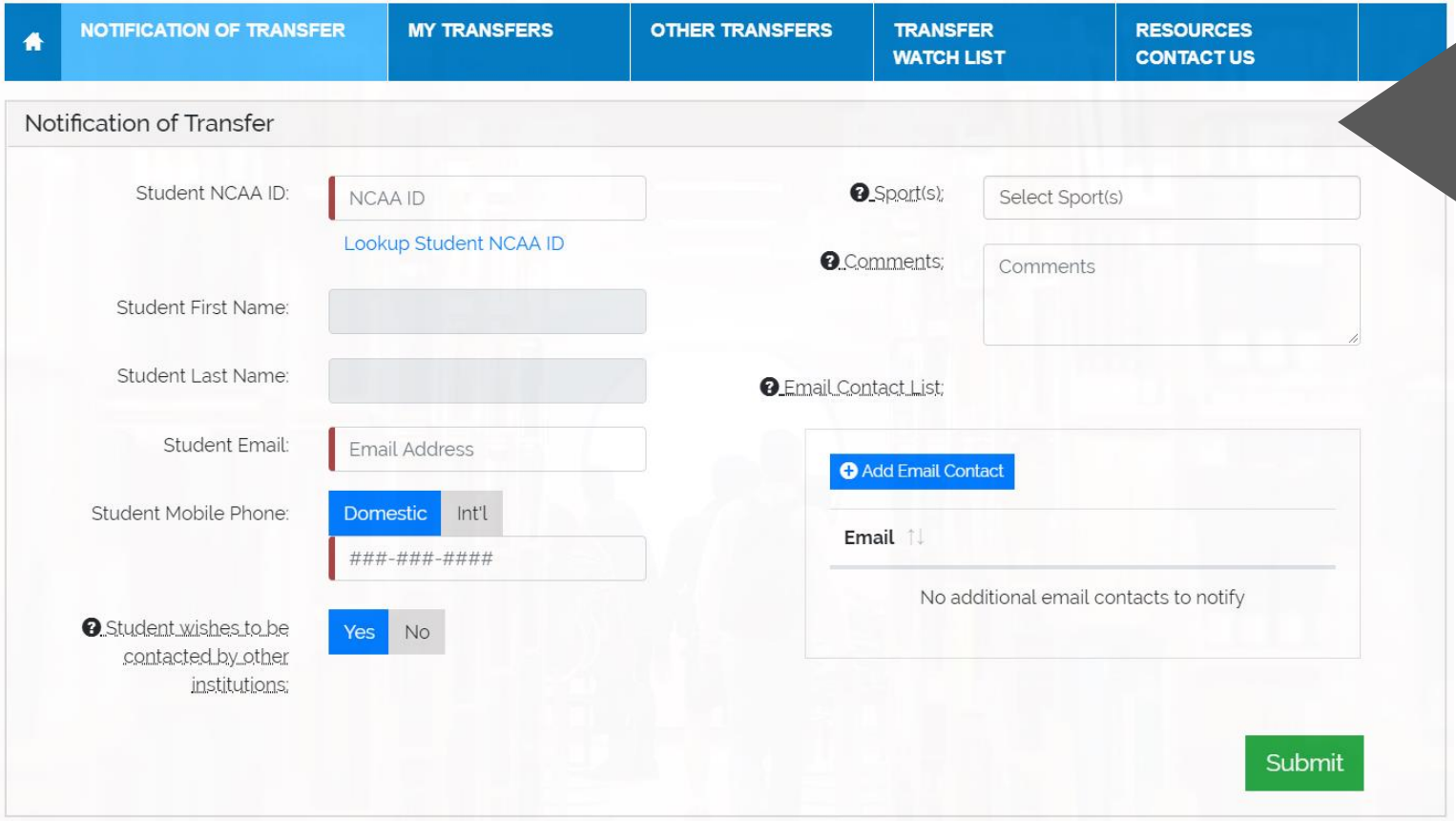
HOW DO I SUBMIT A NOTIFICATION OF TRANSFER

NOTIFICATION OF TRANSFER



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.

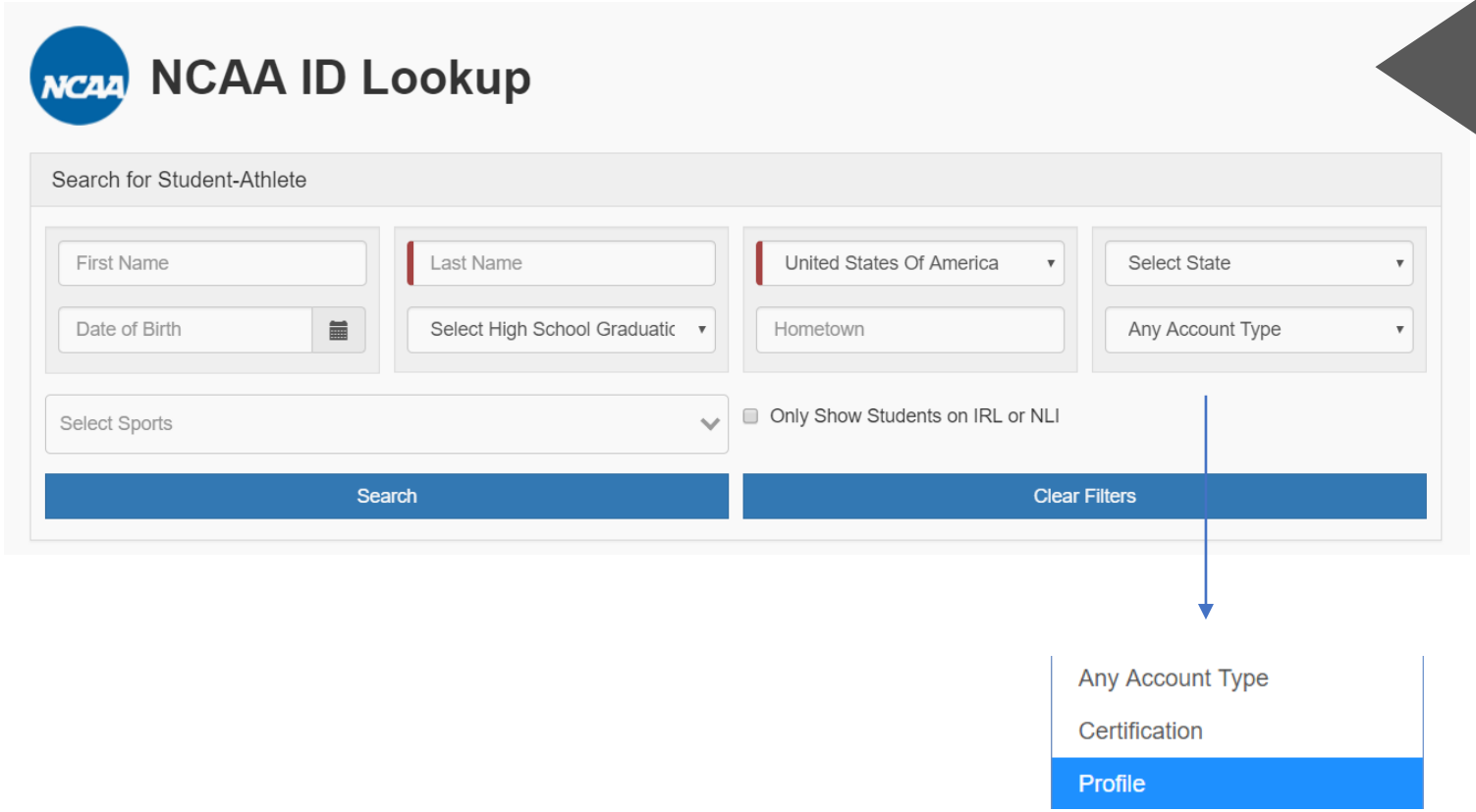
Enter comments, if necessary

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.

TOOL TIPS -Always read for helpful tips.

NCAA ID Lookup



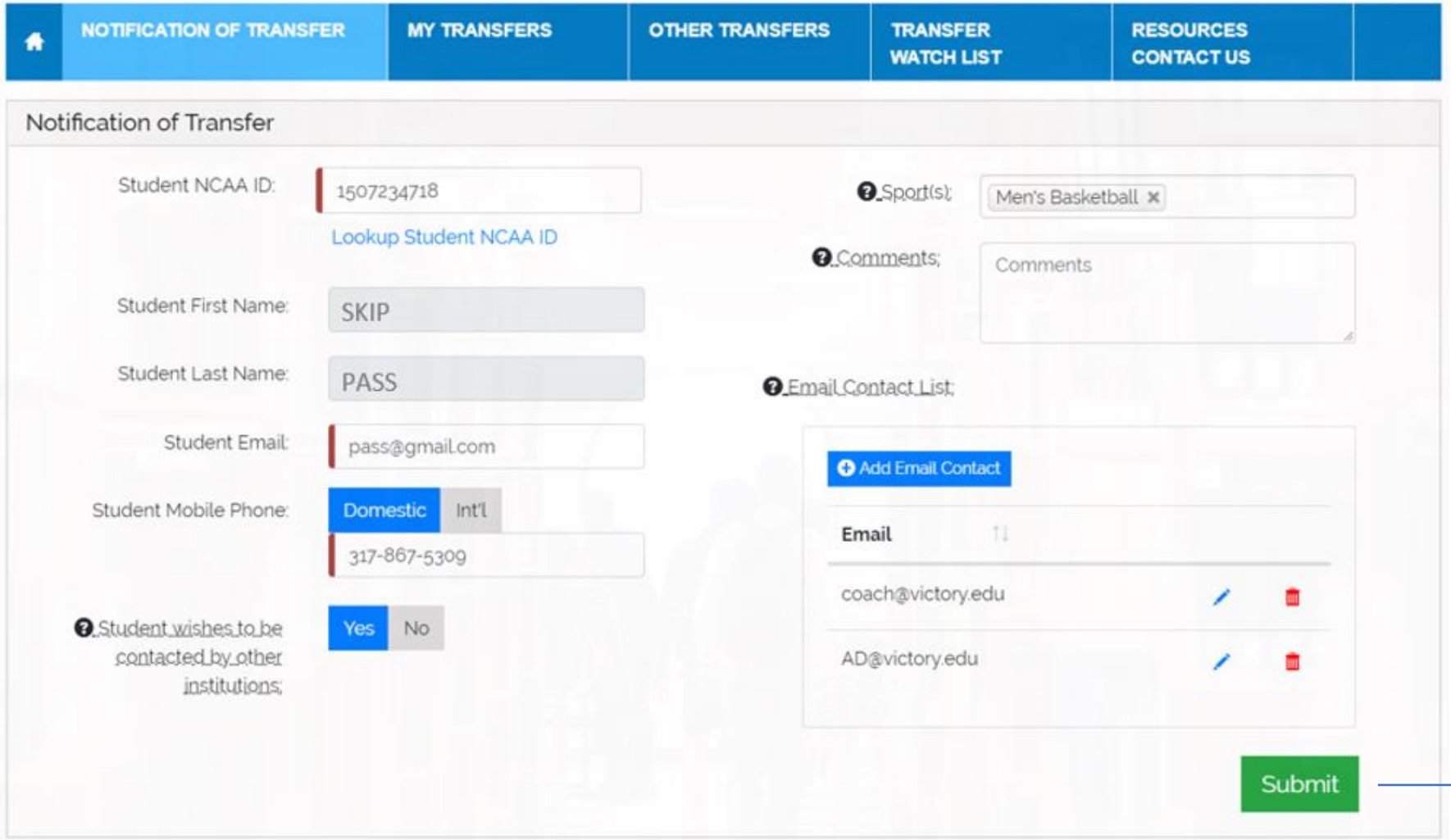
If you do not have the student's NCAA ID, click the lookup.

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



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

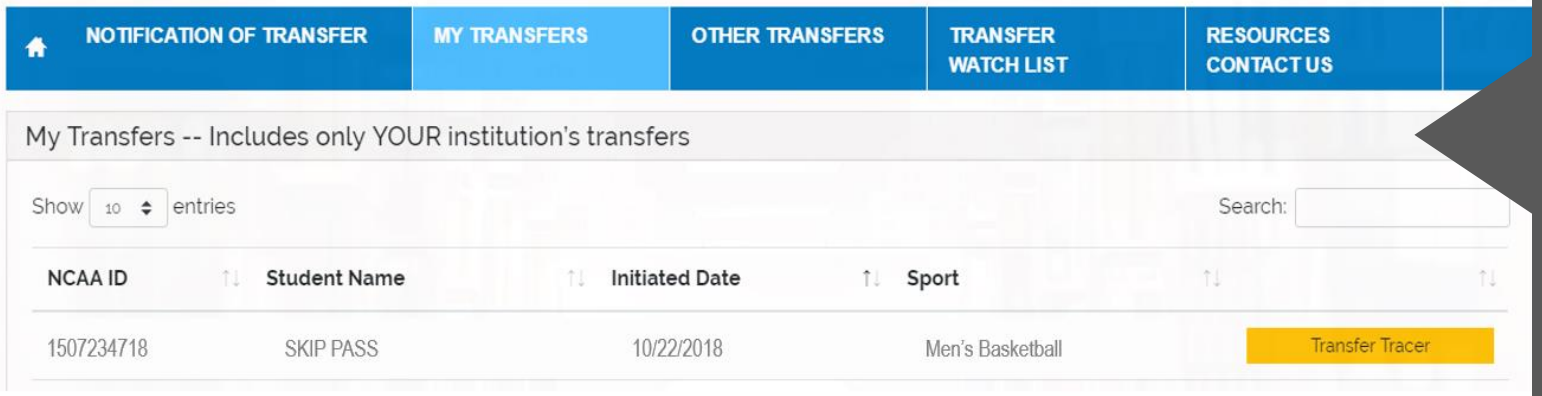
The compliance office for Victory College has submitted a notification of transfer for:

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



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

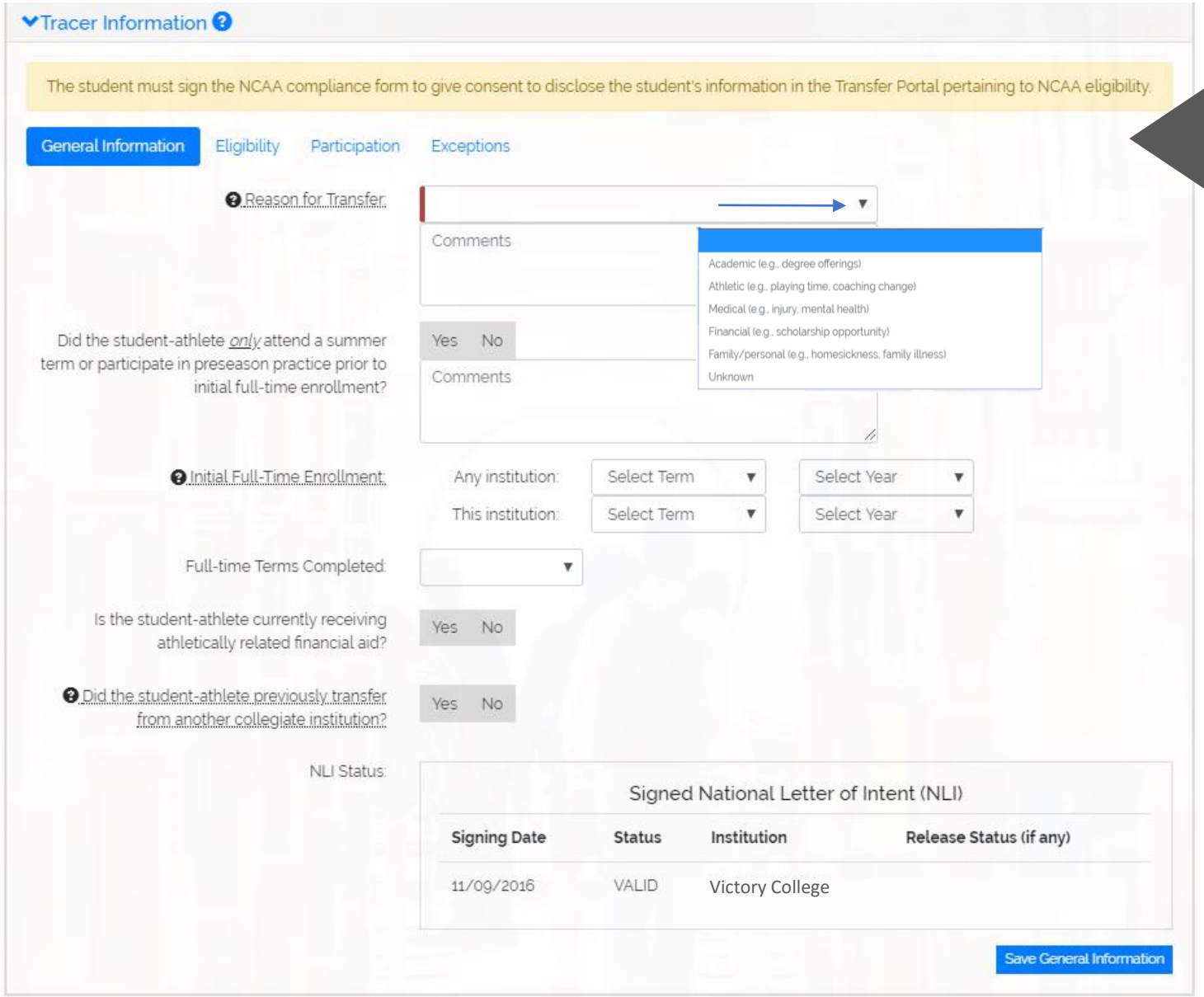
This list includes only your institution's transfers.

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



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.

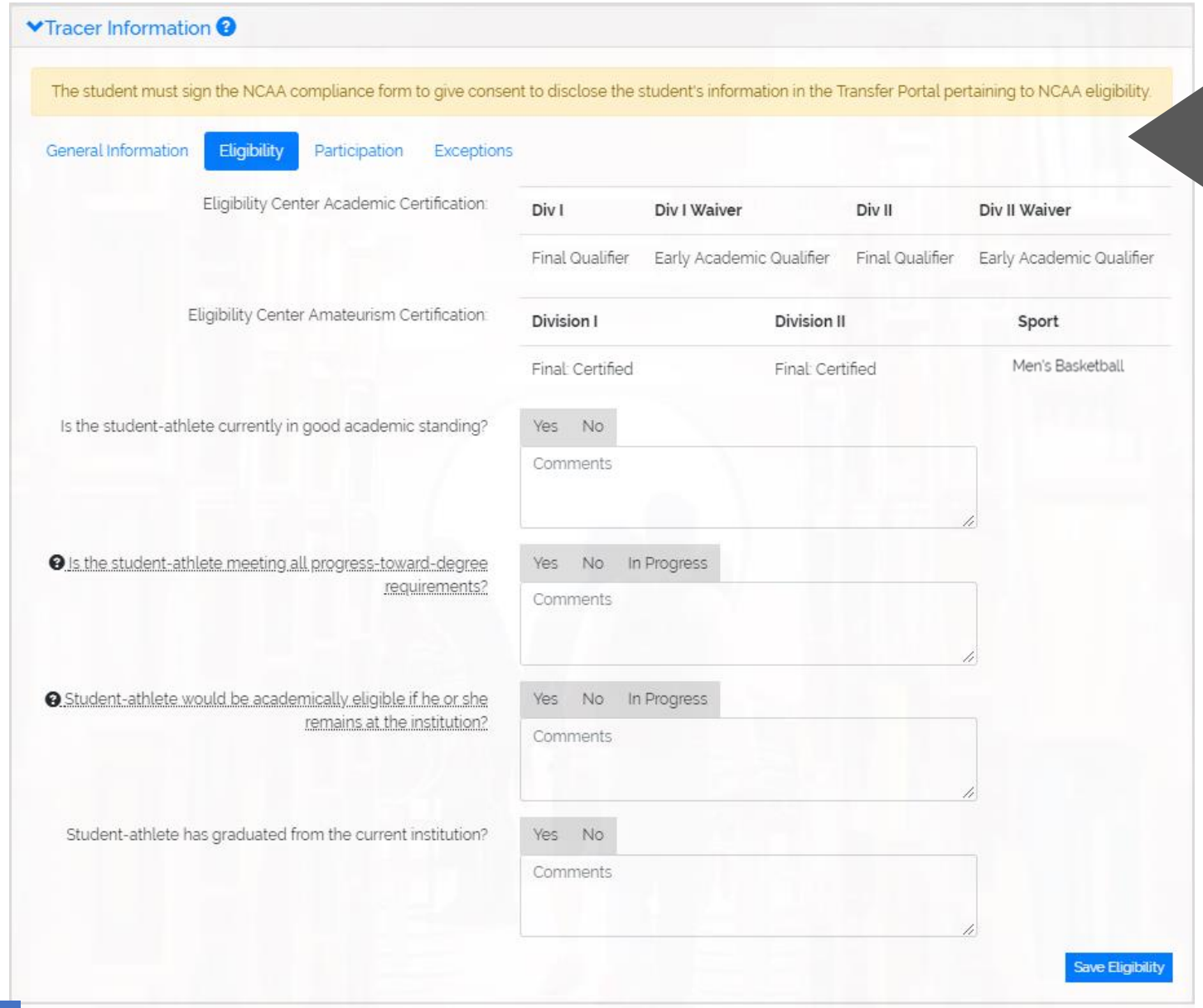
NLI information populates from the NLI Portal.

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

Print Preview — Option to print transfer tracer

TOOL TIPS -Always read for helpful tips.

Transfer Tracer

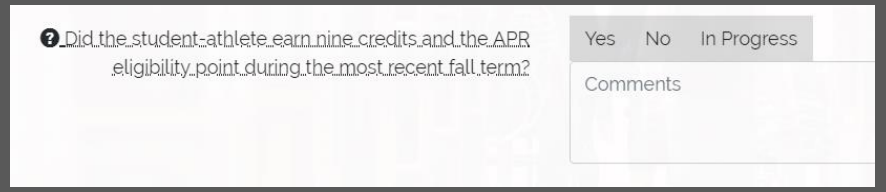


Initial eligibility information populates from the Eligibility Center Portal.

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

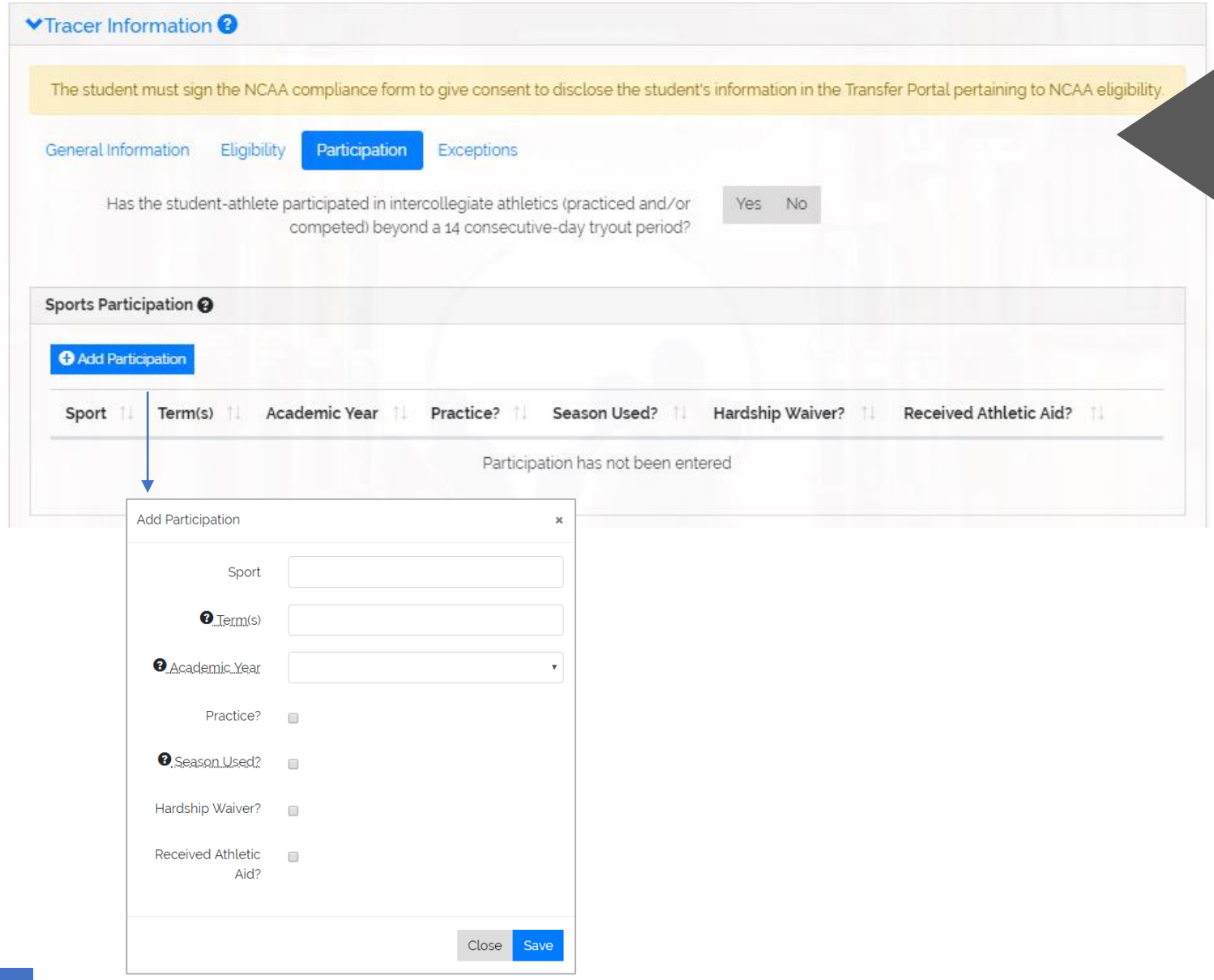
If the student received an undergraduate degree, the text field to enter date will appear.

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



TOOL TIPS -Always read for helpful tips.

Transfer Tracer

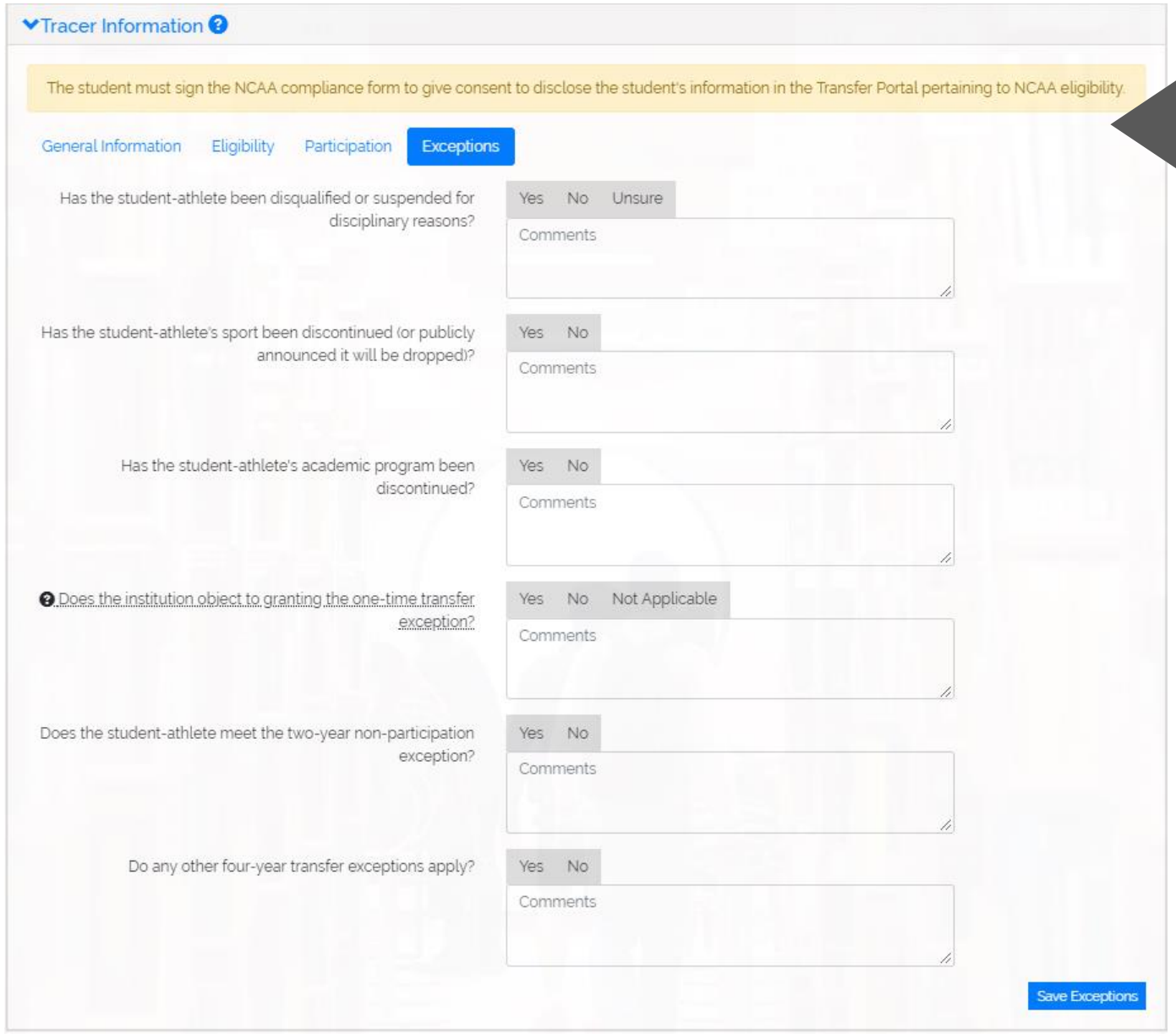


Include all known intercollegiate participation history, including that at previously attended institutions and in-progress seasons, if applicable.

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

TOOL TIPS -Always read for helpful tips.

Transfer Tracer



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.

TOOL TIPS -Always read for helpful tips.

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.

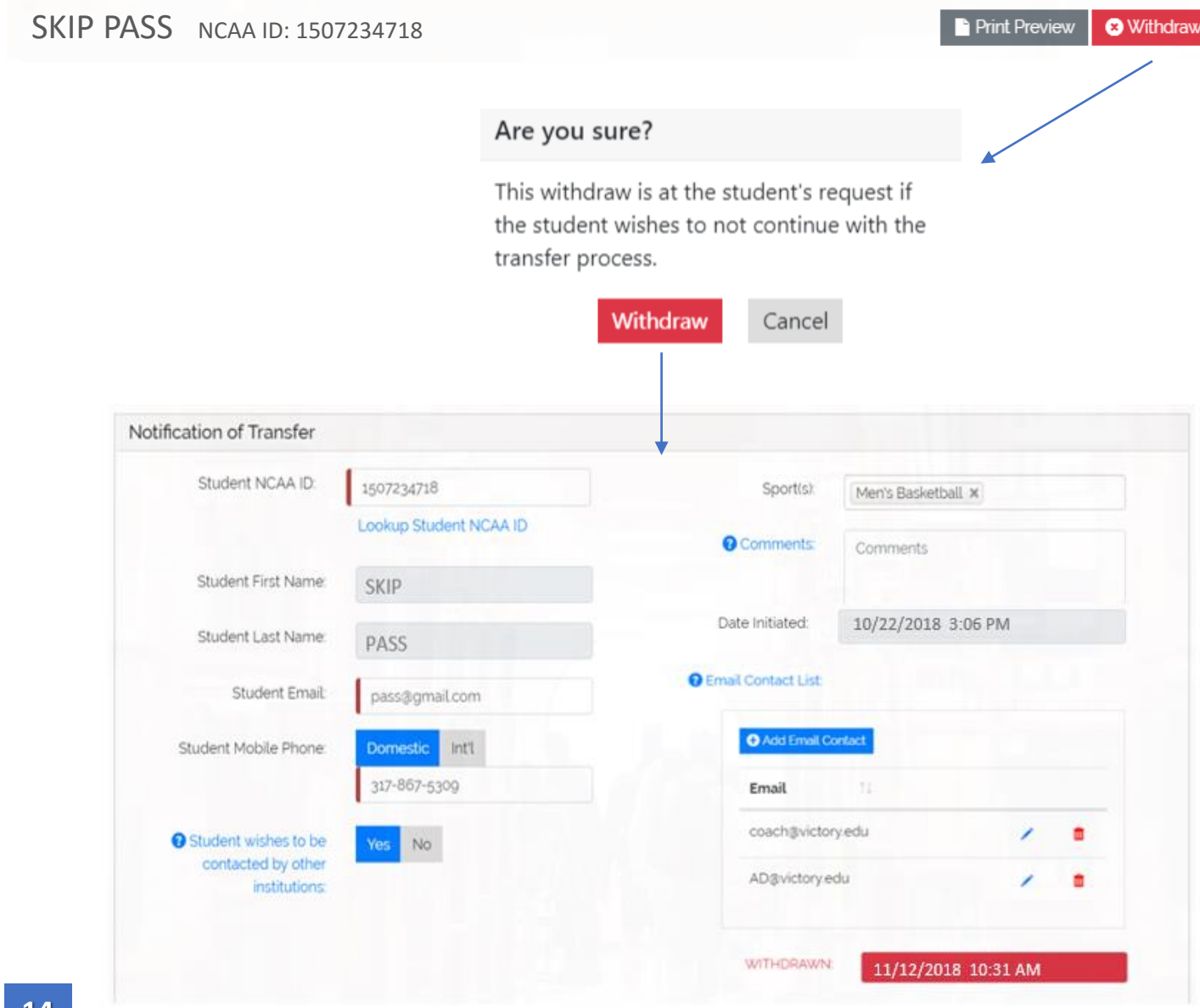
The transfer tracer can be completed by the compliance office at anytime or if requested by another institution.

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



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.

TOOL TIPS -Always read for helpful tips.

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.

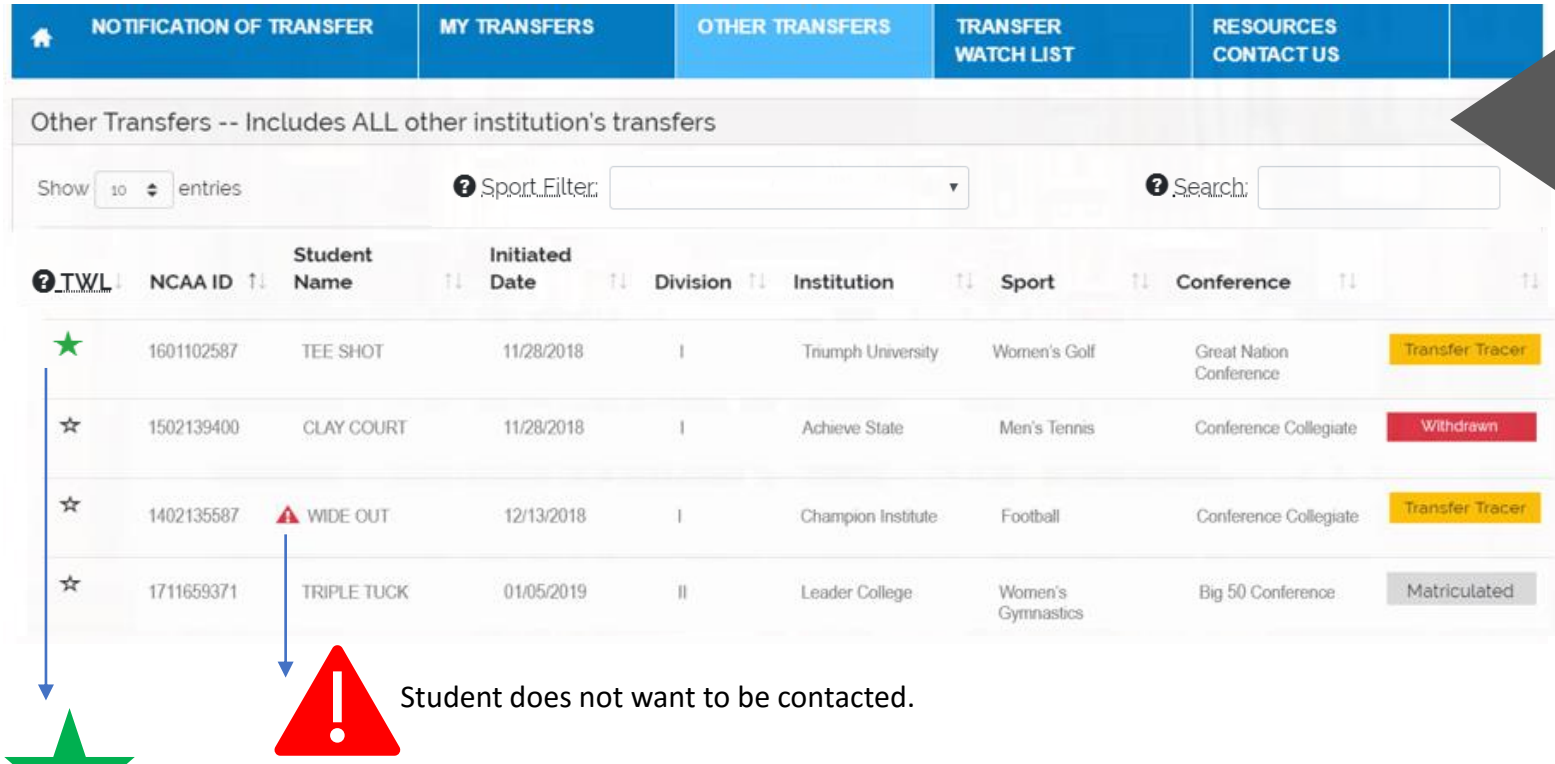
Institution Email

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



Student does not want to be contacted.

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

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.

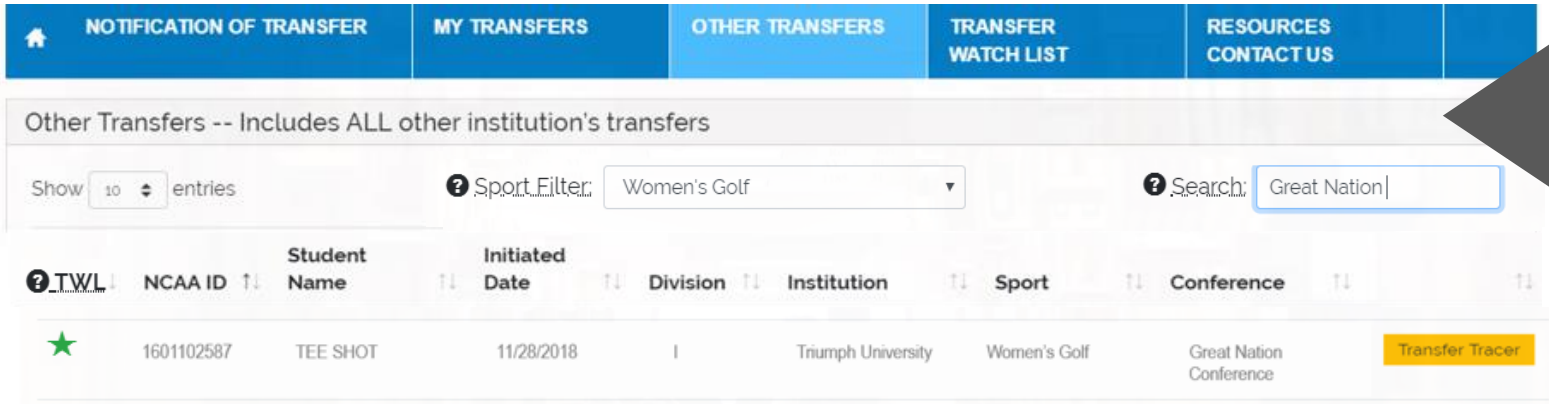
Click on the Transfer Tracer to see the student's academic and athletic history if the information has been entered. (View Only)

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)

TOOL TIPS -Always read for helpful tips.

OTHER TRANSFERS

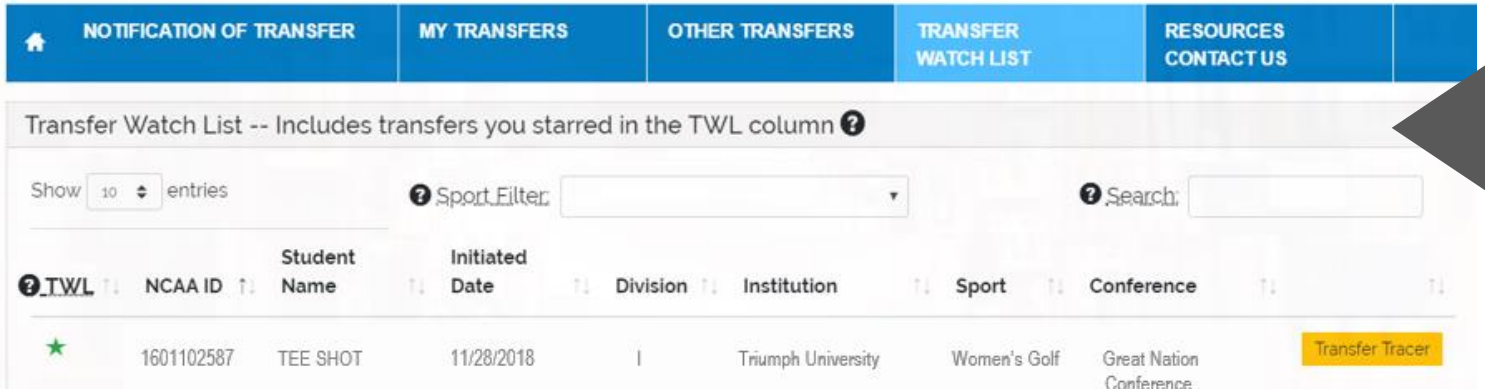


Sport Filter – Select the sport to only show the sport you want to view.

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.

TOOL TIPS -Always read for helpful tips.

TRANSFER WATCH LIST



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.

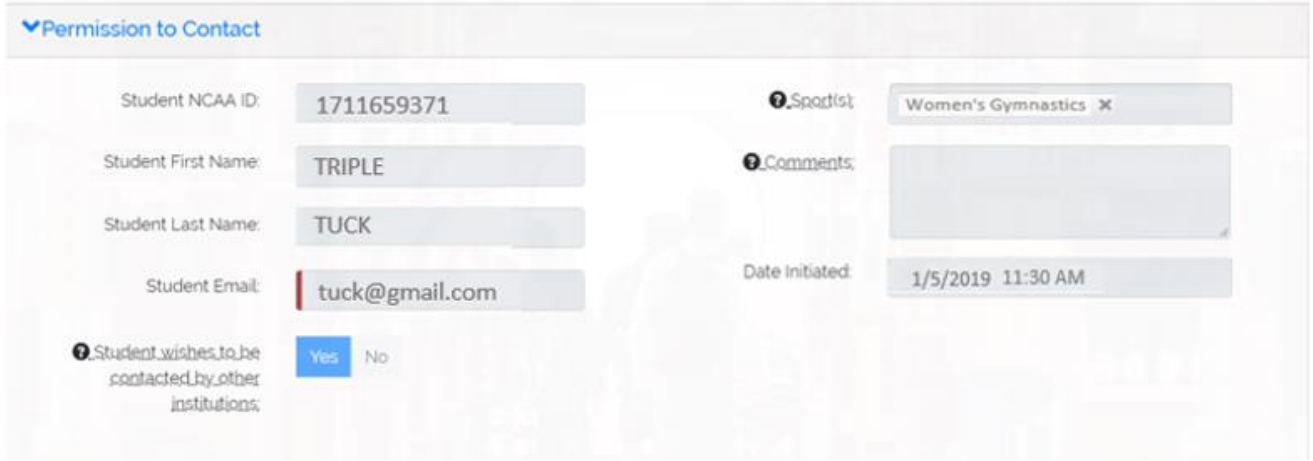
If updates occur in the student's record, emails are sent to all individuals who have the student on their watch list. (see page 22)

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

TOOL TIPS -Always read for helpful tips.

Division I Student's Notification of Transfer

Division II Permission to Contact



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.

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**

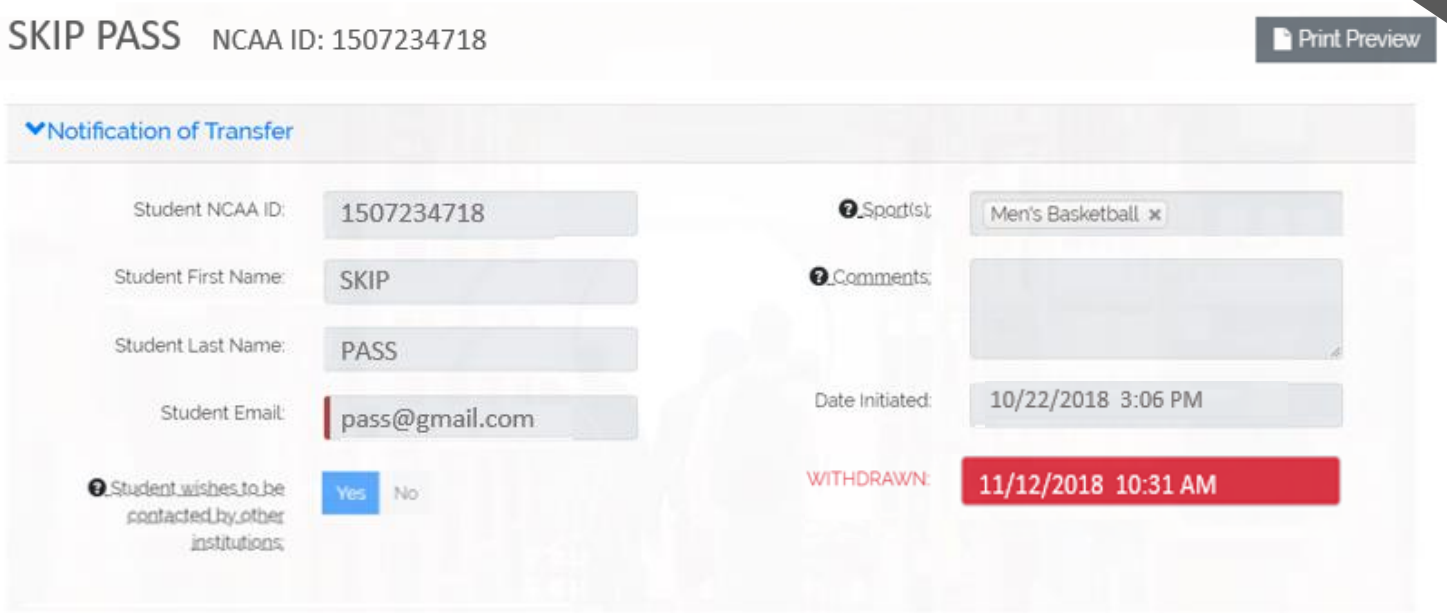
You are receiving this email because updates have occurred in the student's transfer portal record.

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



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

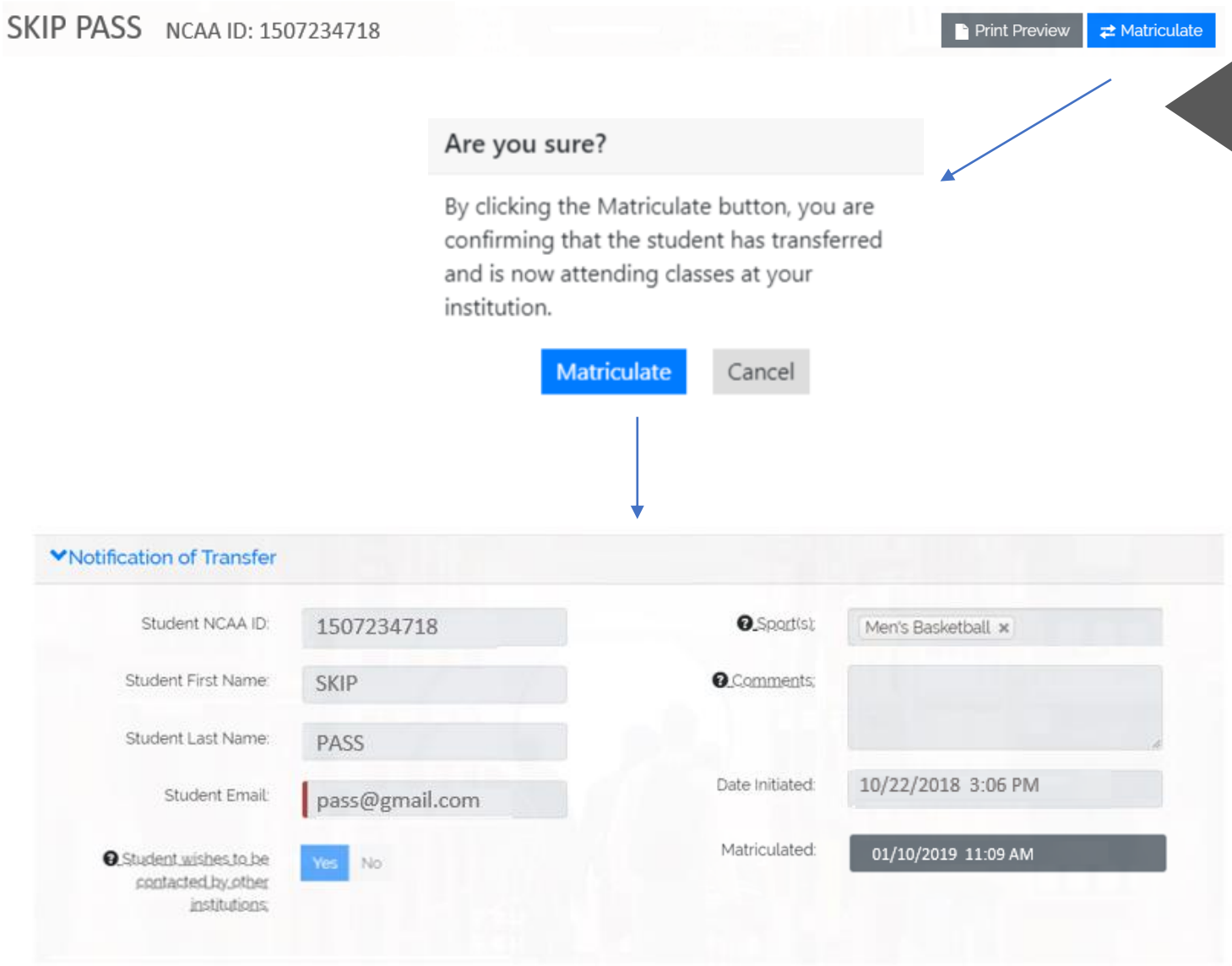
You can click on the withdrawn button located on the OTHER TRANSFERS to see the date and time in the student's notification of transfer.

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

TOOL TIPS -Always read for helpful tips.

WHAT ACTION IS TAKEN AFTER THE STUDENT TRANSFERS

Matriculated



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

TOOL TIPS -Always read for helpful tips.

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.

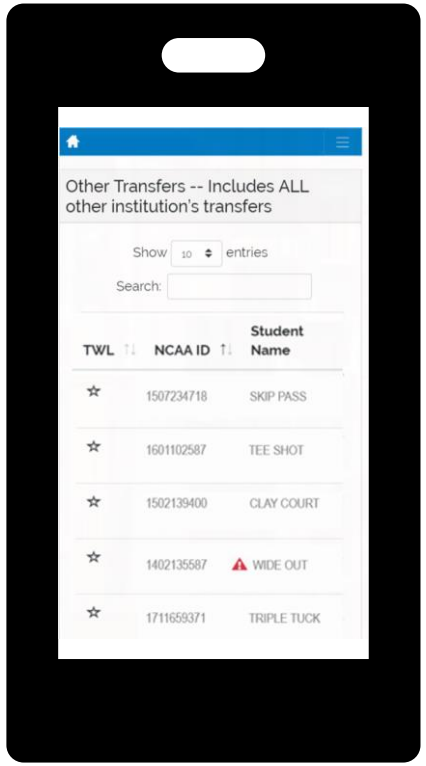
Institution Email

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

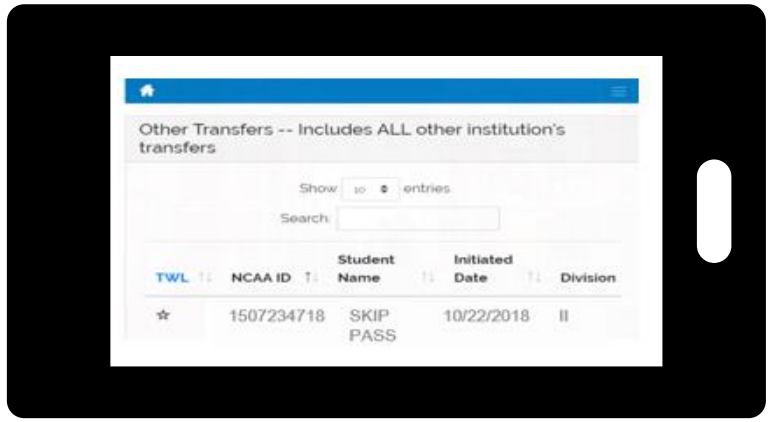
The student-athlete's record is noted as matriculated in the NCAA Transfer Portal. This means the student-athlete has transferred and is attending classes at another institution.

CAN THE TRANSFER PORTAL BE USED ON A MOBILE DEVICE

MOBILE VIEW



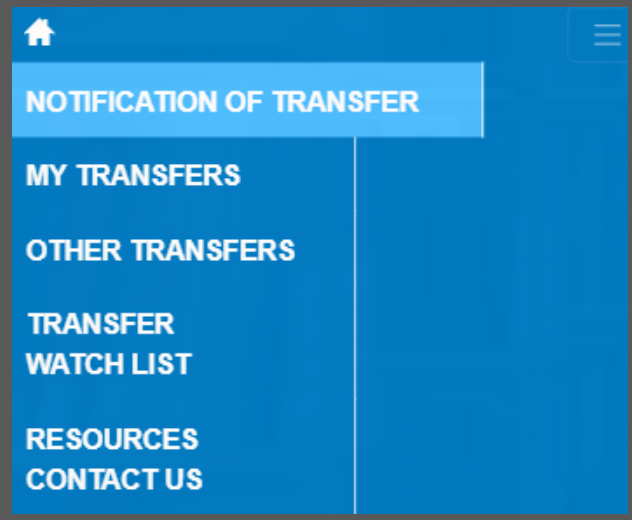
Scroll across screen →



Scroll across screen →

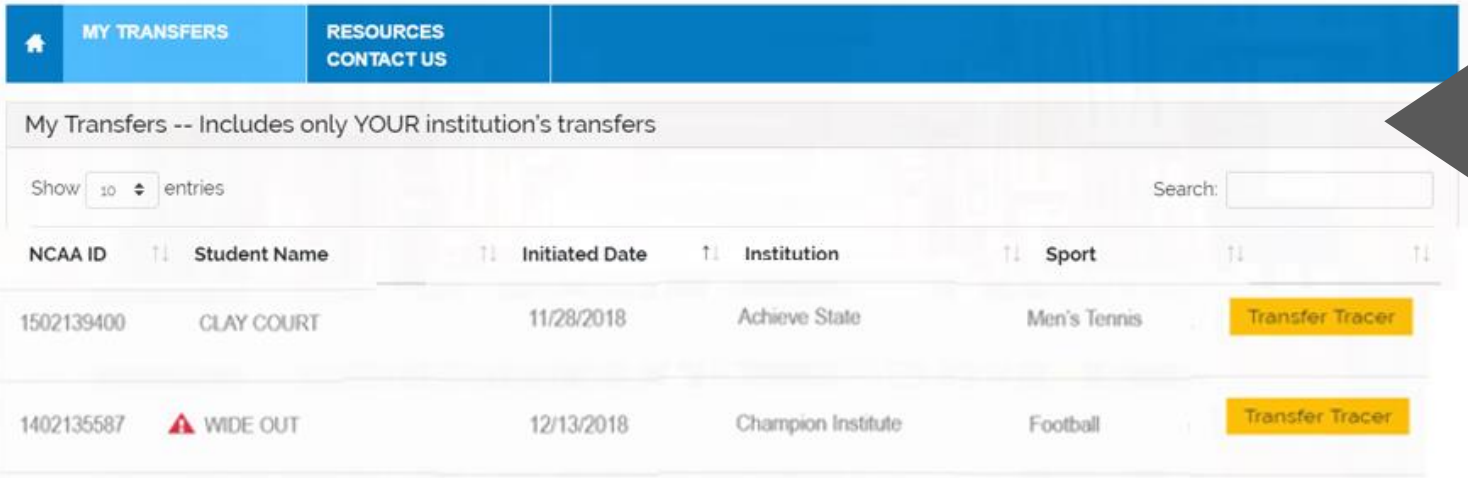
The Transfer Portal can be viewed on a mobile device.

Click on the ☰ to show the menu of tabs.



CAN THE CONFERENCE OFFICE VIEW THE TRANSFER LIST

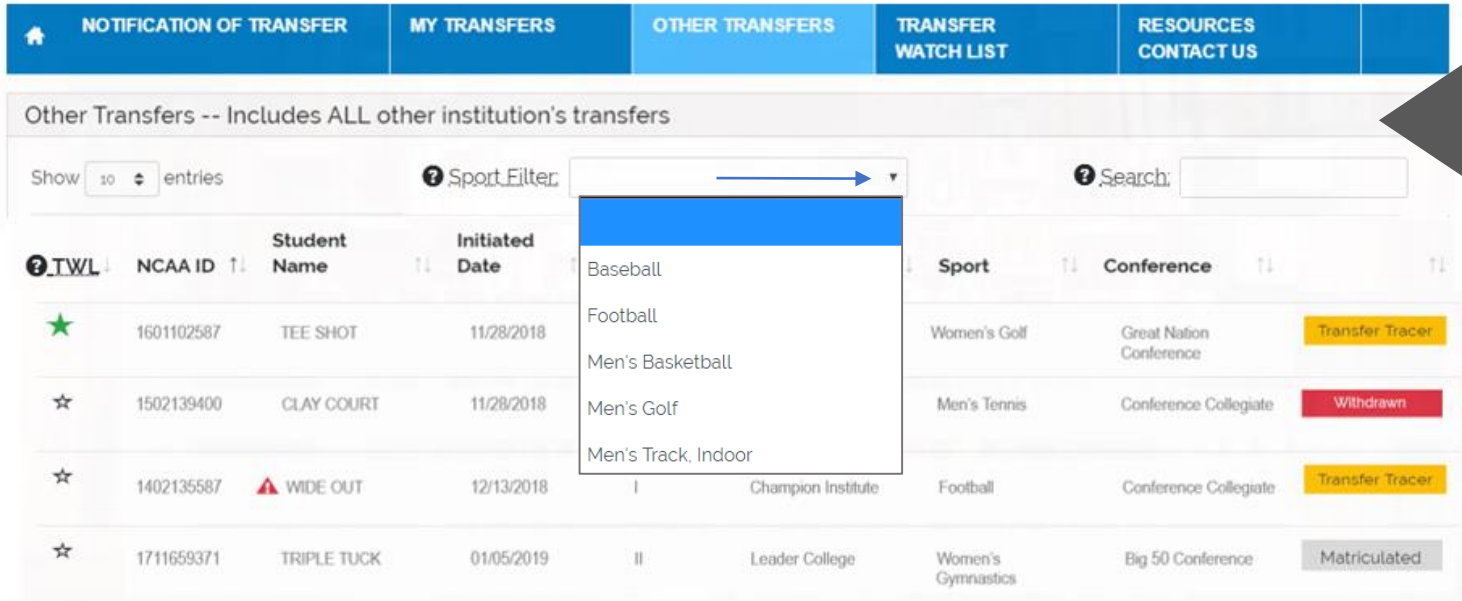
CONFERENCE OFFICE VIEW



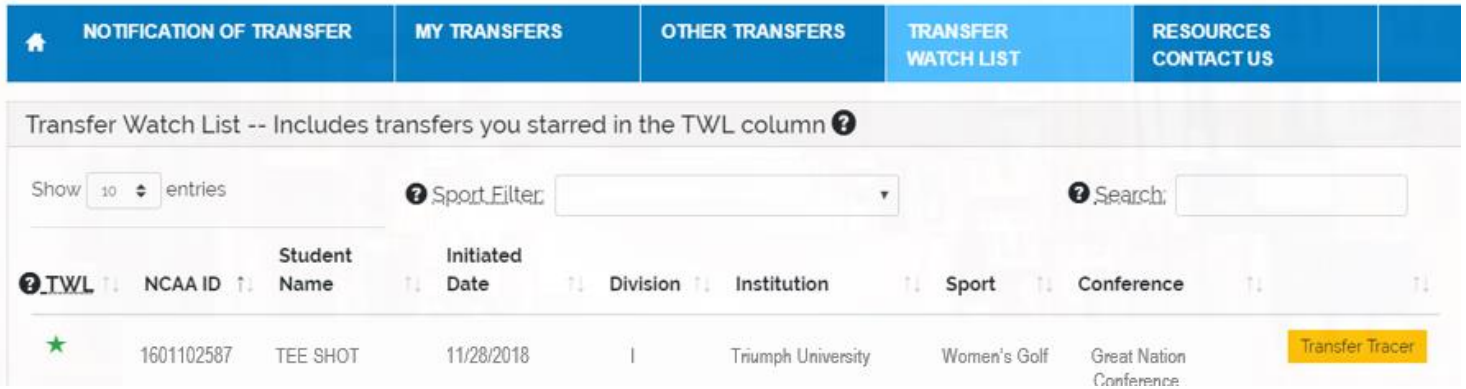
Conference office administrators have access to view their member institutions' transfers in MY TRANSFERS.

HOW WILL COACHES USE THE TRANSFER PORTAL

OTHER TRANSFERS



TRANSFER WATCH LIST



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.

NCAA TRANSFER PORTAL

transfer@ncaa.org