CSU Transfer Planner
Student Portal

Demonstration for California Community College Users
January 30, 2024
## Transfer Planner – New Features

<table>
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<tr>
<th>Transfer Success Pathway</th>
<th>Transfer Planner – New Features</th>
<th>Transfer Planner – Future Features</th>
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</table>
| **Student Portal**       | • Specific students eligible for program  
                           • Confirm eligibility and enroll in TSP programs  
                           • Researching campuses and programs | • Open to all transfer students  
                           • Enter and maintain academic data  
                           • Track transfer progress for Gen Ed, GPA  
                           • Track their followed programs | • Cal State Apply Jump Start  
                           • Links to ADT requirements  
                           • Transfer Timeline Planner |

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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

Same questions available on "More About Me" dashboard link
Dashboard

TSP enrollment period currently closed

Mobile view with three tile slider, no Transfer Tips photos
• 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 – Test Scores

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

Auto-matching Courses & Tests
Milestone Badges
Progress Bar
About General Education
Manual Assignment

The Golden Four

What are “Golden Four” GE courses?
The “Golden Four” refers to four courses in the General Education (GE) subarea. 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
- A2: Written Communication
- A3: Critical Thinking
- B4: Mathematics/Quantitative Reasoning

You’ve completed B4! You’re making great progress. Keep going!
Transfer Progress

- Total Transfer Units Earned
- Transfer GPA

How GPA is calculated:
Viewing Your Transfer Progress and GPA - Liaison (liaisonedu.com)
Selecting Transfer Programs

Saved Programs / Followed Programs

My Programs (0)

Use My Programs to save and keep track of programs you’re considering. The Transfer Success Pathway (TSP) enrollment period is currently closed.

Followed Programs (0/5)

You haven’t selected any programs to follow. You can follow up to five programs. Following a program allows you to track your progress towards the program, as well as allows the university to communicate with you about your tracked program.

Saved Programs

You haven’t saved any programs yet.
Program Progress

Track program progress for up to five followed programs

See articulation agreements for program & community college
TSP Program Progress

- 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.
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.
What's Next?

• Promotional Materials
  o Will be mailed to each Transfer Center Director
  o Transfer Planner brochure accessible at calstate.edu/apply/transfer

• Community College Counselor Portal
  o Testing by end of February
  o Thursday, April 4th 9am (Launch Training)
    ▪ Zoom Webinar Registration Link will be posted
  o Process for obtaining portal access will be similar to e-Verify process
THANK YOU

Have a questions?
Contact:
csutransferplanner@calstate.edu