



# TRANSFER PORTAL

## USER GUIDE

DIVISION III

VERSION 3.0 - AUGUST 2020



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

Students are entered in 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.



Google Chrome is the recommended browser to use the transfer portal.

# TABLE OF CONTENTS

page

5

## **NOTIFICATION OF TRANSFER**

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



page

11

## **MY TRANSFERS**

- my institution's student list - transfer tracer - withdraw request



page

24

## **OTHER TRANSFERS**

- other institution's student list - filter/search - view student status  
- user settings



page

29

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

- individualized student list - receive update emails



# TABLE OF CONTENTS

page

**35**

## **MATRICULATE**

- action after the student transfers



page

**39**

## **MOBILE VIEW**

- compatibility with mobile devices



page

**41**

## **CONFERENCE OFFICE VIEW**

- view students from conference member institutions and other institutions



page

**43**

## **COACH VIEW**

- other transfers - transfer watch list



page

**47**

## **DATA REPORTS**

- chart reports of transfer portal data



HOW DO I SUBMIT THE  
PERMISSION TO CONTACT



# PERMISSION TO CONTACT

[Home](#)[PERMISSION TO CONTACT](#)[MY TRANSFERS](#)[OTHER TRANSFERS](#)[TRANSFER WATCH LIST](#)[DATA REPORTS](#)[RESOURCES CONTACT US](#)[Settings](#)

Permission to Contact

Student NCAA ID:

NCAA ID

Lookup Student NCAA ID

Student First Name:

Student Last Name:

Student Email:

Email Address

Student Mobile Phone:

Domestic

Int'l

###-###-####

Student wishes to be contacted by other institutions?

Yes

No

Is the student transferring to be a graduate student?

Yes

No

Is the student-athlete receiving athletically related financial aid during the academic year?

Yes

No

Was the student-athlete recruited at your institution?

Yes

No

Sport(s):

Select Sport(s)

Is your institution restricting contact with this student?

Yes

No

Permission to Contact Restrictions:

Comments:

Comments

Email Contact List

+ Add Email Contact

Email

No additional email contacts to notify

Once you submit, the student's record will be visible to other institutions.

Submit

## ENTER STUDENT FROM YOUR INSTITUTION

### Enter NCAA ID

- If you do not have the student's NCAA ID, click the lookup (see page 8). The student's name will populate after entering the NCAA ID.
- The NCAA ID cannot be created for the student entry in the transfer portal by anyone but the student. The student must register with the NCAA Eligibility Center to receive an NCAA ID by registering for a certification account or profile account. If an NCAA ID is created by a member institution, it will include a letter within the ID. This is not the acceptable 10-digit NCAA ID for transfer portal entry.

### 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.

### Graduate student

- Identify if the student is intending to participate as a graduate student at another institution. Defaults to No.

Continue...

6

# PERMISSION TO CONTACT

PERMISSION TO CONTACT	MY TRANSFERS	OTHER TRANSFERS	TRANSFER WATCH LIST	DATA REPORTS	RESOURCES CONTACT US
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### Permission to Contact

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

Is the student transferring to be a graduate student?

Yes

No

Is the student-athlete receiving athletically related financial aid during the academic year?

Yes

No

**?** Was the student-athlete recruited at your institution?

Yes

No

**?** Sport(s):

Is your institution restricting contact with this student?

Yes

No

**?** Permission to Contact Restrictions:

Comments:

**?** Email Contact List

➕ Add Email Contact

No additional email contacts to notify

Once you submit, the student's record will be visible to other institutions.

Submit

## Athletics aid

- Identify if the student is receiving athletically related financial aid during the regular academic year. This does not include aid for the summer term(s) or aid awarded for the next academic year. This should be No for Division III sports.

## Recruited

- Identify if the student was recruited at your institution per the NCAA definition of recruited status.

**Enter sport(s)**

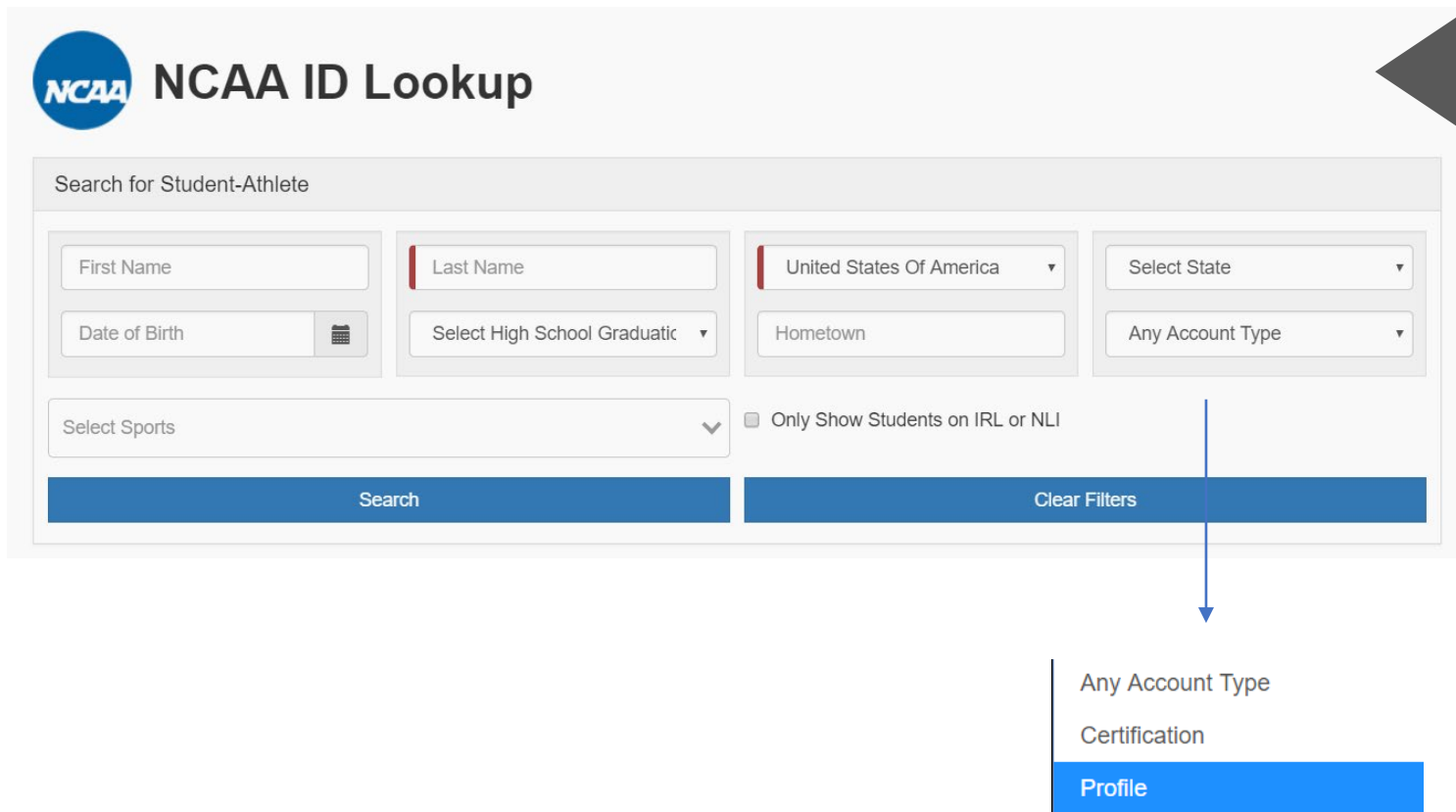
- Drop down list of sports includes all NCAA sports.
- No Sport option is available if wanting to add a non-student-athlete.
- Sports at multidivisional institutions are noted with the division the sport is sponsored.

**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.
- Drop-down list includes institutional personnel listed in the NCAA Membership Directory.

# NCAA ID Lookup



The screenshot shows the NCAA ID Lookup interface. At the top left is the NCAA logo followed by the title 'NCAA ID Lookup'. Below this is a search bar labeled 'Search for Student-Athlete'. The form 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 Graduated' (a dropdown menu), 'Hometown', and 'Select Sports' (a dropdown menu). There is also a checkbox labeled 'Only Show Students on IRL or NLI'. At the bottom of the form are two buttons: 'Search' and 'Clear Filters'. A blue arrow points from the 'Any Account Type' dropdown menu to a separate list of options: 'Any Account Type', 'Certification', and 'Profile'. The 'Profile' option is highlighted in blue.

NCAA ID Lookup

Search for Student-Athlete

First Name

Last Name

Date of Birth

United States Of America

Select State

Select High School Graduated

Hometown

Select Sports

Only Show Students on IRL or NLI

Search

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 Division III sports, 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 or any account type in the NCAA ID Lookup.



# Ready to **Submit** the Permission to Contact

[PERMISSION TO CONTACT](#) [MY TRANSFERS](#) [OTHER TRANSFERS](#) [TRANSFER WATCH LIST](#) [RESOURCES CONTACT US](#)

Permission to Contact

Student NCAA ID: 1507234718

Sport(s): Men's Basketball x

Student First Name:

Student Last Name:

Student Email:

Student Mobile Phone:

Student wishes to be contacted by other institutions:

Is the student transferring to be a graduate student?

Is the student-athlete receiving athletically related financial aid during the academic year?

Was the student-athlete recruited at your institution?

Submit

Cancel

Email

coach@victory.edu

AD@victory.edu

Once you submit, the student's record will be visible to other institutions.

Submit

Are you sure you want to submit this student in the Transfer Portal?

- You are confirming that the student requested to be entered in the Transfer Portal;
- You are confirming that you have checked the student's NCAA ID and name to ensure this is a student at your institution; and
- You are confirming that the student has received education about the NCAA rules associated with the transfer process.

Cancel or continue with Submit

Submit Cancel



EMAIL IS SENT TO THE STUDENT, INDIVIDUALS ON THE EMAIL CONTACT LIST AND THE INDIVIDUAL SUBMITTING THE PERMISSION TO CONTACT.

# PERMISSION TO CONTACT EMAILS

## Student Email



Victory College has submitted your permission to contact. 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 permission to contact withdrawn, or to designate that you do not want coaches to contact you.

### Additional Resources:

[NCAA Transfer Information](#)

[Division I Notification of Transfer](#)

[Division II Notification of Transfer](#)

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

## Institution Email



The compliance office for Victory College has submitted a permission to contact 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 permission to contact withdrawn or for the compliance office to designate if the student-athlete does not want contacted by coaches.

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

# MY TRANSFERS

PERMISSION TO CONTACT	MY TRANSFERS	OTHER TRANSFERS	TRANSFER WATCH LIST	DATA REPORTS	RESOURCES CONTACT US	
My Transfers -- Includes only YOUR institution's transfers for: 2020-21						
Display 50 rows (1-12 of 12 entries) Previous 1 Next PDF Excel						
Year	NCAA ID	Student Name	Initiated Date	Sport	Matriculated To	Student Status
Search	Search	Search	Search	Search	Search	Search
20-21	1507234718	SKIP PASS	08/02/2020	Men's Basketball		Active

Click to open the student's record. Individuals with edit privileges can edit the transfer tracer.

20-21	1507234718	SKIP PASS	08/02/2020	Men's Basketball	Active	✓
-------	------------	-----------	------------	------------------	--------	---

Once transfer tracer is marked as complete, the checkmark will appear in the column.

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

This list includes only your institution's transfers in the specified year. The year can be changed in the drop-down box.

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 record was submitted in the transfer portal. This initiated date is automatically populated when you click submit.

The list can be reordered by sorting each column.

The list can be searched or sorted by each column

If the student is later matriculated by another institution, the name of that institution will appear in the Matriculated To column.

HOW DO I COMPLETE THE  
TRANSFER TRACER



# Transfer Tracer

General Information Eligibility Participation Exceptions Comments Complete

? Reason for Transfer:

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:  This institution:

Full-time Terms Completed:

? Does the student-athlete qualify for an academic year extension? Yes No Not Applicable

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

★ If Yes NLI Status: No NLI on file. ★ If NLI signee

## GENERAL INFORMATION

The transfer tracer can be completed by the compliance office at anytime or if requested by another institution. Click the ACTIVE button located in the MY TRANSFERS list to open the transfer tracer.

Check to ensure the student has signed the annual NCAA Student-Athlete Statement to give consent to disclose the student's information pertaining to NCAA eligibility.

## KEY ITEMS:

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. If an NLI was not signed, status shows as No NLI on file.

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

# Transfer Tracer

## ELIGIBILITY

### KEY ITEMS:

Initial eligibility information populates from the Eligibility Center Portal.

Also includes questions about academic eligibility at the current institution. If in progress is selected, an additional question populates asking for the date your institution's term ends.

If there are any eligibility issues that should not be disclosed on the transfer tracer, there is an option to notify other institutions to contact the compliance office.

### Graduate Student Section:

If the student is intending to participate as a graduate student, confirm graduation date or expected graduation date.

General Information **Eligibility** Participation Exceptions Comments Complete

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	Women's Volleyball

Self-Reported EC Grad Date: 05/01/2019

☒ International Student: No

Is the student-athlete currently in good academic standing?

Yes No N/A

Comments

☒ Is the student-athlete meeting all progress-toward-degree requirements?

Yes No In Progress N/A

Comments

☒ Would the student-athlete be academically eligible if he or she remains at the institution?

Yes No In Progress

Comments

Is the student-athlete's athletics aid renewed for the following academic year?

Yes No To be determined Not on Aid

Comments

Are there any eligibility issues not shown in the transfer tracer that require the institution's compliance office to be contacted?

Yes No

**Graduate Student**

Has the student-athlete graduated from the current institution?

Yes No

Comments

Expected graduation date if student has not graduated? mm/dd/yyyy

# Transfer Tracer

## PARTICIPATION

### KEY ITEMS:

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

If entering previous participation prior to attendance at your institution, selections include two-year college, non-NCAA institution and a drop-down list of all NCAA member institutions.

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

The screenshot displays the 'Participation' tab in the Transfer Tracer system. It includes two eligibility questions with 'Yes/No' options and comment fields. Below these is a 'Sports Participation' section with an 'Add Participation' button. A table lists participation records with columns for Type, Institution, Sport, Term(s), Academic Year, Practice?, Season Used?, Hardship Waiver?, and Received Athletic Aid?. An 'Add Participation' modal is open, showing dropdowns for Participation Type, Sport, Term(s), and Academic Year, along with checkboxes for Practice?, Season Used?, Hardship Waiver?, and Received Athletic Aid. A blue arrow points from the 'Add Participation' button to the modal.

General Information Eligibility **Participation** Exceptions Comments Complete

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

Is the student-athlete eligible for the COVID-19 season of competition waiver? Yes No Not Applicable  
Comments

Participation Comments

Sports Participation ⓘ

**Add Participation**

Type ↑	Institution ↑	Sport ↑	Term(s) ↑	Academic Year ↑	Practice? ↑	Season Used? ↑	Hardship Waiver? ↑	Received Athletic Aid? ↑
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**Add Participation**

Participation Type Select an Option

Sport Select an Option

Term(s) Select an Option

Academic Year Select an Option

Practice? ☐

Season Used? ☐

Hardship Waiver? ☐

Received Athletic Aid? ☐

Close Save



# Transfer Tracer

## 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 divisions, institutions or conferences, add the restrictions to the comment box. Please note, if a division is selected, you are restricting to all institutions in that division. If that is not your intent, do not select the division option.

Once you acknowledge your one-time transfer exception decision, the action is LOCKED. You should not answer this until you are ready since the answer cannot be changed.

An additional question about the student's appeal opportunity will populate if you select Yes or Yes with Restrictions to determine if the student was granted the one-time transfer exception through the appeal process.

The screenshot shows the 'Exceptions' tab of the Transfer Tracer interface. It contains several questions with 'Yes', 'No', and 'Comments' fields. The question 'Does the institution object to granting the one-time transfer exception?' has options 'Yes', 'No', 'Yes with restrictions', and 'Not Applicable'. A blue arrow points from the 'Yes with restrictions' option to a modal window titled 'Restrictions'. The modal contains three sections: 'Select division(s) that this objection applies to:', 'Select institution(s) that this objection applies to:', and 'Select conference(s) that this objection applies to:'. Each section has a corresponding dropdown menu. At the bottom of the modal are 'CONTINUE' and 'CANCEL' buttons. Other questions in the form include 'Has the student-athlete been disqualified or suspended from the institution (as opposed to one of the institution's teams) for disciplinary reasons (as opposed to academic reasons)?', 'Has the student-athlete's sport been discontinued (or publicly announced it will be dropped)?', 'Has the student-athlete's academic program been discontinued?', 'Was the student granted the one-time transfer exception by appeal?', 'Does the student-athlete meet the two-year non-participation exception?', and 'Do any other four-year transfer exceptions apply?'.



# Transfer Tracer

The screenshot shows the 'Comments' tab selected in the Transfer Tracer interface. At the top, there are tabs for 'General Information', 'Eligibility', 'Participation', 'Exceptions', 'Comments', and 'Complete'. Below the tabs is a large text area with the placeholder text 'Please add any additional information not included in the transfer tracer questions.' A 'Save Comments' button is located at the bottom right of the text area.

## COMMENTS

Any additional information not included in the transfer tracer can be added to the comments section.

## COMPLETE

When you determine that all information is final in the transfer tracer, you can click the complete transfer tracer. This will save the transfer tracer.

The transfer tracer cannot be edited after it is complete. You will need to email [transfer@ncaa.org](mailto:transfer@ncaa.org) if you need the complete status removed to update the transfer tracer or to unlock the one-time transfer exception.

The complete will change to a green button once completed and will be visible for other institutions when opening the transfer tracer. The complete checkmark will also appear in the list of student-athletes.

The screenshot shows the 'Complete' tab selected in the Transfer Tracer interface. The text reads: 'Once you have answered all the questions in the transfer tracer and have determined that the information is final with no additional updates, you should proceed by clicking the Complete Transfer Tracer. Once you identify the tracer as complete, the information is saved and cannot be changed.' Below this text is a yellow button labeled 'Complete Transfer Tracer'. An orange confirmation dialog box is open, asking 'Are you sure the transfer tracer is complete?'. It includes a warning icon and the text: 'Once you identify the tracer as complete, the information is saved and cannot be changed.' Below this, it says 'Cancel or Continue with Complete' and has two buttons: 'Complete' (in a blue box) and 'Cancel' (in a red box). A green button labeled 'Complete' is shown to the right of the dialog box, with an arrow pointing from the 'Complete' button in the dialog to it.

# Transfer Tracer

The screenshot shows the 'MY TRANSFERS' tab selected in the top navigation bar. Below the navigation bar, there's a filter for '2020-21'. A table displays transfer records with columns: Year, NCAA ID, Student Name, Initiated, and Student Status. A pop-up notification is overlaid on the table, stating: 'You have 1 active student-athlete record with an incomplete transfer tracer. The tracer status column shows a check once completed.' The notification includes a warning icon and an 'Ok, got it!' button.

Year	NCAA ID	Student Name	Initiated	Student Status
20-21	1507234718	SKIP PASS	08/02/20	Active

## INCOMPLETE TRANSFER TRACER

When you click on MY TRANSFERS, a pop-up reminder will tell you how many transfer tracers have not been completed.

# TRANSFER TRACER 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.

Print options are available to print all sections of the transfer tracer or save to pdf.

# Communication with other compliance administrators



If a compliance administrator needs to contact another institution's compliance administrator, click on the **Institutional Contact** button located in the student's record to see who to contact. Click the email button to populate an email that includes the student's NCAA ID, Name and Sport. The email will be sent directly from you through your email account.

**Complete Transfer Tracer:** Click the email to complete tracer. This will send an email request for the compliance administrator to finalize the transfer tracer.

The Institutional Contact is only available to individuals with edit privileges. The Institutional Contact is the person designated as the Senior Compliance Administrator in the NCAA Membership Directory.

The screenshot displays the 'Institutional Contact' button in the top navigation bar. A blue arrow points from this button to a contact card for 'Senior Compliance Administrator Bee N. Compliance'. The card includes contact information: 'Email: bncompliance@victory.edu' and 'Phone: 555-555-5555'. Two buttons are visible: 'Email Bee' and 'Email Bee to complete tracer'. A red arrow points from the 'Email Bee' button to the 'To' field of an email composition window. Another red arrow points from the 'Email Bee to complete tracer' button to the subject line of the same email window. The email window shows the following details:

- To:** bncompliance@victory.edu
- Subject:** NCAA ID 1507234718 -- SKIP PASS -- MBB -- NCAA TRANSFER PORTAL
- Body:**

Victory College is interested in SKIP PASS as a transfer student-athlete. This is a request to complete the student-athlete's transfer tracer for the compliance office to evaluate the student-athlete's academic and athletic information.

If needed, you can respond directly to this email address to communicate with the person making this request.

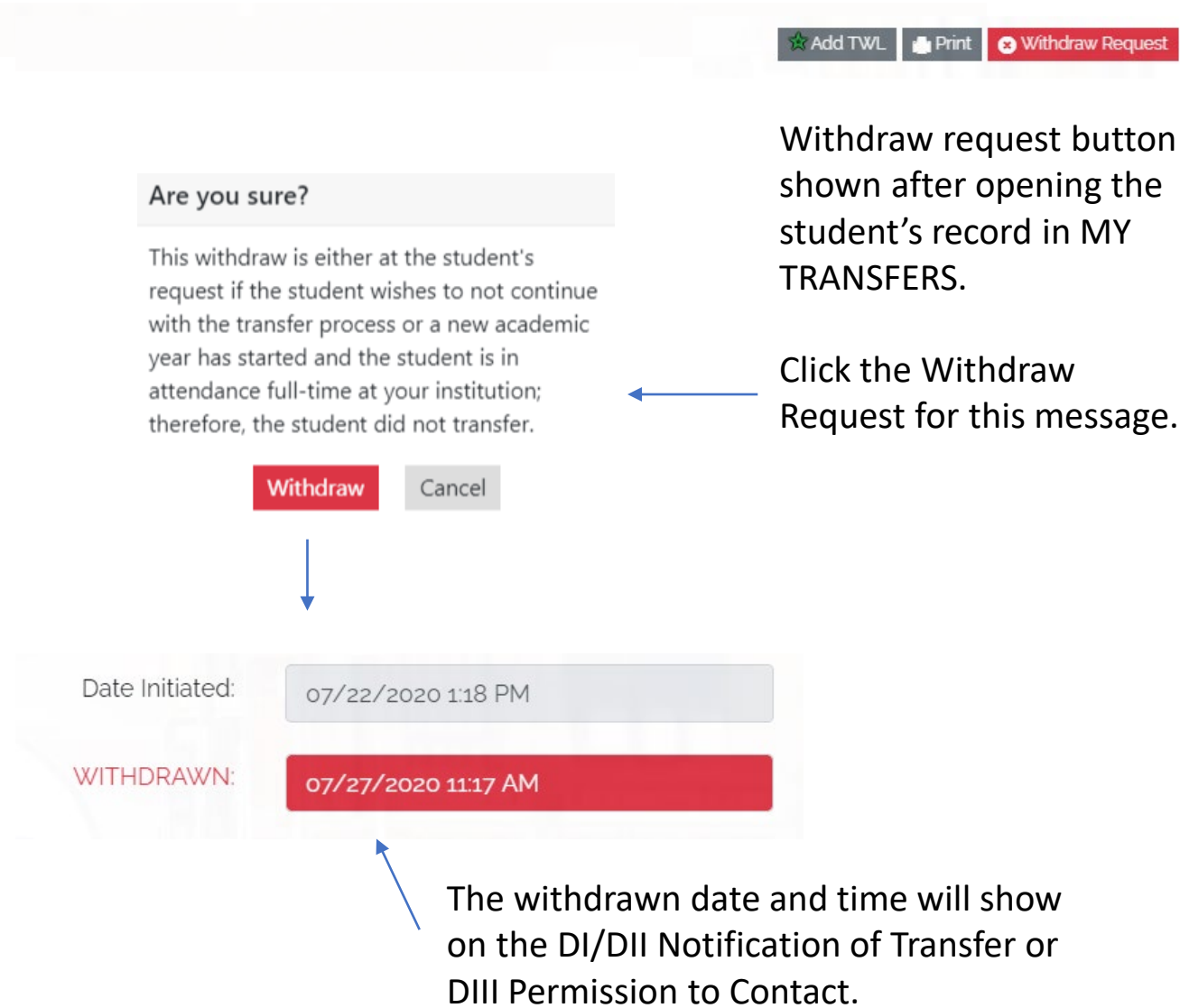
Thank you.

[THIS EMAIL WAS GENERATED FROM THE TRANSFER PORTAL TO REQUEST THE COMPLETION OF THE TRANSFER TRACER.]

HOW DO I WITHDRAW A STUDENT  
WHO DECIDES TO NOT TRANSFER



# Withdraw Request



The screenshot shows a user interface for a 'Withdraw Request'. At the top, there are three buttons: 'Add TWL' (with a star icon), 'Print' (with a printer icon), and 'Withdraw Request' (in a red box). Below these is a confirmation dialog box titled 'Are you sure?'. The text inside the dialog reads: 'This withdraw is either at the student's request if the student wishes to not continue with the transfer process or a new academic year has started and the student is in attendance full-time at your institution; therefore, the student did not transfer.' At the bottom of the dialog are two buttons: 'Withdraw' (in a red box) and 'Cancel' (in a grey box). A blue arrow points from the text 'Click the Withdraw Request for this message.' to the 'Withdraw' button. Below the dialog, the system shows the status of the request. It says 'Date Initiated:' followed by a grey box containing '07/22/2020 1:18 PM'. Below that, it says 'WITHDRAWN:' followed by a red box containing '07/27/2020 11:17 AM'. A blue arrow points from the text 'The withdrawn date and time will show on the DI/DII Notification of Transfer or DIII Permission to Contact.' to the 'WITHDRAWN' box.

★ Add TWL Print Withdraw Request

**Are you sure?**

This withdraw is either at the student's request if the student wishes to not continue with the transfer process or a new academic year has started and the student is in attendance full-time at your institution; therefore, the student did not transfer.

**Withdraw** Cancel

Withdraw request button shown after opening the student's record in MY TRANSFERS.

Click the Withdraw Request for this message.

Date Initiated: 07/22/2020 1:18 PM

WITHDRAWN: 07/27/2020 11:17 AM

The withdrawn date and time will show on the DI/DII Notification of Transfer or DIII Permission to Contact.

If the student later decides to not transfer and the student requests to be withdrawn from the transfer portal or a new academic year has started and the student is in attendance full-time at your institution as a student-athlete, the withdraw request is visible under MY TRANSFERS by clicking on the student's active status button.

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

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 Division I and II Notification of Transfer and the Division III Permission to Contact.



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 permission to contact as you have requested. Please contact your institution's athletics compliance office if you have any questions.

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

## Institution Email



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

The permission to contact has been withdrawn as requested by the student-athlete. The student-athlete's record is noted as withdrawn in the NCAA Transfer Portal.

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

HOW DO I VIEW  
OTHER TRANSFERS









# OTHER TRANSFERS

Other Transfers -- Includes other institution's transfers

♥ Select the specific "year" or "all" to begin search

NCAA ID:  First Name:  Last Name:  Record Status:

Institution:  Conference:  Division:  Sport:

Year:  Other: ☐ ☐ R ☐ A

Year Options:

ALL

2020-21

2019-20

2018-19

**SEE THE USER SETTING  
INSTRUCTIONS ON THE NEXT PAGE  
TO LEARN HOW TO SAVE YOUR  
SEARCH PREFERENCES.**

All columns in the student list can be searched and sorted.

Sport - Select the sport to only show the sport you want to view.

Year - The year defaults to the current academic year. Select a different year if searching a student's record from a previous year or select ALL years.

Conference – Conferences are listed in the drop-down list.

Institutions are listed in accordance with their primary conference and not a sport specific conference. Only one conference can be searched. Multiple conferences cannot be selected.

 Search graduate students

R Search students identified with Division III contact restrictions (Division II before 8/1/2020)

A Search students who are receiving athletics aid at their current institution

# USER SETTINGS



## User settings

? Other Transfers YEAR default: All ▼

? Other Transfers search DIVISION default: Select ▼

? Other Transfers search SPORT default: Football ▼

? Other Transfers search RECORD STATUS default: ACTIVE ▼

Save settings

Other Transfers -- Includes other institution's transfers for ALL years

▼ User default filters are on and search has been performed.

NCAA ID:	<input type="text"/>	First Name:	<input type="text"/>	Last Name:	<input type="text"/>	Record Status:	Active ▼
Institution:	ALL ▼	Conference:	ALL ▼	Division:	All ▼	? Sport:	Football ▼
? Year:	All ▼	Other:	<input type="checkbox"/> <input type="checkbox"/> R <input type="checkbox"/> A				

Customize the search filters by saving your user settings.

This sets the default search in OTHER TRANSFERS to only see your settings each time you view the list of student-athletes.

The settings include YEAR, DIVISION, SPORT, RECORD STATUS.

Click reset to see all the search filters or make changes in USER SETTINGS.





# Division I and II Notification of Transfer

▼ Notification of Transfer - (Victory College)

Student NCAA ID:	<input type="text" value="1507234718"/>	④ Sport(s):	<input type="text" value="Men's Basketball x"/>
Student First Name:	<input type="text" value="SKIP"/>	④ Comments:	<input type="text"/>
Student Last Name:	<input type="text" value="PASS"/>	Date Initiated:	<input type="text" value="07/27/2020 2:44 PM"/>
Student Email:	<input type="text" value="spass@gmail.com"/>		
④ Student wishes to be contacted by other institutions:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Is the student transferring to be a graduate student?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Is the student-athlete receiving athletically related financial aid during the academic year?	<input checked="" type="radio"/> Yes <input type="radio"/> No		
④ Was the student-athlete recruited at your institution?	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Is aid being cancelled due to entering the transfer portal?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Pending		

Question was added for Division I only in version 3.0. Division I institutions can update after August 1, 2020.

The Notification of Transfer will show for a Division I and II student who has entered the transfer portal.

The Notification of Transfer allows another institution to contact the student (NCAA Bylaw 13).

The student's email address will not show if the student does not want contacted by other institutions.

The Notification of Transfer does not identify if the student is granted a transfer exception for immediate eligibility (NCAA Bylaw 14). This information would be included in the transfer tracer exceptions.

## Division III Permission to Contact

▼ Permission to Contact - (Triumph University)

Student NCAA ID:	<input type="text" value="1601102587"/>	🔍 Sport(s):	<input type="text" value="Women's Golf x"/>
Student First Name:	<input type="text" value="TEE"/>	Is your institution restricting contact with this student?	Yes <input checked="" type="button" value="No"/>
Student Last Name:	<input type="text" value="SHOT"/>	🔍 Permission to Contact Restrictions:	<input type="text"/>
Student Email:	<input type="text" value="tshot@gmail.com"/>	🔍 Comments:	<input type="text"/>
🔍 Student wishes to be contacted by other institutions:	Yes <input checked="" type="button" value="No"/>	Date Initiated:	<input type="text" value="07/28/2020 12:54 PM"/>
Is the student transferring to be a graduate student?	Yes <input checked="" type="button" value="No"/>		
Is the student-athlete receiving athletically related financial aid during the academic year?	Yes <input checked="" type="button" value="No"/>		
🔍 Was the student-athlete recruited at your institution?	Yes <input checked="" type="button" value="No"/>		

The Permission to Contact will show for a Division III student who has entered the transfer portal. Using the transfer portal is optional for Division III institutions.

Permission to Contact allows another institution to contact the student (NCAA Bylaw 13).

Division III institutions are permitted to restrict contact with the student. The restriction will show on the permission to contact.

The student's email address will not show if the student does not want contacted by other institutions.

The Permission to Contact does not identify if the student is granted a transfer exception for immediate eligibility (NCAA Bylaw 14). 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 23)

## 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.

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

## 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.

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

# Withdraw Request

## Other Transfers View

This will show as Permission to Contact for Division III students

★ Add TWL   Print   Institutional Contact

▼ Notification of Transfer - (Victory College)

Student NCAA ID:	1507234718	ⓘ Sports(s):	Men's Basketball x
Student First Name:	SKIP	ⓘ Comments:	
Student Last Name:	PASS	Date Initiated:	07/22/2020 1:18 PM
Student Email:	spass@gmail.com	WITHDRAWN:	07/27/2020 11:17 AM
ⓘ Student wishes to be contacted by other institutions:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
Is the student transferring to be a graduate student?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Is the student-athlete receiving athletically related financial aid during the academic year?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
ⓘ Was the student-athlete recruited at your institution?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
Is aid being cancelled due to entering the transfer portal?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Pending		

This question only shows for Division I

If a student's Division I and II Notification of Transfer or Division III Permission to Contact is withdrawn, the student's status will show as Withdrawn.

You can click on the Withdrawn button located on the OTHER TRANSFERS to see the date and time located in the student's Division I and II Notification of Transfer or Division III Permission to Contact screen.

Communication with the student is permissible during the time period between the initiated date and the withdrawn date.

WHAT ACTION IS TAKEN  
AFTER THE STUDENT TRANSFERS



# Matriculated

★ Add TWL   Print   **Matriculate**   Institutional Contact

By clicking Matriculate, you are confirming that the student has transferred and is, or will be, attending the first day of class of the academic year at your institution.

Has the student-athlete triggered transfer in the summer?  
☐ Yes ☐ No

Is the student-athlete enrolled, or will be enrolled, full time during the academic year?  
☐ Yes ☐ No

What term did the student-athlete matriculate full-time?  
☐ Fall ☐ Winter ☐ Spring  
☐ N/A (Did not matriculate full-time)

Is the student-athlete receiving, or will be receiving, athletic aid during the academic year?  
☐ Yes ☐ No

**Note:** Once you matriculate the student-athlete's record, the transfer tracer cannot be updated by the originating institution. Please be sure the transfer tracer is complete before matriculating the record.

Cancel or Continue with Matriculation

Matriculate   Cancel

Matriculated information will show on the Division I and II Notification of Transfer or Division III Permission to Contact

? Matriculated:

07/22/2020 2:14 PM  
Triumph University  
Enrolled full time: Y  
Receiving athletic aid: Y  
Full-Time Term: Fall  
Student-athlete triggered transfer in the summer.

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

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

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

The matriculated date, time, institution, full-time status, athletic aid status and term will show in the student's record.

Also noted is if the student triggered transfer in the summer.



Once matriculated, emails will automatically be sent to the student, individuals at the 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 and have attended the first day of class for the regular academic year at another institution. Please contact your institution's athletics compliance office if you have any questions.

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

## 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 has attended the first day of class for the regular academic year at another institution.

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

# Matriculated



## NCAA Division I Academic Performance Program

**For:** NCAA Division I member institutions and Division II and Division III institutions sponsoring a Division I sport.

**Action:** Keep on file by institutional personnel responsible for fulfilling NCAA Division I Academic Performance Program data submission requirements.

**Purpose:** To certify compliance with NCAA Division I Academic Progress Rate adjustments for student-athletes transferring to a four-year institution presenting a grade-point average of 2.6 at time of transfer.

**Name of Student-Athlete:** CHIP SHOT  
**Sport:** Men's Golf

### Transfer Portal Matriculation Information:

Victory College  
Enrolled full time: Y  
Receiving athletic aid: Y  
Full-Time Term: Fall

The student-athlete's record was matriculated in the transfer portal on: 07/22/2020 2:14 PM

The classification of the institution is: Division I

The student-athlete's record was matriculated by:

**Name:** Compliance, Bee N.  
**Email:** bncompliance@victory.edu

### To be completed by the institution

1. What was the student-athlete's last term in the APR cohort, in which he/she lost the retention point?  
\_\_\_\_\_
2. Did the student-athlete earn the eligibility point in the last term of enrollment prior to transfer?  
☐ Yes ☐ No
3. Did the student-athlete present a cumulative grade-point average of at least 2.6 at the time of transfer?  
☐ Yes ☐ No

### What to do with this form:

1. Keep a copy of this form in your files. It is not to be sent to the NCAA national office.
2. Contact the NCAA academic and membership affairs staff at 317-917-6222 if you have questions.

Information from the matriculated action is also included in the APR form.

This form is used by Division I institutions to certify compliance with the Academic Progress Rate adjustments.

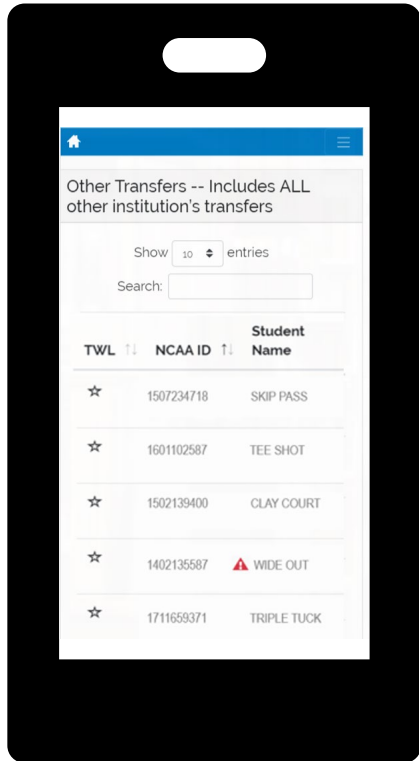
The information included in the APR form is replicated to include transfer portal information in page 1 on the form.

Page 2 of the APR form is to be completed by the Division I institution responsible for fulfilling the NCAA Division I APP data submission requirements. This information is regarding the student-athlete who departed the Division I institution.

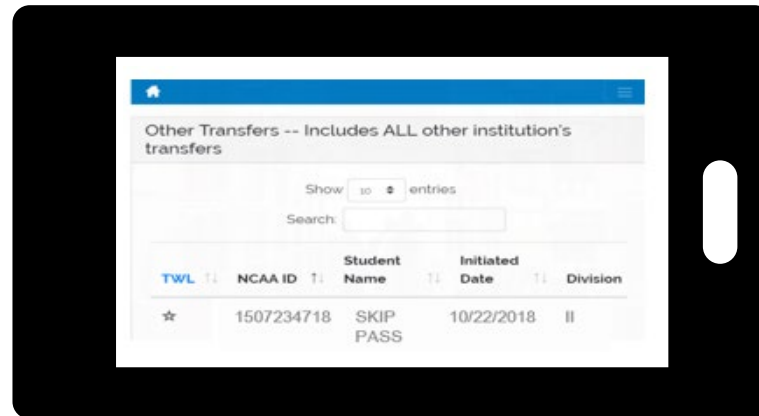
CAN THE TRANSFER PORTAL  
BE USED ON A MOBILE DEVICE



# MOBILE VIEW



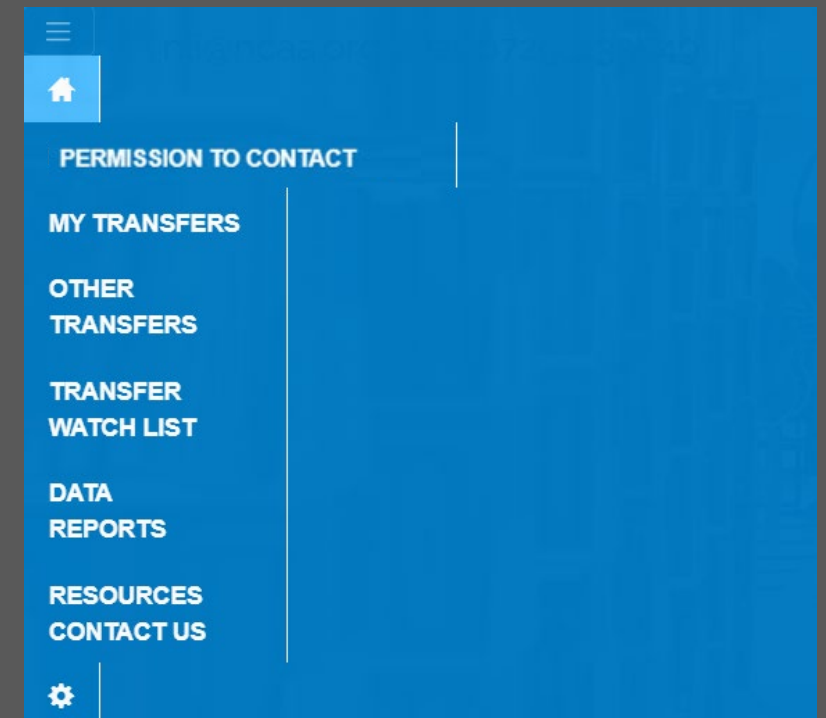
Scroll across  
screen →



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 for: 2020-21

Display 50 rows (1-50 of 270 entries) Previous 1 2 3 4 5 6 Next PDF Excel

Year	NCAA ID	Student Name	Initiated Date	Institution	Sport	Matriculated To	Student Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Student-athletes from only the conference's member institutions are listed under MY TRANSFERS

Other Transfers -- Includes other institution's transfers

Select the specific year or all to begin search

NCAA ID:  First Name:  Last Name:  Record Status: All

Institution: All Conference: All Division: All Sport: All

Year: Select Other: ☐ ☐ R ☐ A

Reset Search

Student-athletes from the conference's member institutions and all other institutions are listed under OTHER TRANSFERS

Conference office administrators have access to view their member institutions' students who are listed in the transfer portal in MY TRANSFERS, in addition to students from other institutions listed in OTHER TRANSFERS.

A conference's member institutions will also be listed in the OTHER TRANSFERS.

HOW WILL COACHES USE  
THE TRANSFER PORTAL



# OTHER TRANSFERS

Other Transfers -- Includes other institution's transfers for ALL years

▼ Search filters are on

NCAA ID:  First Name:  Last Name:  Record Status:

Institution:  Conference:  Division:  Sport:

Year:  Other: ☐ ☐ R ☐ A

Display  (1-50 of 1,658 entries) (filtered from 2) Previous      ...  Next

?	TWL	Year	NCAA ID	First Name	Last Name	Initiated Date	Last Updated	D	Institution	Sport	Conference	Student Status
☆	20-21	1507234718	SKIP 🎓	PASS	08/2/2020	08/16/2020	II	Victory College	Men's Basketball	Big 50 Conference	Active	
★	20-21	1601102587	TEE R	SHOT	08/05/2020	08/05/2020	III	Triumph University	Women's Golf	Great Nation Conference	Active	
☆	20-21	1502139400	CLAY	COURT	08/06/2020	08/11/2020	I	Achieve State	Men's Tennis	Conference Collegiate	Withdrawn	
☆	20-21	1402135587	WIDE ⚠️	OUT	08/09/2020	08/09/2020	I	Champion Institute	Football	Conference Collegiate	Active	
★	20-21	1711659371	TRIPLE	TUCK	08/9/2020	08/21/2020	II	Leader College	Women's Basketball	Big 50 Conference	Matriculated	

If an institution's SSO administrator has granted a coach access to the transfer portal, a coach will have view only privileges. This provides a coach access to view OTHER TRANSFERS, TRANSFER WATCH LIST, DATA REPORTS, RESOURCES AND USER SETTINGS.

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 or filtering any column. See a coach's user settings on the next page.

Please refer to pages 25 and 26 for detailed information related to the OTHER TRANSFERS list and the various icons and student status.

The transfer tracer is not accessible to individuals with view only privileges. It is the compliance administrator's decision to share the transfer tracer with a coach by printing or saving as a pdf.

The Division I and II Notification of Transfer and Division III Permission to Contact can be viewed by a coach by clicking on the student status button.

# OTHER TRANSFERS

The screenshot shows the 'OTHER TRANSFERS' search interface. At the top is a navigation bar with tabs: OTHER TRANSFERS, TRANSFER WATCH LIST, DATA REPORTS, and RESOURCES CONTACT US. Below the navigation bar is a header bar with the text 'Other Transfers -- Includes other institution's transfers for ALL years'. A green banner below the header indicates 'Search filters are on'. The search filters are organized into two rows. The first row contains: NCAA ID (text input), First Name (text input), Last Name (text input), and Record Status (dropdown menu set to 'All'). The second row contains: Institution (dropdown menu set to 'ALL'), Conference (dropdown menu set to 'ALL'), Division (dropdown menu set to 'All'), and Sport (dropdown menu set to 'All'). Below these are additional filters: Year (dropdown menu set to 'All'), Other (checkboxes for Football, R, and A), and buttons for Reset and Search. A blue arrow points to the Year dropdown, and a red arrow points to the Search button.

This shows a search with no filters selected or no user settings saved.

This shows the user settings to ALL YEARS, FOOTBALL, ACTIVE STATUS

The screenshot shows the 'OTHER TRANSFERS' search interface with user default filters applied. The header bar is the same. A yellow banner below the header indicates 'User default filters are on and search has been performed.' The search filters are the same as in the first screenshot, but with the following changes: Record Status is set to 'Active', Sport is set to 'Football', and Year is set to 'All'. The Other filters (checkboxes for Football, R, and A) are also present. The Reset and Search buttons are at the bottom.

Please see how to set and save the USER SETTINGS on page 28.

Coaches can customize the search filters by saving the user settings.

This sets the default search in OTHER TRANSFERS to only see the settings selected each time a coach views the list of student-athletes.

This includes YEAR, DIVISION, SPORT, RECORD STATUS.

Click reset to see all search filters or make changes in USER SETTINGS.

# TRANSFER WATCH LIST

OTHER TRANSFERS

TRANSFER WATCH LIST

DATA REPORTS

RESOURCES CONTACT US

Transfer Watch List ? -- Includes transfers you starred in the TWL column for: 2020-21

Display 50 rows

(1-1 of 1 entries)

Previous

1

Next

PDF

Excel

TWL ?	Year	NCAA ID	First Name	Last Name	Initiated Date	Last Updated	D	Institution	Sport	Conference	Student Status
★	20-21	1507234718	SKIP	PASS	08/2/2020	08/16/2020	II	Victory College	Men's Basketball	Big 50 Conference	Active

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 PORTAL DATA REPORTS



# DATA REPORTS



First, select the report name.  
Next, select the data items that will  
be illustrated in a chart format.  
MORE REPORTS WILL BE  
AVAILABLE SOON.

Report:

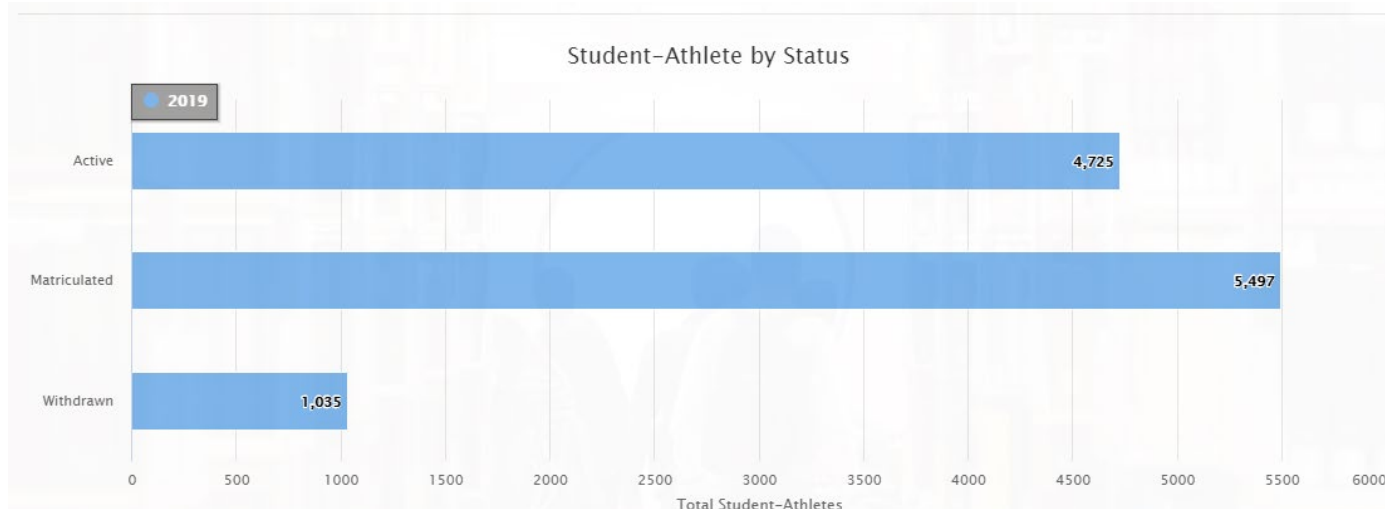
Year:

Sport:

Division:

Conference:

Institution:



This feature organizes the transfer portal data in chart reports.

Select the data for any of the following: YEAR, SPORT, DIVISION, CONFERENCE, INSTITUTION

One report will be available on August 1, 2020 with more reports available throughout the year.





# NCAA TRANSFER PORTAL

**transfer@ncaa.org**



**TOOL TIPS** -Always read for helpful tips.



Google Chrome is the recommended browser to use the transfer portal.