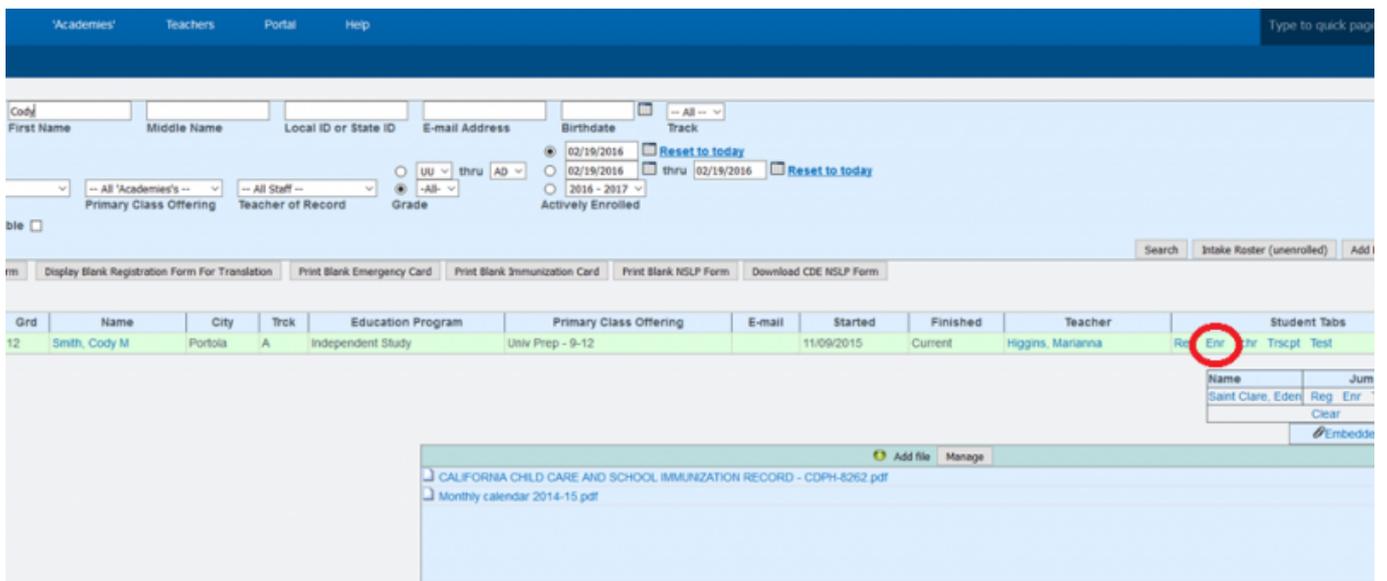


admin, student records

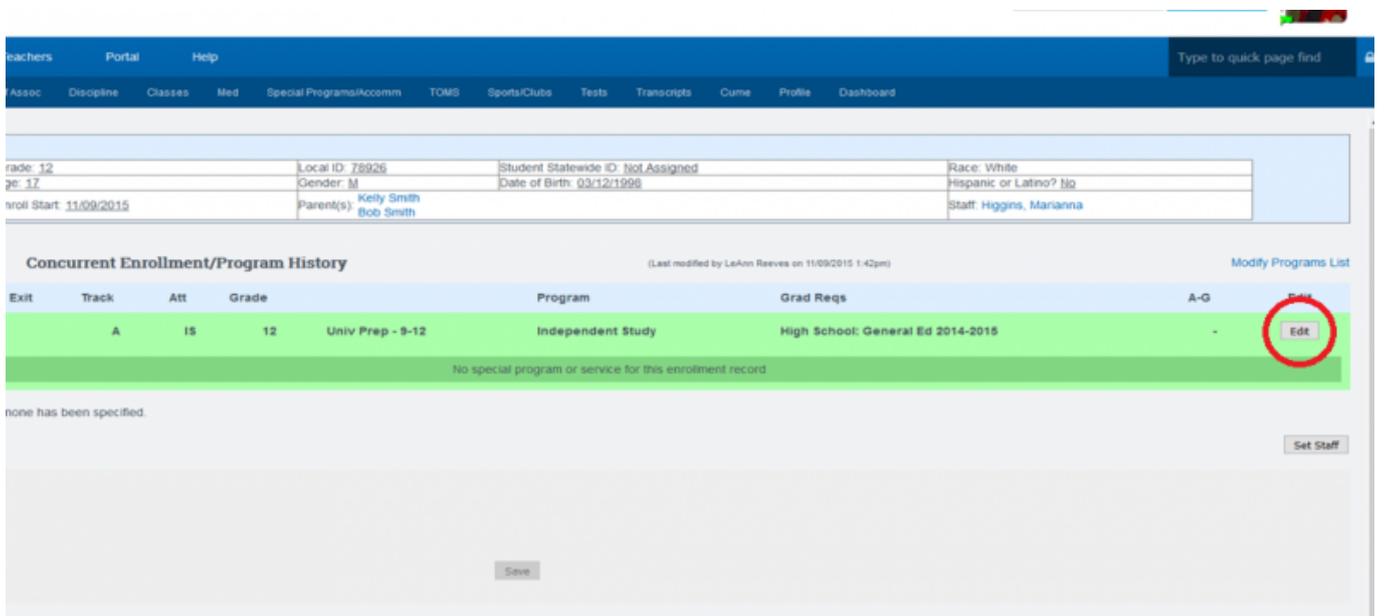
# Inter-District Transfers

## 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



- 3. Click on Edit for the current enrollment.



- 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 a student dashboard with the following sections:

- Physical Address:** 1452 Taylor Street, Portola, CA 96122
- Parents / Guardians:** Bob Smith (Father), Kelly Smith (Mother)
- Siblings:** Jamie Smith (Female)
- Master Agreement Table:**

MA Class	State Code	Catalog	MA Term	Crd
A Art Appreciation	2616	Art Appreciation	01/11/16 - 02/19/16	5
A Chemistry	2607	Chemistry	01/11/16 - 02/19/16	10
A English 12A	2133	English 12A	01/11/16 - 02/19/16	5
A Geometry B	2413	Geometry B	01/11/16 - 02/19/16	5
A US Government	2703	US Government	01/11/16 - 02/19/16	5
- Attendance History:** 2015 - 2016
- Enrollment History Table:**

Track	Start	Finish	Grd Att	Program	Grad Reqs
A	11/09/2015	02/19/2016	12	IS - Independent Study	

- 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. A table lists enrollment records:

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

Below the table, a red circle highlights the button: **Transfer Student Records to another School**.

- 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

The screenshot shows the 'Concurrent Enrollment/Program History' page. At the top, there are navigation tabs: Reports, Academies, Teachers, Portal, Help. Below that, a secondary set of tabs includes List, Registration, Enrollment, IS Staff Assoc, Discipline, Classes, Med, Special Programs/Accomm, TOMS, Sports/Clubs, Tests, Transcripts, Cumu, Profile, and Dashboard. The main content area has a header 'Concurrent Enrollment/Program History' and a sub-header '(Last modified by LeAnn Reeves on 02/19/2016 1:21pm)'. A table lists enrollment records with columns: Dates, Exit, Track, Att, Grade, Program, Grad Reqs, A-G, and Edit. One record is visible for dates 11/09/2015 - 02/19/2016, Exit T160, Track A, Att IS, Grade 12, Program Univ Prep - 9-12, Grad Reqs Independent Study, and High School: General Ed 2014-2015. Below the table, there is a message: 'No special program or service for this enrollment record'. A red circle highlights a button labeled 'Transfer Student Records to another School'. Below this, there is a 'Program Enrollment' section with a 'Save' button.

- 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

The screenshot shows the 'Transfer Students to/from Another Scope' page. At the top, there are navigation tabs: Admin, Reports, Academy, Teachers, Portal, Help. Below that, there are tabs for Retrieve and Sent. The main content area has a header 'Transfer Students to/from Another Scope'. Below the header, there are filters: Schoolyear: 2015 - 2016, Order By: Request Sent Date, and Hide already picked up records: . There are 'Update' and 'Download CSV' buttons. Below the filters is a table with columns: #, Sent From, Student, Sent, Status, and Action. The table contains 7 rows of student records. A red arrow points to the 'Retrieve Now' link in the Action column for the first student, Cody Smith.

#	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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