



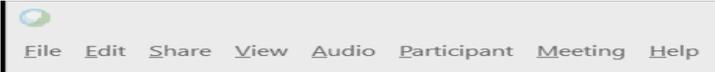
Division III August Webinar

NCAA Transfer Portal Part I: Permission to Contact

Louise McCleary & Susan Peal

We will begin at promptly 1:30 p.m. (EST). Please MUTE your phone and/or the audio on your computer.

Webinar Instructions

- If using a computer, click on the audio link at the top of the screen.  Choose audio connection and then select call using computer. Turn off the computer video and make sure the sound is off.
- If your computer audio isn't working, please call 1-844-621-3956 and enter access code: 805 301 801. Please mute your phone.
- The PowerPoint is posted on the Division III homepage, [DIII Webinars Link](#), on ncaa.org.

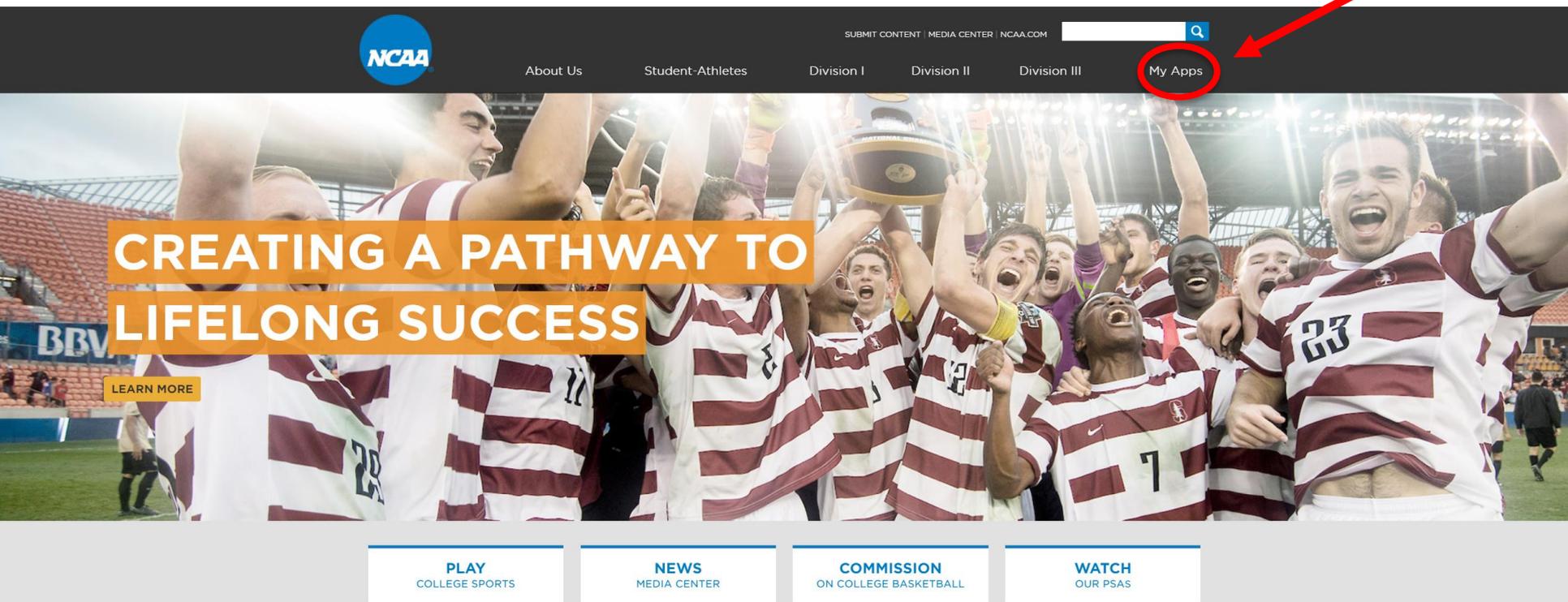
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Agenda

- Assigning access to the NCAA Transfer Portal.
Must be a Single Source Sign-On Administrator.
 - Compliance officers.
 - Head coaches and staff.
- Key information.
 - Permission to contact and FAQ.
 - Transfer list.
- Resources.

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Assigning Access



CREATING A PATHWAY TO
LIFELONG SUCCESS

LEARN MORE

PLAY
COLLEGE SPORTS

NEWS
MEDIA CENTER

COMMISSION
ON COLLEGE BASKETBALL

WATCH
OUR PSAs

OUR PRIORITIES

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Assigning Access



NCAA Applications

Log in to My Apps

Email

lmccleary@ncaa.org

Password

.....

Is this a public or shared computer? ⓘ

Sign in

[Forgot Password?](#)

If you are a college-bound student-athlete or a high school administrator, you cannot log in on this page. Instead, go to the [NCAA Eligibility Center](#) website.

Questions or Assistance? Contact the [NCAA Web Help Desk](#).

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Division III
DISCOVER | DEVELOP | DEDICATE

Assigning Access

My Apps **Users** Groups Logs Reports Help

Recently Used Sort By Name (A-Z) Sort By Name (Z-A)

 NCAA Learning Portal	 Transfer Portal	 Program Hub	 Ultipro
 DIII Conference Grants	 Committee Collaboration Zones	 NCAA Directory	 Self-Study Guide
 LSDBi	 Digital Library	Sports Sponsorship and Demographic Forms	 Committees

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Assigning Access – New User

My Apps Users Groups Logs App Admin Reports Settings Help

Search

Active Users ▼

← Previous 1 2 3 Next →

Name	Title	Department	E-mail	Administrator?
Access, Full	SSO Administrator		fullaccess@gmail.com	Yes
Akamai, Test			test@akamai.com	No
Baber, Don			dbaber1@bigten.org	No
Baber, Don			dbaber2@bigten.org	No
Barnett, Kevin	Test Account		klb@ncaa.org	Yes
Bennett, Elizabeth	SWA		ebennett@pemberly.edu	Yes
Chappell, Colin			cchappell@ncaa.org	Yes
Chappell, Colin			colin.chappell@ncaatest.xyz	No
Chappell, Colin			cchappell@ncaatest.xyz	No
Chockalingam (Org User), Ram			rchockalingam_org	No
Dickinson, Clifford			cdickinson@ncaa.org	Yes
Doe, Jane	Assistant Director of Athletics 1	Athletics	sample@email.edu	No
Goldstein, David	Chief Operating Officer		dgoldstein@usports.ca	No
Groth, Cary			emersoncanyon2010@yahoo.com	No
Johnson, Jim			fullaccess@test.edu	Yes
Koors, Ryan			rkoors@ncaa.org	No
Lindahl, Kathy			thepictorgroup@outlook.com	No
Newbie, Sucha	Compliance Coordinator	Compliance	newbie@compliance.edu	No
Paul, Tom			tptest12@ncaa.org	No
Roberts, Nicholas			nroberts@ncaa.org	No

[Create New User](#)

Download: [CSV](#) | [Excel](#)

Unless otherwise stated, NCAA applications (e.g., LSDBi, RSRO, etc.) were designed and are intended for use by NCAA members. The NCAA provides administrators the ability to determine and assign access to NCAA applications through Single Source Sign On at prescribed access levels. Administrators should take care to protect data by providing only the access levels needed for each individual that has access to the system. Administrators are ultimately responsible for any access to information that is provided to an unintended user.

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Assigning Access – New User

[My Apps](#) [Users](#) [Groups](#) [Logs](#) [App Admin](#) [Reports](#) [Settings](#) [Help](#)

Select person from our database

Active
Expires after
Administrator?
 Send email notification of new account?

or [Cancel](#)

(Date when account will automatically expire.)
(Administrators can create user accounts and assign account privileges.)

* Denotes required field

Key: Include institutional email, first & last name and title format: head coach of (sport), athletics director, senior woman administrator, etc..

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Assigning Access – Existing User



Alcox, Kevin		Championships Ops B (Championships Ops B)	kalcox@ncaa.org	No
Alford, Tiffany	Assistant Director	Academic & Mbrshp Affairs (AMA)	talford@ncaa.org	No
Ali, Nuzhath		Academic & Mbrshp Affairs (MSAA)	nali@ncaa.org	No
Anderson, Tom		Academic & Mbrshp Affairs (Academic & Mbrshp Affairs (MSAA))	tanderson@ncaa.org	No
Andrew, Lynne	Associate Director	Women's Basketball (Women's Basketball)	landrew@ncaa.org	No
Arkins, Nathaniel		Championships External Op (Championships)	narkins@ncaa.org	No
Arnett, Laura		Law, Policy & Governance (Law, Policy & Governance)	larnett@ncaa.org	No
Arnold, Tracy			tarnold@ncaa.org	No
Arthur, Troy		Academic & Mbrshp Affairs (MSAA)	tarthur@ncaa.org	No
Askew-Evans, Venessa			vaskewevans@ncaa.org	No
Atkinson, Deborah		Finance (Administrative Services)	datkinson@ncaa.org	No

[Create New User](#)

[Download: CSV](#) | [Excel](#)

Unless otherwise stated, NCAA applications (e.g., LSDBi, RSRO, etc.) were designed and are intended for use by NCAA members. The NCAA provides administrators the ability to determine and assign access to NCAA applications through Single Source Sign On at prescribed access levels. Administrators should take care to protect data by providing only the access levels needed for each individual that has access to the system. Administrators are ultimately responsible for any access to information that is provided to an unintended user.

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Assigning Access

[My Apps](#) [Users](#) [Groups](#) [Logs](#) [Reports](#) [Help](#)

Name Kevin Alcox

Email kalcox@ncaa.org

Active? true

Department Championships Ops B

NCAA Department Championships Ops B

Last Activity 06/10/2019

Created At 02/28/2018

Updated At 06/10/2019

Edit User

Groups

AMA Staff

Add Group

▶ All NCAA Staff

▶ LSDBi Staff

Access To

ACS

Add Application Access

▶ Digital Library

Please MUTE your phone and/or computer microphone.

Assigning Access



Access To  Add Application Access

1. Click on the small arrow to see the drop down list.
2. Highlight Transfer Portal.
3. After you set parameters, click Add Application Access.

Please MUTE your phone and/or computer microphone.

Assigning Access

Access To Transfer Portal Add Application Access

▸ Digital Library

▾ Transfer Portal

Remove access to this application

Roles

Application Administrator?

Privileges

Function	Access
Access to make changes?	EDIT

Coaches should NOT be granted access to make changes.

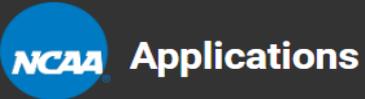
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Assigning Access

NCAA

LOUISE MCCLEARY

[My Profile](#) [Logout](#)



My Apps Users Groups Logs Reports Help

Recently Used Sort By Name (A-Z) Sort By Name (Z-A)

10

 NCAA Learning Portal	 Transfer Portal	 Program Hub	 Ultipro
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Transfer Portal



PERMISSION TO CONTACT

MY TRANSFERS

OTHER TRANSFERS

TRANSFER
WATCH LIST

RESOURCES
CONTACT US

Welcome to the NCAA Transfer Portal

07/18/2019 -- TRANSFER PORTAL VERSION 2.0 GOES LIVE ON AUGUST 1, 2019

With the next version of the transfer portal (2.0) going live on August 1, 2019, updated educational materials are now posted in the transfer portal resources. Many features look different in Version 2.0 so it is important to review the educational materials to understand what is new before using the transfer portal. The updated transfer portal user guide will be posted in the transfer portal resources the week of July 29.

Thank you for all your feedback and suggestions for Version 2.0! [Please click to review the list of portal enhancements.](#)

Please MUTE your phone and/or computer microphone.

PERMISSION TO CONTACT

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

Permission to Contact

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

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?

Sport(s):

Is your institution restricting contact with this student?

Permission to Contact Restrictions:

Comments:

Email Contact List

Email:

No additional email contacts to notify

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

ENTER STUDENT FROM YOUR INSTITUTION

Enter NCAA ID

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

Please MUTE your phone and/or computer microphone.

PERMISSION TO CONTACT

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

Permission to Contact

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

Student First Name:

Student Last Name:

Student Email:

Student Mobile Phone:

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

1 Sport(s) Yes No

2 Permission to Contact Restrictions:

3 Comments:

4 Email Contact List:

No additional email contacts to notify

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

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.

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NCAA ID Lookup

The screenshot shows the 'NCAA ID Lookup' search interface. At the top left is the NCAA logo and the title 'NCAA ID Lookup'. Below this is a search bar labeled 'Search for Student-Athlete'. The search form contains several input fields: 'First Name', 'Last Name', 'Date of Birth', 'Select High School Graduated', 'United States Of America' (country dropdown), 'Hometown', 'Select State' (state dropdown), and 'Any Account Type' (account type dropdown). There is also a 'Select Sports' dropdown and a checkbox labeled 'Only Show Students on IRL or NLI'. At the bottom of the search form are two buttons: 'Search' and 'Clear Filters'.

- Any Account Type
- Certification
- Profile

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

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

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

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

Please MUTE your phone and/or computer microphone.

What will I see after submitting the Permission to Contact?

MY TRANSFERS

The screenshot shows the 'MY TRANSFERS' section of a web application. At the top, there are navigation tabs: PERMISSION TO CONTACT, MY TRANSFERS (selected), OTHER TRANSFERS, TRANSFER WATCH LIST, and RESOURCES CONTACT US. Below the tabs, there is a filter section: 'My Transfers -- Includes only YOUR institution's transfers for: 2019-20 and sport: ALL'. A table below shows one entry with columns: Year, NCAA ID, Student Name, Initiated Date, Sport, Matriculated To, and Student Status. The entry is for the year 19-20, NCAA ID 1507234718, Student Name SKIP PASS, Initiated Date 10/22/2019, Sport Men's Basketball, and Student Status Active. A yellow 'Active' button is next to the status. A callout box with an arrow points to the 'Active' button, containing the text 'Click to open' and 'Active'.

Year	NCAA ID	Student Name	Initiated Date	Sport	Matriculated To	Student Status
19-20	1507234718	SKIP PASS	10/22/2019	Men's Basketball		Active

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.

Please MUTE your phone and/or computer microphone.

What do other institutions see after submitting the Permission to Contact?

OTHER TRANSFERS

PERMISSION TO CONTACT	MY TRANSFERS	OTHER TRANSFERS	TRANSFER WATCH LIST	RESOURCE CONTACT US						
Other Transfers -- Includes ALL other institution's transfers for year (2019-2020)										
Search and Filter -- Click to enter search criteria and/or filter a sport										
Display 10 rows Showing 0 to 0 of 0 entries Previous Next PDF Excel										
TWL	Year	NCAA ID	First Name	Last Name	Initiated Date	DIV	Institution	Sport	Conference	Student Status
★	19-20	1507234718	SKOP	PASS	10/22/2019	II	Victory College	Men's Basketball	Big 50 Conference	Active
★	19-20	1601102567	TEE	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	1711658371	TRIPLE	TUCK	01/05/2020	II	Leader College	Women's Gymnastics	Big 50 Conference	Matriculated

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.

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



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



Student identified as a graduate student



Student identified with Division II or III contact restrictions



Student does not want to be contacted.

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Resources

- [What is the Transfer Portal?](#)
- [Permission to Contact.](#)
- [Coach – How to Use the Portal.](#)
- [User Guide.](#)

Please MUTE your phone and/or computer microphone.

QUESTIONS

Please MUTE your phone and/or computer microphone.