



# TRANSFER PORTAL

## USER GUIDE

DIVISION III

VERSION 4.0 - AUGUST 2021



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.

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HOW DO I SUBMIT THE  
PERMISSION TO CONTACT



# PERMISSION TO CONTACT

Permission to Contact

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

Student First Name:

Student Last Name:

Student Email:

Student Mobile Phone: Domestic Int'l

Sport(s):

Is your institution restricting contact with this student? Yes No

Permission to Contact Restrictions:

Comments:

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

Did the student meet the notification of transfer deadline? Yes No Not Applicable

*(Only applies to DI sports)*

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

[Add Email Contact](#)

Email

No additional email contacts to notify

[Submit](#)

**Only applicable for DI sports due to one-time transfer criteria**

## 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 number

- 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...

# 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:   
[Lookup Student NCAA ID](#)

Student First Name:

Student Last Name:

Student Email:

Student Mobile Phone: 

Domestic

Int'l

2 Sport(s):

Is your institution restricting contact with this student? 

Yes

No

2 Permission to Contact Restrictions:

Comments:

2 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

2 Was the student-athlete recruited at your institution? 

Yes

No

Did the student meet the notification of transfer deadline?   
*(Only applies to DI sports)*

Yes

No

Not Applicable

2 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

## 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

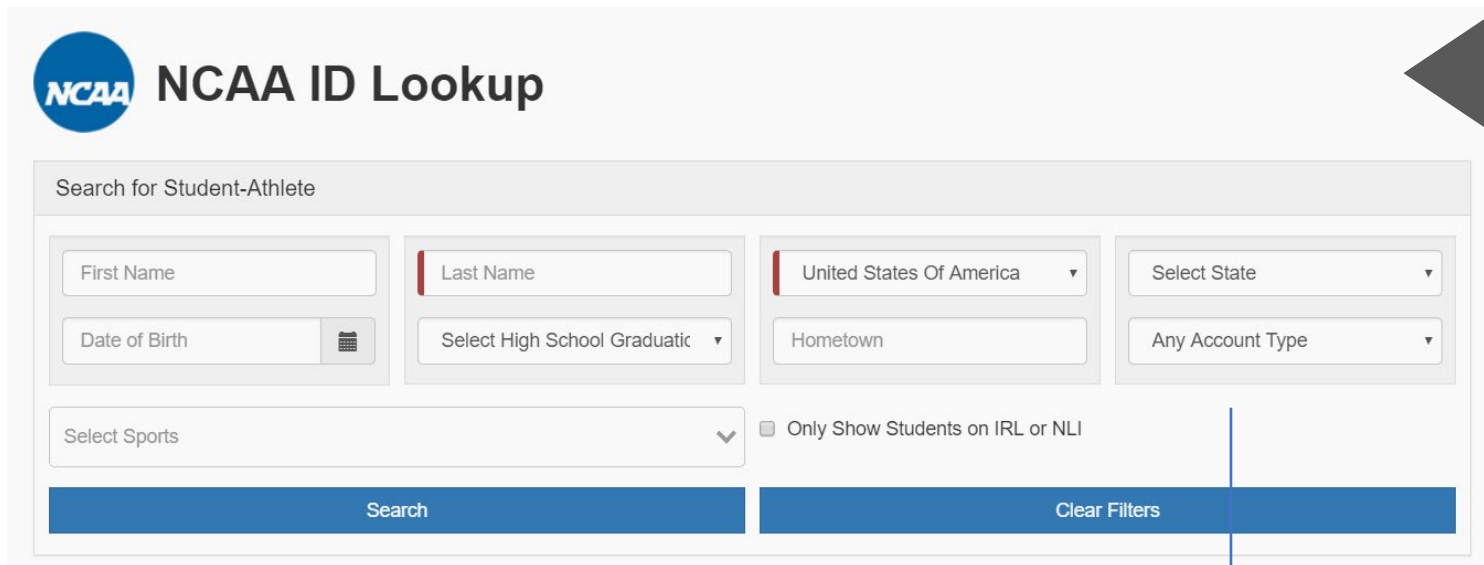
## Enter email contact list

- 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.
- Email entry available if individual is not listed in drop-down.

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

# NCAA ID Lookup



The screenshot shows the NCAA ID Lookup search interface. At the top left is the NCAA logo followed by the title "NCAA ID Lookup". Below this is a header "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", "Any Account Type" (a dropdown menu), 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 blue 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
- 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

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

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

Did the student meet the notification of transfer deadline?  
(Only applies to DI sports)

Yes

No

Not Applicable

Email

coach@victory.edu

AD@victory.edu

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

Submit



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

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.

The screenshot shows the 'General Information' tab of the Transfer Tracer form. It includes fields for 'Reason for Transfer' (a drop-down menu), 'Comments', '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 with Term and Year dropdowns), 'Full-time Terms Completed' (a dropdown), 'Does the student-athlete qualify for an academic year extension?' (Yes/No/Not Applicable), and 'Did the student-athlete previously transfer from another collegiate institution?' (Yes/No). Below these is the 'NLI Status' section, which says 'No NLI on file.' and has a blue star annotation '★ If NLI signee'. A blue arrow points from the '★ If Yes' annotation to a pop-up form for 'Did the student-athlete use the one-time transfer exception?'. Another blue arrow points from the '★ If NLI signee' annotation to a table titled 'Signed National Letter of Intent (NLI)'.

★ If Yes

★ If NLI signee

Did the student-athlete use the one-time transfer exception? Yes No

Was another transfer exception used? Yes No

Comments

Previous Institutions

Add Previous Institution

Institution	Type
Please add at least one previous institution	

Signing Date	Status	Institution	Release Status (if any)
11/09/2010	VALID	State University	

# 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.

The screenshot shows the 'Eligibility' tab of the Transfer Tracer interface. It contains several sections for academic and athletic certification, with dropdown menus for 'Div I', 'Div I Waiver', 'Div II', and 'Div II Waiver'. Questions include 'Is the student-athlete currently in good academic standing?', 'Is the student-athlete meeting all progress-toward-degree requirements?', 'Would the student-athlete be academically eligible if he or she remains at the institution?', 'Is the student-athlete's athletics aid renewed for the following academic year?', and 'Are there any eligibility issues not shown in the transfer tracer that require the institution's compliance office to be contacted?'. A 'Graduate Student' section at the bottom asks 'Has the student-athlete graduated from the current institution?' and 'Expected graduation date if student has not graduated?'. A 'Save Eligibility' button is at the bottom right.

General Information **Eligibility** Participation Exceptions Comments Complete

Eligibility Center Academic Certification: **Div I** **Div I Waiver** **Div II** **Div II Waiver**

Final Qualifier Final Nonqualifier

Eligibility Center Amateurism Certification: Amateurism Certification not found

Self-Reported EC Grad Date:

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

Save Eligibility

# 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.

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?
Participation has not been entered								

Save Participation

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

The screenshot shows the 'Exceptions' tab of the Transfer Tracer interface. It contains several questions with 'Yes', 'No', and 'Comments' fields. A callout box points to the 'Restrictions' dialog, which is used to specify divisions, institutions, or conferences for which an objection applies.

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

**For Division II and III student-athletes** - Does the institution object to granting the one-time transfer exception? Yes No Yes with restrictions  
For Division I student-athletes - See the DI One-Time Transfer Tab  
Once comments are entered, you will not be able to edit after saving.

**For Division II and III student-athletes** - Was the student granted the one-time transfer exception by appeal? Yes No Appeal opportunity has expired  
Comments

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

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

Save Exceptions

**Restrictions**  
Select one or more of the following and click **CONTINUE**  
Select division(s) that this objection applies to: Select Division(s)  
Select institution(s) that this objection applies to: Select Institution(s)  
Select conference(s) that this objection applies to: Select Conference(s)  
CONTINUE CANCEL

## 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.

For Division II and III student-athletes:

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. If you need to unlock this question, go to the "Actions" button. This button appears in the upper right of the screen.

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

The screenshot shows the 'Comments' tab selected in the top navigation bar. Below the navigation bar, there is a large text area for adding comments. The text inside the area reads: 'Please add any additional information not included in the transfer tracer questions.' In the bottom right corner of the text area, there is a 'Save Comments' button.

## COMMENTS

Any additional information not included in the transfer tracer can be added to the comments section in addition to questions and answers you want to add to the tracer.

## 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 screenshot shows the 'Complete' tab selected in the top navigation bar. Below the navigation bar, there is a text box with the following instructions: '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. Go to the "Actions" button above if you need to remove the complete status.' Below this text box, there is a 'Complete Transfer Tracer' button.

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 dialog box is orange and contains the following text: 'Are you sure the transfer tracer is complete?' followed by a warning icon and the text: 'Continuing with this complete process will mark the transfer tracer as complete and no changes to the tracer will be allowed.' Below this, it says 'Continue with Complete, or Cancel'. There are two buttons: 'Complete' (blue) and 'Cancel' (red). An arrow points from the 'Complete' button to a green 'Complete' button.

The transfer tracer cannot be edited after it is complete. Go to the "Actions" button if you need to remove the complete status. This button appears in the upper right of the screen.

# Transfer Tracer

The screenshot shows the 'MY TRANSFERS' tab selected in a navigation bar. Below the navigation bar, a dropdown menu shows '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 request complete tracer. This will send an email request for the compliance administrator to finalize the tracer.

The Institutional Contact is only available to individuals with edit privileges. The Institutional Contact shows individuals listed in the NCAA Membership Directory as the Transfer Portal Contact and Senior Compliance Administrator. These designations are updated by you in the directory.

★ Add TWL   Print   Institutional Contact

### Victory College Contacts

#### Transfer Portal Contact

Paul Portal

Email: [pportal@victory.edu](mailto:pportal@victory.edu)  
Phone: 555-555-5554

[Email Paul](#)   [Email Paul to complete tracer](#)

#### Senior Compliance Administrator

Bee N. Compliance

Email: [bncompliance@victory.edu](mailto:bncompliance@victory.edu)  
Phone: 555-555-5555

[Email Bee](#)   [Email Bee to complete tracer](#)

Send

To...  
[bncompliance@victory.edu](mailto:bncompliance@victory.edu)

CC...

Bcc...

Subject  
NCAA ID 1507234718 -- SKIP PASS -- MBB -- NCAA TRANSFER PORTAL

Send

To  
[bncompliance@victory.edu](mailto:bncompliance@victory.edu)

Cc

Bcc

Subject  
Request to complete transfer tracer for: NCAA ID 1507234718 -- SKIP PASS -- MBB -- NCAA TRANSFER PORTAL

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 is a navigation bar with buttons: 'Actions' (green), 'Add TWL' (grey), 'Print' (blue), and 'Withdraw Request' (red). Below this is a confirmation dialog box titled 'Are you sure?'. The dialog contains the text: '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' (red) and 'Cancel' (grey). A blue arrow points from the 'Withdraw' button to a text box that says 'Click the Withdraw Request for this message.' Below the dialog, the system shows a record with 'Date Initiated: 07/22/2020 1:18 PM' and 'WITHDRAWN: 07/27/2020 11:17 AM'. A blue arrow points from the 'WITHDRAWN' date and time to a text box that says 'The withdrawn date and time will show on the DI/DII Notification of Transfer or DIII Permission to Contact.'

Actions 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

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  
2021-22  
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

A 'User settings' form with four rows of settings, each with a help icon (?), a label, and a dropdown menu. The settings are: 'Other Transfers YEAR default:' with 'All' selected; 'Other Transfers search DIVISION default:' with 'Select' selected; 'Other Transfers search SPORT default:' with 'Football' selected; and 'Other Transfers search RECORD STATUS default:' with 'ACTIVE' selected. A red 'Save settings' button is at the bottom left. A blue arrow points from the 'Save settings' button to the 'Other Transfers' section of the second screenshot.A search results page for 'Other Transfers'. It includes a header 'Other Transfers -- Includes other institution's transfers for ALL years' and a yellow banner stating 'User default filters are on and search has been performed.' Below are search filters: 'NCAA ID:', 'First Name:', 'Last Name:', 'Record Status:' (set to 'Active'), 'Institution:' (set to 'ALL'), 'Conference:' (set to 'ALL'), 'Division:' (set to 'All'), '? Sport:' (set to 'Football'), '? Year:' (set to 'All'), and 'Other:' with checkboxes for a graduation cap, 'R', and 'A'. At the bottom are 'Reset' and 'Search' buttons. A blue arrow points from the 'Save settings' button in the first screenshot to the 'Search' button in this screenshot.

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:	1507234718	ⓘ Sport(s):	Men's Basketball x
Student First Name:	SKIP	ⓘ Comments:	
Student Last Name:	PASS		
Student Email:	spass@gmail.com	Date Initiated:	07/27/2020 2:44 PM

ⓘ 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	
Is aid being cancelled due to entering the transfer portal?	Yes	No	Pending
Did the student meet the notification of transfer deadline? (Only applies to DI sports)	Yes	No	Not Applicable

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"/>
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"/> No <input type="button"/>	Date Initiated:	<input type="text" value="07/28/2020 12:54 PM"/>
Is the student transferring to be a graduate student?	Yes <input type="button"/> No <input checked="" type="button"/>		
Is the student-athlete receiving athletically related financial aid during the academic year?	Yes <input type="button"/> No <input checked="" type="button"/>		
🔍 Was the student-athlete recruited at your institution?	Yes <input checked="" type="button"/> No <input type="button"/>		
Did the student meet the notification of transfer deadline? <small>(Only applies to DI sports)</small>	Yes <input type="button"/> No <input type="button"/> Not Applicable <input checked="" type="button"/>		

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

▼ Notification of Transfer - (Victory College)

Student NCAA ID:	1507234718	ⓘ Sport(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:	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	
Is aid being cancelled due to entering the transfer portal?	Yes	No	Pending
Did the student meet the notification of transfer deadline? <i>(Only applies to DI sports)</i>	Yes	No	Not Applicable

If a student's Division I and Division II Notification of Transfer 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 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
- The compliance office confirms receipt of head coach and student-athlete certification confirming no impermissible recruiting.   ☐ Yes   ☐ No   ☐ N/A (for Division II / III sports)

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:

07/22/2021 3:25 PM  
Triumph University   Y   Y  
Enrolled full time: Y  
Receiving athletic aid: Y  
Full-Time Term: Fall  
Student-athlete triggered transfer in the summer.  
Recruiting certification confirmed: Y

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

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 and the DI recruiting certification confirmation which is a criteria for the DI one-time transfer exception.



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.

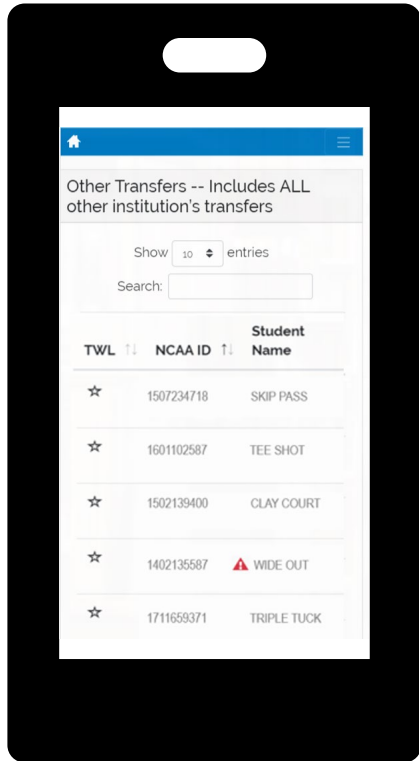
The information included in the APR form is replicated to include transfer portal information in page 1 on the form.

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.

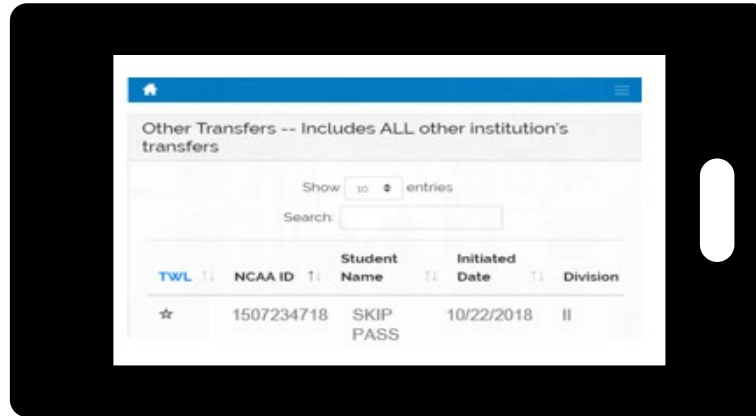
CAN THE TRANSFER PORTAL  
BE USED ON A MOBILE DEVICE



# MOBILE VIEW



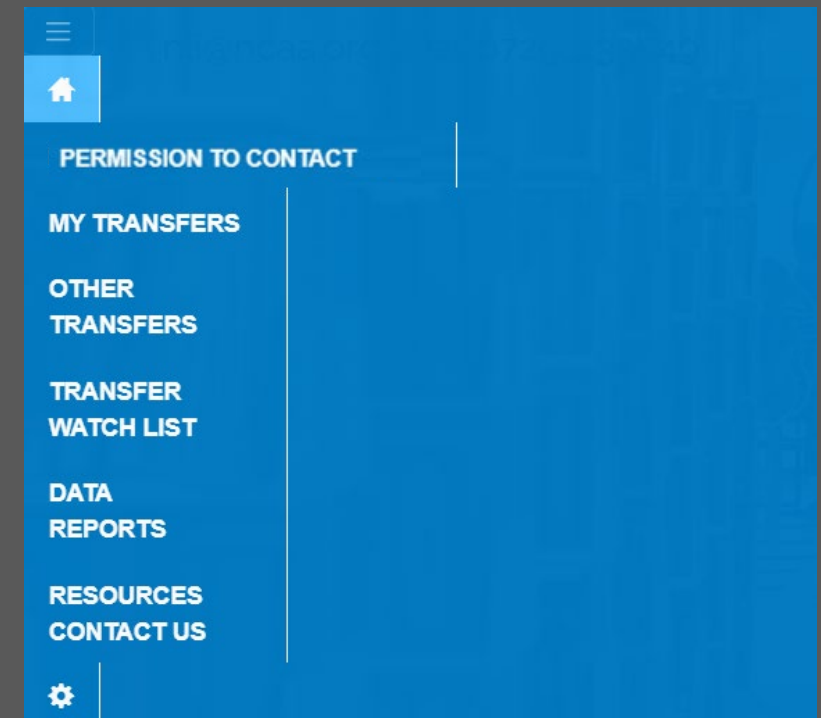
Scroll across  
screen →



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 links: OTHER TRANSFERS, TRANSFER WATCH LIST, DATA REPORTS, RESOURCES CONTACT US, and a settings gear icon. Below the navigation bar is a header: 'Other Transfers -- Includes other institution's transfers for ALL years'. A green banner states 'Search filters are on'. The search filters are: NCAA ID (text input), First Name (text input), Last Name (text input), Record Status (dropdown menu set to 'All'), Institution (dropdown menu set to 'ALL'), Conference (dropdown menu set to 'ALL'), Division (dropdown menu set to 'All'), Sport (dropdown menu set to 'All'), Year (dropdown menu set to 'All'), and Other (checkboxes for graduation, R, and A). There are 'Reset' and 'Search' buttons at the bottom right.

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 is the same. A yellow banner states 'User default filters are on and search has been performed.' The search filters are: NCAA ID (text input), First Name (text input), Last Name (text input), Record Status (dropdown menu set to 'Active'), Institution (dropdown menu set to 'ALL'), Conference (dropdown menu set to 'ALL'), Division (dropdown menu set to 'All'), Sport (dropdown menu set to 'Football'), Year (dropdown menu set to 'All'), and Other (checkboxes for graduation, R, and A). There are 'Reset' and 'Search' buttons at the bottom right.

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

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

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.

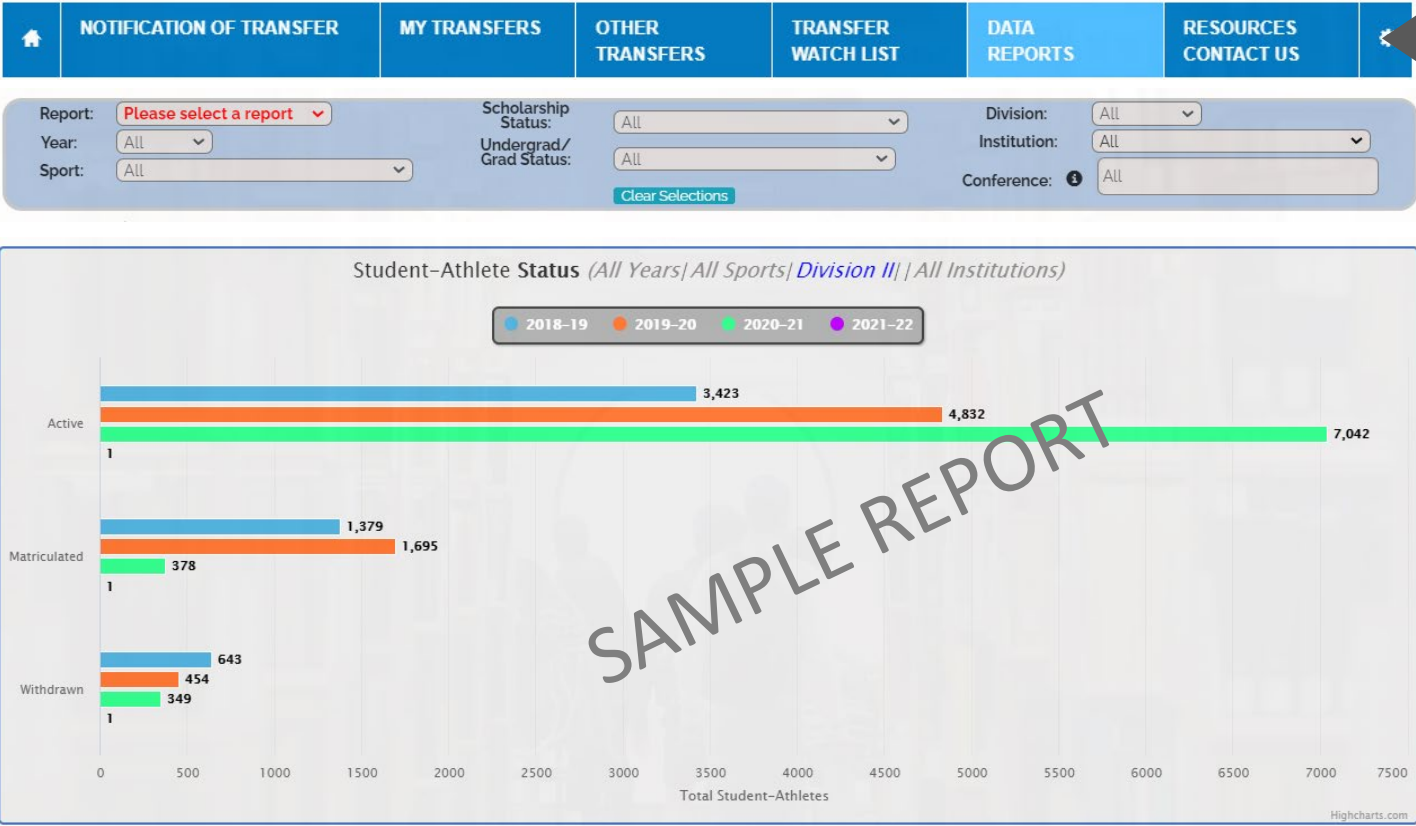
If updates occur in the student's record, emails are sent to all individuals who have the student on their watch list.

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



This feature organizes the transfer portal data in chart reports.

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

You can also filter scholarship and non-scholarship status and undergraduate and graduate status.

The option to filter all male sports or all female sports is also available in the Sport drop-down list.





# NCAA TRANSFER PORTAL

**transfer@ncaa.org**



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



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