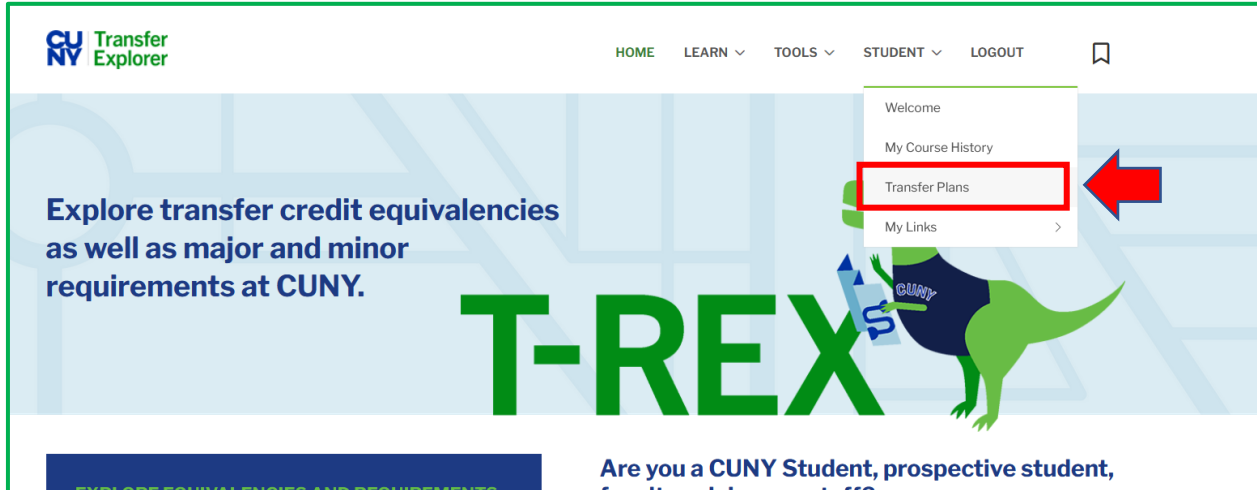


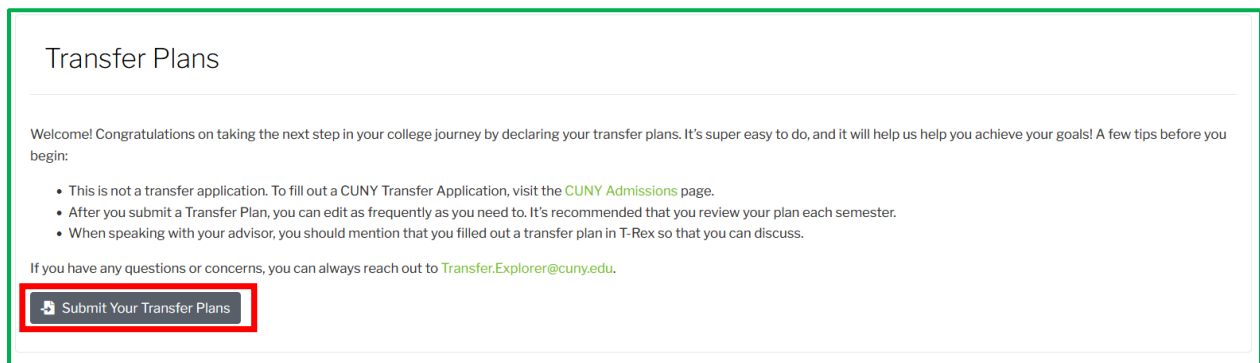
# How to Submit a Transfer Plan

You have the ability to submit a **Transfer Plan** through Transfer Explorer by logging in using your CUNYfirst credentials.

After signing in, hover over the **STUDENT** icon and click **Transfer Plans**.



To create a new Transfer Plan, click **Submit Your Transfer Plans**.



1. The Transfer Plan submission landing page will have all of your general information such as EMPLID, emails, and current and prior CUNY institutions.

The screenshot shows the 'Transfer Plans' submission landing page. At the top, the title 'Transfer Plans' is displayed. Below the title, a prompt reads: 'Follow prompts below to complete your Transfer Plan. If you have any questions or concerns, you can always reach out to [Transfer.Explorer@cuny.edu](mailto:Transfer.Explorer@cuny.edu).' Below the prompt are four navigation tabs: '1. Student Information' (highlighted in blue), '2. Career Goals', '3. Transfer College / Program (1)', and '4. Finish'. The main content area contains two columns of input fields. The left column includes: 'Name' (Doe, John), 'Preferred Email' (john.doe@cuny.edu), and 'Current College (if applicable)' (Lehman College). The right column includes: 'EMPLID' (12345678), 'Campus Email' (john.doe@cuny.edu), and 'Previously Attended College(s) (if applicable)' (Borough of Manhattan CC). At the bottom right, there are 'Previous' and 'Next' buttons.

2. The next step focuses on what level of education you are interested in pursuing and what career(s) you want to pursue. (You can choose up to 3 careers). You can also indicate that you are unsure what you want to do. The career selection also allows for free form typing to indicate something that does not show up as an option.

The screenshot shows the 'Transfer Plans' submission landing page, Step 2: Career Goals. The title 'Transfer Plans' is at the top. Below the title, the same prompt as in Step 1 is shown. The navigation tabs are: '1. Student Information', '2. Career Goals' (highlighted in blue), '3. Transfer College / Program (1)', and '4. Finish'. The main content area is divided into two sections, both highlighted with red boxes. The left section is titled 'Please share your educational goals and career aspirations.' and contains a dropdown menu for 'Select the highest level of education you hope you to attain.' with 'Bachelors' selected, and a checkbox labeled 'Check here if you don't know'. The right section is titled 'Select the career(s) you wish to pursue, if you do not see your chosen career, you can manually type it.' and contains a text input field with 'Accountant', 'Small Business Owner', and 'Actor' entered, and a checkbox labeled 'Check here if you don't know'. At the bottom right, there are 'Previous' and 'Next' buttons.

3. Finally, you can begin specifying your program and college(s) of interest. Program of interest also allows for free form typing, to indicate something that does not show up as an option.

Transfer Plans

Follow prompts below to complete your Transfer Plan. If you have any questions or concerns, you can always reach out to [Transfer.Explorer@cuny.edu](mailto:Transfer.Explorer@cuny.edu).

1. Student Information    2. Career Goals    3. Transfer College / Program (1)    4. Finish

Select your likely transfer major and college. (You can select up to four by answering yes to "Are you also considering transferring anywhere else?")

Program of Interest  
Accounting and Finance

College/Program  
Brooklyn College - Public Accounting & Finance BS

Check here if you don't know  
 Check here if you are interested in a Non-CUNY institution

Are you also considering transferring anywhere else?  
If you choose "Yes", you can select up to 4 choices  
Yes  
 Check here if you don't know

Previous    Next

If you:

- are interested in a non-CUNY institution, select the **Check here if you are interested in a Non-CUNY institution** button.
- are undecided as to what you want to pursue, you can click the **Check here if you don't know** button.
- want to add more programs and colleges, you can answer "Yes" to **Are you also considering transferring anywhere else?**
  - Answering "No" will end the submission process.
  - You are limited to 4 programs and colleges of interest.

## What's Next?

After a plan is submitted, the transfer plan will be available to the college(s) of interest, as well as your current institution (if any).

Faculty/staff with the Transfer Plans Reviewer role will have access to a dashboard where they can track students who have submitted a plan.

# How to Edit/Delete a Transfer Plan

## Editing a Transfer Plan

If you previously created a Transfer Plan and want to make modifications, click **Edit Current Transfer Plan**.

### Transfer Plans

Welcome back John Doe!

- You can edit this plan as frequently as you need to. It's recommended that you review your plan each semester.
- When speaking with your advisor, you should mention that you filled out a transfer plan in T-Rex so that you can discuss.
- This is not a transfer application. To fill out a CUNY Transfer Application, visit the [CUNY Admissions](#) page.

[Delete Current Submission](#) [Edit Current Transfer Plan](#)

Submitted on: 03/01/2024 12:24 PM

<b>Name</b>	<b>EMPLID</b>
Doe, John	99999999
<b>Preferred Email</b>	<b>Campus Email</b>
transfer.explorer@cuny.edu	transfer.explorer@cuny.edu
<b>Current Institution</b>	<b>Previous Institution(s)</b>
John Jay College	Bronx CC Lehman College
Select the highest level of education you hope you to attain.	<b>Career(s)</b>
Associates	Accountant
<b>Program(s) of interest and College(s)/Program(s) you are most likely to transfer to</b>	
<b>Program of Interest:</b> Accounting <b>Program:</b> Accounting BA at Herbert H. Lehman College	
<b>Program of Interest:</b> Health <b>College:</b> Adelphi University	
<b>Program of Interest:</b> Not sure <b>College:</b>	

Once the edit button is pressed, the bottom portion of the plan will transform into editing mode.

<b>Current Institution</b>	<b>Previous Institution(s)</b>
John Jay College	Bronx CC Lehman College
Select the highest level of education you hope you to attain.	<b>Career(s)</b>
Associates	Accountant
<b>Program(s) of interest and College(s)/Program(s) you are most likely to transfer to</b> <a href="#">Add</a>	
<b>Program of Interest:</b> Accounting <b>Program:</b> Accounting BA at Herbert H. Lehman College	
<b>Program of Interest:</b> Health <b>College:</b> Adelphi University	
<b>Program of Interest:</b> Not sure <b>College:</b>	
<a href="#">Cancel Changes</a> <a href="#">Save Changes</a>	

You can:

- Add another college to your plan if there is still space (limit of 4 options)

Program(s) of interest and College(s)/Program(s) you are most likely to transfer to **Add**

---

**Program of Interest:** Accounting  
**Program:** Accounting BA at Herbert H. Lehman College

---

**Program of Interest:** Health  
**College:** Adelphi University

---

**Program of Interest:** Not sure  
**College:**

Upon clicking **add**, a dialogue box will appear where you can configure your choice. Clicking **Save** will lock in the choice.



**Add** ×

Program of Interest  
Accounting and Finance

College/Program  
Brooklyn College - Public Accounting & Finance BS

Check here if you are interested in a Non-CUNY institution

**Save** Cancel

- Click the  icon to edit the current row on your transfer plan. A similar dialogue box to the earlier one will open.
- Click the  icon to delete the current row on your transfer plan.

To lock in all changes, click the Save Changes button at the bottom right of the plan. If you do not want to save your changes, click **Cancel Changes**.

Program(s) of interest and College(s)/Program(s) you are most likely to transfer to **Add**

---

**Program of Interest:** Not sure  
**College:**

---

**Program of Interest:** Accounting and Finance  
**Program:** Public Accounting & Finance BS at Brooklyn College

**Cancel Changes** **Save Changes**

## Deleting a Transfer Plan

To delete a Transfer Plan, click on the **Delete Current Submission** icon on the Transfer Plan landing page.

This will remove the plan from your view as well as the dashboard of any colleges you had previously shown interest in.

### Transfer Plans

Welcome back John Doe!

- You can edit this plan as frequently as you need to. It's recommended that you review your plan each semester.
- When speaking with your advisor, you should mention that you filled out a transfer plan in T-Rex so that you can discuss.
- This is not a transfer application. To fill out a CUNY Transfer Application, visit the [CUNY Admissions](#) page.

[Delete Current Submission](#) [Edit Current Transfer Plan](#)

Submitted on: 03/01/2024 12:24 PM

<b>Name</b>	Doe, John	<b>EMPLID</b>	99999999
<b>Preferred Email</b>	transferexplorer@cury.edu	<b>Campus Email</b>	transferexplorer@cury.edu
<b>Current Institution</b>	John Jay College	<b>Previous Institution(s)</b>	Bronx CC Lehman College
Select the highest level of education you hope you to attain.	Associates	<b>Career(s)</b>	Accountant

**Program(s) of Interest and College(s)/Program(s) you are most likely to transfer to**

**Program of Interest:** Accounting  
**Program:** Accounting BA at Herbert H. Lehman College

**Program of Interest:** Health  
**College:** Adelphi University

**Program of Interest:** Not sure  
**College:**