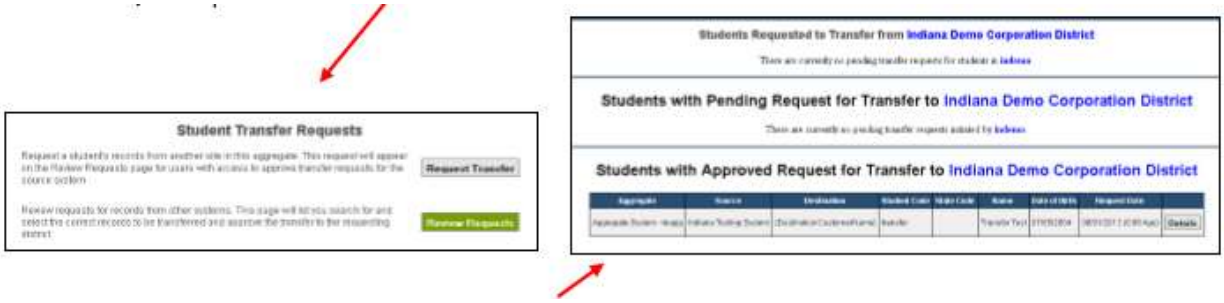
IndianaIEP Transfer Guide

SUMMARY

The Transfer Process provides users with the ability to retrieve student records from the student's previous school as long as the previous corporation used the IndianaIEP system. Since each user only sees information from within their own district prior to the transfer, there are no data security issues that could impact the Transfer Process.

There are two major processes when transferring records. The **REQUEST TRANSFER** process allows corporations to request student records from previous corporations. Once the transfer is requested, they are managed through the **REVIEW REQUESTS** process.



The Review Transfer Requests page shows three tables:

- **Students Requested to Transfer from [your corporation]** – This contains any incoming requests for student records that are currently in your corporation.
- **Students with Pending Request for Transfer to [your corporation]** – This contains any pending requests made by your corporation for student records (including pending denials).
- **Students with Approved Request for Transfer to [your corporation]** – This contains any requests made by your corporation that have been approved and are ready to finalize and schedule.

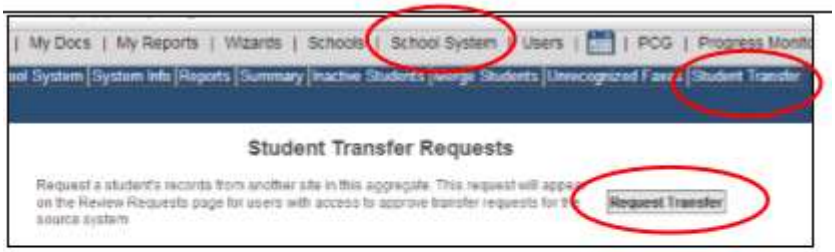
TERMINOLOGY:

Destination District – The corporation requesting the transfer of a student record from another corporation.

Source District – The corporation in which the student's record currently resides

Destination (Requesting) Corporation – Requesting Student Transfers

- Click **SCHOOL SYSTEM** tab
- Click **STUDENT TRANSFER** tab
- Click **REQUEST TRANSFER** button
- The system displays a drop-down request.
- Keep the drop-down to IN Aggregate
- Click **SELECT TRANSFER AGGREGATE AND CONTINUE** button



- Enter information
  - Source District
  - Transfer Date
  - Name
  - Student ID (STN)
  - Date of Birth
  - Notes
- Click **REQUEST STUDENT TRANSFER(S)** button

Your transfer request is complete

<u>View Pending Requests:</u>

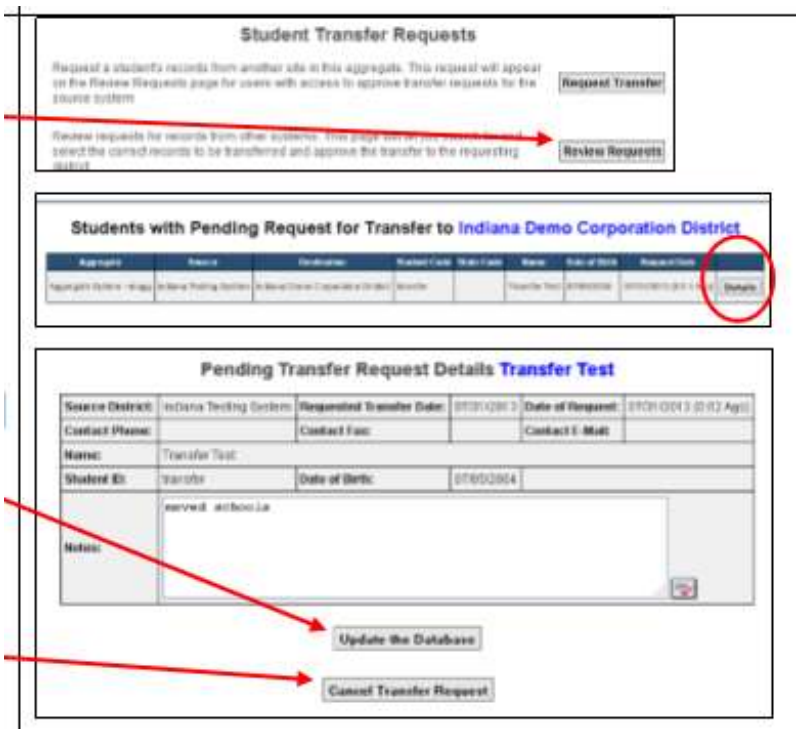
While a request is pending review the record appears on the **REVIEW REQUESTS** button in the Students with Pending Transfer table.

- Click the **DETAILS** button to review the request.

You can update the Notes field and click **the UPDATE THE DATABASE** button.

<u>CANCELING REQUEST:</u>

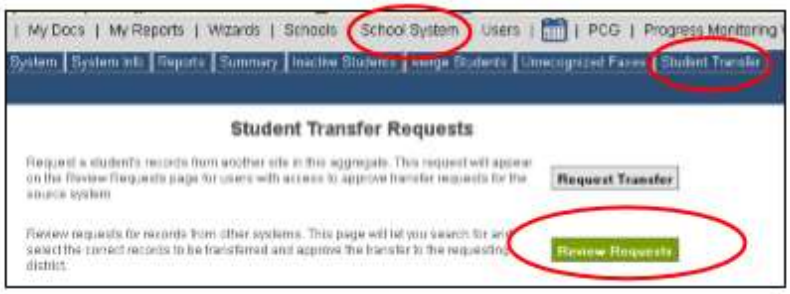
Click the **CANCEL TRANSFER REQUEST** button to cancel the request



Source (Approving) District – Approving Transfer Requests

User in *Source* District Reviews Requests

- Click **SCHOOL SYSTEM** tab
- Click **STUDENT TRANSFER** tab
- Click **REVIEW REQUESTS** button
- Click the **DETAILS** button of the desired request



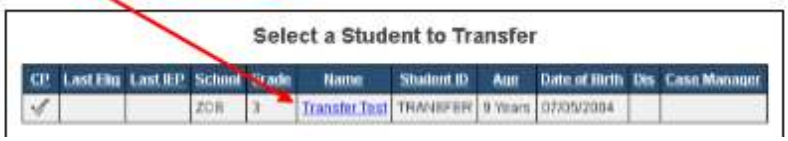
The system displays the Transfer Request Details page.

<u>To Approve Request:</u>

- Click the **FIND STUDENT TO TRANSFER** button

The system will pre-fill the student name and STN fields for you.

- Click **VIEW STUDENTS**
- Click the name of the student

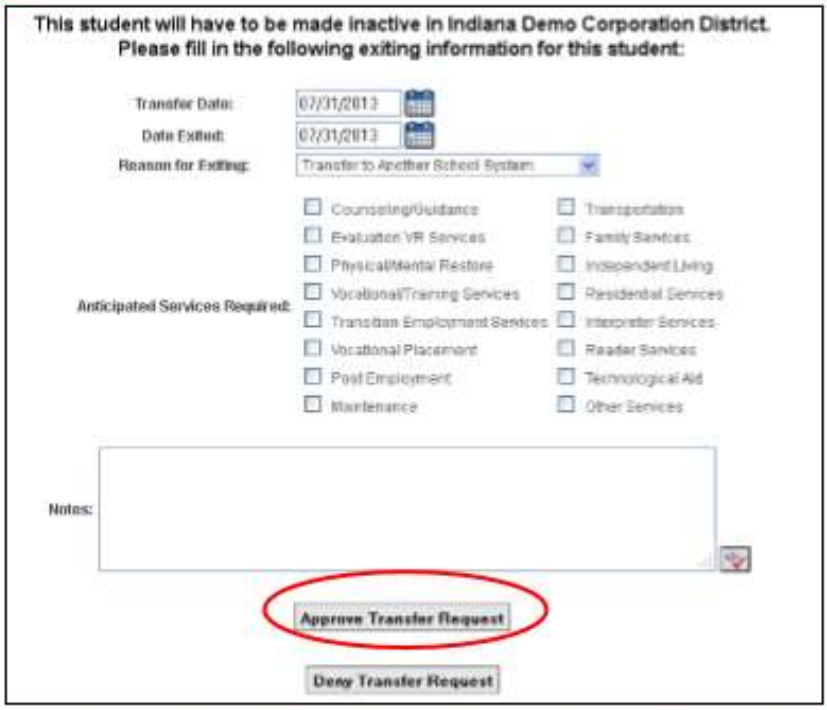


The Approve Transfer page reappears with additional information:

- The Destination District
- The Requested Transfer Date and Date of Request
- The Contact Phone, Fax, and Email of the requesting district
- Identifying information for the student (Name, Student ID, STN, and Date of Birth)

<u>Wrong Student Selected:</u>

- Click **CLEAR SELECTED STUDENT** button to remove the current selection
- Click **FIND STUDENT TO TRANSFER** button to search again
- Enter the following information:
  - Transfer Date
  - Date Exited
  - Reason for Exiting
  - Anticipated Services Required
  - Notes
- Click the **Approve Transfer Request** button



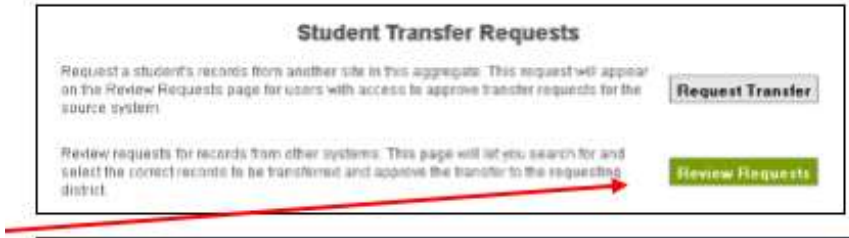
The system returns to the Review Transfer Requests page.

You have completed the transfer approval process.

Destination District – Scheduling Transfers

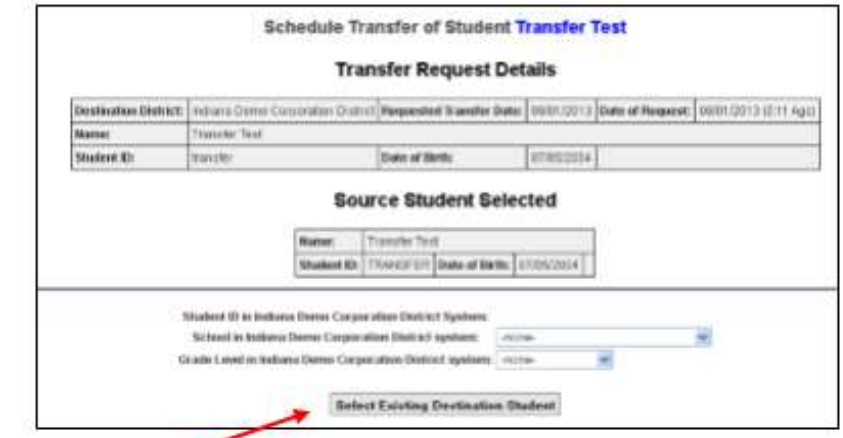
User in *Destination* System Views Approved Requests

- Click **SCHOOL SYSTEM** tab
- Click **STUDENT TRANSFER** tab
- Click **REVIEW REQUESTS** button
- Click the **DETAILS** button of the desired request



The Schedule Transfer of Student page appears with details regarding the transfer request.

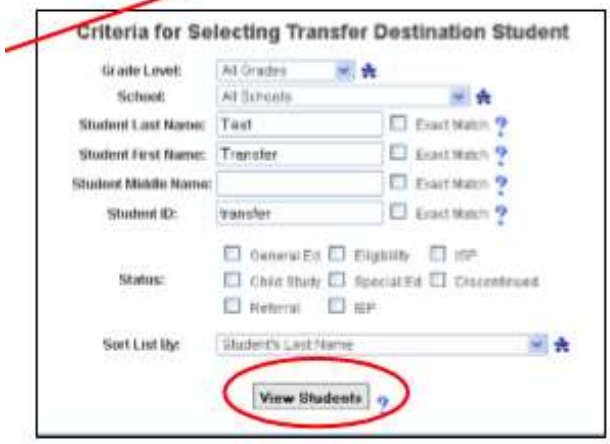
- The Destination District
- The Requested Transfer Date and Date of Request
- The Destination District's selected student name, STN, and DOB
- The Source District's selected student name, STN, and DOB



<u>Select Existing Student:</u>

Click the **SELECT EXISTING DESTINATION STUDENT** button to search for and select an existing set of student records as the destination for the transfer.

This opens the search criteria page



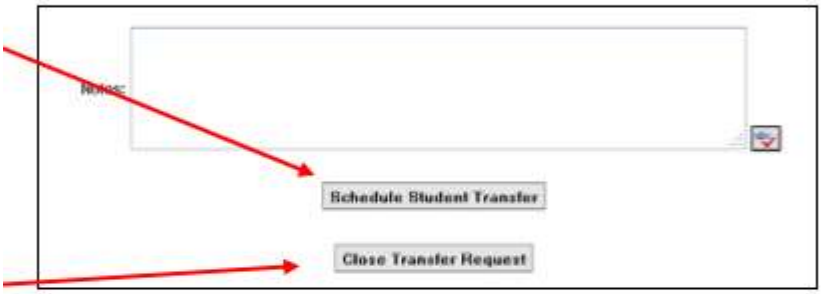
The system will pre-fill the student name and STN fields for you.

- Click **VIEW STUDENTS**
- Click the name of the student

Once a student is selected, their existing information displays.

Click **CLEAR SELECTED STUDENT** button, to change students.

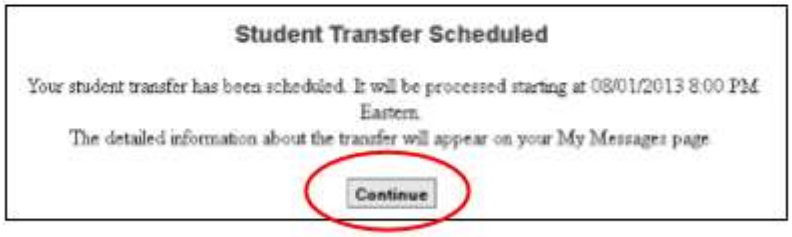
Click **SCHEDULE STUDENT TRANSFER** button at the bottom of the Schedule Transfer of Student page



You may also deny the request at this point by clicking the **CLOSE TRANSFER REQUEST** button.

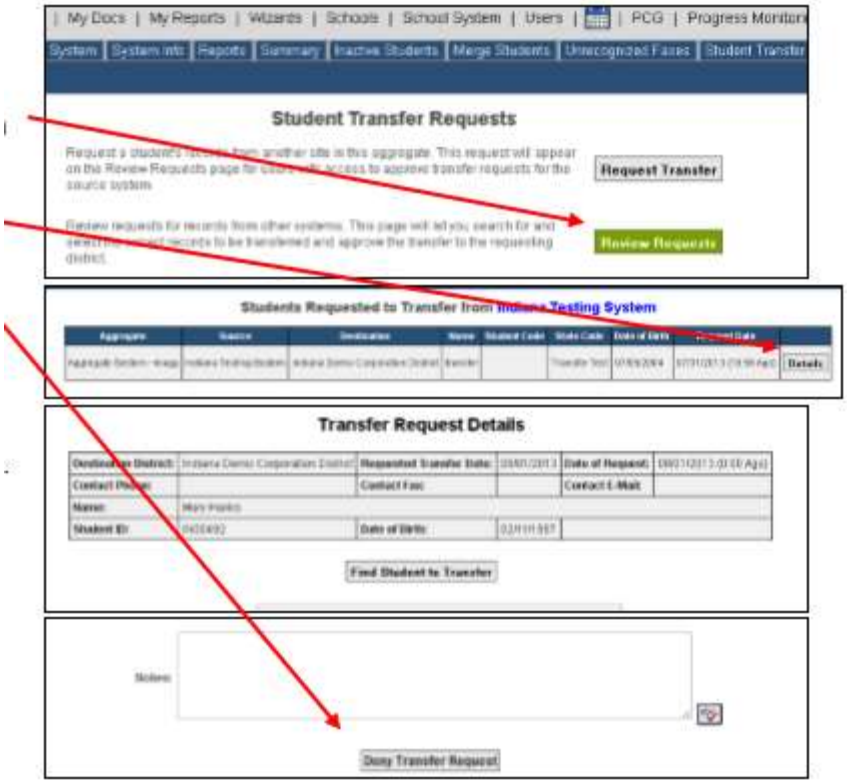
The system displays the Student Transfer Scheduled page.

- Click **CONTINUE** button to return to the Review Transfer Requests page.



Source (Approving) District – Denying Income Transfer Requests

- Click **SCHOOL SYSTEM** tab
- Click **STUDENT TRANSFER** tab
- Click **REVIEW REQUESTS** button
- Click the **DETAILS** button of the desired request
- Click the **DENY TRANSFER REQUEST** button



The system returns the request to the *destination* (requesting) district marked as 'Denied' (see next section).

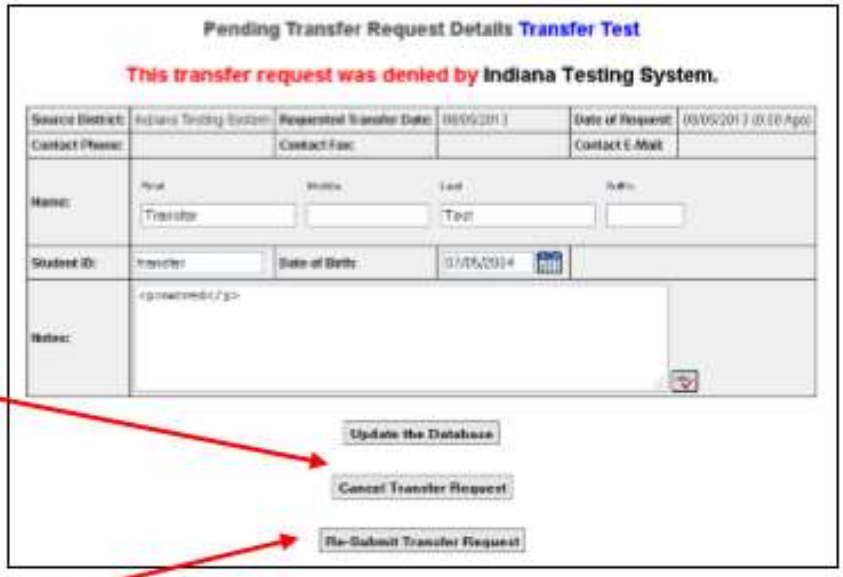
Destination District – Closing/Re-submitting Denied Requests

When a request has been denied, the record appears in the middle table in the *Destination System*, highlighted for further action.

<u>To take action on a denied request:</u>

- Click the **DETAILS** button of the desired request

The system shows the Pending Transfer Request Details page with data on the denied request, including any notes entered by the *Source* (denying) District.



<u>Cancel the Request:</u>

- Click the **CANCEL TRANSFER REQUEST** button

<u>Re-submit the Request:</u>

- Enter data to update the information in the request

Click **Re-Submit Transfer Request** button