

# Student Records Transfer

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Tool Search: Student Records Transfer

Records Transfer functionality varies from state to state. See the [National Records Exchange \(NRE\)](#) article to learn about how that tool is used to exchange student records among Campus districts ***across the nation***.

See the [Student Records Transfer Tool Rights](#) article for information on tool rights needed to complete this process.

The **Student Records Transfer** tool allows districts to transfer integral student data electronically to other districts using the *same regional or State Edition of Campus*. The state or regional edition acts as the intermediary that facilitates the exchange process between districts.

To view details of student records transfer activity, select each student within the Transfers window.

Student Records Transfer ☆
System Settings > Data Interchange Administration > Student Records Transfer
Related Tools ^

Transfers

Request Date	Name	Status	Requesting District	Releasing District
06/20/2024	Smith, [redacted]	error	ROBBINSDALE SCHOOL DISTRICT	CHANDLER UNIFIED DISTRICT
06/20/2024	Abdullahi, [redacted]	error	ROBBINSDALE SCHOOL DISTRICT	CHANDLER UNIFIED DISTRICT
01/22/2024	Sage, [redacted]	error	Ignacio	CHANDLER UNIFIED DISTRICT

Records Transfer Smith, [redacted]

This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

**Student:**  
Last Name Smith  
Gender [redacted]  
Grade [redacted]

**Enrollment Type:** Secondary Services  
First Name [redacted] Middle Name [redacted]  
Birthdate [redacted] SSN [redacted]  
School 2023-24 2/3 Day Preschool - NH Start Date 09/11/2023

**Requesting District & User**  
District 028101 ROBBINSDALE SCHOOL DISTRICT Name System Administrator Username admin  
Request Date 06/20/2024 Work Phone [redacted] Email [redacted]  
Comments  
Test if AZ can see this from MN

**Target District**  
District 070280000 CHANDLER UNIFIED DISTRICT

**Releasing District & User**  
District 070280000 CHANDLER UNIFIED DISTRICT Name [redacted] Username [redacted]  
Release Date [redacted] Work Phone [redacted] Email [redacted]  
Comments  
None

Error Message: The student requested does not exactly match any records in your system, transfer not possible.

Records Transfer

## Main Technical Components

The terms in this section outline the primary components of the student records transfer process.

- **Agent-** Transferring records within a Campus State Edition occurs through Campus agent-to-agent communication. There are three agents involved in a records transfer:
  - **State-level agent** - (*The agent existing in the state-level installation of Campus.*)  
The state-level agent is the main facilitator of all agent communication and makes requesting and transferring records possible.
  - **New district agent** - (*The agent in the new district to which the student has transferred.*)  
The new district may enroll the new student and then request his/her records from the former district by creating a records transfer request. The new district's agent will send the request message to the state-level agent. The state-level agent will then route the request message to the agent in the student's former district.
  - **Former district agent** - (*The agent in the previous district that the student no longer attends.*)  
The agent in the student's former district will receive the records request message from the state-level agent on behalf of the new district. The designated records transfer user in

the former district will approve the release of the student's records. The agent in the former district will send the records in a message to the state-level agent. The state-level agent will then route the records to the new district.

- **State zone** - The designated area in which the district agents communicate through the state-level agent. The state zone is accessible by each district and at the state.

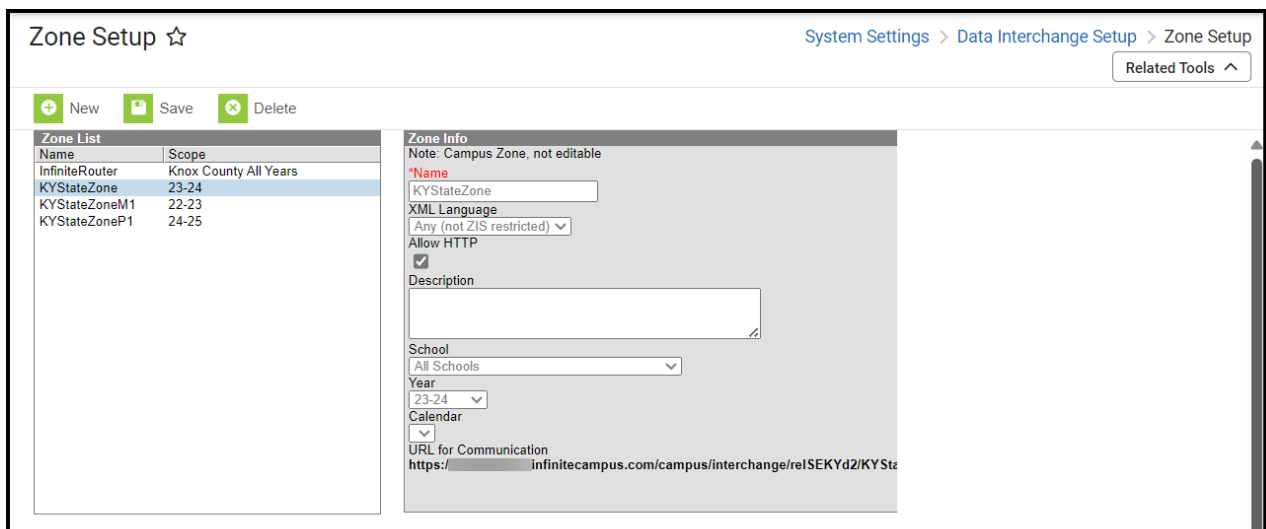
## DIS Agents and Zones

Tool Search: Zone Setup, Agents

Completing a student records transfer between two districts uses DIS messaging and involves built-in Campus agents installed by Campus hosting staff during the district/state's initial configuration.

To allow an intrastate records transfer, Campus hosting sets up DIS communication between district and state agents.

Districts do NOT communicate directly with each other. All messaging and data movement between districts flows through the state-level agent.



**Zone Setup** ☆ System Settings > Data Interchange Setup > Zone Setup

Buttons: New, Save, Delete

Zone List	
Name	Scope
InfiniteRouter	Knox County All Years
KYStateZone	23-24
KYStateZoneM1	22-23
KYStateZoneP1	24-25

**Zone Info**  
Note: Campus Zone, not editable

**Name**  
KYStateZone

**XML Language**  
Any (not ZIS restricted) ▼

**Allow HTTP**  
☒

**Description**

**School**  
All Schools ▼

**Year**  
23-24 ▼

**Calendar**  
▼

**URL for Communication**  
https://infinitecampus.com/campus/interchange/reISEKYd2/KYSta

### *District-Level View of the State Zone*

In each district, a state zone exists to facilitate communication with the state-level agent. This zone is where messages related to student data, including records transfer within the state, are exchanged.

## Zone Setup ☆

+ New
💾 Save
✖ Delete

[System Settings](#) > [Data Interchange Setup](#) > Zone Setup
 

Related Tools ^

Zone List	
Name	Scope
KY301Zone	Knox County 23-24
KY301ZoneM1	Knox County 22-23
KY301ZoneP1	Knox County 24-25
KY555Zone	Trigg County 23-24
KY555ZoneM1	Trigg County 22-23
KY555ZoneP1	Trigg County 24-25

**Zone Info**  
Note: Campus Zone, not editable

**\*Name**

**XML Language**

Any (not ZIS restricted) ▾

**Allow HTTP**

☒

**Description**

Zone for Knox County Next Year

**District**

Knox County (301) ▾

**School**

All Schools ▾

**Year**

24-25 ▾

**Calendar**

▾

**URL for Communication**

https://infinitecampus.com/campus/interchange/reISEKYst/KY301

### State-Level View of Each District Zone

At the state level, a zone exists for each district within the state to facilitate communication and exchange messages related to student data, including records transfer within the state.

## Enroll Students with the Student Locator

Tool Search: Student Locator

Districts are required to use the [Student Locator](#) tool to add and enroll new students, preventing duplicate entries and records from being created for the same person.

When the student is enrolled and located by the Student Locator, it means he/she is transferring from another district within the same state/region and already has a record in the state database. This indicates that his/her records can be requested from the former district once the student is enrolled.

### Student Locator

#### Student Search

Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. The user must enter the State ID, the SSN, or the full legal lastName, firstName and gender. Select a student from the list or click on Create New Student. When doing a SSN-only search, the user must still do a name based search before they are allowed to create a new person.

Last Name

First Name

Gender

F ▼

Birth Date

Middle Name

SSN #

State ID

Search--->

Name	State ID	Gender	Birth Date	%
Test, Kid	086250441	F	04/02/2000	100

Create New Student >

*Locating a Transfer Student for Enrollment in a New District*

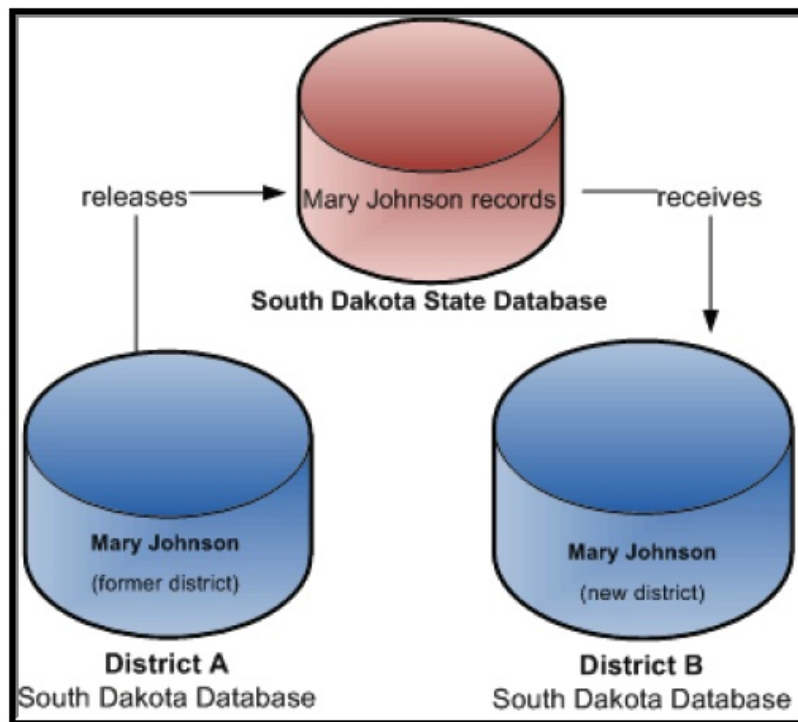
## Transfer Student Records

The following sections detail the necessary steps for completing a student records transfer

1. [New District Requests a Student Records Transfer](#)
2. [Former District Responds to a Student Records Transfer Request](#)
3. [New District Receives Released Records from Former District](#)

For a student records transfer to be possible, the state database must have a record of the student's former enrollment and the student's *stateID* number.

When the Student Records Transfer is requested or released, the messages and data are funneled through the state to the new district via the [state agent](#).



*Sample Transfer of Student Records*

## New District Requests a Student Records Transfer

Tool Search: Records Transfer

A records transfer may be requested at any time after the transfer student has been enrolled in the new district. The records transfer page will display immediately after the student's new enrollment is saved.

The transfer can be performed at the time of enrollment or at a later date. To request a transfer, navigate to the [Records Transfer](#) tool, select the **New State Transfer Request** icon (if applicable), and select the **Submit Request** button.

Records Transfer ☆

Student Information > General > Records Transfer

Counselor:

Student #:

Grade: 11

DOB:

Related Tools ^

New State Transfer Request

New National Transfer Request

Transfers

Request Date	Name	Status	Requesting District	Releasing District
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Records Transfer

Use this tool to request the release of a transfer student's records. The following information will be sent to the student's former district and they will be given the opportunity to release their records. Only an exact student match can yield a release, so it is a good idea to call the district to confirm this student was enrolled there and to let them know to expect a release request.

Student:

Last Name

First Name

Middle Name M

Gender

F

Birthdate

SSN

Grade

11

School

24-25 Knox Central High School

Start Date

07/01/2024

Enrollment Type: Primary

Requesting District & User

District

301 Knox County Name

System Administrator

Username

admin

Request Date

08/27/2024

Work Phone

Email

Comments

Submit Request

## Records Transfer Tool

## Process Inbox Status - Waiting

The new district's Process Inbox and the student's Records Transfer tab will both display a **Waiting** status until the former district responds.

Only users who have Notify Process Inbox tool rights and calendar rights (or All Calendars rights) to the school where the student is currently enrolled in will receive this message.

Process Inbox				
Date Range		to	Display	All Processes
				Find Messages
Delete Selected Messages				
<input type="checkbox"/>	<input type="checkbox"/>	Process	Name	Posted Date
<input type="checkbox"/>	<input type="checkbox"/>	Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011
<input type="checkbox"/>	<input type="checkbox"/>	Records Transfer	<a href="#">Waiting: Test, Julia 12345678</a>	04/11/2011
<input type="checkbox"/>	<input type="checkbox"/>	Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011
<input type="checkbox"/>	<input type="checkbox"/>	Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011
<input type="checkbox"/>	<input type="checkbox"/>	Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011
<input type="checkbox"/>	<input type="checkbox"/>	Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011

## New District's Process Inbox - Waiting Status

During this time, the new district will not know what district the student previously attended.

Student Records Transfer					
<b>Records Release</b>					
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.					
<b>Records Transfer Test, Julia # 12345678</b>					
<b>Student:</b>		<b>Enrollment Type:</b> Primary			
Last Name	Test	First Name	Julia	Middle Name	Ruth
Gender	F	Birthdate	06/15/1998	SSN	
Grade	07	School	10-11 Middle School	Start Date	08/25/2010
<b>Requesting District &amp; User</b>					
District	32002 Pierre 32-2	Name	Administration Administration	Username	admin
Request Date	04/11/2011	Work Phone		Email	
Comments					
Send Records Please.					
<b>Status: Waiting for former district to release records.</b>					

## Records Transfer Tab - Waiting

If the student's former district cannot be located because the state does not have a matching record for the student, a transfer error will appear to let the user know the request was unsuccessful. Clicking the link will display the reason for the error.

Student Records Transfer					
<b>Records Release</b>					
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.					
<b>Records Transfer Abel, Rylan #</b>					
<b>Student:</b>		<b>Enrollment Type:</b> Primary			
Last Name	Rylan	First Name	Rylan	Middle Name	Rylan
Gender	M	Birthdate	00/00/2000	SSN	
Grade	03	School	09-10 C.C. Lee Elementary	Start Date	08/24/2009
<b>Requesting District &amp; User</b>					
District	06001 Aberdeen 06-1	Name	System Administrator	Username	admin
Request Date	05/18/2011	Work Phone		Email	
Comments					
None.					
<b>Releasing District &amp; User</b>					
District		Name		Username	
Release Date		Work Phone		Email	
Comments					
None.					
<b>Error Message: No former district records found.</b>					

## Records Transfer Tab - Error



## Former District Responds to a Student Records Transfer Request

When a student records transfer is requested, the former district will receive a notification in his/her Process Inbox.

The screenshot shows a web interface titled "Process Inbox". At the top, there are filters for "Date Range" (with empty input fields for "to"), "Display" (set to "All Processes"), and a "Find Messages" button. Below these is a "Delete Selected Messages" button. The main area is a table with columns: "Process", "Name", "Posted Date", and "Due Date".

Process	Name	Posted Date	Due Date
Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011	
Records Transfer	<a href="#">Request for you to release: Test, Julia 12345678</a>	04/11/2011	
Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011	
Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011	
Records Transfer	<a href="#">Transfer Released: Student, New 117852868</a>	04/11/2011	

### *Former District's Process Inbox - Request to Release Records*

When the link is selected, the request displays the following screen with information on the student and new district:

Student Records Transfer

Release or Reject a Request for Transfer Records

An external district is requesting the release of your district's records of a student. The request has come from the new district. The student has been enrolled in the new district, so please help to prevent incorrect data or enrollment.

Infinite Campus verifies that the requesting district is whom they say they are, and that the user making the request is a valid user. You may accept or reject this request, but you are encouraged to call the requesting district to verify the user.

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**Records Transfer Lane, Susie #**

<b>Student:</b>		<b>Enrollment Type:</b> Primary	
Last Name	Test	First Name	Julia
Gender	F	Middle Name	Ruth
Birthdate	06/15/1998	SSN	
Grade	07	School	10-11 Middle School
Start Date	08/25/2010		

**Requesting District & User**

District	06001 Aberdeen 06-1	Name	System Administrator	Username	admin
Request Date	04/07/2011	Work Phone		Email	
Comments None.					

**Releasing District & User**

District	32002 Pierre 32-2	Name	Administration Administration	Username	admin
Release Date	04/26/2011	Work Phone		Email	
Comments <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>					

Release Records
Reject Request
Ignore Request

### Former District - Incoming Records Request

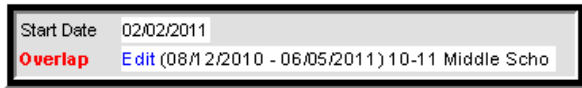
The former district is expected to respond to the request in one of three ways:

- **Release Records** - Student records and the previous district's contact information is sent to the new district. A notice appears in the new district's Process Inbox stating "Transfer Released."
- **Reject** - No student records are sent to the new district. A notice appears in the new district's Process Inbox stating "Transfer Rejected." The previous district's contact information is visible.
- **Ignore** - No student records or former district information is sent. A notice appears in the new district's Process Inbox stating "Transfer Rejected." This is an anonymous rejection with no indication of the former district.

The **Ignore** feature should only be used in the event that a former district has a valid, legal reason to withhold student information from the new district (*e.g.*, court order, witness protection program agreement).

## Enrollment Overlap Indicator

In case the former district has not ended the student's enrollment in its district at the time it receives the Student Records Transfer request, an enrollment **Overlap** indicator will appear with the student's current and active enrollment displayed.



### *Enrollment Overlap Indicator*

Selecting the **Edit** link will redirect the user to the student's [Enrollments tab](#) where his/her enrollment may immediately be ended.

The Overlap indicator only appears if a student's enrollment in his/her former district has not been ended. This message may be the first notification to the former district that a student has transferred and is enrolling into a new district.

## Mismatched Data

To prevent mistaken transfers of student data, Campus only allows a district to release student records if an exact match is found between districts.

Therefore, if the new district enters the student's information incorrectly (e.g., spells the name wrong or enters the wrong birthday), the former district will not be able to release the records for the student. When the new district user clicks on the records release link, an error will display.

Student Records Transfer

**Records Release**  
 This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

**Records Transfer Test, Julia # 12345678**

<b>Student:</b>		<b>Enrollment Type:</b> Primary	
Last Name	Test	First Name	Julia
Gender	F	Middle Name	Ruth
		Birthdate	06/15/1998
Grade	07	SSN	
		School	10-11 Middle School
		Start Date	08/25/2010

**Requesting District & User**

District	32002 Pierre 32-2	Name	Adam Person	Username	adamper
Request Date	01/19/2010	Work Phone	(555)427-6650	Email	
Comments <i>None.</i>					

**Releasing District & User**

District	34301 Crow Creek Tribal School Name	Username	
Release Date		Work Phone	
Comments <i>None.</i>			

**Error Message: The student requested does not match any records in your system, transfer not possible.**

*Data Integrity Error*

## Records Transfer Objects

See the [Record Transfer Objects](#) section for more information about which objects are transferred during the student records transfer.

## New District Receives Released Records from Former District

When the former district selects the **Release Records** option, records are sent to the new district. The new district will receive a message link in its Process Inbox containing the student's records and the former district's contact information.

Records transfers can be accessed in three areas of Campus, when the appropriate user rights have been assigned:

- *Process Alerts (formerly Process Inbox) (until deleted)*
- *Student Information > General > Student Records Transfer (permanent record)*
- *System Settings > Data Interchange > Student Records Transfer (permanent record)*

A released records transfer message will contain two methods of receiving the transferred student records. It is the responsibility of the new district to complete the records transfer by importing and/or entering the relevant data.

- **Transferred Documents** – PDFs available for download, saving and/or printing.
- **Data Import Wizards** – Method of directly writing the former district data to the new district database.

**Requesting District & User**  
District 06001 Aberdeen 06-1 Name Username  
Request Date 08/18/2011 Work Phone Email  
Comments  
None.

**Releasing District & User**  
District 06301 ABERDEEN CATHOLIC SCHOOL SYSTEM Name Username  
Release Date 08/18/2011 Email  
Comments  
None.

**Transfer Documents**  

Transcript

Census Contact Summary

Extended Census Summary

Enrollment History

Schedule

Attendance Period Detail

Assessment Summary

Behavior Summary

Health Condition Summary

Health Screening Summary

Health Immunization Summary

Quarter 4

Quarter 1

Quarter 2

Quarter 3

IEP

Special Ed Evaluation

IEP Documents

PLP

PLP Documents

LEP

LEP Services

LEP Accommodations

Status: Records released.

**Data imports**  

Transcript Import Wizard

Extended Census Import Wizard

Enrollment History Import Wizard

Assessment Import Wizard

Immunization Import Wizard

Health Condition Import Wizard

Health Screening Import Wizard

IEP Import Wizard

Special Ed Evaluation Import Wizard

Special Ed Documents Import Wizard

PLP Import Wizard

PLP Documents Import Wizard

LEP Import Wizard

Released Records Message

Crossed-out items may appear on the release page of both the new and former district. When an item in the Transfer Documents or Data Imports section is crossed out, it indicates that the student did not have any relevant records for that transfer type.

## What Is Sent During A Records Transfer

Information transferred from one district to another can be generated as PDFs and/or imported into the receiving district via import wizards. The table below describes what information is transferred and how the information is made available to the receiving district (PDF and/or Import Wizard).

Record Type	Description and Logic	PDF is Sent	Data Import Wizard
<b>Assessment</b>	<p>All District, State and National tests are transferred. This includes test dates and scores.</p> <p>At this time, Assessment records are not included as part of a National Records Exchange request. NRE users will only receive an assessment summary for the student.</p>	Yes	<p>Yes</p> <p>See the section for more information.</p>
<b>Attendance</b>	<p>Current year attendance records are transferred, including:</p> <ul style="list-style-type: none"> <li>• Dates</li> <li>• Codes</li> <li>• Descriptions/comments</li> <li>• Term summaries</li> <li>• Course summaries</li> </ul> <p>Attendance from previous years is not transferred</p>	Yes	No
<b>Behavior</b>	<p>All behavior records are transferred including:</p> <ul style="list-style-type: none"> <li>• Incidents</li> <li>• Events</li> <li>• Responses</li> <li>• Comments</li> <li>• Details</li> <li>• Resolutions</li> <li>• Roles</li> <li>• Locations</li> <li>• Classifications (Drugs, Harassment, Weapons)</li> </ul>	Yes	No
<b>Census Contact Summary</b>	<p>Current demographic information about the student and his/her contacts is transferred including:</p> <ul style="list-style-type: none"> <li>• Demographics Information</li> <li>• Contact Info</li> <li>• Mailing Addresses</li> <li>• Primary Household Data (with relationships)</li> <li>• Non-Household Relationships</li> </ul>	Yes	No

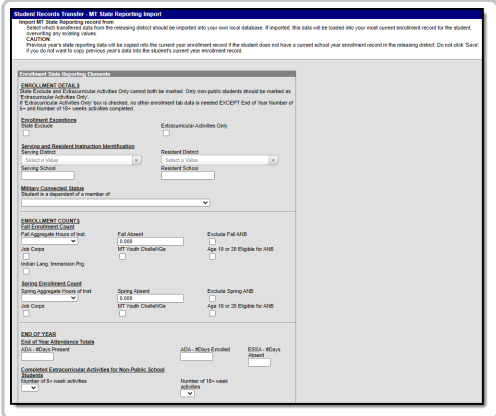
Record Type	Description and Logic	PDF is Sent	Data Import Wizard
<b>Counseling Documents</b>	Counseling related documents entered on the <a href="#">Counseling Documents</a> tool.	Yes	Yes
<b>Enrollment History</b>	All current and historical enrollment records are transferred. Future enrollment records are not sent.	Yes	Yes  See the <a href="#">Enrollment History Import Wizard</a> section for more information.
<b>Extended Census</b>	Additional demographics data is transferred including: <ul style="list-style-type: none"> <li>• Birth Country</li> <li>• Date Entered US</li> <li>• Date Entered US School</li> <li>• Home Primary Language</li> <li>• Native American Language</li> <li>• Birth Verification</li> <li>• Nickname</li> </ul> Only information from the student's most recent identity record is transferred.	Yes	Yes See the section for more information.
<b>English Learners</b>	EL program data is transferred.	Yes	Yes See the <a href="#">EL Import Wizard</a> section for more information.
<b>EL Services</b>	All existing EL Services data is transferred via PDF.	Yes	No
<b>EL Accommodations</b>	All existing EL Accommodations data is transferred via PDF.	Yes	No
<b>Foster Care</b>	All foster care records are transferred. A PDF is sent containing the student's Foster Care information.	Yes	No

Record Type	Description and Logic	PDF is Sent	Data Import Wizard
<b>Health Condition</b>	All health records are transferred. A PDF is sent containing conditions and treatments. The import wizard transfers health alert information and flagged medical programs.	Yes Conditions and treatments are transferred via PDF, including: <ul style="list-style-type: none"> <li>• Conditions</li> <li>• Treatments</li> <li>• Contact</li> </ul>	Yes The Health Alerts Import Wizard transfers the following information: <ul style="list-style-type: none"> <li>• Programs</li> <li>• Start/End Dates</li> <li>• User Warnings</li> <li>• Descriptions</li> <li>• Flagged Medical Programs</li> </ul> See the <a href="#">Health Condition Import Wizard</a> section for more information.
<b>Health Documents</b>	Health related documents entered on the <a href="#">Health Documents</a> tool.	Yes	Yes
<b>Health Screening</b>	All student health screenings and details are transferred, including: <ul style="list-style-type: none"> <li>• Screening Type</li> <li>• Date</li> <li>• Comments</li> </ul>	Yes	Yes See the <a href="#">Health Screening Import Wizard</a> section for more information.
<b>Homeless Summary</b>	A PDF of the student's homeless records is transferred.  This is only available in states where Program Participation > Homeless is enabled.	Yes	No



Record Type	Description and Logic	PDF is Sent	Data Import Wizard
<b>Immunizations</b>	All vaccine data is transferred, including: <ul style="list-style-type: none"> <li>• Vaccines</li> <li>• Shot Dates</li> <li>• Current compliance status as determined by the former district</li> <li>• Exemptions/waivers</li> <li>• Immunization certifications (applicable to KY, KS and CA).</li> </ul>	Yes	Yes See the <a href="#">Immunization Import Wizard</a> section for more information.
<b>Military Connections</b>	A student's Military Connections records (for student and guardian).	Yes	No
<b>PLP</b>	A student's most recent, locked PLP for the current school year is transferred.	Yes	Yes See the <a href="#">PLP Import Wizard</a> section for more information.
<b>PLP Documents</b>	All PLP documents entered on the <a href="#">PLP Documents</a> tool.	Yes	Yes See the <a href="#">PLP Documents Import Wizard</a> section for more information.
<b>Report Cards</b>	Report cards are only included in the transfer when the student has grading records in the active year. <ul style="list-style-type: none"> <li>• Sends the first 4 report cards in the reports list, alphabetically</li> </ul>	Yes	No
<b>Schedule</b>	The student's current year schedule is transferred if the student has an active enrollment in the currently active school year. Schedules from previous years/enrollments are not transferred. The schedule that sends is based on the last 'schedule report' created in the Report Setup tool (System Settings > System Preferences.) This report lists records in alphabetical order.	Yes	No

Record Type	Description and Logic	PDF is Sent	Data Import Wizard
<b>Special Ed Documents</b>	All Special Ed documents are transferred.	Yes	Yes See the <a href="#">Special Education Document Import Wizard</a> section for more information.
<b>Special Ed Evaluations</b>	All current, locked Special Ed evaluations for the current school year are transferred.	Yes	Yes See the <a href="#">Special Education Evaluation Import Wizard</a> section for more information.
<b>Special Ed IEPs</b>	All current, locked Special Ed IEPs for the current school year are transferred.	Yes	Yes See the <a href="#">IEP Import Wizard</a> section for more information.
<b>Special Education Summary</b>	The most recent State Reported and Data Entry record transfers as live, editable data.	No	Yes  See the <a href="#">Special Education Summary Import Wizard</a> section for more information.
<b>Transcript</b>	<p>The latest transcript record in the sending district's database is transferred.</p> <p>If the <a href="#">Default for Transfer preference is set on a transcript</a>, this transcript is the default transcript sent when performing a records transfer via the National Records Exchange or Student Records Transfer. Only one transcript report per school can be marked as Default for Transfer.</p>	<p>Yes</p> <p>The print format must be defined. If more than one transcript exists for the calendar, the latest one (in database order) will be sent.</p>	<p>Yes</p> <p>See the <a href="#">Transcript Import Wizard</a> section for more information.</p>
<b>State-specific Transferred Information</b>			

Record Type	Description and Logic	PDF is Sent	Data Import Wizard
<b>KY State Reporting</b>	Current year Kentucky-specific data is transferred, which includes the following: <ul style="list-style-type: none"> <li>• State reporting enrollment elements.</li> <li>• Special ed enrollment elements.</li> <li>• Attendance summary counts.</li> <li>• Gifted and Talented records.</li> </ul>	No	Yes
<b>MT Supplemental Documents</b>	Montana-specific Special Ed data is transferred.	No	Yes
<b>MT State Reporting</b>	Montana-specific enrollment data is transferred. <div data-bbox="432 869 930 1283">  </div>	No	Yes

## Data Import Wizards

Within the body of a released records transfer, users will have the option to directly import student records.

Using a Data Import Wizard may require the new district to adapt and map codes/values used by the former district to fit those of the new district. Users should be aware that running an Import Wizard more than once for the same student may produce duplicate records.

School/district's cannot access and import data via a Records Transfer request after 4 years have passed since the initial transfer request date. After four years, schools that would like to access and import an expired records transfer request will need to request a new records transfer.

The following Import Wizards are available in a release records transfer (as long as the student has

records related to that type of Import Wizard):

- [Transcript Import Wizard](#)
- [Extended Census Import Wizard](#)
- [Enrollment History Import Wizard](#)
- [Assessment Import Wizard](#)
- [Immunization Import Wizard](#)
- [Health Condition Import Wizard](#)
- [Health Screening Import Wizard](#)
- [IEP Import Wizard](#)
- [Special Education Evaluation Import Wizard](#)
- [Special Education Document Import Wizard](#)
- DE Meeting Invite Import Wizard (Delaware Only)
- [Special Education Summary Import Wizard](#)
- [PLP Import Wizard](#)
- [PLP Documents Import Wizard](#)
- State Reporting Elements - Available in some states
- [EL Import Wizard](#) - Available on a state-by-state basis

The following tables are general representations of the fields available for import. Transfer results will vary, depending on the student's actual data. Users should expect to map elements that differ between districts.

## Transcript Import Wizard

The following fields from the student's [Transcript tab](#) will transfer from the former district to the requesting district:

**Montana Only:** Transcript Session Type, Session Number, and Secondary Credit information is also transferred and saved upon import of transcript data via the Transcript Import Wizard.

**Kentucky Only:** Difficulty Level data is transferred and saved upon import of transcript data via the Transcript Import Wizard.

If the [Default for Transfer preference is set on a transcript](#), this transcript is the default transcript sent when performing a records transfer via the National Records Exchange or Student Records Transfer. Only one transcript report per school can be marked as Default for Transfer.

Transcript History		
Actual Term	End Term	Score
Attempted	GPA Max	Standard Name
Bonus Points	GPA Value	Standard Number
Comments	GPA Weight	Start Term
Course Name	Grade	State Code
Course Number	Percent	Terms Long
Date	School Import	Transcript Credit
District Number	School Name	Unweighted GPA Value
Earned	School Number	SCED Subject Area <div>This field is only available for states using SCED course codes.</div>
		SCED Course Identifier <div>This field is only available for states using SCED course codes.</div>

Transcript data may be mapped and imported into the new district. Records may be saved as the names and numbers defined by the former district or as local names and numbers defined by the new district.

If a student has left and then returned to the same district, you should mark the **Don't Import** checkbox for each transcript correlating to enrollment records already existing within your system.

The print format must be defined. If more than one transcript exists for the calendar, the latest one (in database order) will be sent.

The screenshot displays the 'Transcript Import Wizard' interface. At the top, there is a 'Credit Multiplication Factor' field set to 1 and an 'Adjust All Credits' button. Below this, there are two identical entry forms. Each form includes a 'Don't Import' checkbox, a '\*School Year' dropdown (set to 2007-2008), a '\*Grade' dropdown (set to 09), a 'District No.' field (6001), a 'School No.' field (1), a 'School Name' field (Central High School), a '\*Course Number' field (123 for Advocate A1, 234 for Debate 1 A), and a 'Course Name' field. Below these are fields for '\*Score' (A), 'GPA Weight' (0), 'GPA Value' (4), 'Percent' (4), 'GPA Max' (4), 'Unweighted GPA Value' (4), '\*Earned' (empty), '\*Attempted' (empty), and '\*Transcript Credit' (empty). Further down are 'Bonus Points', 'Standard Number', 'Standard Name', 'Date' (10/22/2007), 'Actual Term' (1), 'Start Term' (1), 'End Term' (4), 'Terms Long' (4), and 'State Code' (empty). A 'Comments' field at the bottom of each form contains the text 'Imported from 06001 Aberdeen 06-1 Records Transfer.'

### Transcript Import Wizard

Fields in red are required for the transcript entry to be properly saved to the student's record.

When transferring transcript records, the Earned and Attempted fields will be populated with data as entered on the Transcript tab.

If flagged, the **Don't Import** checkbox indicates that the selected transcript entry will not be imported as part of the student's transcript history.

When importing transcript information, districts will want to consider adjusting credit types, which may differ substantially between the exchanging districts. The **Credit Multiplication Factor** field and **Adjust All Credits** button can be used to mass-adjust credit amounts. Individual entries may also be adjusted.

## Extended Census Import Wizard

The following fields from the student's [Demographics tab](#) will transfer.

Extended Census	
Birth Country	Date Entered US
Date Entered US School	Home Primary Language
Birth Verification	Nick Name
Alternate Language	

**Student Records Transfer - Extended Census Import**

**Import Census records from 32002 Pierre 32-2**  
 Enter the transferred data from the releasing district into your own local database.  
 Values entered in the 'Value to Save' column will be saved into the student's current identity record.

	Current Value	Imported Value	Value to Save
Birth Country	<a href="#">France</a>	<a href="#">Belgium</a>	FR: France
Date Entered US	<a href="#">08/03/2009</a>	<a href="#">08/03/2009</a>	08/03/2009
Date Entered US School	<a href="#">09/08/2009</a>	<a href="#">09/08/2009</a>	09/08/2009
Home Primary Language	<a href="#">French</a>	<a href="#">English</a>	French
Birth Verification	<a href="#">Birth Certificate</a>	<a href="#">Birth Certificate</a>	Birth Certificate
NickName	<a href="#">QA-J</a>	<a href="#">QA-J</a>	QA-J

Save

*Extended Census Import Wizard*

## Enrollment History Import Wizard

The following fields from the student's [Enrollments tab](#) transfer when not null in the former district:

Enrollment History		
Calendar Name	State End Status	Start Date
District Name	Grade	State Start Status
End Comments	Service Type	
End Date	Start Comments	

For Enrollment Statuses, the Local Start Status and Local End Status do not transfer; however, data in those fields are populated based on the receiving district's list of start and end statuses.

All historical enrollments recorded by the former district can be mapped and imported to the new district. This includes any out-of-district enrollments that were recorded in the former district.

## Student Records Transfer - Enrollment History Import

### Import Enrollment History records from 0902 School District #1

Enter the transferred data from the releasing district into your own local database. Enrollment Start/End codes can be mapped to a local value if

District Name School District #1	*Calendar Name 15-16 High School	*Grade 09	NCES Grade 09
*Start Date 09/15/2015	End Date 06/03/2016	*Service Type P: Primary	
Local Start Status 03: Re-entry to the same school after withdrawal (Valid 93-)	Local End Status		
State Start Status 03: Re-entry to the same school after withdrawal	State End Status 100: End of year, returning to same school next year		
Start Comments Egypt	End Comments		

District Name School District #1	*Calendar Name 16-17 High School	*Grade 10	NCES Grade 10
*Start Date 09/06/2016	End Date 06/06/2017	*Service Type P: Primary	
*Local Start Status	Local End Status		
State Start Status 02: Continued enrollment same school, no interruption	State End Status 100: End of year, returning to same school next year		
Start Comments	End Comments		

### Enrollment History Import Wizard

When importing enrollment history information, users may need to enter **Local Start** and **Local End Status** codes. No graduation, state-reporting, special education or custom elements are included.

Fields in red are required for the record to properly save.

### For Same State Transfers



Local Start Status	Local End Status
<p>Local Start Status is not a required field when data is transferred, but it is required on the student's enrollment record.</p> <p>Local Start Status populates based on the State Start Status transferred from the prior district.</p> <p>If the receiving district has defined a Local Start Status in the Enrollment Status Mapping tool that meets the following requirements, the Local Start Status is populated with that value:</p> <ul style="list-style-type: none"> <li>• Is an exact match of the sending district's State Start Status on description.</li> <li>• Has the same State Start Status mapped.</li> <li>• The end year is either null (blank) or after the end year of the enrollment.</li> </ul> <p>If there is no local code that meets the above requirements, the Local Start Status field displays blank. If the user saves the local enrollment Start Status with a blank value, the existing State Start Status must save to the database and displays on the student's enrollment record.</p> <p>The Local Start Status on the enrollment history import remains available for selection to allow for a district override. If the district overrides the value, the State Start Status tied to the Local Start Status is saved.</p>	<p>The Local End Status populates based on the State Status transferred from the prior district. If the receiving district has defined a Local End Status in the Enrollment Status Mapping tool that meets the following requirements, the Local End Status populates with that value:</p> <ul style="list-style-type: none"> <li>• Is an exact match of the sending district's State End Status on description.</li> <li>• Has the same State End Status mapped.</li> <li>• The end year is either null (blank) or after the end year of the enrollment.</li> </ul> <p>If no local code meets the above requirements, the Local End Status field displays blank. If the user saves the local enrollment End Status with a blank value, the existing State End Status saves to the database and displays on the student's enrollment history record.</p> <p>The Local End Status on the enrollment history import remains available for selection to allow for a district override. If the district overrides the value, the State End Status tied to the Local End Status is saved.</p>

### For National Records Exchange - State A to State B

There are no data transfers in the Enrollment History Import Wizard. The existing state and local enrollment statuses are transferred via the PDF Enrollment History document.

### For National Records Exchange and State Records Transfers

Local Start Status is not a required entry on the Import Wizard. However, it is still required on the student's Enrollment record. If a Local Start Status has not been provided, data imports with a blank Local Start Status and must be entered when any modification is made to the Enrollment record.

## Assessment Import Wizard

At this time, Assessment records are not included as part of a National Records Exchange request. NRE users will only receive an assessment summary for the student.

The following fields from the student's [Assessments tab](#) will transfer when not null in the former district:

Assessments		
Comments	Percent	Result
Date	Percentile	Scale Score
Equivalent	Question Count	Test
Normal Curve	Raw Score	

Assessment information, including test scores, can be mapped and imported to the new district as long as the new district has already established the proper test structure.

The test structure **MUST** exist before the import can occur. It must be formatted in a manner appropriate to receiving the assessment information.

### Assessment Import Wizard

The new district may not wish to import all tests results. Any time a test score should not be imported, the user can set the **Test** field value to **Not Imported** and the results will be excluded from the import.

### Excluding a Test from Import

## Immunization Import Wizard

The following fields from the student's [Immunization tab](#) will transfer when not null in the former district:

Immunization Certificate		
Certificate Date	Expiration Date	Type
Vaccine		
Dose Date(Shot Date)	Waiver Date	Vaccine Name
Waiver (Exemption)		

**Immunization Certificate**  
Certificate Date Expiration Date Type  
    
  
**Vaccine Name**  
Diphtheria-tetanus-pertussis, combined [DTaP, DTP]  07/20/1993  09/23/1993  11/18/1993  05/10/1995  01/22/1998   
Diphtheria-tetanus-pertussis, combined [DTaP, DTP]        
  
Polio [IPV, OPV]  07/20/1993  09/23/1993  05/24/1994  01/22/1998   
Polio [IPV, OPV]        
  
Measles-Mumps Rubella [MMR]  08/09/1994  01/22/1998   
Measles-Mumps Rubella [MMR]      
  
Hepatitis B [Hep B]  05/27/1993  07/20/1993  11/18/1993   
Hepatitis B [Hep B]        
  
Hemophilus influenza, type B [Hib]  07/20/1993  09/23/1993  11/18/1993   
Hemophilus influenza, type B [Hib]

### Immunization Import Wizard

Immunization certificates, vaccine names, shot dates and exemptions can be imported to the new district. In the **Vaccine Name** fields, the import wizard will display the vaccine it presumes to be the correct match.

Vaccine names are core fields in Campus and should not vary between districts; however, if necessary, the **Vaccine Name** field allows the user to specify the vaccine to which the record should be mapped.

When importing immunization data to a student that already has an existing Immunization Certificate record, the existing record is deleted and the new Immunization Certification is imported.

## Health Condition Import Wizard

The following fields from the student's health [Conditions tab](#) will transfer when not null in the former district:

### Health Conditions

Code	Doctor Name	Initials
Comments	Doctor Phone	Start Date
Description	End Date	Status

Additional State-Specific fields such as Auto Accident Related, Auto Accident State, etc.

Health Condition

\*Code

Z91.030

\*Description

Bee allergy status (\*use fc

\*Start Date

09/11/2017

End Date

\*Status (N: )

N: Not Resolved

\*Initials

trc

Doctor Name

Doctor Phone

( ) - x

Auto Accident Related

☐

Auto Accident State

Employment Related

☐

Other Accident Related

☐

Comments

Imported from 301 Knox County.

Health Alerts

\*Program

Behavior

☐ Don't Import

\*Start Date

10/09/2017

End Date

User Warning

1st medical flag

Description

Health Alerts

\*Program

Medical

☐ Don't Import

\*Start Date

11/06/2017

End Date

User Warning

2nd medical flag

Description

Save

### Health Conditions Import Wizard - Health Condition

For existing flagged Programs with a Program Type = Medical, the receiving district is allowed to import these records via the Health Alerts import section.

For programs that should not be imported, select the **Program** and mark the **Don't Import** checkbox.

The following Medical Programs values will be imported per selected program:

### Health Alerts

Program	Start Date	End Date
User Warning	Description	

Health Condition

\*Code

Z91.030

\*Description

Bee allergy status (\*use fc

\*Start Date

09/11/2017

End Date

\*Status (N: )

N: Not Resolved ▾

\*Initials

trc

Doctor Name

Doctor Phone

( ) - x

Auto Accident Related

☐

Auto Accident State

Employment Related

☐

Other Accident Related

☐

Comments

Imported from 301 Knox County.

Health Alerts

\*Program

Behavior ▾

☐ Don't Import

\*Start Date

10/09/2017

End Date

User Warning

1st medical flag

Description

Health Alerts

\*Program

Medical ▾

☐ Don't Import

\*Start Date

11/06/2017

End Date

User Warning

2nd medical flag

Description

Save

#### Health Conditions Import Wizard - Health Alerts

Fields in red are required for the record to properly save.

The health conditions and treatment records can be mapped and imported into the new district as desired.

## Health Screening Import Wizard

The following data from the student's health [Screenings tab](#) will transfer when not null in the former district:

### Health Screenings

All data entered for a student in the health Screenings tab can be imported to the new district. Each screening type and associated field data will transfer.

Don't Import ☐

\*Date 05/21/2007

\*Type Health Appraisal

Comments  
Imported from 06001 Aberdeen 06-1.

HealthScreeningTuberculosis tbFree=false  
 HealthScreeningGrowth growthDate=05/21/2007 growthHeight=64.25 growthWeight=152.00  
 HealthScreeningHearing hearingDate=05/21/2007  
 HealthScreeningVision visionDate=05/21/2007  
 HealthScreeningDental religiousObjection=false proofOfappointment=false

### Health Screening Import Wizard

Fields in red are required for the record to properly save.

The text below the **Comments** field contains the screening information that will be imported to the student's Screening tab. If flagged, the **Don't Import** checkbox indicates that the selected screening entry will not be imported.

Don't Import ☐

\*Date 05/21/2007

\*Type Health Appraisal

Comments  
Imported from 06001 Aberdeen 06-1.

HealthScreeningTuberculosis tbFree=false  
 HealthScreeningGrowth growthDate=05/21/2007 growthHeight=64.25 growthWeight=152.00  
 HealthScreeningHearing hearingDate=05/21/2007  
 HealthScreeningVision visionDate=05/21/2007  
 HealthScreeningDental religiousObjection=false proofOfappointment=false

### Health Screening Import Wizard - Don't Import Option

## IEP Import Wizard

IEP data is pulled from the Plan folder of the [Special Education Documents tab](#) in the former district.

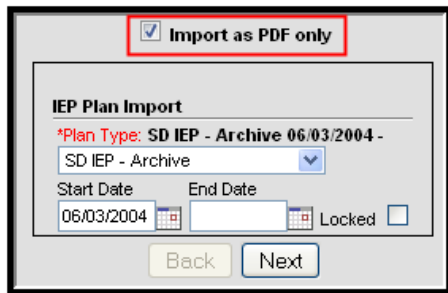
## IEP Import

The former district sends a student's most recent, active and locked IEP plan for importing in the new district database. All services related to the plan are included.

When not null, these items are sent to the new district: **Plan Type** name, **Start Date/End Date** of plan, names of all **Service(s)** provided by plan, name of the **Service Provider** and **Service Position** title.

Bolded text indicates values sent from the former district. These values are NOT imported into the new district.

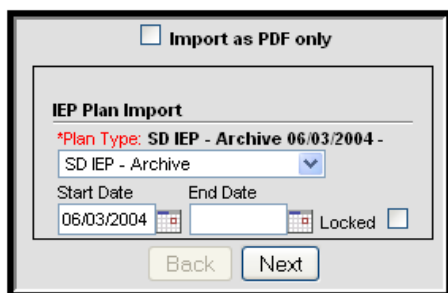
If the plan should be imported as a PDF to the Forms section of the Documents tab, flag the **Import as PDF only** checkbox. When this box is flagged, the IEP will NOT be imported to the Plan area of the Documents tab and will NOT be editable.



The screenshot shows the 'IEP Plan Import' form. At the top, the checkbox 'Import as PDF only' is checked and highlighted with a red rectangle. Below this, the form displays the title 'IEP Plan Import'. The 'Plan Type' is set to 'SD IEP - Archive' with a dropdown arrow. The 'Start Date' is '06/03/2004' and the 'End Date' is empty. There is a 'Locked' checkbox which is unchecked. At the bottom, there are 'Back' and 'Next' buttons.

*IEP Plan Import - Import as PDF Only*

When importing the plan, the new district is required to map the **Plan Type** to a similar item within the district. The closest match is auto-selected upon import.



The screenshot shows the 'IEP Plan Import' form. At the top, the checkbox 'Import as PDF only' is unchecked. Below this, the form displays the title 'IEP Plan Import'. The 'Plan Type' is set to 'SD IEP - Archive' with a dropdown arrow. The 'Start Date' is '06/03/2004' and the 'End Date' is empty. There is a 'Locked' checkbox which is unchecked. At the bottom, there are 'Back' and 'Next' buttons.

*IEP Plan Import*

The **Start Date/End Date(s)** are transferred from the former district and may be modified, as necessary.

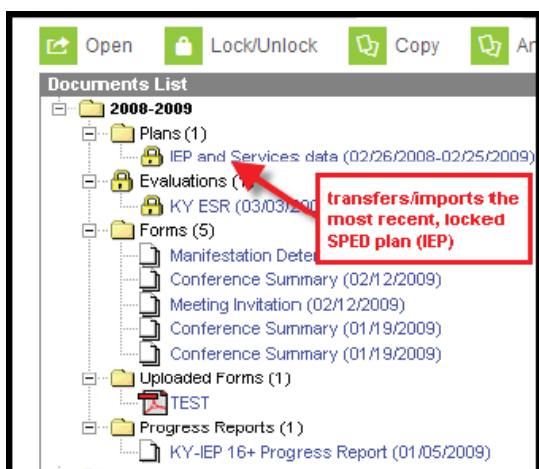
The **Locked** checkbox should be flagged if the new district wants to import the plan in locked format so only an administrator with the proper tool rights can modify it.

Each **Service** associated with the plan will be included in the import. If the service should be imported, it must be mapped to a similar item within the district. If a service should not be imported, the **Do Not Import the following service** checkbox should be flagged.

#### *IEP Services Import*

The **Service Provider** and **Service Position** fields may be mapped, as desired. The **Display on Print** checkbox should be flagged if the Service Position field should display when the plan is printed in lieu of the Service Provider's name.

After importing, the transferred IEP will appear in the Plans section of the current school year on the student's [Documents tab](#).



#### *Plans Section of the Documents tab*



If a document that has the same name as a document already in the system is imported, the Student Records Transfer compares the last modified date on the form. Several import options are available:

☐ Import as PDF only

**IEP Plan Import**

\*Plan Type: ME State IEP 05/17/2017 - 05/15/2018

ME State IEP (Type Match)

The document being imported matches a document already in the database.

Transferring Document Modified Timestamp: 05/17/2017 15:32 (newer)

Local Document Modified Timestamp: 05/17/2017 15:29

☐ Keep both documents

☐ Keep the local document

☐ Keep the transferring document

☐ Keep the transferring document as PDF only

Start Date: 05/17/2017 End Date: 05/15/2018 Locked ☐

Back Next

*Import Comparison Options*

## Special Education Evaluation Import Wizard

Evaluation data is pulled from the Evaluations folder of the [Special Education Documents tool](#) in the former district.

**Kentucky Only:** The KY Consent to Evaluation and KY Referral documents do NOT transfer using this import tool; instead, they are imported through the Special Ed Documents as read-only PDF documents.

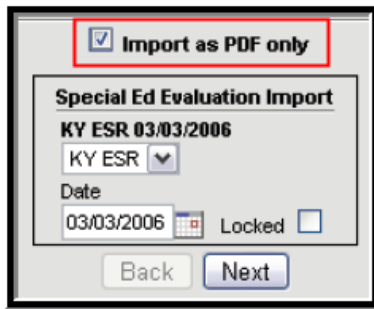
### Evaluation Import

The former district sends the student's most current special education evaluation.

When not null, all existing editor data for the evaluation is transferred (e.g., all field data from the evaluation header, information editors, results).

**Bolded text indicates values sent from the former district. These values are NOT imported into the new district.**

If the plan should be imported as a PDF to the Forms section of the Documents tool, flag the **Import as PDF only** checkbox. When this box is flagged, the IEP will NOT be imported to the Plan area of the Documents tab and will NOT be editable.



The dialog box is titled "Special Ed Evaluation Import". It contains a checkbox labeled "Import as PDF only" which is checked. Below this, there is a dropdown menu showing "KY ESR" and a date field showing "03/03/2006". To the right of the date field is a "Locked" checkbox which is unchecked. At the bottom are "Back" and "Next" buttons.

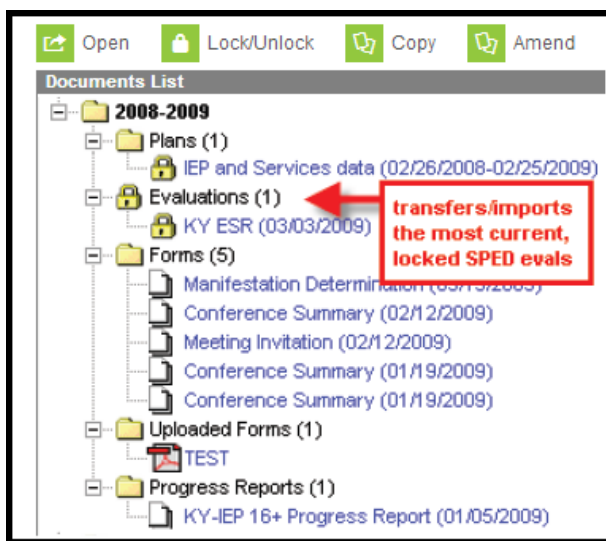
### *Special Ed Evaluation Import*

When importing, the new district is required to map the evaluation to a similar item within the district. When an evaluation is mapped, all data will transfer, provided the proper editors are enabled for that evaluation in the new district ([System Administration > Special Education > Eval Types](#)).

The evaluation **Date** is transferred from the former district and may be modified, as necessary.

The **Locked** checkbox should be flagged if the new district would like the import the evaluation in locked format so only an administrator with the proper tool rights can modify it.

After importing, the transferred evaluation will appear in the Evaluations section of the current school year on the student's [Documents tab](#).



### *Locked Evaluation on the Documents Tab*

If a document that has the same name as a document already in the system is imported, the Student Records Transfer compares the last modified date on the form. Several import options are available:

☐ Import as PDF only

**IEP Plan Import**

\*Plan Type: ME State IEP 05/17/2017 - 05/15/2018  
 ME State IEP (Type Match)

The document being imported matches a document already in the database.

Transferring Document Modified Timestamp: 05/17/2017 15:32 (newer)  
 Local Document Modified Timestamp: 05/17/2017 15:29

☐ Keep both documents  
☐ Keep the local document  
☐ Keep the transferring document  
☐ Keep the transferring document as PDF only

Start Date: 05/17/2017 End Date: 05/15/2018 Locked ☐

Back Next

### Import Comparison Options

## Special Education Documents Import Wizard

All existing materials are transferred from the [Special Education Documents tab](#) in the old district.

### SPED Documents Import

The former district sends ALL existing special education documents related to the student, including any documents stored in the Plans, Evaluations, Forms, Uploaded Forms, Progress Reports and historical folders.

These documents are imported as PDFs directly to the appropriate folder of the Special Education Documents tab of the student.

The most recent, locked IEP plan and evaluation are transferred in separate import wizards and not through this import.

Users have the option to exclude documents from the import process by flagging the **Do not import the following document** checkbox, as necessary.

The **Name** must be designated for all import documents. The original name will display as transferred from the former district.

**Special Ed Documents Import**

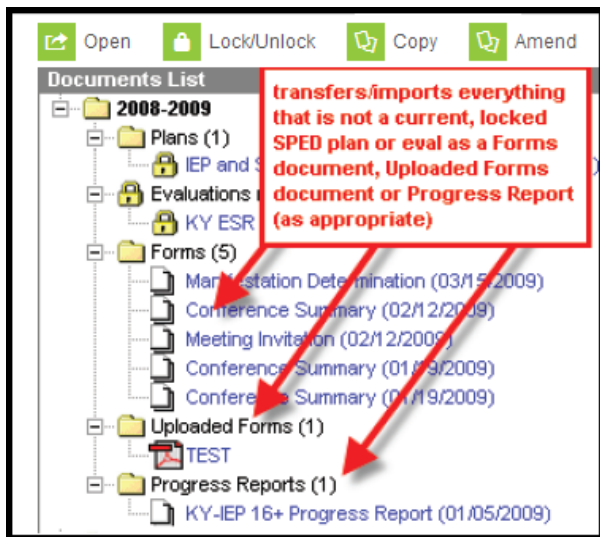
☐ Do not import the following document.

\*Name: IEP Addendum Archive ☒

Save

### Special Ed Documents Import

After importing, transferred documents will be uploaded to the appropriate folder on the student's Documents tool within the current school year.



*Other Documents on the Documents tab*

If a document that has the same name as a document already in the system is imported, the Student Records Transfer compares the last modified date on the form. Several import options are available:

☐ Import as PDF only

**IEP Plan Import**

\*Plan Type: ME State IEP 05/17/2017 - 05/15/2018

ME State IEP (Type Match)

The document being imported matches a document already in the database.

Transferring Document Modified Timestamp: 05/17/2017 15:32 (newer)

Local Document Modified Timestamp: 05/17/2017 15:29

☐ Keep both documents

☐ Keep the local document

☐ Keep the transferring document

☐ Keep the transferring document as PDF only

Start Date: 05/17/2017 End Date: 05/15/2018 Locked ☐

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*Import Comparison Options*

## Special Education Summary Import Wizard

The most recent State Reported and Data Entry record from the [Special Education Summary](#) tool transfers as live, editable data. The only fields that apply are Start Date, End Date, and Special Ed Setting.

**Student Records Transfer - Special Ed State Import**

Enter the transferred data from the releasing district into your own local database. Enrollment Start/End codes can be mapped to a local value if applicable. Wherever data is named the same in the releasing data, this will already be done for you.  
 Local Start Status is not a required selection on this tool, but is required on the student's Enrollment record. If Local Start Status has not been provided, data imports with a blank Local Start Status, and must be entered when any modification is made to the Enrollment record.

Start Date: 01/01/2025	End Date: 07/23/2027
Special Ed Setting: 03	

*Special Education Summary Import Wizard*

Click **Save** to import the Special Education Summary record.

## PLP Plan Import Wizard

PLP data is pulled from the Plan folder of the [PLP Documents tab](#) in the old district.

### PLP Plan Import

The former district sends a student's most recent, active, and locked PLP plan for import into the new district database. The plan includes all related services.

When not null, these items are sent to the new district: **Plan Type** name, **Start Date/End Date** of plan, names of all **Service(s)** provided by plan, name of the **Service Provider** and **Service Position** title.

Bold text indicates values sent from the former district. These values are NOT imported into the new district.

If the plan should be imported as a PDF to the Forms section of the Documents tab, flag the **Import as PDF only** checkbox. When this box is flagged, the PLP will be NOT be imported to the Plan area of the Documents tab and will NOT be editable.

#### *PLP Plan Import Wizard*

When importing the plan, the new district is required to map the **Plan Type** to a similar item within the district. The closest match is auto-selected upon import.

#### *PLP Plan Import*

The **Start Date/End Date(s)** are transferred from the former district and may be modified, as necessary.

The **Locked** checkbox should be flagged if the new district would like the import the plan in locked format so only an administrator with the proper tool rights can modify it.

Each **Service** associated with the plan will be included in the import. If the service should be imported, it must be mapped to a similar item within the district. If a service should not be imported, the **Do Not Import the following service** checkbox should be flagged.

#### *PLP Services Import*

The **Service Provider** and **Service Position** fields may be mapped, as desired. The **Display on Print** checkbox should be flagged if the Service Position field should display when the plan is printed in lieu of the Service Provider's name.

After importing, the transferred PLP will appear in the Plans section of the current school year on the student's [Documents tab](#).



#### *Locked Plans on the PLP Documents Tab*

If a document is imported that has the same name as a document already in the system, the Student Records Transfer compares the last modified date on the form. Several import options are available:

☐ Import as PDF only

**IEP Plan Import**

\*Plan Type: ME State IEP 05/17/2017 - 05/15/2018

ME State IEP (Type Match) ▼

The document being imported matches a document already in the database.

Transferring Document Modified Timestamp: 05/17/2017 15:32 (newer)  
Local Document Modified Timestamp: 05/17/2017 15:29

☐ Keep both documents  
☐ Keep the local document  
☐ Keep the transferring document  
☐ Keep the transferring document as PDF only

Start Date: 05/17/2017 End Date: 05/15/2018 Locked ☐

Back Next

#### *Import Comparison Options*

## PLP Documents Import Wizard

All existing materials are transferred from the [PLP Documents tab](#) in the former district.

## PLP Documents Import

The former district sends ALL existing PLP documents related to the student, including any documents stored in the Plans, Forms, Uploaded Forms and historical folders.

These documents are imported as PDFs directly to the appropriate folder of the PLP Documents tab of the student.

The most recent, locked PLP plan is transferred in a separate import wizard and not through this import.

Users have the option to exclude documents from the import process by flagging the **Do not import the following document** checkbox, as necessary.

A **Name** must be designated for all import documents. The original name will display as transferred from the former district.

**PLP Documents Import**

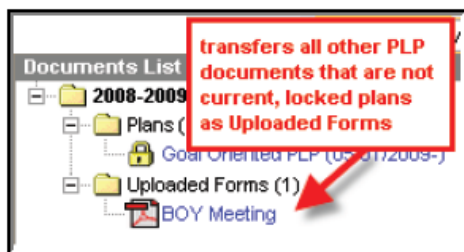
☐ Do not import the following document.  
 \*Name: Archive  
 PLP BOY Meeting ☒

☒ Do not import the following document.  
 \*Name: Archive  
 PLP EOY Meeting ☒

Save

### PLP Documents Import

After importing, transferred documents will upload to the appropriate folder within the current school year on the student's [Documents tab](#).



### Other Documents on the PLP Documents Tab

## EL Import Wizard

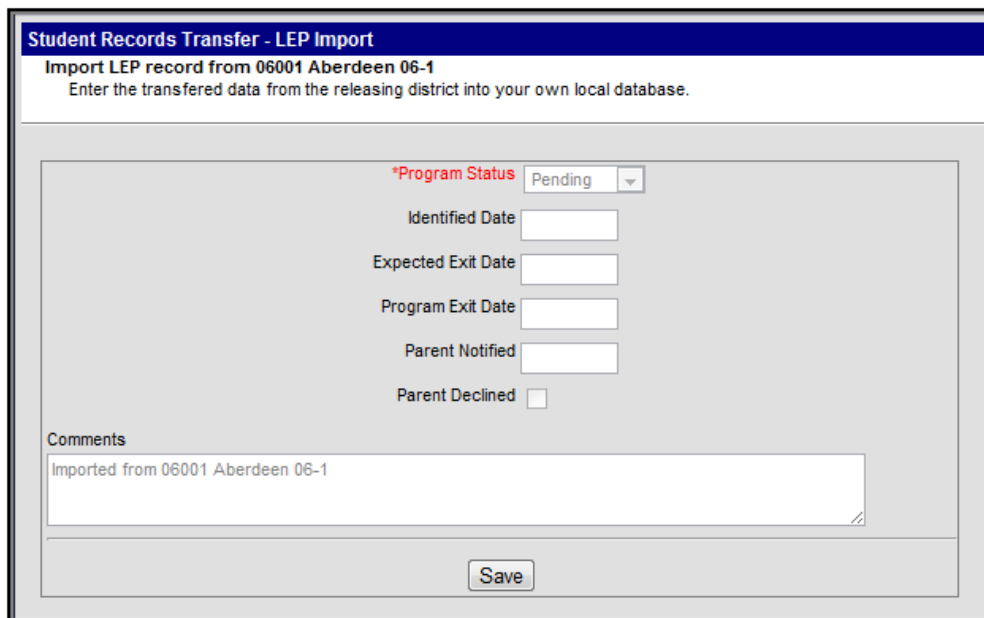


Available on a state-by-state basis

The following fields from the student's [EL tab](#) will transfer from the former district to the requesting district:

EL Import		
Program Status	Identified Date	Expected Exit Date
Program Exit Date	Parent Notified	Parent Declined

The EL Import wizard is a read-only editor displaying the student's current EL record information. Review the data and select the **Save** button to save the EL record to the database. The district who released the record is displayed in the **Comments** field.



### EL Import

If the imported EL record is still active, it will remain active within the district that imported it.

## Records Transfer Objects Table

The following table provides information on the *recordsTransfer* table.

The former district cannot preview or control which records are sent in the transfer. In addition, after a record is requested or released, it cannot be canceled.

Description	Transfer Objects
<b>Information about the specific transfer request</b>	<ul style="list-style-type: none"> <li>• transferID</li> <li>• transferGUID</li> <li>• state</li> <li>• status</li> </ul>
<b>Information about the district and user requesting the records</b>	<ul style="list-style-type: none"> <li>• requestDistrictID</li> <li>• requestStateLinked</li> <li>• requestDate</li> <li>• requestDistrictNumber</li> <li>• requestDistrictName</li> <li>• requestName</li> <li>• requestUserID</li> <li>• requestUserName</li> <li>• requestUserPhone</li> <li>• requestUserEmail</li> <li>• requestCertInfo</li> <li>• requestStateDistrictID</li> <li>• requestComments</li> </ul>
<b>Comparison of the student's state ID and person IDs at all levels (both districts and state)</b>	<ul style="list-style-type: none"> <li>• stateID</li> <li>• requestPersonID</li> <li>• statePersonID</li> <li>• releasePersonID</li> </ul>
<b>Basic student information</b>	<ul style="list-style-type: none"> <li>• studentLastName</li> <li>• studentFirstName</li> <li>• studentMiddleName</li> <li>• studentGender</li> <li>• studentBirthdate</li> <li>• studentSSN</li> <li>• studentGrade</li> <li>• studentStartDate</li> <li>• studentServiceType</li> </ul>
<b>Information about the district and user releasing the records</b>	<ul style="list-style-type: none"> <li>• releaseStateLinked</li> <li>• releaseDate</li> <li>• releaseDistrictNumber</li> <li>• releaseDistrictName</li> <li>• releaseName</li> <li>• releaseUserID</li> <li>• releaseUserName</li> <li>• releaseUserPhone</li> <li>• releaseUserEmail</li> <li>• releaseStateDistrictID</li> <li>• releaseComments</li> </ul>

## The student records transferred when released

See the [What is Transferred During a Student Records Transfer?](#) section for details.

### Transfer Objects

- xmlStudentRecord
- errorMessage
- otherID
- transcriptXML
- transcriptFOP
- censusXML
- censusFOP
- enrollmentXML
- enrollmentFOP
- scheduleXML
- scheduleFOP
- attendanceXML
- attendanceFOP
- assessmentXML
- assessmentFOP
- behaviorXML
- behaviorFOP
- healthConditionXML
- healthConditionFOP
- healthScreeningXML
- healthScreeningFOP
- healthImmunizationXML
- healthImmunizationFOP
- iepXML
- iepDataXML
- iepDocumentXML
- iepMTXML
- iepFOP
- iepMTFOP
- plpXML
- plpDataXML
- plpDocumentXML
- plpFOP
- plpEvaluationXML\*
- plpEvaluationDataXML\*
- plpEvaluationFOP
- literacyDataXML
- literacyDocumentXML
- literacyXML
- literacyFOP
- evaluationXML
- evaluationDataXML
- evaluationFOP
- reportCard1XML
- reportCard1FOP
- reportCard1Name
- reportCard2XML
- reportCard1FOP
- reportCard2Name

Description	Transfer Objects
	<ul style="list-style-type: none"> <li>• reportCard3XML</li> <li>• reportCard3FOP</li> <li>• reportCard3Name</li> <li>• reportCard4XML</li> <li>• reportCard4FOP</li> <li>• reportCard4Name</li> <li>• stateReportingXML</li> <li>• lepXML</li> <li>• lepFOP</li> <li>• lepServiceXML</li> <li>• lepServiceFOP</li> <li>• lepAccommodationXML</li> <li>• lepAccommodationFOP</li> </ul>
<b>Exchange information</b>	<ul style="list-style-type: none"> <li>• requestDistrictGUID</li> <li>• releaseDistrictGUID</li> </ul>

All items are not applicable to all states.