**Advising Checklist for working with Transfer Students**

Developed by the Advising Collaborative Transfer Student Success Subcommittee December 2024

Here is a list of questions advisors can use as a guideline when working with transfer students. This is meant to be a helpful list of impactful questions that could help you advise a transfer student. We know time at orientation is limited but this checklist can be used at any student interaction point. These are things to think about as you continue your advising practices.

The following questions about test credits and college level courses while in high school are not always reflected in a transfer admission application and so it is important to ask these questions:

* Do you have any test credits such as CLEP, IB, AP, or A-Level exams? If so, have you requested your official test scores to be sent?
* Did you take any college level courses while in high school (Dual Enrollment, Early College, etc.)? If so, have you requested for the official transcripts to be sent?
* Do you have any military credit? Did you submit a Joint Service Transcript (JST) to admissions?
* Are you planning on taking any other classes before the start of the semester (winter/summer sessions at another college or non-matriculated at UMass Boston)?

Other questions that impact transfer students to consider:

* Did you have any in-progress courses while applying? The final transcript is needed for the credit to be applied.
	+ If yes, are any of those courses going towards the MassTransfer Gen Ed Foundation? Will you have the MassTransfer Gen Ed Foundation? (Only for MA Community College students)
	+ If they have questions about the MassTransfer Gen Ed Foundation it is best to talk with their Community College transfer counselor. If a student isn’t aware of the term “MassTransfer Gen Ed Foundation”, don’t harp on it – they typically would know if they were trying to meet that program and would have been working on it overtime at their previous community college.
* What does the student have for courses in progress? Consider adding these credits to their earned credits to see if that would impact your advising recommendations (Example: waiver of First Year Seminar for students over 30 credits)
* When reviewing the Transfer Credit Evaluation tab in the degree audit system, ask the student if the courses listed there are a complete list of all the courses they expected to transfer. If not, have the student share any official transcripts, test scores, etc. with Undergraduate admissions.
* Have you taken the ALEKS math placement test? (if needed)
* Do you intend to be full-time or part-time?
* Do you intend to take summer classes?
* Transfer students can be eager to understand their timeline to earn their degree from UMass Boston. Time at orientation registration can be limited. Consider sharing the following:
	+ “Rather than looking at total number of credits earned on your degree audit, you will be ready to graduate when all the remaining requirements for your degree are completed, and you have at least 120 credits. It is common for students to earn more than 120 credits on the way to earn their bachelor’s degree.”
	+ “Schedule a follow up appointment with your advisor to look at your path to graduation in more detail”
	+ If you as the advisor notice any information that you can see about their timeline to graduate such as an important sequence of pre-requisite courses that will need to be completed, and can briefly share that with the student when they ask about their timeline to graduate, it may be helpful to share that initial information with the student and then invite the student for a follow up meeting to look at it in more detail.