

[admin](#), [student records](#)

Inter-District Transfers

PART I Administration at Original School

- 1. Go to Admin> Student Info. » Find/ Add Student
- 2. Search for student to be transferred and Click 'Enr' for that student

The screenshot shows the 'Student Info.' page in a web application. At the top, there are tabs for 'Academics', 'Teachers', 'Portal', and 'Help'. Below the tabs, there are input fields for 'Cody', 'First Name', 'Middle Name', 'Local ID or State ID', 'E-mail Address', and 'Birthdate'. There are also dropdown menus for 'Track' (set to 'All'), 'Primary Class Offering' (set to 'All Academics'), and 'Teacher of Record' (set to 'All Staff'). A 'Grade' dropdown is set to '12'. Below these fields, there are buttons for 'Search', 'Intake Roster (unenrolled)', and 'Add'. A table below shows student records with columns: Grd, Name, City, Trck, Education Program, Primary Class Offering, E-mail, Started, Finished, Teacher, and Student Tabs. The first row shows '12', 'Smith, Cody M', 'Portola', 'A', 'Independent Study', 'Univ Prep - 9-12', '11/09/2015', 'Current', 'Higgins, Marianna', and 'Enr'. The 'Enr' button is circled in red. Below the table, there are links for 'CALIFORNIA CHILD CARE AND SCHOOL IMMUNIZATION RECORD - CDPH-5262.pdf' and 'Monthly calendar 2014-15.pdf'.

- 3. Click on Edit for the current enrollment.

The screenshot shows the 'Concurrent Enrollment/Program History' page. At the top, there are tabs for 'Academics', 'Teachers', 'Portal', and 'Help'. Below the tabs, there are input fields for 'Grade: 12', 'Local ID: 78926', 'Student Statewide ID: Not Assigned', 'Race: White', 'Gender: M', 'Date of Birth: 03/12/1999', 'Hispanic or Latino? No', 'Enrollment Start: 11/09/2015', 'Parent(s): Kelly Smith, Bob Smith', and 'Staff: Higgins, Marianna'. Below these fields, there is a table with columns: Exit, Track, Att, Grade, Program, Grad Reqs, A-G, and Edit. The first row shows 'A', '15', '12', 'Univ Prep - 9-12', 'Independent Study', 'High School: General Ed 2014-2015', and 'Edit'. The 'Edit' button is circled in red. Below the table, there is a message: 'No special program or service for this enrollment record'. At the bottom, there is a 'Set Staff' button.

- 4. Complete the following steps
 - a. Insert a Finish Date
 - b. Check the box titled "Close Records"
 - c. Choose the State Exit Code (Transfer California Regular or choose appropriate)
 - d. Choose appropriate Class ending status for student from dropdown
 - e. Save Record

The screenshot shows the 'Student Dashboard' for a student named MARIANNA HIGGINS. The dashboard is divided into several sections:

- Personal Information:** Physical Address (1452 Taylor Street, Portola, CA 96122), Mailing Address (321 Flume Street, Chico CA 95928), and Parents/Guardians (Bob Smith, Father; Kelly Smith, Mother).
- Emergency Card:** A red button labeled 'Emergency Card'.
- Master Agreement:** A table showing the student's enrollment in various classes (Art Appreciation, Chemistry, English 12A, Geometry B, US Government) with their respective state codes, catalog numbers, and terms.
- Attendance History:** A section for the 2015-2016 school year.
- Staff Association History:** A table showing the student's association with staff members (Higgins, Marianna) and their start/finish dates.
- Student Enrollment History:** A table showing the student's enrollment in various programs (Independent Study, High School: General Ed 2014-2015) with their respective start/finish dates and grades.

- 5. Go to Student Dashboard
 - a. Choose the pencil to edit in the Student Enrollment History Area

The screenshot shows the 'Concurrent Enrollment/Program History' page. It features a table with columns for Dates, Exit, Track, Att, Grade, Program, Grad Reqs, A-G, and Edit. The table contains one record for the 11/09/2015 - 02/19/2016 period, showing a student in the 'Independent Study' program with a grade of 12. Below the table, there is a section for 'Program Enrollment' with radio buttons for 'Immersion', 'Non-Immersion', 'Yes', 'No', and 'Unknown'. A red circle highlights the 'Transfer Student Records to another School' button.

- 6. Choose Edit on enrollment record
- 7. Make sure state exit code and finish date are entered then SAVE
- 8. Click on Transfer Students Records to Another School

Concurrent Enrollment/Program History (Last modified by LeAnn Reeves on 02/19/2016 1:21pm)

Dates	Exit	Track	Att	Grade	Program	Grad Reqs	A-G	Edit
11/09/2015 - 02/19/2016	T160	A	IS	12	Univ Prep - 9-12	Independent Study	High School: General Ed 2014-2015	- Edit

No special program or service for this enrollment record

shown in red should have an Exit code given, but none has been specified.
in grey indicate a non-attendance program.

[Transfer Student Records to another School](#) [Set Status](#)

Program Enrollment
[nish Immersion](#)
 nish Immersion ☐ Yes ☐ No ☐ Unknown

[Save](#)

- 9. Enter scope name into Transfer to Scope: (check with School Pathways for correct scope title)
- 10. The students file has now been sent to the new school.
- 11. To view the status of the transfer, you may either click on a. Go to the Transfer Students section or b. Admin> Student> Info» Inter-District Trans *After this process is finished the transferred student must be pulled into the new school. Please see PART II for full instructions.

PART II Administrators at New School

- 1. Go to Administration» Student Info. » Inter-District Transfers
- 2. A list of students will be shown
- 3. Choose Retrieve now under Action

Admin Reports Academy Teachers Portal Help

[Retrieve](#) [Sent](#)

Transfer Students to/from Another Scope

Schoolyear:

Order By:

Hide already picked up records: ☐

[Update](#) [Download CSV](#)

#	Sent From	Student	Sent	Status	Action
1	milestone	Smith, Cody	02/19/2016	Not Yet Picked Up	Retrieve Now
2	milestone	Looman, Brittney	02/19/2016	picked up 02/19/2016	(redo RW)
3	milestone	Saint Clare, Eden	02/19/2016	picked up 02/19/2016	(redo RW)
4	milestone	Garcia, Jaime	12/02/2015	picked up 12/02/2015	(redo RW)
5	milestone	Boyd, Josephine	08/27/2015	Not Yet Picked Up	Retrieve Now
6	milestone	Alvarez, Derek	08/22/2015	picked up 08/22/2015	(redo RW)
7	milestone	Hook, Killian	07/23/2015	picked up 07/23/2015	(redo RW)

- 4. Choose the following to retrieve the file

- 5. Go to that Students Dashboard
- 6. Create new enrollment record. Add date, program etc. and SAVE
- 7. Create Staff Association
 - 8. *The student is now within the new school. HOWEVER, classes and master agreements must be recreated in this new school.*

— Last Updated by [Max Williams](#) on 2016/03/07 18:24

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