

CSU Transfer Planner Student Portal

Demonstration for California Community
College Users

January 30, 2024



Transfer Planner – New Features

	Transfer Success Pathway	Transfer Planner – New Features	Transfer Planner – Future Features
Student Portal	<ul style="list-style-type: none">• Specific students eligible for program• Confirm eligibility and enroll in TSP programs• Researching campuses and programs	<ul style="list-style-type: none">• Open to all transfer students• Enter and maintain academic data• Track transfer progress for Gen Ed, GPA• Track their followed programs	<ul style="list-style-type: none">• Cal State Apply Jump Start• Links to ADT requirements• Transfer Timeline Planner

A photograph of a female student in a laboratory setting. She is wearing a green and grey striped cardigan over a light blue collared shirt and clear safety goggles. She is focused on a task involving laboratory glassware, including a test tube rack and a beaker. The background shows a typical lab environment with windows and equipment.

Agenda

Transfer Planner

1. Student Portal Overview
2. Student Portal Demonstration



Student Portal

Functionality Available for Transfer Planner

- Onboarding Additions (Bio Info/ADT/Enrollment Status)
 - More About Me - CSU Additional Details
- Dashboard
- Enter College Coursework & Standardized Tests
- General Education Progress
- Transfer Progress – GPA and Transfer Units
- Followed Programs
 - Selecting Followed/Saved Programs
 - Program Progress
 - TSP Program Progress
 - ADT Messages

Onboarding

My Additional Details

Biographical Information

- Race & Ethnicity Summary Question

Academic Information

- ADT Information
- Enrollment Status

Welcome to the CSU Transfer Planner

Please complete the following information to start using Transfer Planner.

PERSONAL INFORMATION ✓

MY CSU TRANSFER PLANNER ADDITIONAL DETAILS 📄

Biographical Information ✓

Academic Information 📄

My CSU Transfer Planner Additional Details

Academic Information

ASSOCIATE DEGREE FOR TRANSFER: DEGREE GOAL

Not sure your associate degree is part of the Associate Degree for Transfer (ADT) program? Contact your California Community College or visit the [ADT Page](#) for more information and to learn about the benefits of an ADT, such as guaranteed priority admission.

Have you earned, are you pursuing, or are you planning to pursue an Associate Degree for Transfer (AA-T/AS-T) from a California Community College?*

Yes

No

ENROLLMENT STATUS

What is your planned enrollment status?*

Below half-time (1-5.9 semester units)

Half-time (6-8.9 semester units)

Three-quarter

[PREVIOUS](#) [SAVE & CONTINUE](#)

Same questions available on "More About Me" dashboard link

Dashboard

TSP enrollment period currently closed

The desktop dashboard features a dark purple header with the CSU logo and 'Transfer Planner' text. A navigation menu on the left includes 'Research Universities & Programs', 'More About Me', and 'Ask a General Question'. The main content area is titled 'Welcome back, Kimberly!' and includes an 'Overview' section with three tiles: 'Followed Programs' (5), 'Courses Completed' (3), and 'Transfer Units Earned' (37). Below this is a 'What's Next?' section with two action cards: 'Add a community college to your account or update your academic history' and 'New Term? Add your new courses to update your progress'. The bottom section contains three main widgets: 'Followed Programs' (listing Aerospace Engineering and Art), 'Gen Ed Progress' (a progress bar for 21/39 units across four areas), and 'Transfer Progress' (showing 'Next Step: GOLDEN FOUR COMPLETED').

Mobile view with three tile slider, no Transfer Tips photos

The mobile view is a condensed version of the desktop dashboard. It features a dark purple header with the CSU logo and 'Transfer Planner' text. The main content area is titled 'Welcome back, Kimberly!' and includes an 'Overview' section with three tiles: 'Followed Programs' (2), 'Courses Completed' (6), and 'Transfer Units Earned' (0). Below this is a 'Transfer Tips' section with a message: 'Taking at least 30 transferable units in an academic year (Fall, Spring, Summer) keeps you on track to transfer in two years.' The bottom section contains two main widgets: 'Gen Ed Progress' (a progress bar for 21/39 units across four areas) and 'Transfer Progress' (showing 'Next Step: GOLDEN FOUR COMPLETED').

Academic History

- Add Courses

Adding / Removing Community Colleges

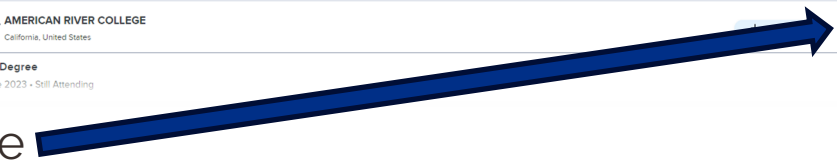
- Add a College
 - Use the small (+) to add a college
- Removing a College
 - Use the pencil icon to edit the college
 - Scroll to the bottom
 - Select remove college

Academic History

COLLEGES ATTENDED

AMERICAN RIVER COLLEGE
California, United States

No Degree
June 2023 - Still Attending



Academic History

COLLEGES ATTENDED

AMERICAN RIVER COLLEGE
California, United States

No Degree
June 2023 - Still Attending

STANDARDIZED TESTS

Edit College or University

End Date

Month: Year:

Have you graduated?*

Yes No

Graduation / Expected Graduation Date

Month: Year:

GPA (out of 4.0)

Term Type*

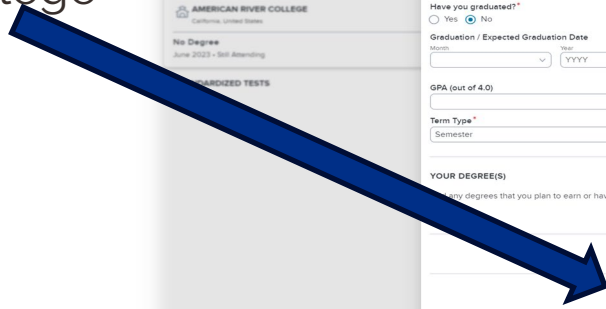
YOUR DEGREE(S)

Enter any degrees that you plan to earn or have earned at this institution.

+ ADD DEGREE

+ ADD COURSE

REMOVE COLLEGE



Academic History – Test Scores

Academic History

▲ COLLEGES ATTENDED

▼ STANDARDIZED TESTS

You have not added any tests yet.

ADD TEST

- Academic History
- Add Test
- Select Test Category (AP, IB, CLEP)
- Select Test type
- Enter exam details
- Save!

Add Test

Test Category
Credit by exam (AP/IB/CLEP)

Test Type*
AP (Advanced Placement)

EXAM DETAILS

AP Exam*
Please select Exam.

Have you taken this exam?*

Yes, I've taken this exam
 No, I am planning to take this exam

AP ID

When do you plan to take this exam?*

Month: Year:

CANCEL

General Education

Auto-matching Courses & Tests

Milestone Badges

Progress Bar

About General Education

Manual Assignment

Milestones



A2 Completed



Golden 4 Completed



B4 Completed



18 Units Completed

The screenshot shows a user interface for tracking general education progress. On the left, a sidebar titled "My Transfer Plan" lists various programs and their associated universities. The main area displays "General Education Progress" with a progress bar showing 21/39 units completed. Below this, there are sections for "Area A" through "Area F", each with a list of courses and their completion status. A pop-up window titled "The Golden Four" explains that these four courses (A1, A2, A3, B4) must be completed with a minimum grade of C- for transfer. A celebratory notification at the bottom right states "You've completed B4. You're making great progress. Keep going!"

My Transfer Plan

Transfer Plan Overview

General Education Progress

Transfer Progress

My Followed Programs (5)

- AEROSPACE ENGINEERING (California State University, Long Beach)
- ART (California State University, Bakersfield)
- BUSINESS ADMINISTRATION (California State University, Bakersfield)
- COMPUTER SCIENCE (California State University, Bakersfield)
- COMPUTER SCIENCE, B.S. (California State University, Bakersfield)

General Education Progress

21/39 Units

Not Complete | Planned / In-Progress | Completed | Golden Four

EDIT ASSIGNMENTS

Area A - English Language Communication and Critical Thinking (9/9 Units)

- A1 - Oral Communication: INTERPERSONAL COMMUNICATION (COMMB2)
- A2 - Written Communication: ADVANCED COMPOSITION AND CRITICAL THINKING (ENGLB2)
- A3 - Critical Thinking: INTRODUCTION TO LOGIC (PHILB7)

Area B - Scientific Inquiry and Quantitative Reasoning (6/9 Units)

Area C - Arts and Humanities (3/9 Units)

Area D - Social Sciences (3/6 Units)

Area E - Lifelong Learning and Self-Development (0/3 Units)

Area F - Ethnic Studies (0/3 Units)

The Golden Four

What are "Golden Four" GE courses?

The "Golden Four" refers to four courses in the General Education (GE) subareas. To transfer into the CSU, you must complete and pass each of these courses with a minimum grade of C-.

These courses are:

- A1 - Oral Communication**
Examples: oral, public speaking, argumentation & debate
- A2 - Written Communication**
Examples: composition, composition & literature
- A3 - Critical Thinking**
Examples: critical thinking, logic, argumentation & debate
- B4 - Mathematics/Quantitative Reasoning**
Examples: statistics, college algebra, precalculus, calculus

You've completed B4.

You're making great progress. Keep going!

CLOSE

Transfer Progress

The screenshot displays the 'My Transfer Plan' interface. On the left is a navigation sidebar with a red vertical bar containing icons. The main content area is titled 'Transfer Plan' and includes a 'MY PROGRAMS (12)' button. Under 'Transfer Plan', there is an 'Overview' section with a 'Transfer Progress' button. The 'Transfer Progress' section features a progress bar with three stages: 'A2 AND B4 COMPLETED', 'GOLDEN FOUR COMPLETED', and '30 UNITS & GOLDEN FOUR COMPLETED'. A red box indicates 'Total Transfer Units Earned' as 11. Below the progress bar, there is a 'TRANSFER GPA: 4.00' box with sub-details: 'Total Transfer Units Attempted: 4' and 'Quality Points: 16'. The 'My Followed Programs (5)' section lists: 'BIOLOGY' (California State University, Bakersfield), 'BUSINESS ADMINISTRATION' (California State University, Bakersfield), 'BUSINESS ADMINISTRATION, B.S.' (Sonoma State University), 'ECONOMICS' (California State University, Bakersfield), and 'INDUSTRIAL ENGINEERING, B.S.' (California Polytechnic University, San Luis Obispo). A 'GO TO ACADEMIC HISTORY' button is located at the bottom of the main content area. The footer contains links for 'CSU Admissions', 'Help Center', 'Contact Us', '617-431-5741', 'The California State University', 'Privacy Policy', and 'Accessibility Statement', along with social media icons and a copyright notice for 2023 Liaison International.

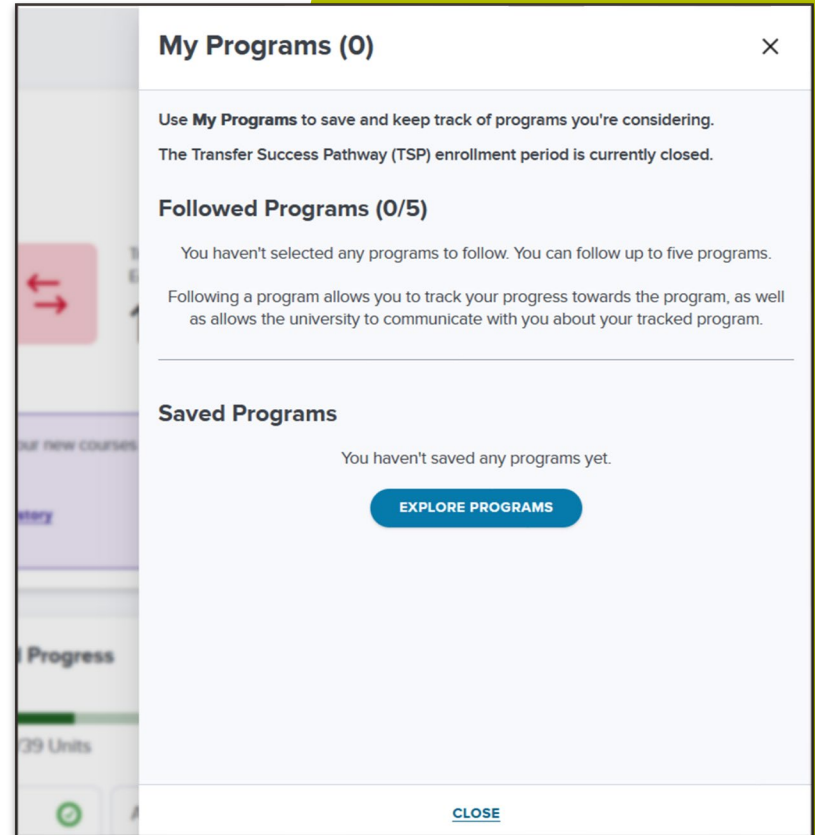
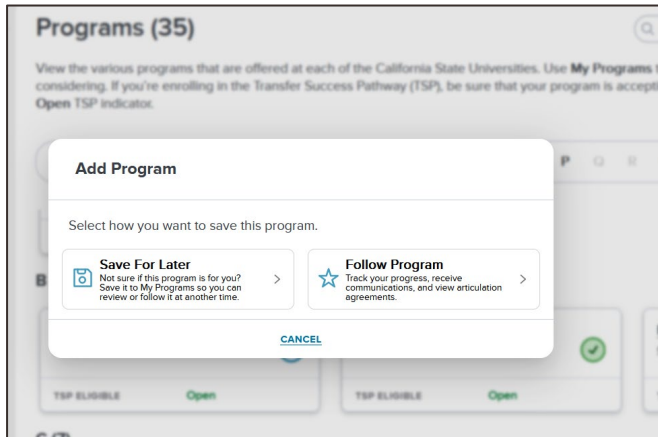
- Total Transfer Units Earned
- Transfer GPA

How GPA is calculated:

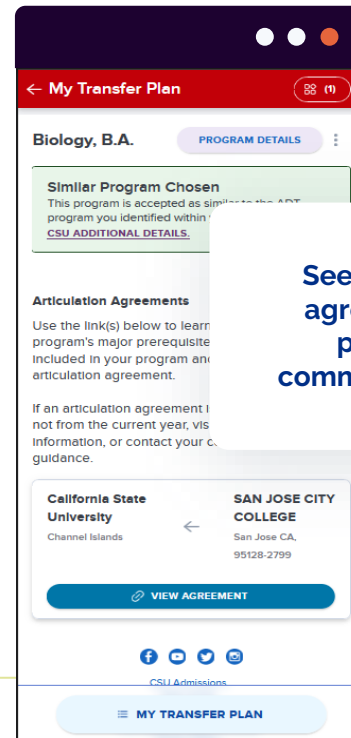
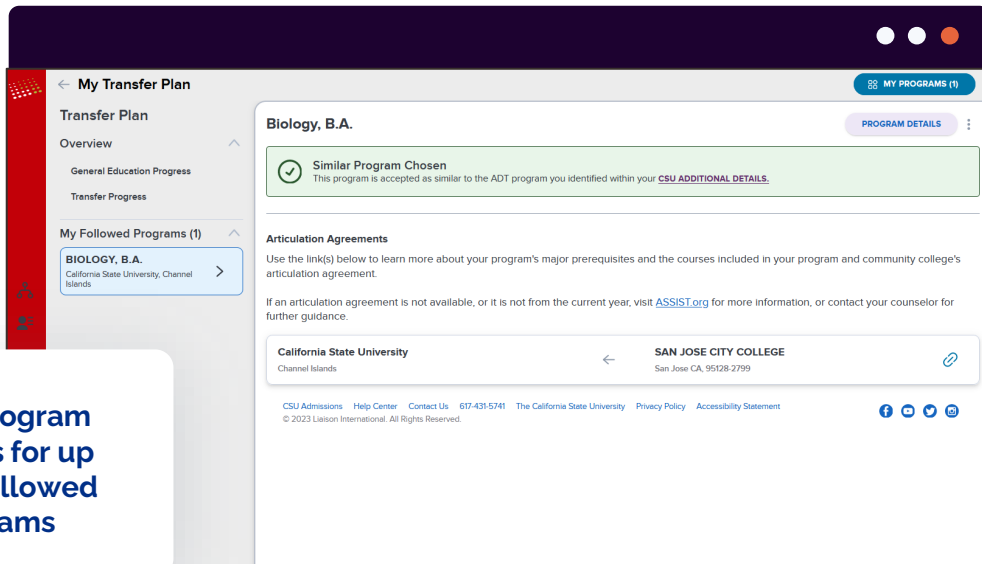
[Viewing Your Transfer Progress and GPA - Liaison \(liaisonedu.com\)](https://liaisonedu.com)

Selecting Transfer Programs

Saved Programs / Followed Programs



Program Progress



Track program progress for up to five followed programs

See articulation agreements for program & community college

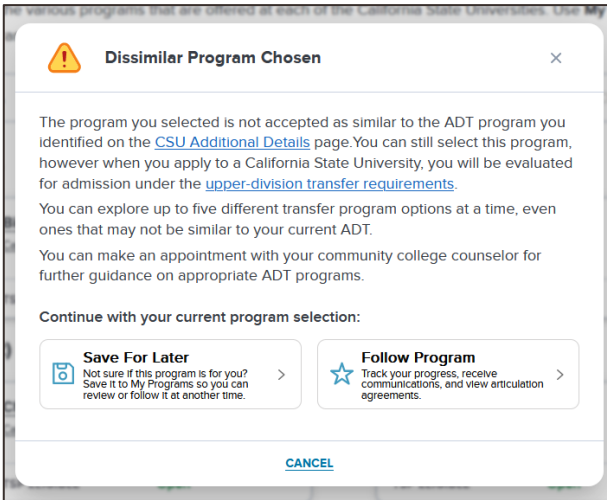
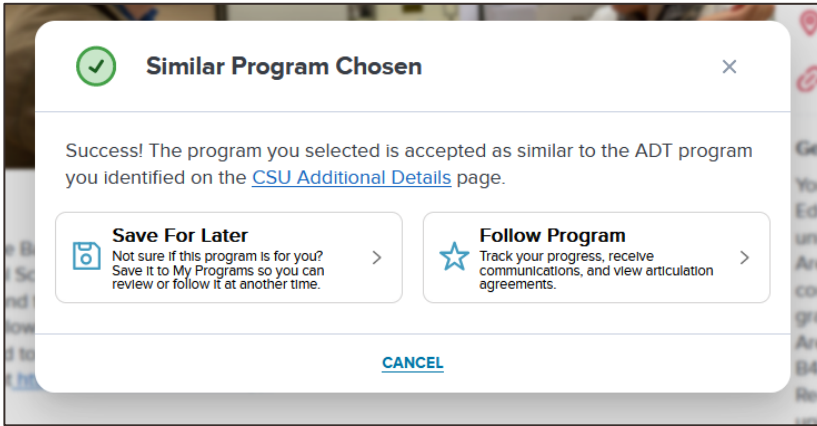
TSP Program Progress

The screenshot shows a web interface for a student's Transfer Success Pathway (TSP) program. The page is titled "My Transfer Plan" and "Business Administration". A green checkmark indicates the student is currently enrolled in this pathway. The page is divided into several sections:

- Transfer Plan Overview:** Includes "General Education Progress" and "Transfer Progress".
- My Followed Programs (5):** A list of programs with "BUSINESS ADMINISTRATION" selected. Other programs include BIOLOGY, BUSINESS ADMINISTRATION, B.S., ECONOMICS, and INDUSTRIAL ENGINEERING, B.S.
- Business Administration Details:**
 - California State University & Program:** California State University, Bakersfield, Business Administration. URL: <https://www.calstate.edu>
 - Primary Community College:** BAKERSFIELD COLLEGE, Start Date: FALL 2023. URL: <https://www.calstate.edu>
- Transfer Requirements:**

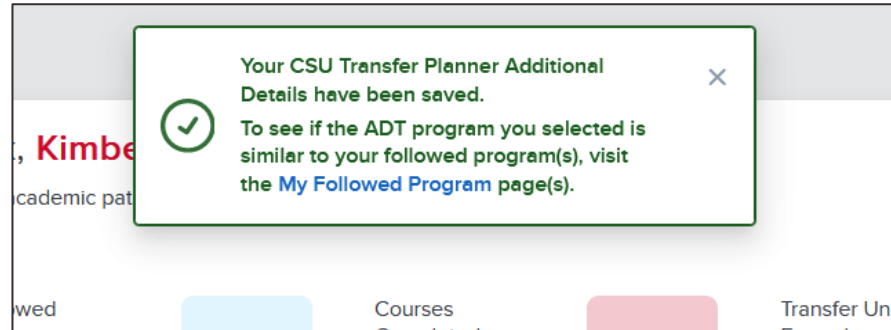
Transfer Requirements	Other Requirements
Transferable GPA	4.0/2.0 N/A
Major prerequisite GPA	2.0
Minimum grade for prerequisite courses	C-
TSP start term	FALL 2023
TSP terms remaining	6 Terms Remaining
- Other Requirements:** There is a 3-year limit to enroll at a Cal State University. Three years is equal to 6 terms or 12 quarters, not counting summer terms.
- Learn more about the major prerequisites**

- TSP Enrollment Details
- Transfer Requirements
 - Track Transfer GPA
 - Track TSP Terms Remaining
- Major Prerequisites
- Request Release



ADT Messages

- ADT Similar & Dissimilar alert when adding program
- Reminder to check Program Progress page when adding or changing ADT after programs followed



How is Transfer Planner associated with Assist.org?

Transfer Planner links directly to assist articulation agreements

The screenshot displays the 'My Transfer Plan' interface. On the left, a sidebar contains navigation options: 'Transfer Plan', 'Overview' (with sub-items 'General Education Progress' and 'Transfer Progress'), and 'My Followed Programs (1)'. The 'My Followed Programs (1)' section is expanded to show 'ANTHROPOLOGY B.A.' at 'California Polytechnic University, Humboldt'. The main content area shows the program details for 'Anthropology B.A.' at 'California Polytechnic University, Humboldt'. It includes a 'Program Progress' section with a warning message: 'Your Transfer Success Pathway enrollment status change is under review.' Below this is the 'Articulation Agreements' section, which states: 'Use the link(s) below to learn more about your program's major prerequisites and the courses included in your program and community college's articulation agreement. If an articulation agreement is not available, or it is not from the current year, visit [ASSIST.org](https://assist.org) for more information, or contact your CSU counselor for further guidance.' At the bottom, a table lists the institutions involved in the articulation agreement: 'California Polytechnic University, Humboldt' and 'AMERICAN RIVER COLLEGE, Sacramento CA, 95841-4286'. A red box highlights a link icon in the bottom right corner of the table.



Important Resources

- [Student Portal Link](#)
 - All students must create their Transfer Planner accounts in the production link above.
- [UAT Student Portal](#)
 - Great for testing and assisting students
 - **Do not share with students**
- **Help Center**
 - [CSU Transfer Planner Student Help Center](#)
- **Liaison Student Customer Support:** For technical support related to Transfer Planner contact us by email: csutransferplanner@liaisoncas.com, or by phone at [617-431-5741](tel:617-431-5741).

What's Next?

- Promotional Materials
 - Will be mailed to each Transfer Center Director
 - Transfer Planner brochure accessible at calstate.edu/apply/transfer
- Community College Counselor Portal
 - Testing by end of February
 - Thursday, April 4th 9am (Launch Training)
 - Zoom Webinar Registration Link will be posted
 - Process for obtaining portal access will be similar to e-Verify process



Q&A

**THANK
YOU**

Have a questions ?

Contact:

csutransferplanner@calstate.edu

 **LIAISON**