TRANSFER PORTAL

USER GUIDE

DIVISION II and III

VERSION 2.0 - AUGUST 2019

INTRODUCTION

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 notification of transfer and Division II and 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.

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HOW DO I SUBMIT A PERMISSION TO CONTACT ?

PERMISSION TO CONTACT

PERMISSION TO CONTACT | MY TRANSFERS | OTHER TRANSFERS | TRANSFER WATCH LIST | RESOURCES CONTACT US

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 4). The student's name will populate after entering the NCAA ID.

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.

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.

Recruited

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

Continue…

PERMISSION TO CONTACT

PERMISSION TO CONTACT | MY TRANSFERS | OTHER TRANSFERS | TRANSFER WATCH LIST | RESOURCES CONTACT US

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 sport(s)

- Drop down list of sports sponsored at your institution.
- Discontinued sport(s) listed if discontinued in last four years.
- 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 Contact restrictions, if any

- Permission to contact restrictions must be included if there are institutional restrictions for contacting the student.
- The student's record is identified with a symbol **R** next to the student's name to notify other institutions of the restrictions. Other institutions can view the student's permission to contact and see the restrictions.

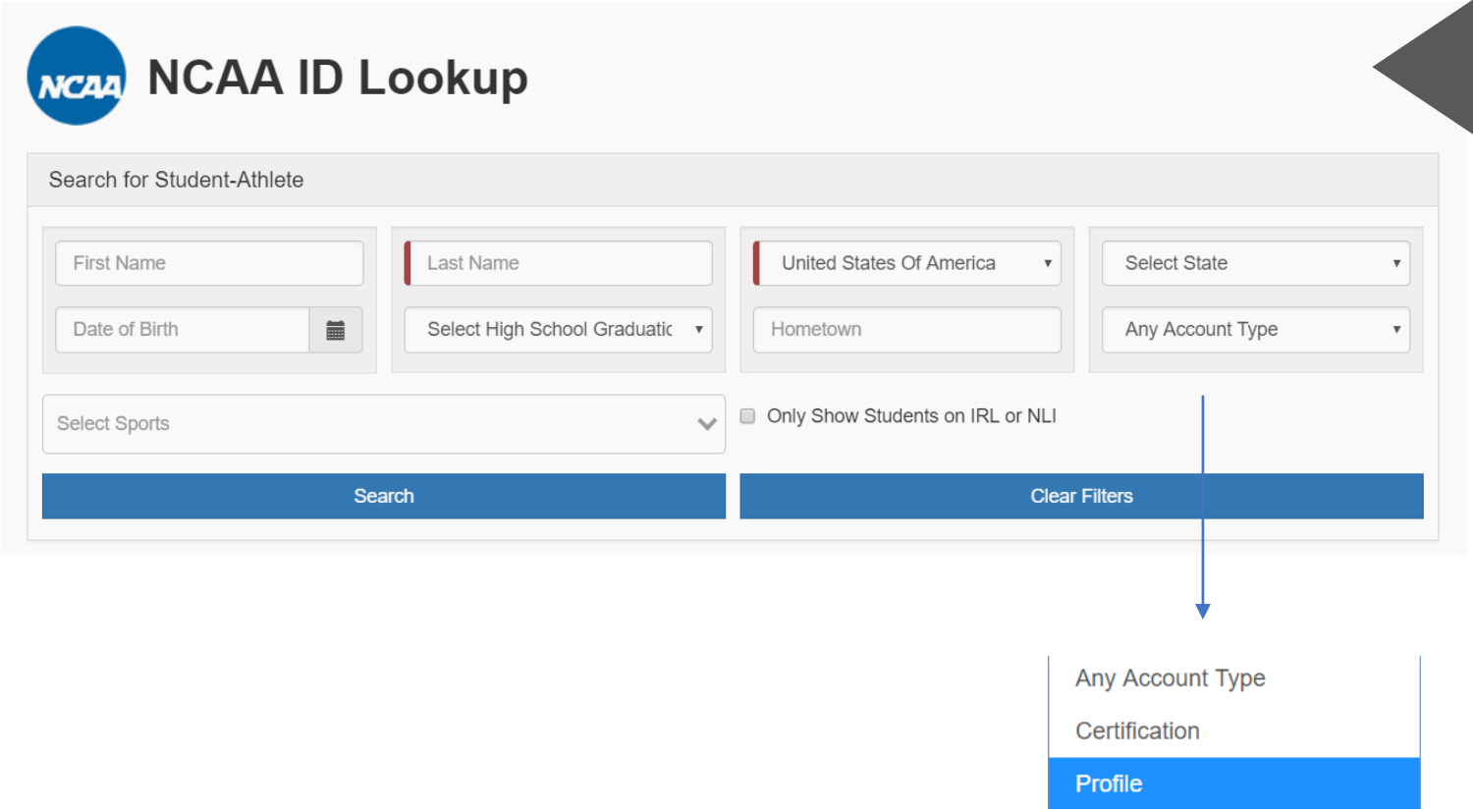
Enter comments, if necessary

Enter email contact list

- Any individual(s) on the email contact list will receive emails when the permission to contact is submitted and will receive future emails specific to this student.
- Drop-down list includes institutional personnel listed in the NCAA Membership Directory.

TOOL TIPS -Always read for helpful tips.

NCAA ID Lookup



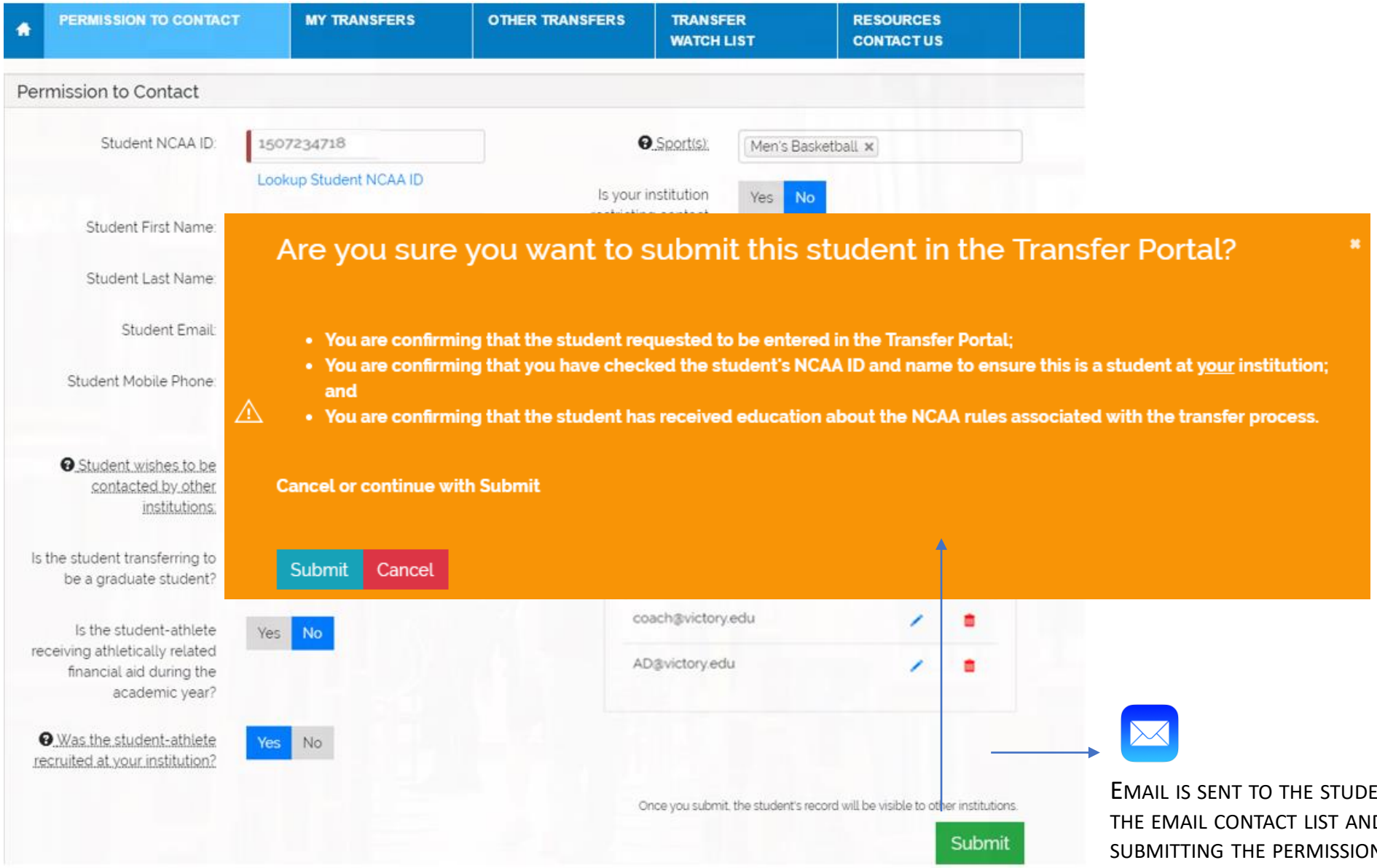
If you do not have the student's NCAA ID, click the lookup.

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** Permission to Contact



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.

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

Institution Email

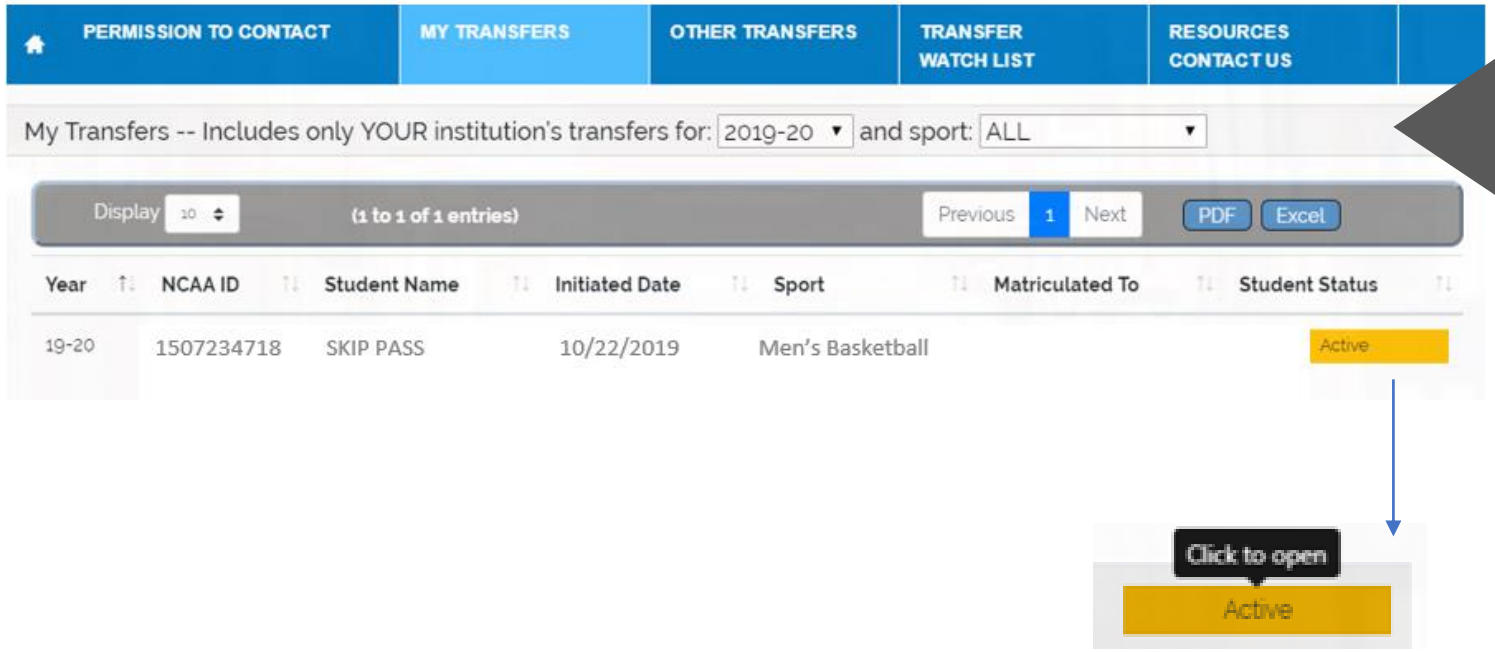
The compliance office for Victory College has submitted a permission to contact for:

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



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

After submitting the permission to contact, 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.

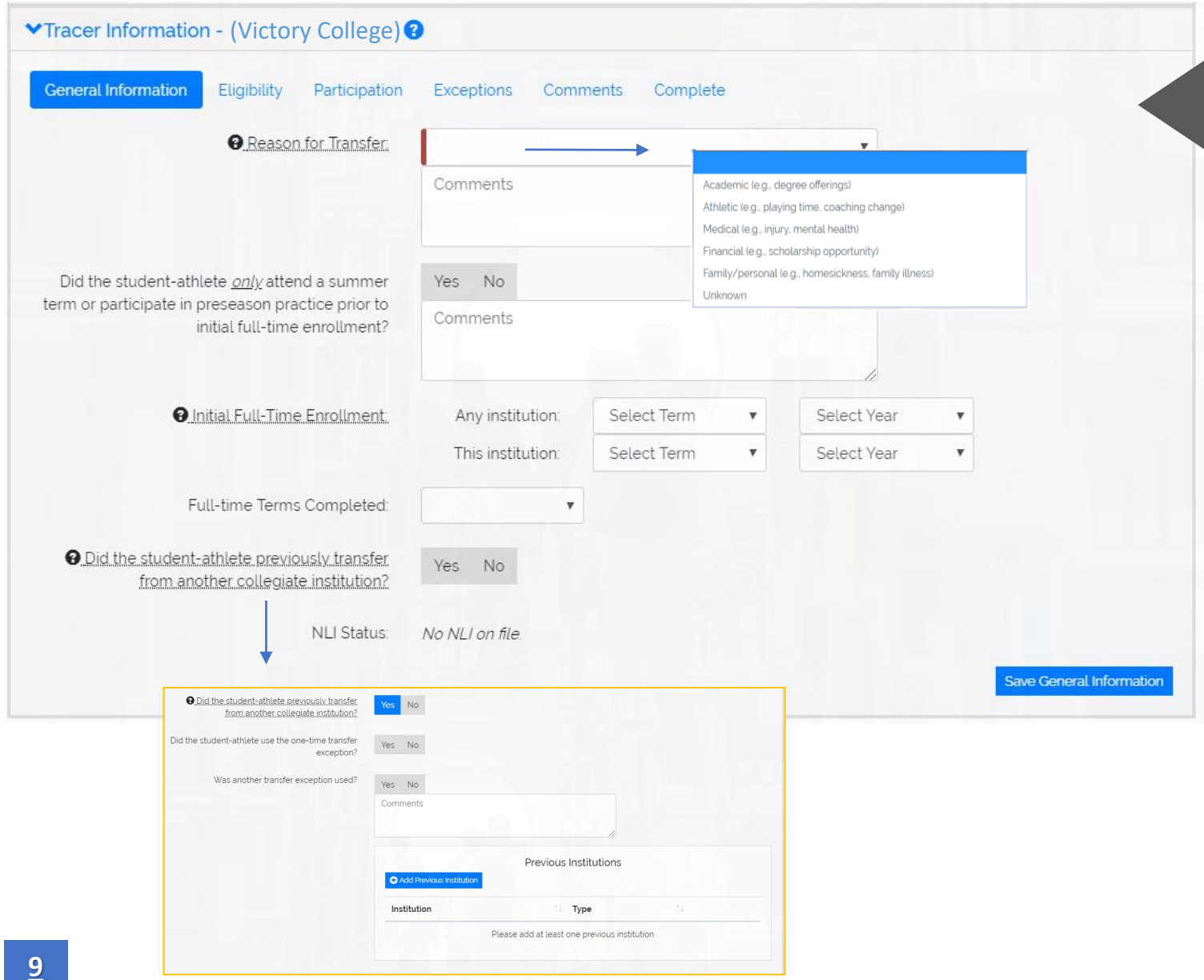
The list can be reordered by sorting each column.

The list can include ALL sports or you can select a sport from the drop-down box.

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

HOW DO I COMPLETE THE TRANSFER TRACER ?

Transfer Tracer



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

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 <u>each</u> screen next to the save button.

Transfer Tracer

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	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

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

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

Save Eligibility

Initial eligibility information populates from the Eligibility Center Portal.

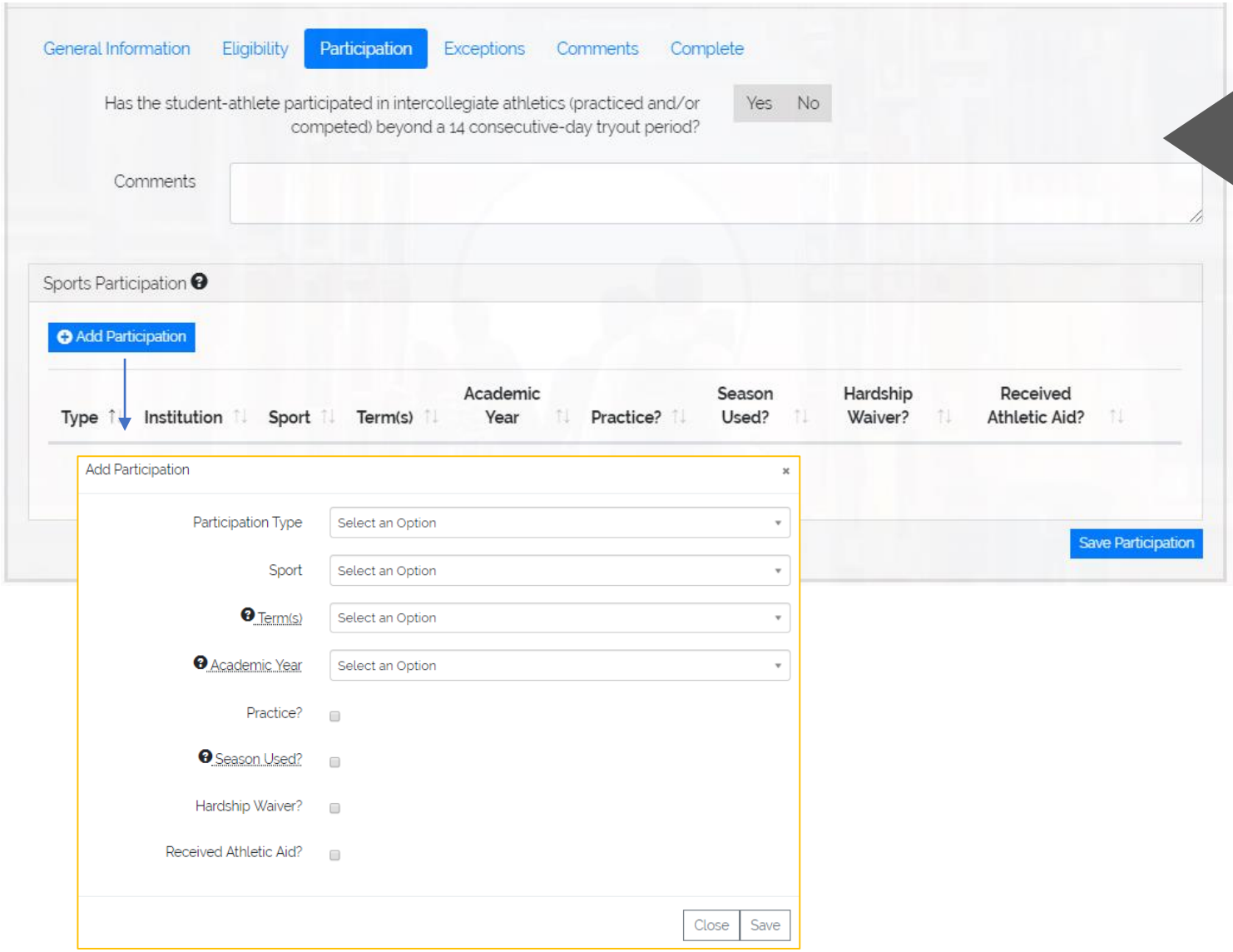
In progress is an option if academic status is not complete. If in progress is selected, an additional question populates asking for the date your institution's term ends.

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.

Transfer Tracer



Include all known intercollegiate participation history, including that 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.

Transfer Tracer

General Information | Eligibility | Participation | Exceptions | Comments | Complete

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)?
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 Yes with
Once comments are e
after saving.

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

The student does not have visibility of the transfer portal. Institutional decisions related to the student's transfer eligibility must be communicated directly to the student.

********* CAUTION *********
Clicking Acknowledge will lock this exception. You cannot undo this action after acknowledging.

If you are not ready to answer the one-time transfer exception, please click CANCEL. Cancelling will not answer or lock the exception.

Please contact transfer@ncaa.org if needed.

Acknowledge | CANCEL

Save Exceptions

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

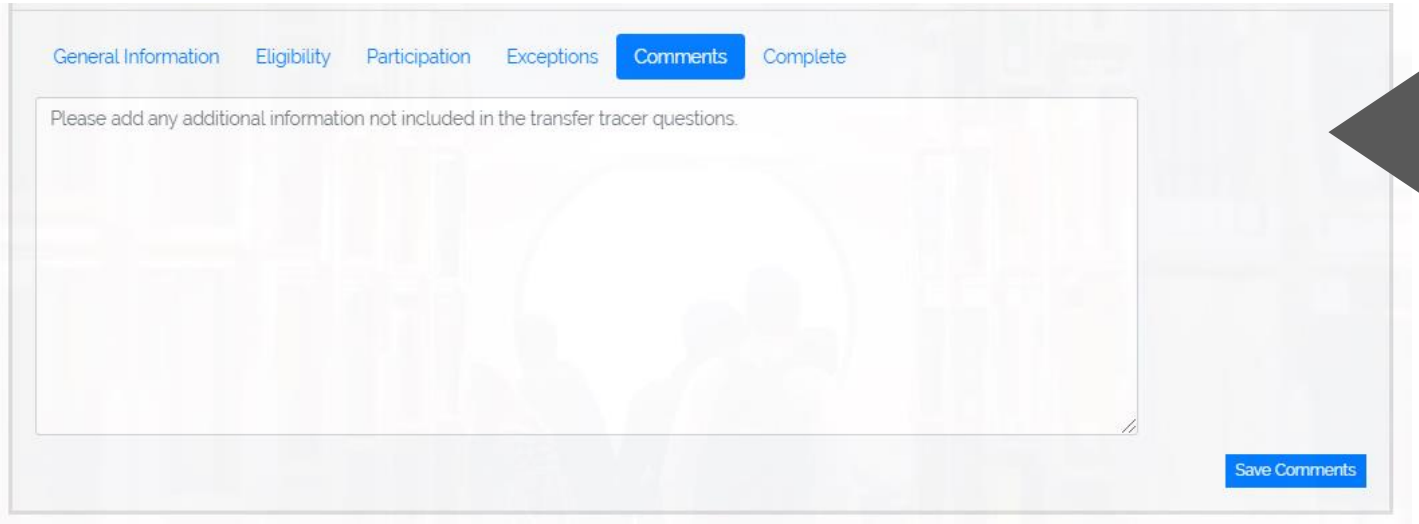
If the applicable transfer exception is not listed, see the last question and include what exception applies in the comment box.

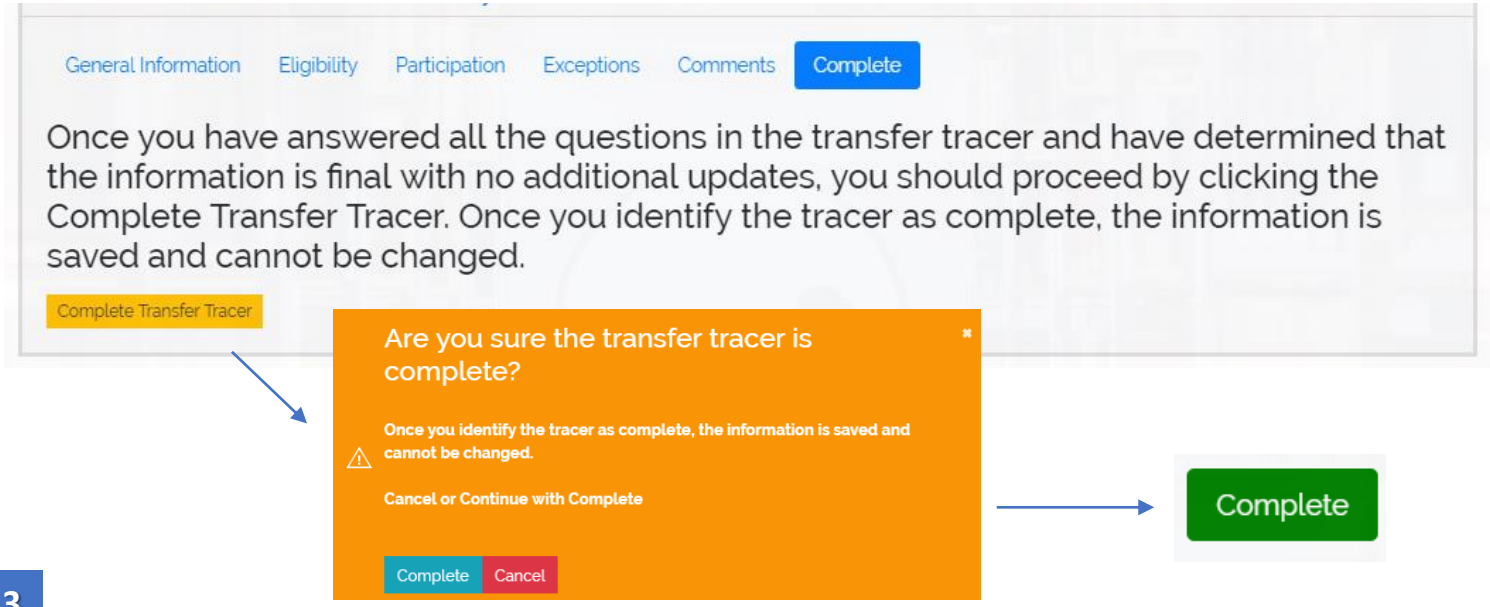
If your institution does not object to granting the one-time transfer exception, but restrictions apply for specific institutions or conferences, add the restrictions to the comment box.

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.

Transfer Tracer





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.

The complete will change to a green button once completed and will be visible in green for other institutions to know the tracer is complete.

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.

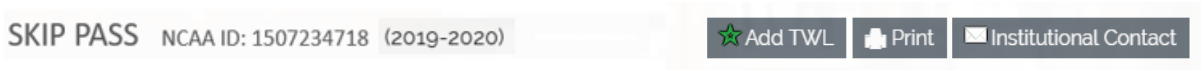
The transfer tracer can be completed by the compliance office at anytime or if requested by another institution.

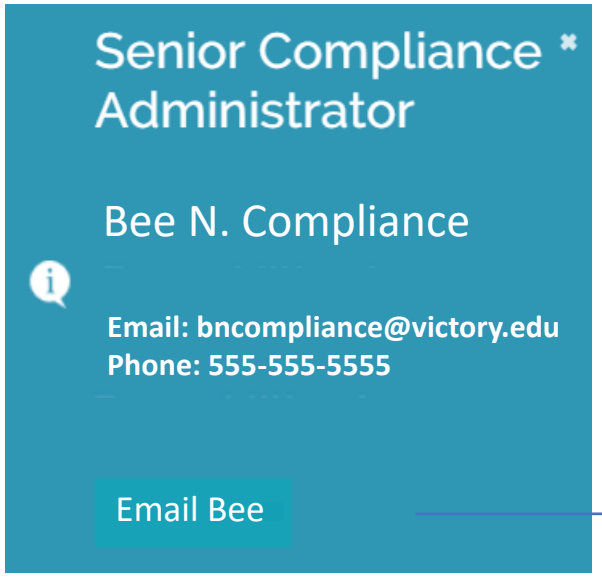
The student-athlete's information can be updated and saved independently (by question or section) without completing the full transfer tracer.

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 on a continuous page or save to pdf.

Communication with other compliance administrators

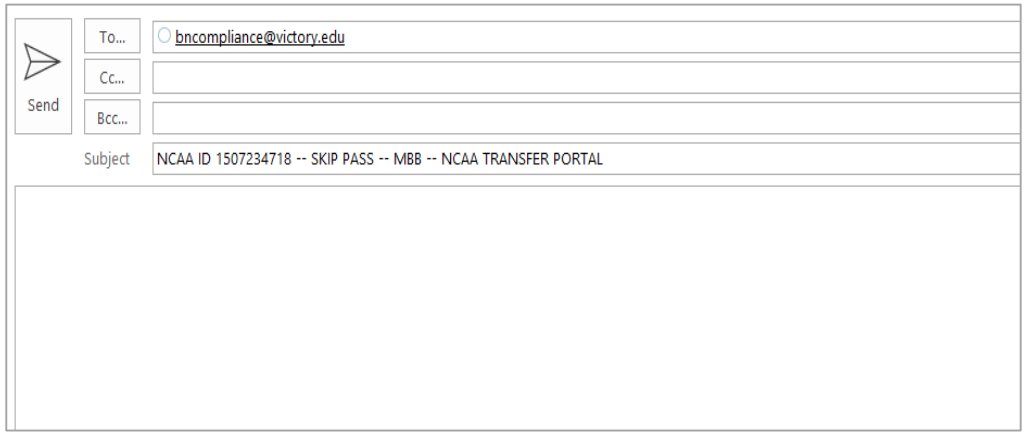




If a compliance administrator needs to contact another institution's compliance administrator, click on the **Institutional Contact** button located in the student's record to see who to contact.

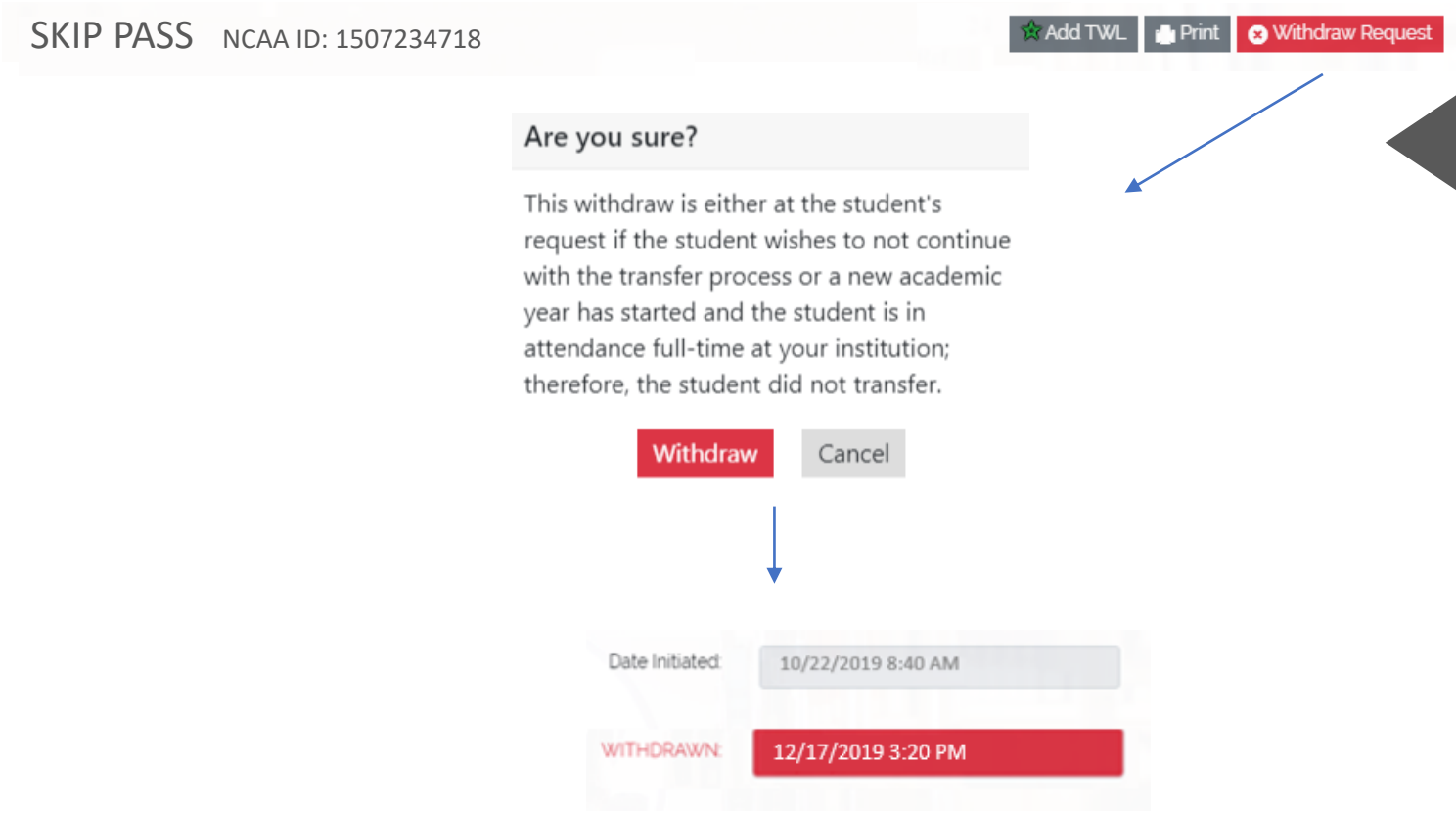
Click the email button to populate an email that includes the student's NCAA ID, Name and Sport. The email will be sent directly from you through your email account.

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.



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 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, 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 Notification of Transfer and the Division II or III Permission to Contact screen.

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

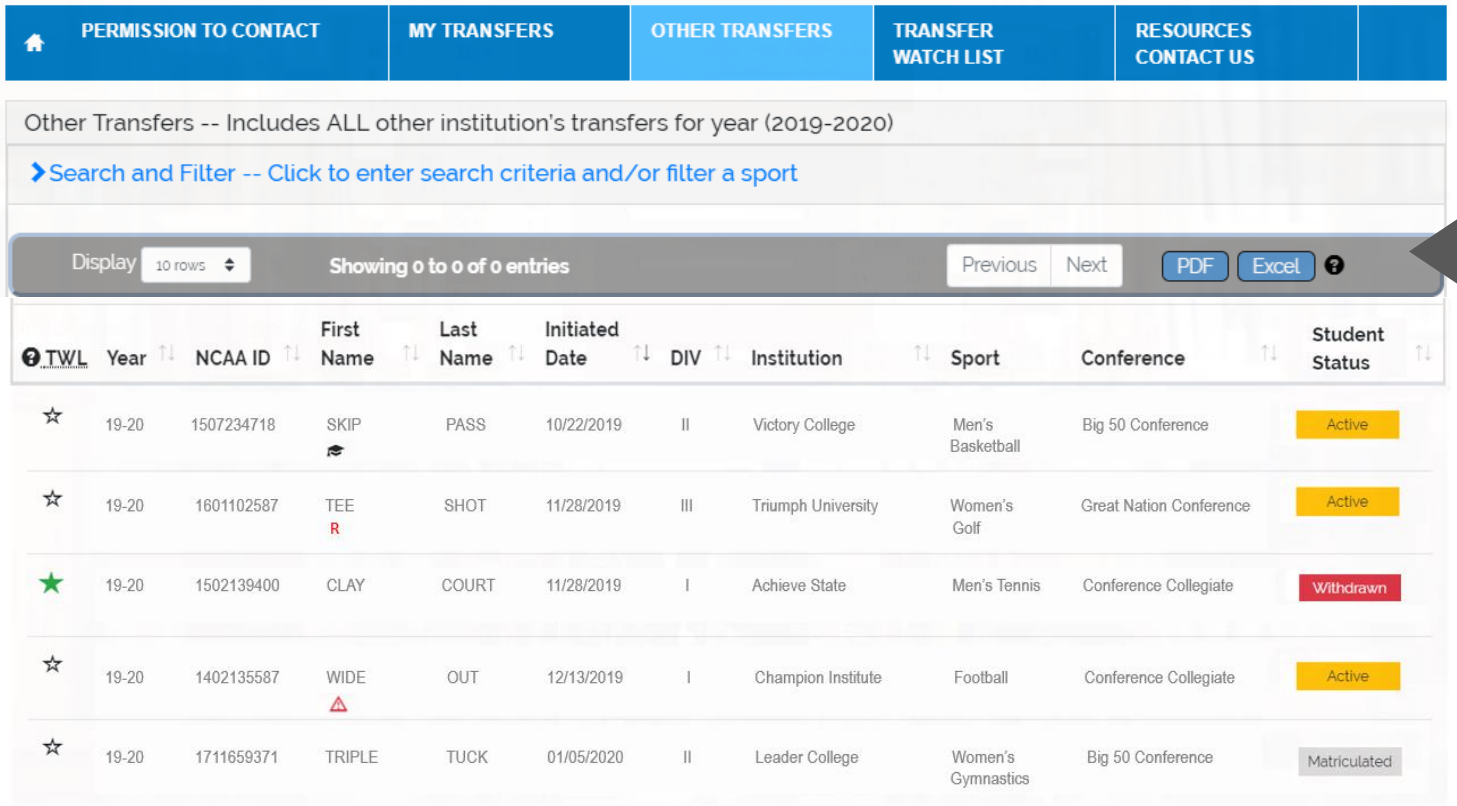
Student Name: **SKIP PASS**
NCAA ID: **1507234718**
Sport(s): **Men's Basketball**
Institution: **VICTORY COLLEGE**

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



TWL	Year	NCAA ID	First Name	Last Name	Initiated Date	DIV	Institution	Sport	Conference	Student Status
☆	19-20	1507234718	SKIP	PASS	10/22/2019	II	Victory College	Men's Basketball	Big 50 Conference	Active
☆	19-20	1601102587	TEE R	SHOT	11/28/2019	III	Triumph University	Women's Golf	Great Nation Conference	Active
★	19-20	1502139400	CLAY	COURT	11/28/2019	I	Achieve State	Men's Tennis	Conference Collegiate	Withdrawn
☆	19-20	1402135587	WIDE	OUT	12/13/2019	I	Champion Institute	Football	Conference Collegiate	Active
☆	19-20	1711659371	TRIPLE	TUCK	01/05/2020	II	Leader College	Women's Gymnastics	Big 50 Conference	Matriculated

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

Student identified as a graduate student

Student does not want to be contacted.

R Student identified with Division II or III contact restrictions

Select OTHER TRANSFERS to view students from other institutions listed in the transfer portal. You will not see your institution's students in this list.

A student's name appears on the list if the notification of transfer (Division I) or permission to contact (Division II or III) was submitted.

Identifier icons may appear next to the student's name.

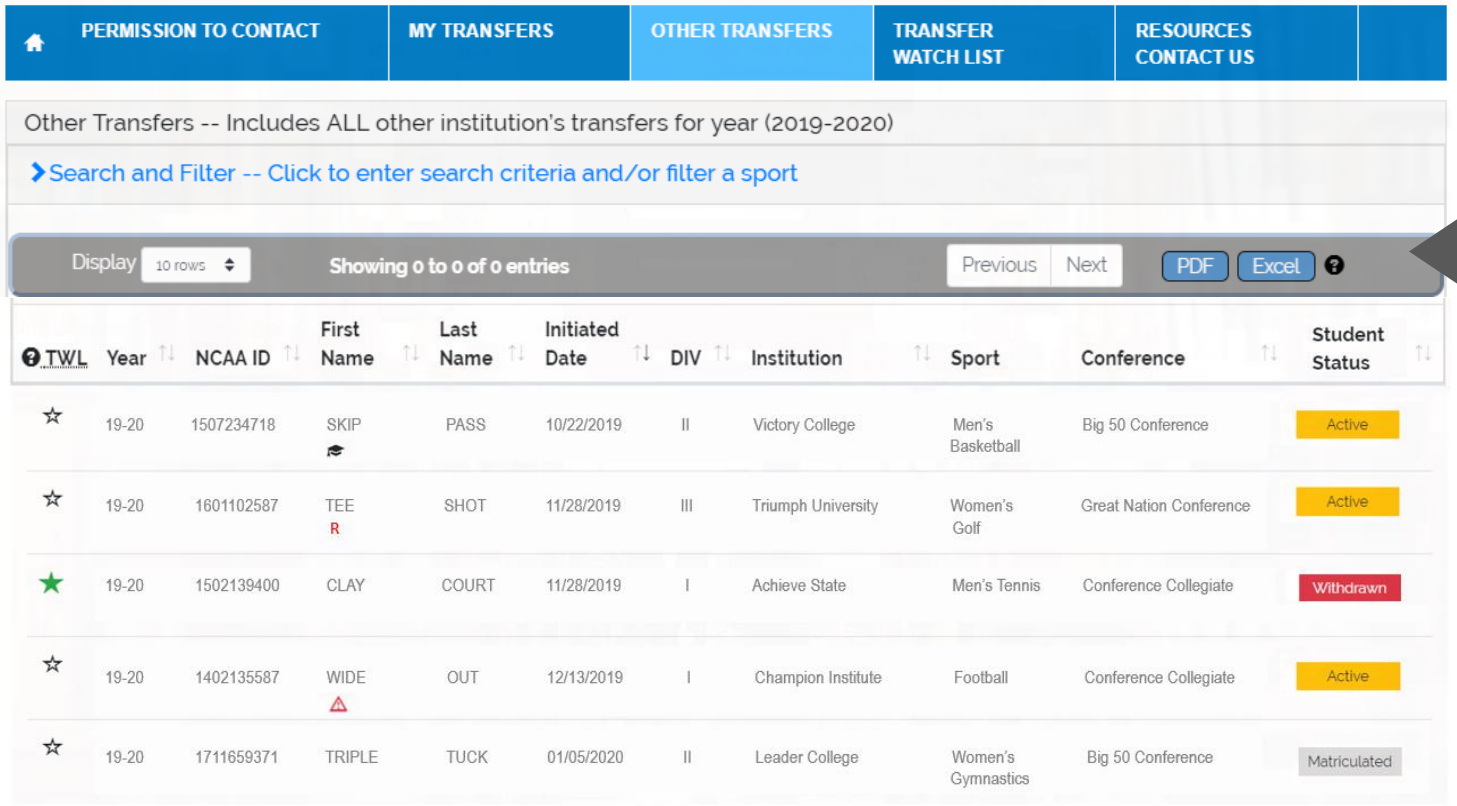
The student's status will appear as Active, Withdrawn or Matriculated.

ACTIVE: Student's record shows Active if the student wishes to communicate with other institutions about potential transfer.

WITHDRAWN: Student's record shows Withdrawn if the student's decision to explore transfer changed. (see page 28)

MATRICULATED: Student's record shows Matriculated once the student has transferred and attended the first day of class of the regular academic year. (see page 30)

OTHER TRANSFERS



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Click on the Student Status:

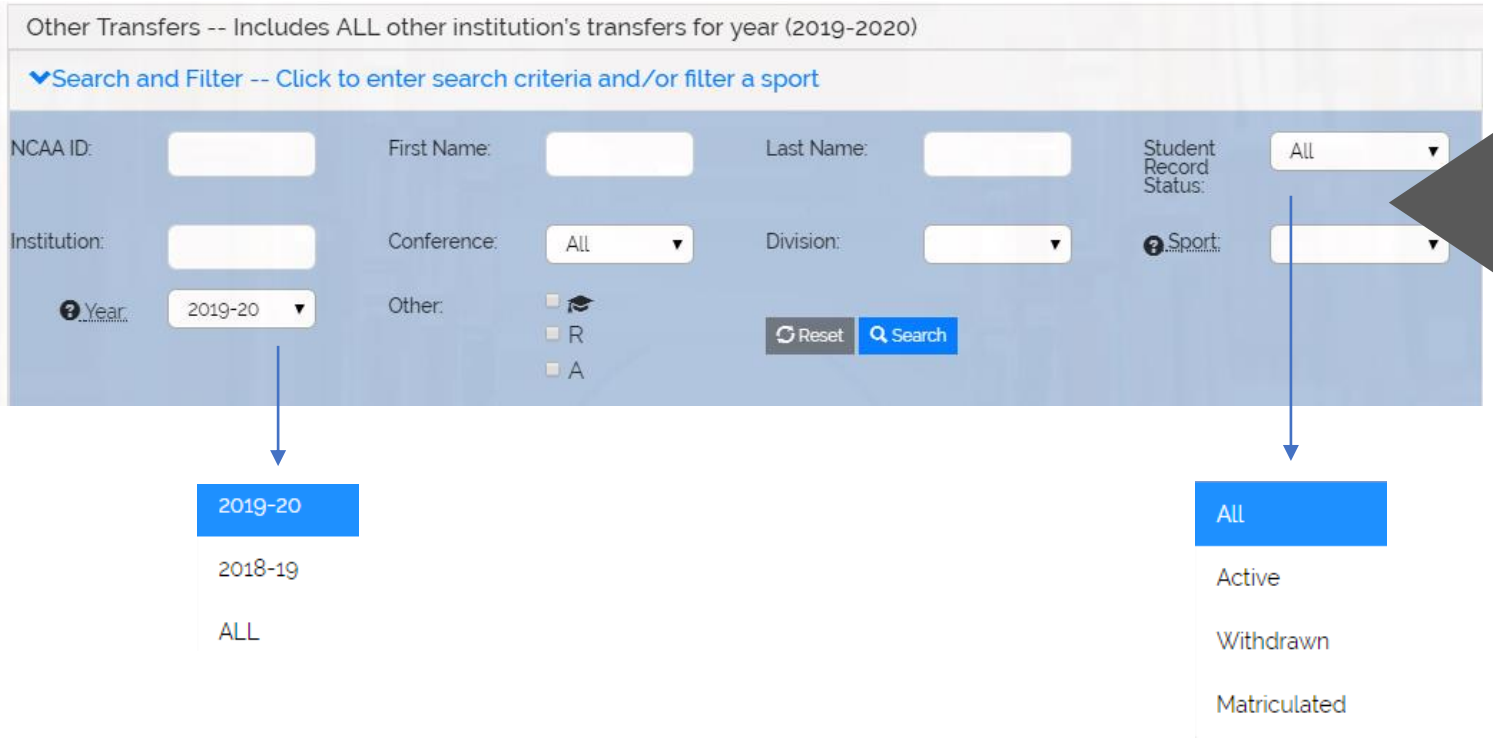
Individuals With View Only Access –

Will see the student's Division I Notification of Transfer or Division II/III Permission to Contact and will not see the student's transfer tracer.

Individuals With Edit Access –

Will see the transfer tracer in addition to the Division I Notification of Transfer or Division II/III Permission to Contact.

OTHER TRANSFERS



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

Sport - Select the sport to only show the sport you want to view. If a sport is not listed in the drop-down, there are no students in the portal for that sport.

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

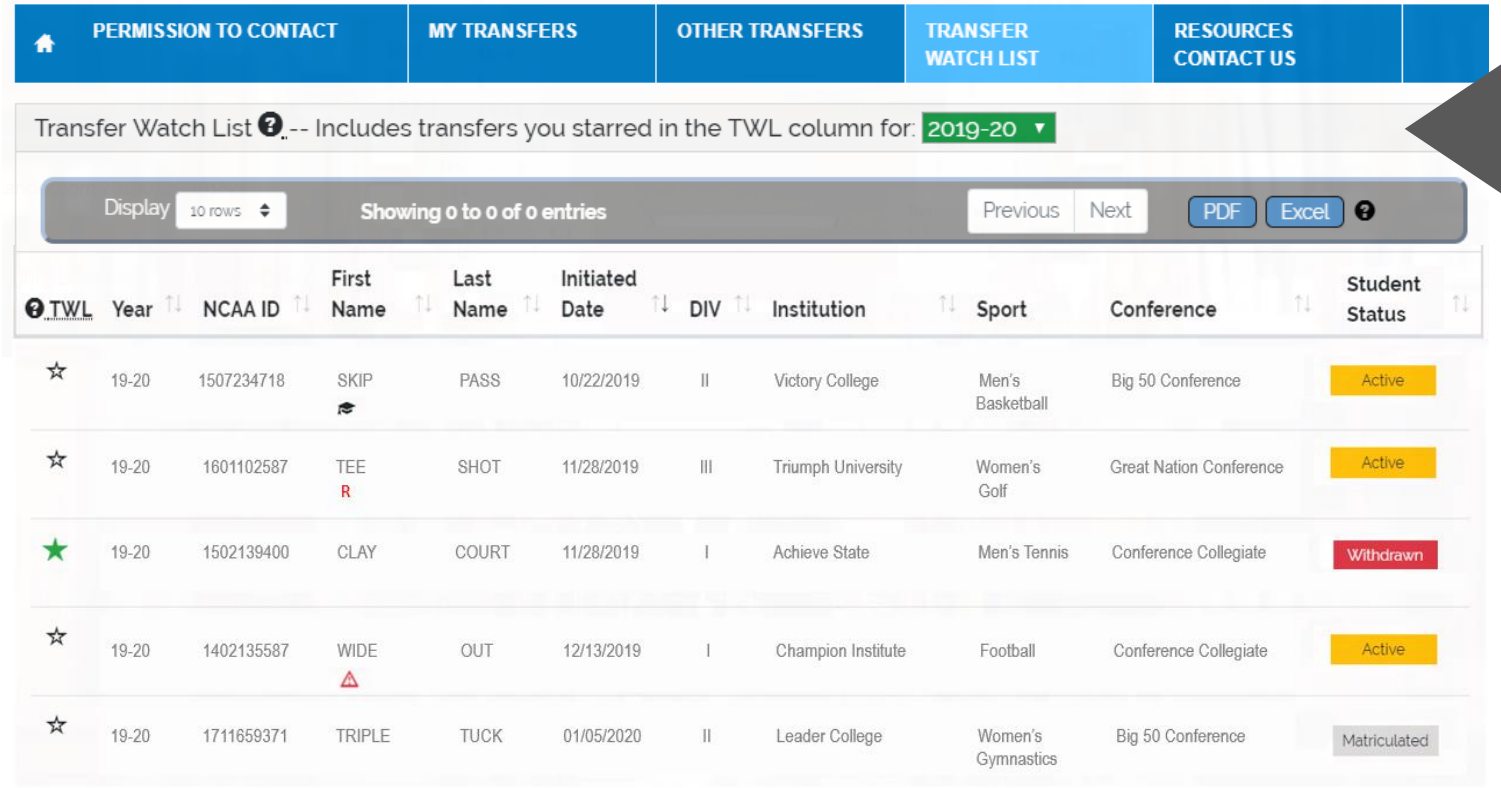
Conference – Conferences are listed in the drop-down list. If a conference is not listed, there are no students in the portal for that conference in that year. Institutions are listed in accordance with their primary conference and not a sport specific conference. Only one conference can be searched. Multiple conferences cannot be selected.

🎓 Search graduate students

R Search students identified with Division II and III contact restrictions

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

TRANSFER WATCH LIST



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☆	19-20	1711659371	TRIPLE	TUCK	01/05/2020	II	Leader College	Women's Gymnastics	Big 50 Conference	Matriculated

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

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

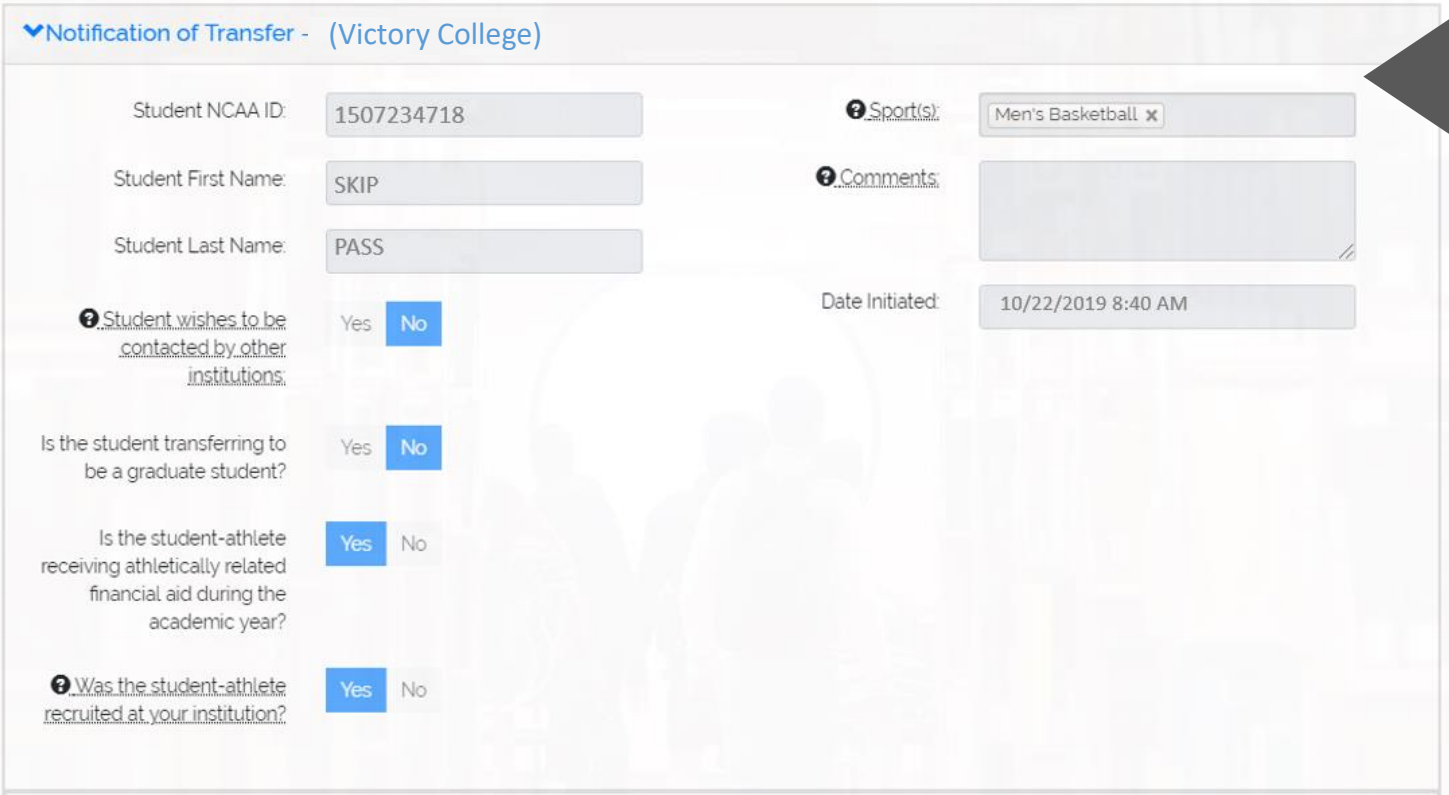
Each individual logged into the transfer portal can create his or her own watch list.

If updates occur in the student's record, emails are sent to all individuals who have the student on their watch list. (see page 27)

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

A watchlist can be shared among a staff if all use the same SSO login.

Division I Notification of Transfer



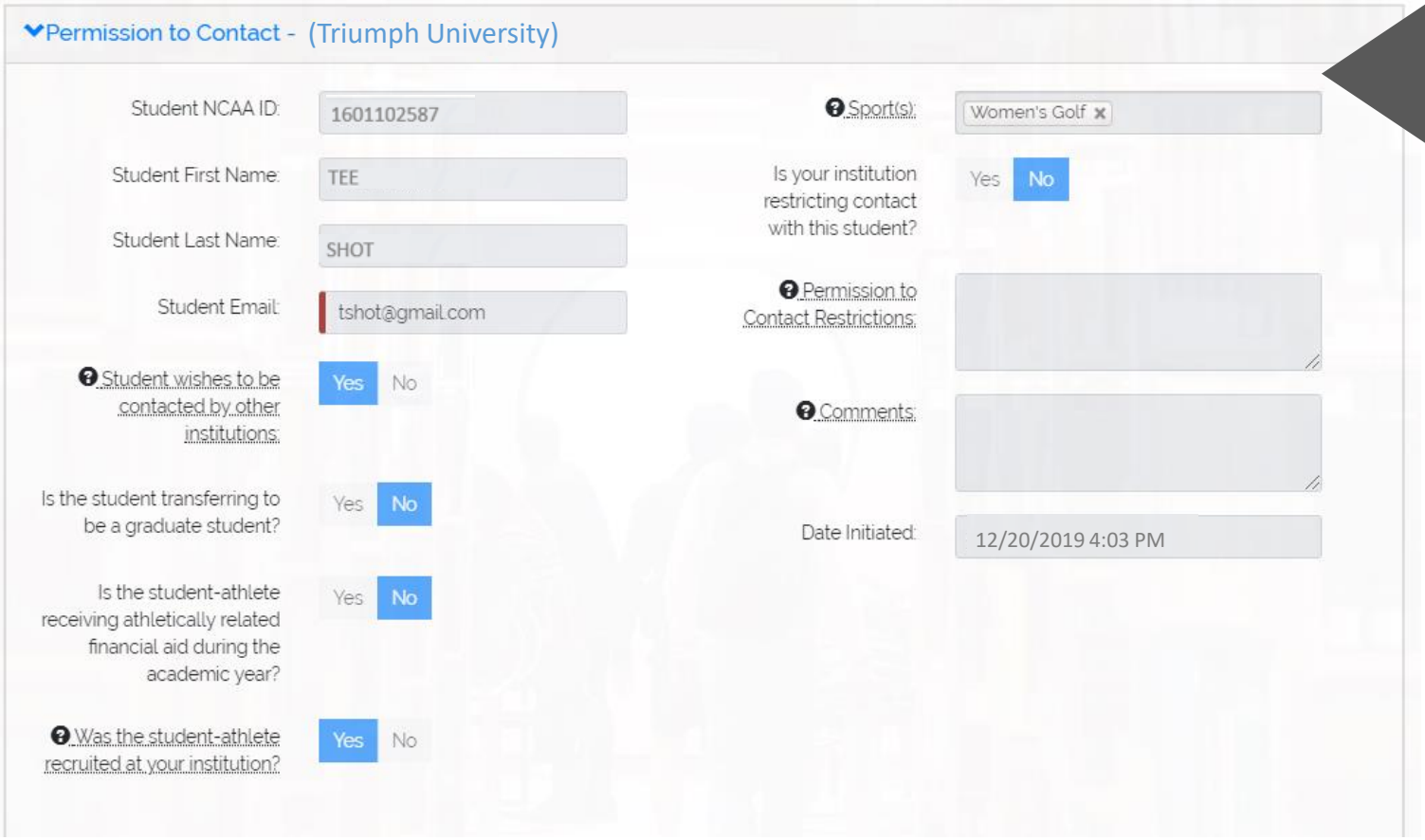
The Notification of Transfer will show for a Division I student who has entered the transfer portal.

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 Division I 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 II and III Permission to Contact



The Permission to Contact will show for a Division II and III student who has entered the transfer portal.

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

Division II and 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 18)

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]

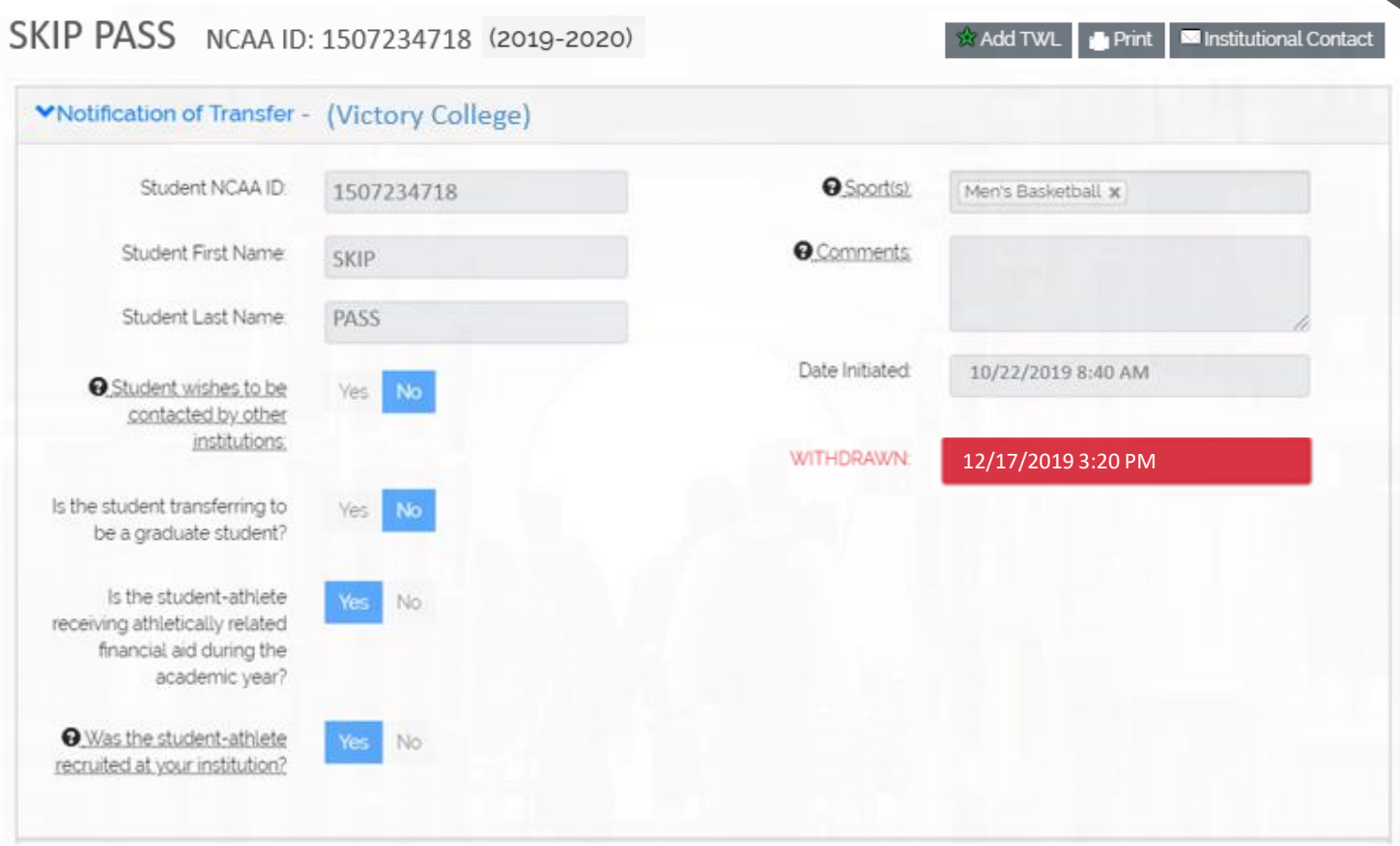
Transfer Watch List Institution Email

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



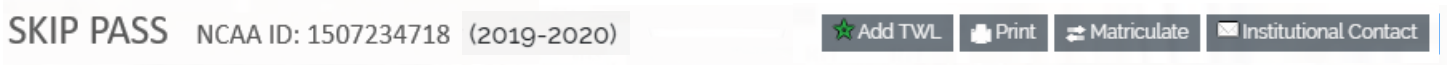
If a student's Division I Notification of Transfer or Division II or III Permission to Contact is withdrawn, the student's status will show as Withdrawn.

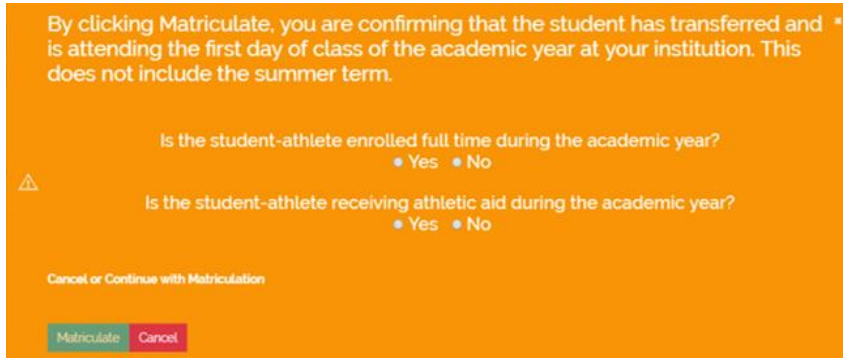
You can click on the Withdrawn button located on the OTHER TRANSFERS to see the date and time located in the student's Division I Notification of Transfer or Division II or III Permission to Contact screen.

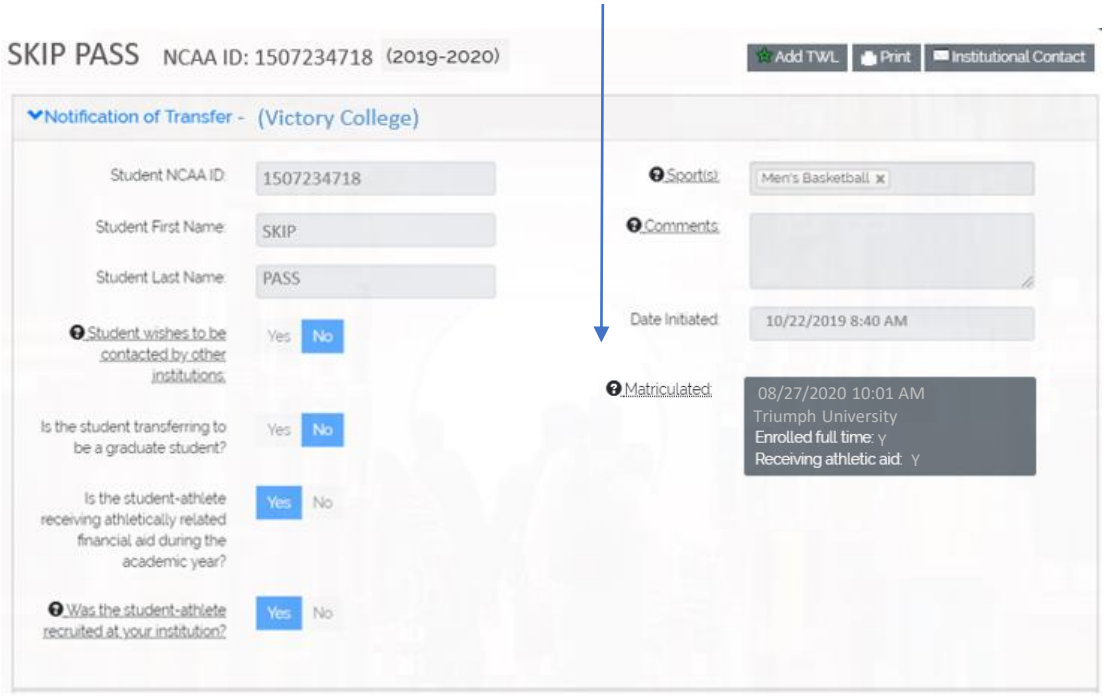
Communication with the student is permissible during the time period between the initiated date and the withdrawn date.

WHAT ACTION IS TAKEN AFTER THE STUDENT TRANSFERS ?

Matriculated







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

The compliance office will identify the student as matriculated once the student has attended the first day of class of the regular academic year.

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 and athletic aid status will show in the student's record.

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

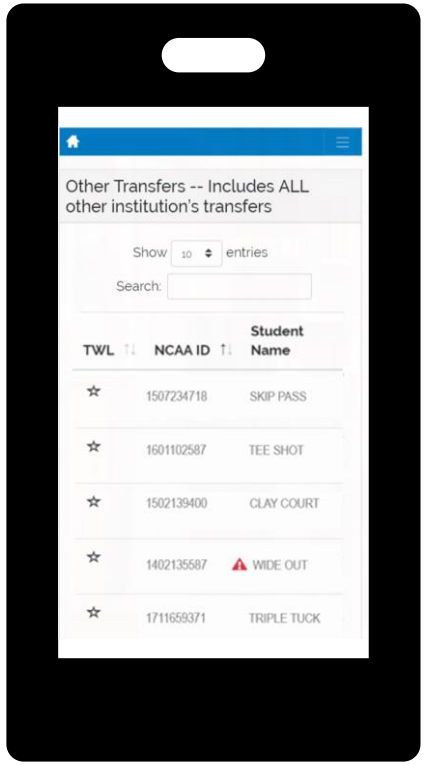
Student Name: **SKIP PASS**
NCAA ID: **1507234718**
Sport(s): **Men's Basketball**
Institution: **VICTORY COLLEGE**

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.

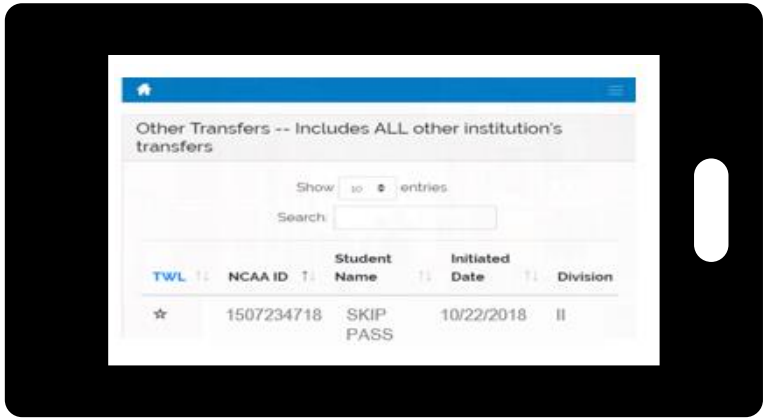
[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

CAN THE TRANSFER PORTAL BE USED ON A MOBILE DEVICE ?

MOBILE VIEW



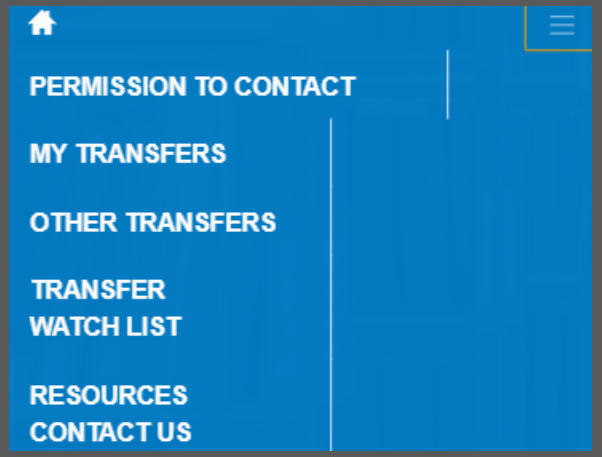
Scroll across screen



Scroll across screen

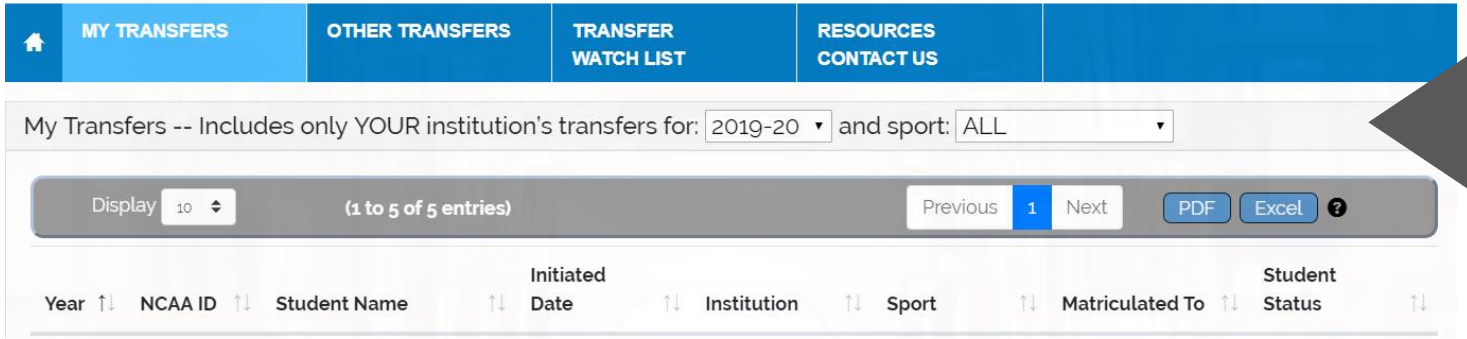
The Transfer Portal can be viewed on a mobile device.

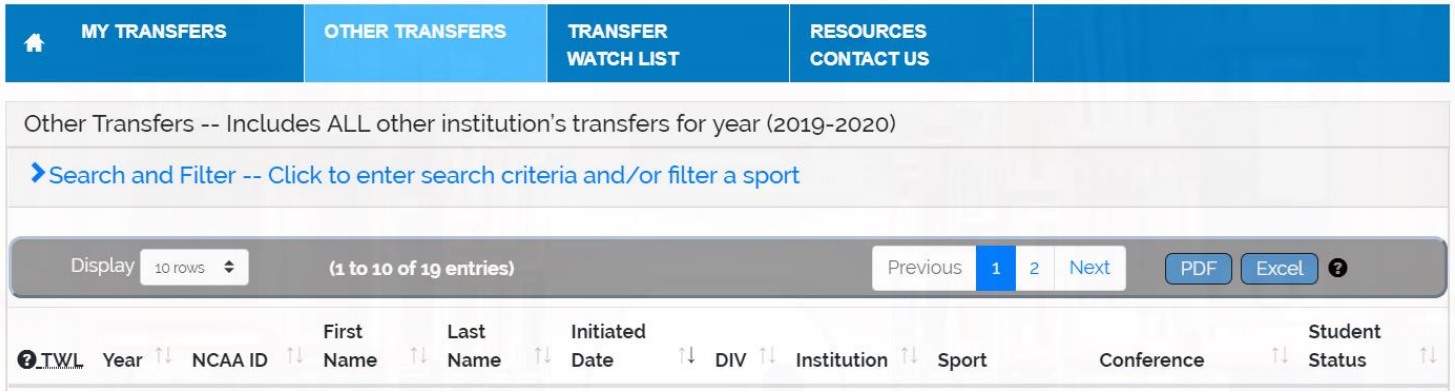
Click on the ☰ to show the menu of tabs.



CAN THE CONFERENCE OFFICE VIEW THE TRANSFER LIST ?

CONFERENCE OFFICE VIEW



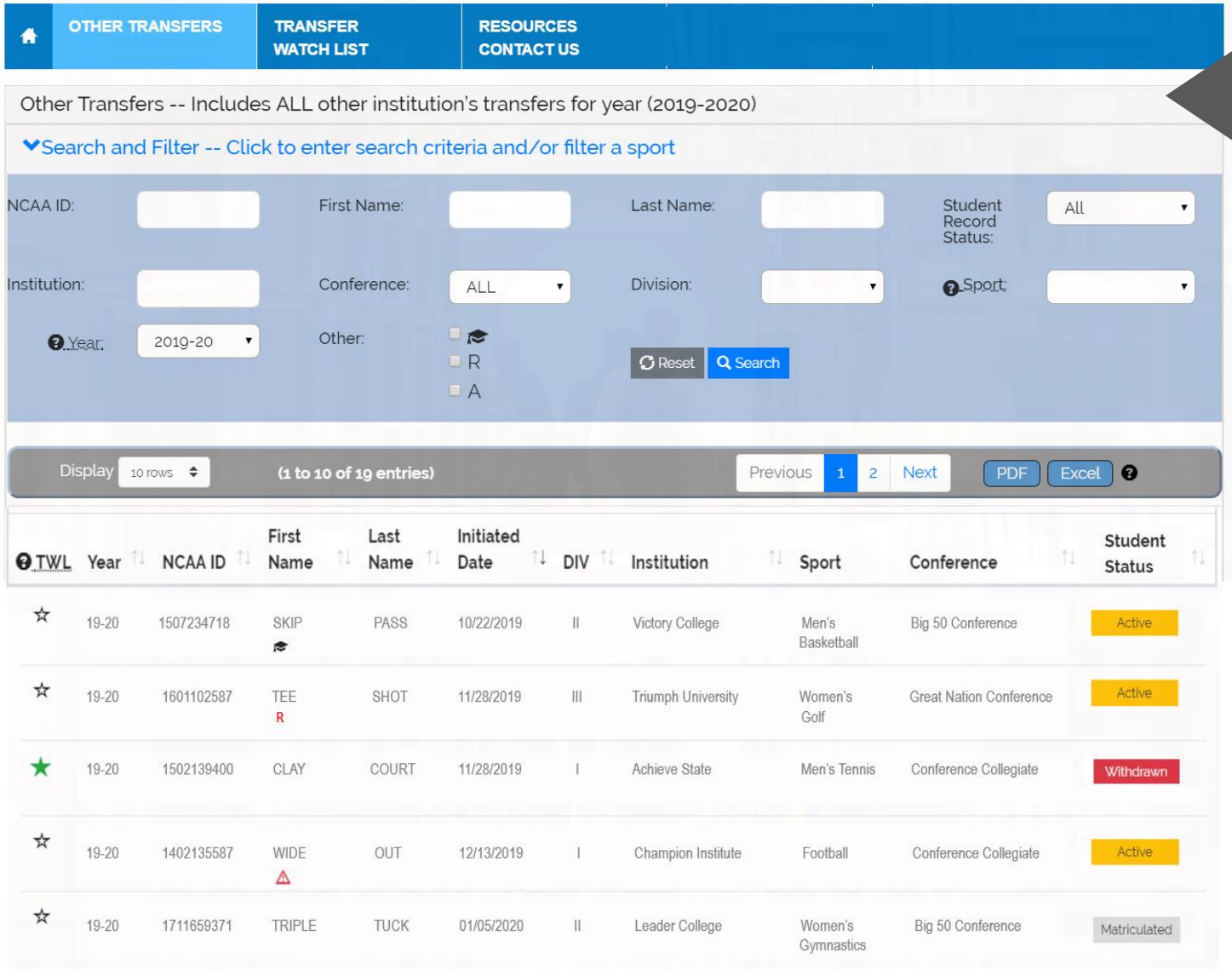


Conference office administrators have access to view their member institutions' students who are listed in the transfer portal in MY TRANSFERS, in addition to students from other institutions listed in OTHER TRANSFERS.

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

HOW WILL COACHES USE THE TRANSFER PORTAL ?

OTHER TRANSFERS



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 and RESOURCES.

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.

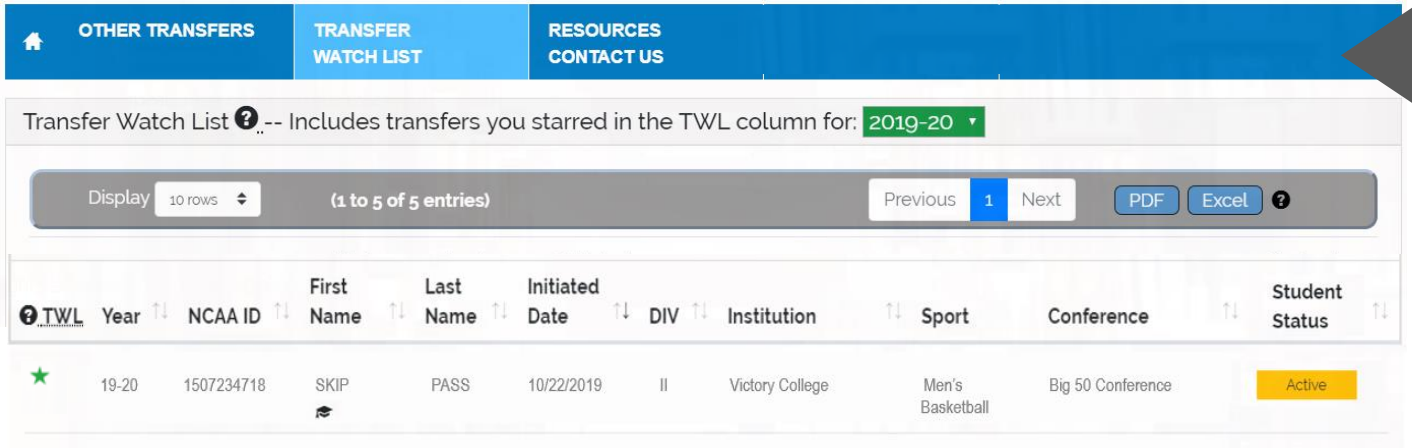
A coach can narrow the list to only his or her sport by selecting the sport in the sport filter. A more narrowed search can also occur by searching or filtering any column.

Please refer to pages 20 and 21 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 Notification of Transfer and Division II or III Permission to Contact can be viewed by a coach by clicking on the student status button.

TRANSFER WATCH LIST



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.

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

NCAA TRANSFER PORTAL

transfer@ncaa.org

TOOL TIPS -Always read for helpful tips.

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