Student Records Transfer

Last Modified on 07/01/2026 11:43 am CDT

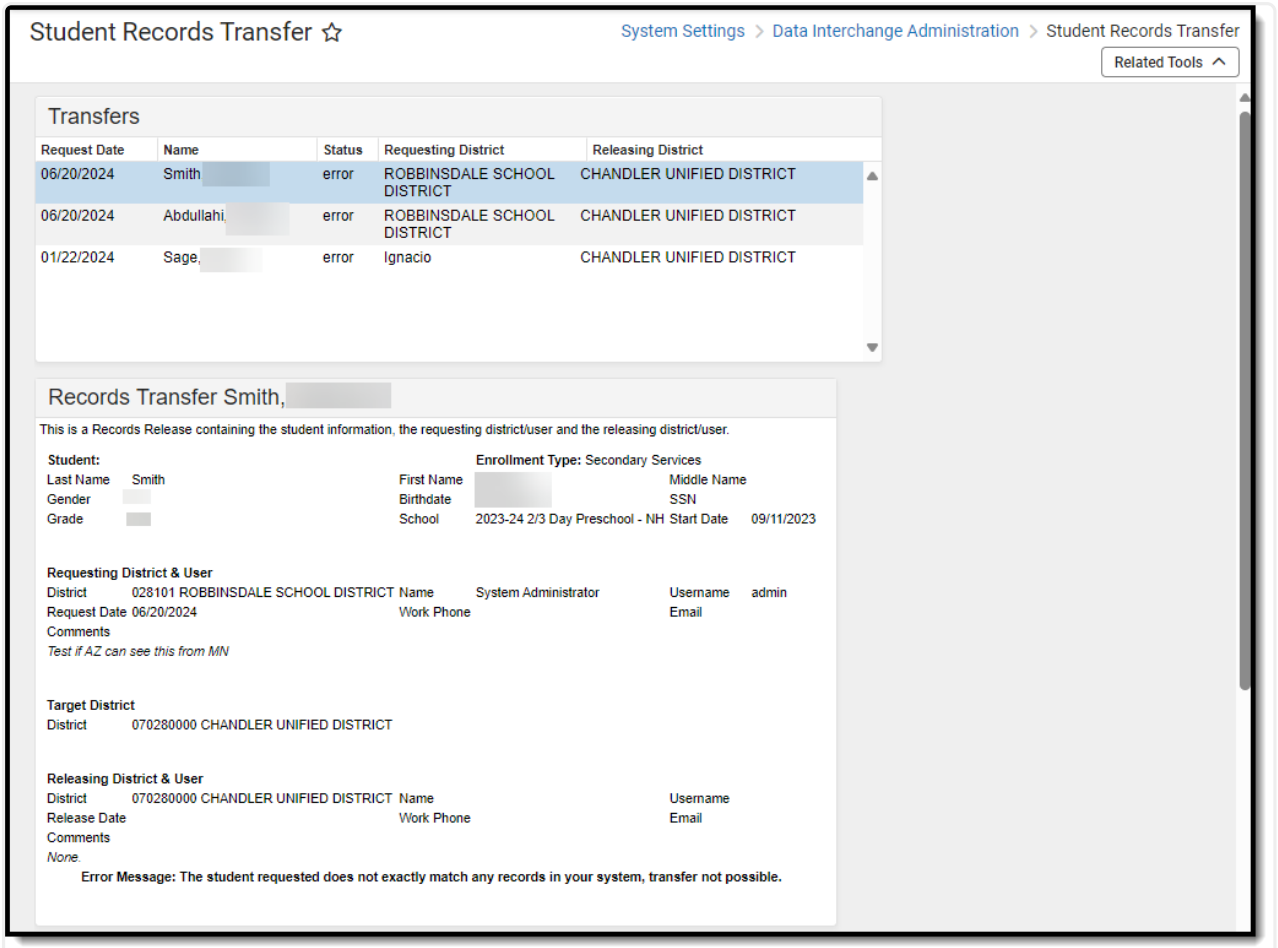
Tool Search: Student Records Transfer

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.



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.

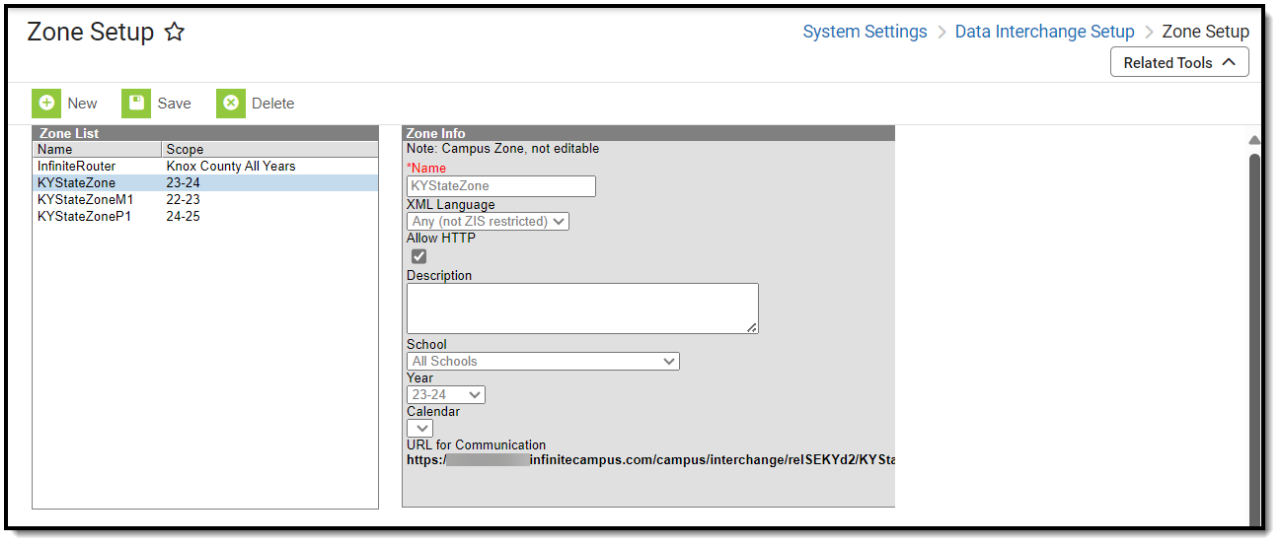
DIS Agents and Zones

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.

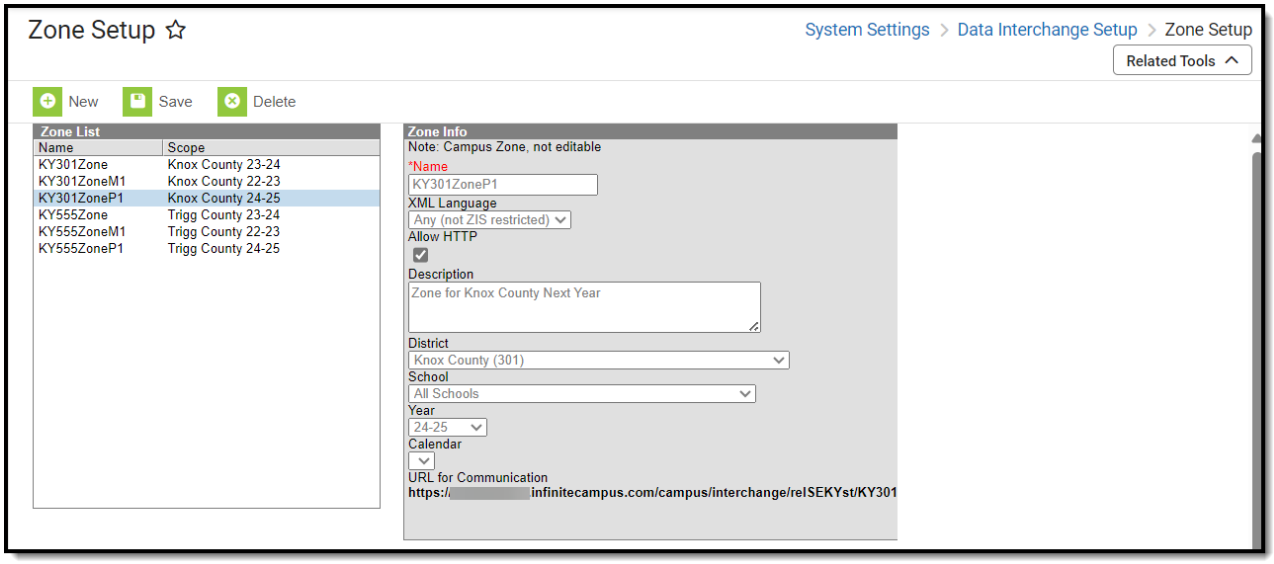
To allow an intrastate records transfer, Campus hosting sets up DIS communication between district and state agents.

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



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.



State-Level View of Each District Zone

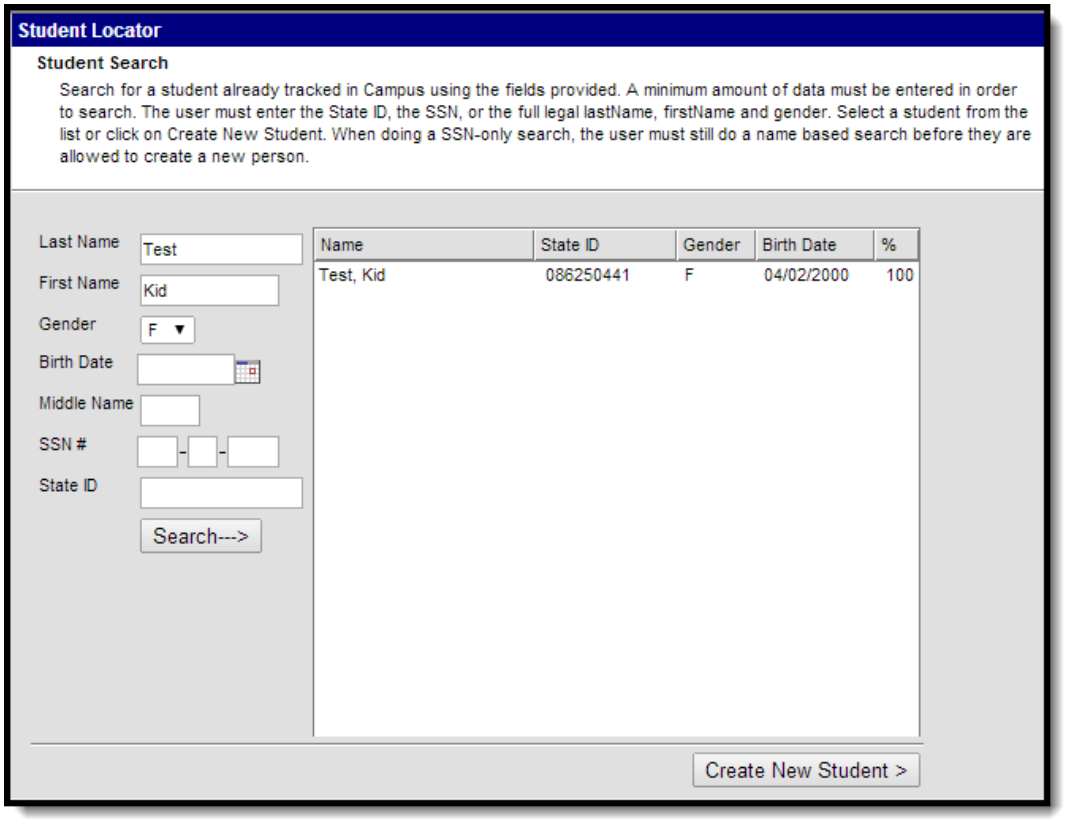
At the state level, a zone exists for each district within the state to facilitate communication and exchange messages related to student data, including records transfer within the state.

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.



Locating a Transfer Student for Enrollment in a New District

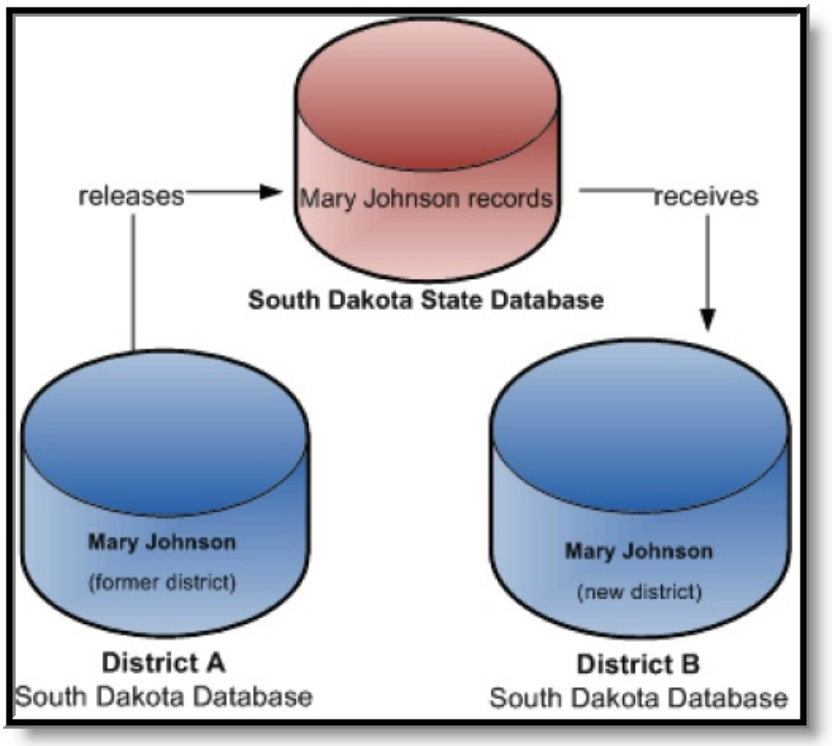
Transfer Student Records

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.



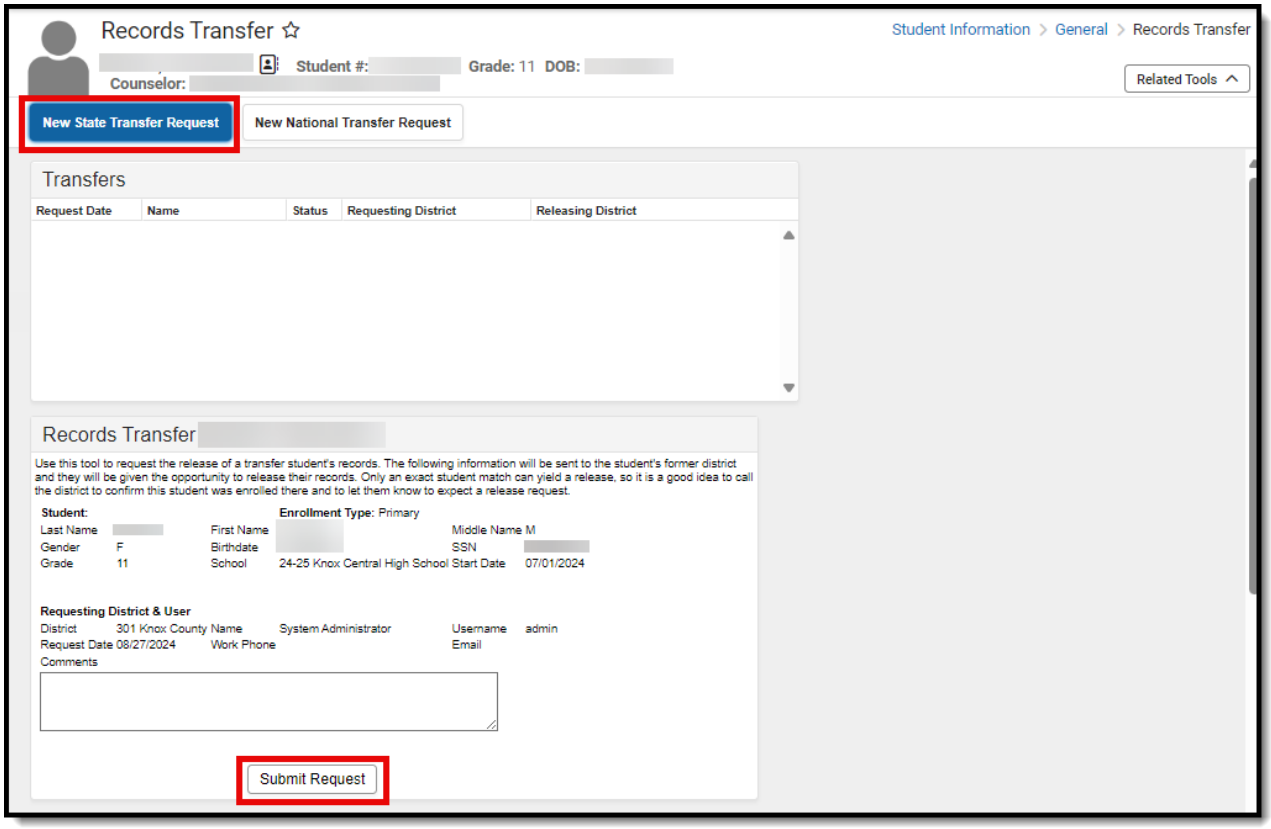
Sample Transfer of Student Records

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.

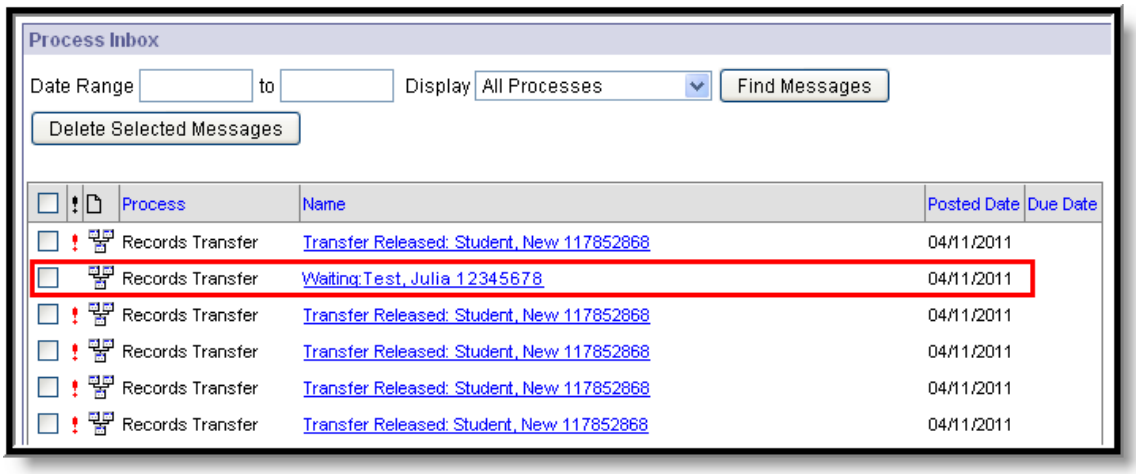


Records Transfer Tool

Process Inbox Status - Waiting

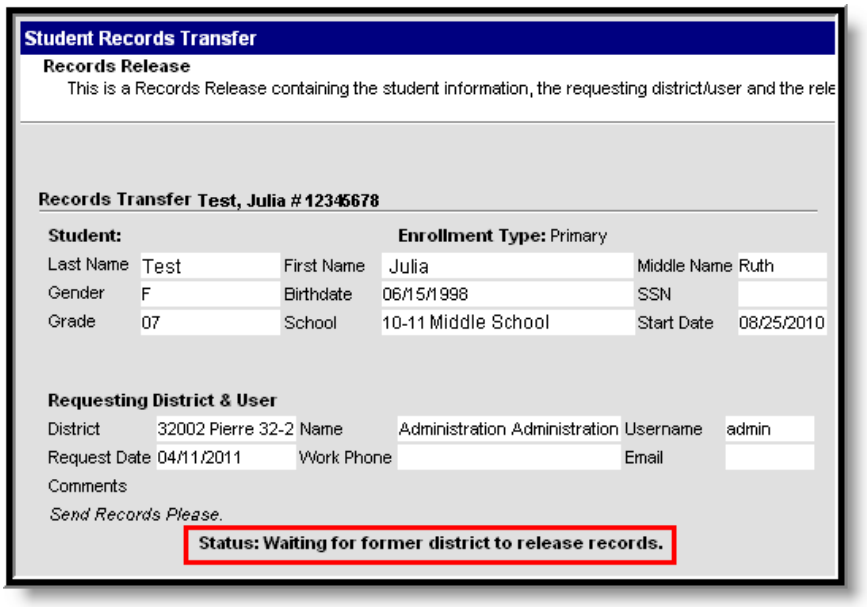
The new district's Process Inbox and the student's Records Transfer tab will both display a **Waiting** status until the former district responds.

> 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.



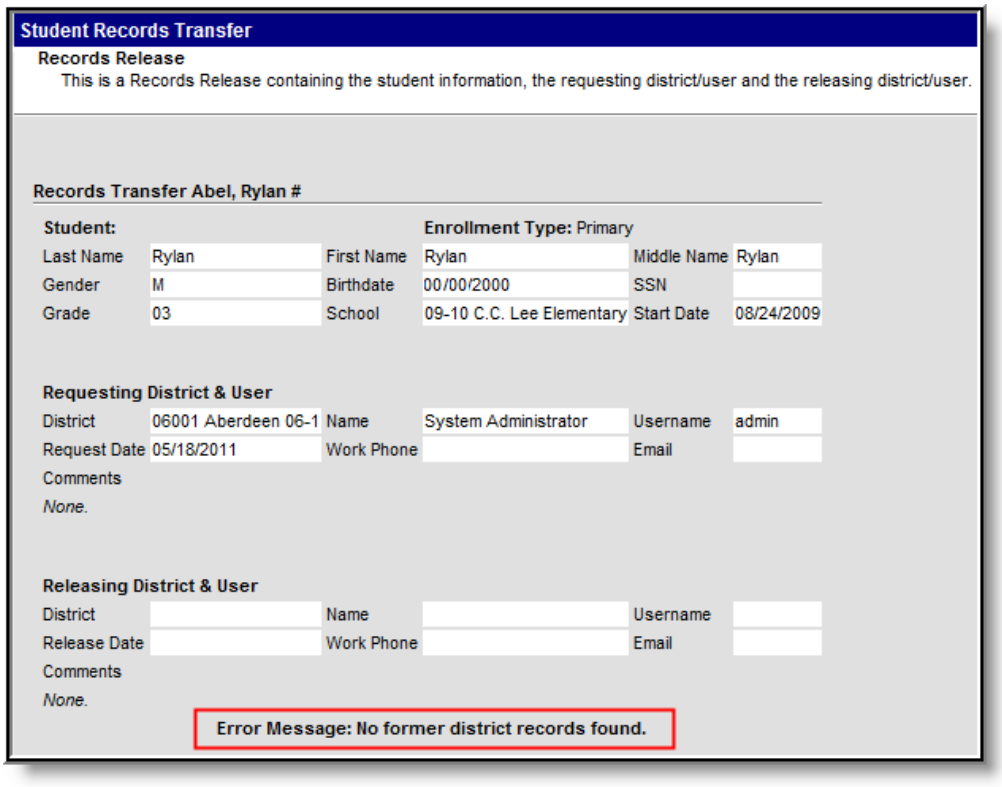
New District's Process Inbox - Waiting Status

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



Records Transfer Tab - Waiting

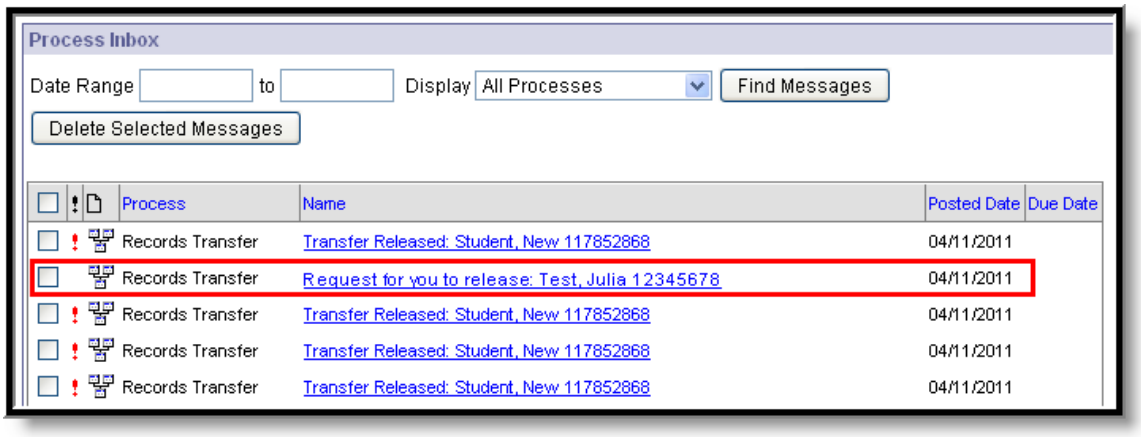
If the student's former district cannot be located because the state does not have a matching record for the student, a transfer error will appear to let the user know the request was unsuccessful. Clicking the link will display the reason for the error.



Records Transfer Tab - Error

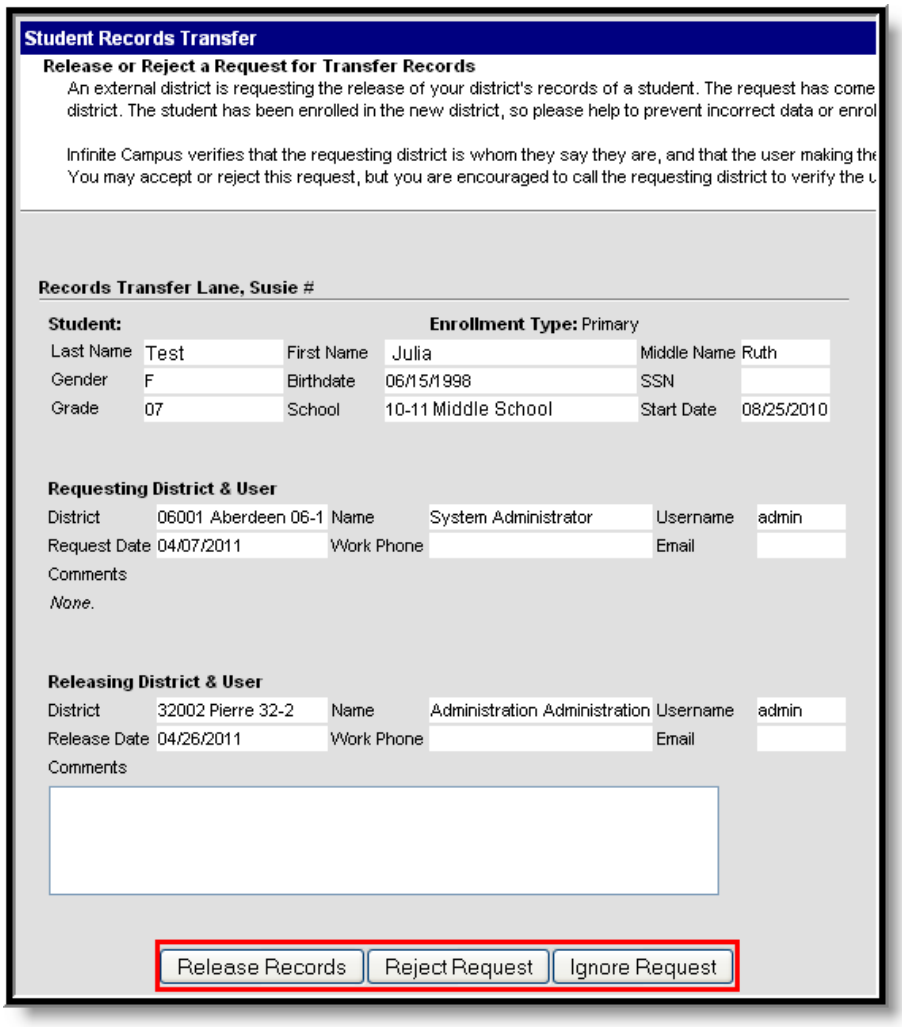
Former District Responds to a Student Records Transfer Request

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



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:



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

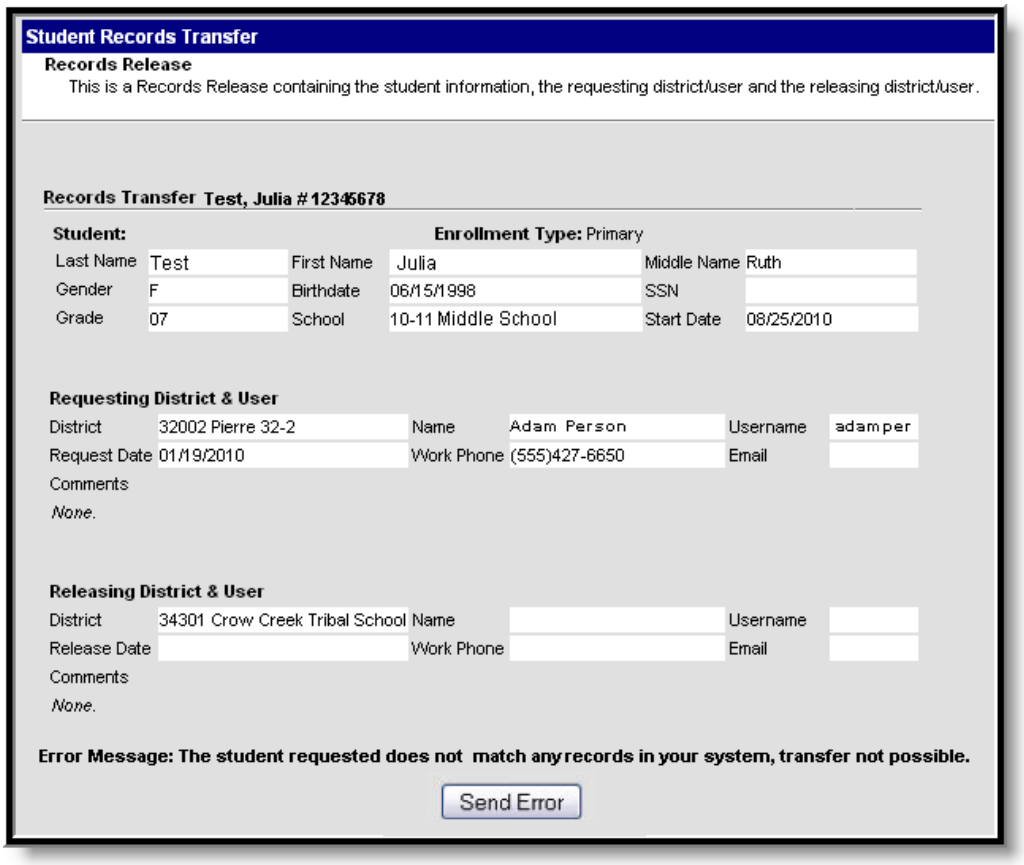
Selecting the **Edit** link will redirect the user to the student's Enrollments tab where his/her enrollment may immediately be ended.

> 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.



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

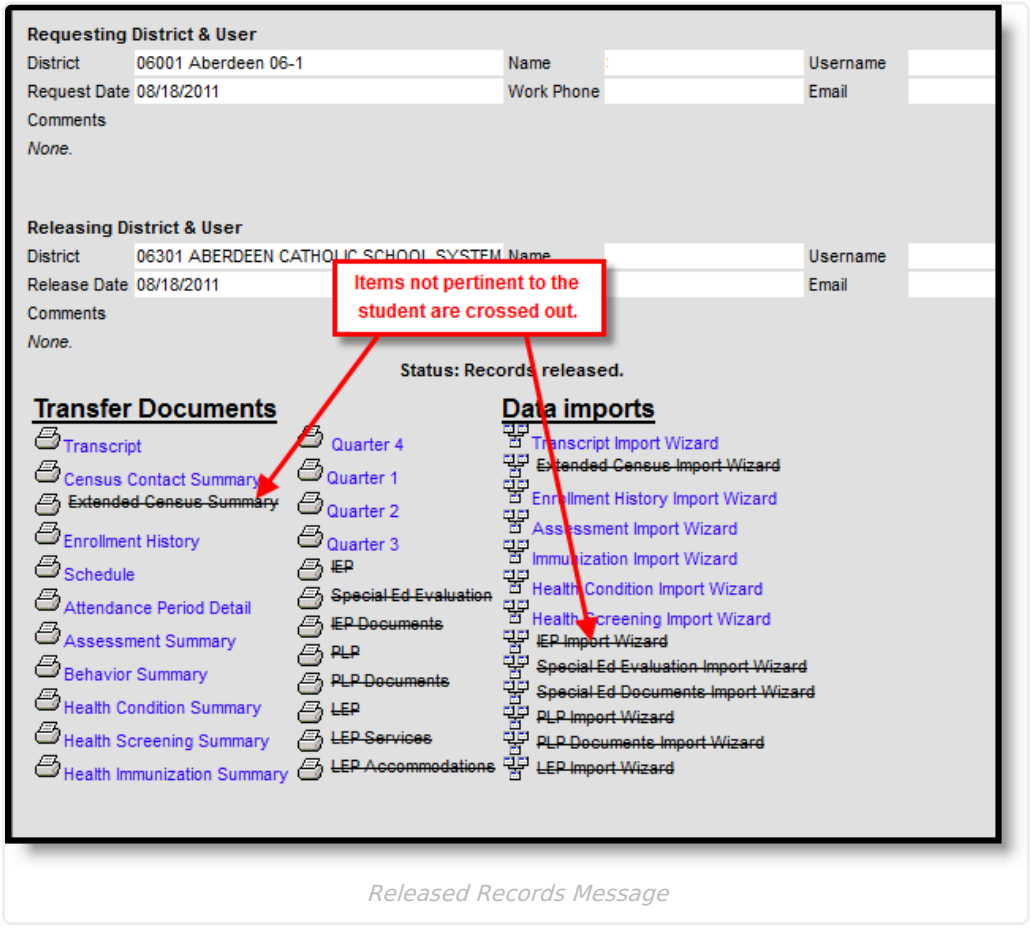
When the former district selects the **Release Records** option, records are sent to the new district. The new district will receive a message link in its Process Inbox containing the student's records and the former district's contact information.

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.



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

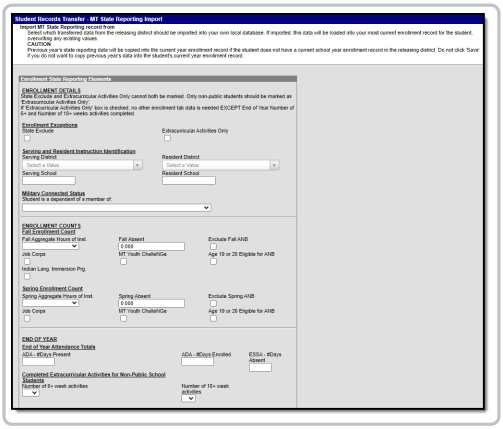
Record Type	Description and Logic	PDF is Sent	Data Import Wizard
Assessment	All District, State and National tests are transferred. This includes test dates and scores. At this time, Assessment records are not included as part of a National Records Exchange request. NRE users will only receive an assessment summary for the student.	Yes	Yes See the section for more information.
Attendance	Current year attendance records are transferred, including: • Dates • Codes • Descriptions/comments • Term summaries • Course summaries Attendance from previous years is not transferred	Yes	No
Behavior	All behavior records are transferred including: • Incidents • Events • Responses • Comments • Details • Resolutions • Roles • Locations • Classifications (Drugs, Harassment, Weapons)	Yes	No
Census Contact Summary	Current demographic information about the student and his/her contacts is transferred including: • Demographics Information • Contact Info • Mailing Addresses • Primary Household Data (with relationships) • Non-Household Relationships	Yes	No

Record Type	Description and Logic	PDF is Sent	Data Import Wizard
Counseling Documents	Counseling related documents entered on the Counseling Documents tool.	Yes	Yes
Enrollment History	All current and historical enrollment records are transferred. Future enrollment records are not sent.	Yes	Yes See the Enrollment History Import Wizard section for more information.
Extended Census	Additional demographics data is transferred including: • Birth Country • Date Entered US • Date Entered US School • Home Primary Language • Native American Language • Birth Verification • Nickname Only information from the student's most recent identity record is transferred.	Yes	Yes See the section for more information.
English Learners	EL program data is transferred.	Yes	Yes See the EL Import Wizard section for more information.
EL Services	All existing EL Services data is transferred via PDF.	Yes	No
EL Accommodations	All existing EL Accommodations data is transferred via PDF.	Yes	No
Foster Care	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
Health Condition	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: • Conditions • Treatments • Contact	Yes The Health Alerts Import Wizard transfers the following information: • Programs • Start/End Dates • User Warnings • Descriptions • Flagged Medical Programs See the Health Condition Import Wizard section for more information.
Health Documents	Health related documents entered on the Health Documents tool.	Yes	Yes
Health Screening	All student health screenings and details are transferred, including: • Screening Type • Date • Comments	Yes	Yes See the Health Screening Import Wizard section for more information.
Homeless Summary	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
Immunizations	All vaccine data is transferred, including: • Vaccines • Shot Dates • Current compliance status as determined by the former district • Exemptions/waivers • Immunization certifications (applicable to KY, KS and CA).	Yes	Yes See the Immunization Import Wizard section for more information.
Military Connections	A student's Military Connections records (for student and guardian).	Yes	No
PLP	A student's most recent, locked PLP for the current school year is transferred.	Yes	Yes See the PLP Import Wizard section for more information.
PLP Documents	All PLP documents entered on the PLP Documents tool.	Yes	Yes See the PLP Documents Import Wizard section for more information.
Report Cards	Report cards are only included in the transfer when the student has grading records in the active year. • Sends the first 4 report cards in the reports list, alphabetically	Yes	No
Schedule	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
Special Ed Documents	All Special Ed documents are transferred.	Yes	Yes See the Special Education Document Import Wizard section for more information.
Special Ed Evaluations	All current, locked Special Ed evaluations for the current school year are transferred.	Yes	Yes See the Special Education Evaluation Import Wizard section for more information.
Special Ed IEPs	All current, locked Special Ed IEPs for the current school year are transferred.	Yes	Yes See the IEP Import Wizard section for more information.
Special Education Summary	The most recent State Reported and Data Entry record transfers as live, editable data.	No	Yes See the Special Education Summary Import Wizard section for more information.
Transcript	The latest transcript record in the sending district's database is transferred. 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.	Yes The print format must be defined. If more than one transcript exists for the calendar, the latest one (in database order) will be sent.	Yes See the Transcript Import Wizard section for more information.
State-specific Transferred Information			

Record Type	Description and Logic	PDF is Sent	Data Import Wizard
KY State Reporting	Current year Kentucky-specific data is transferred, which includes the following: • State reporting enrollment elements. • Special ed enrollment elements. • Attendance summary counts. • Gifted and Talented records.	No	Yes
MT Supplemental Documents	Montana-specific Special Ed data is transferred.	No	Yes
MT State Reporting	Montana-specific enrollment data is transferred. 	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
- Progress Report Import Wizard (North Dakota Only)
- Consent for Evaluation Import Wizard (North Dakota Only)
- 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.

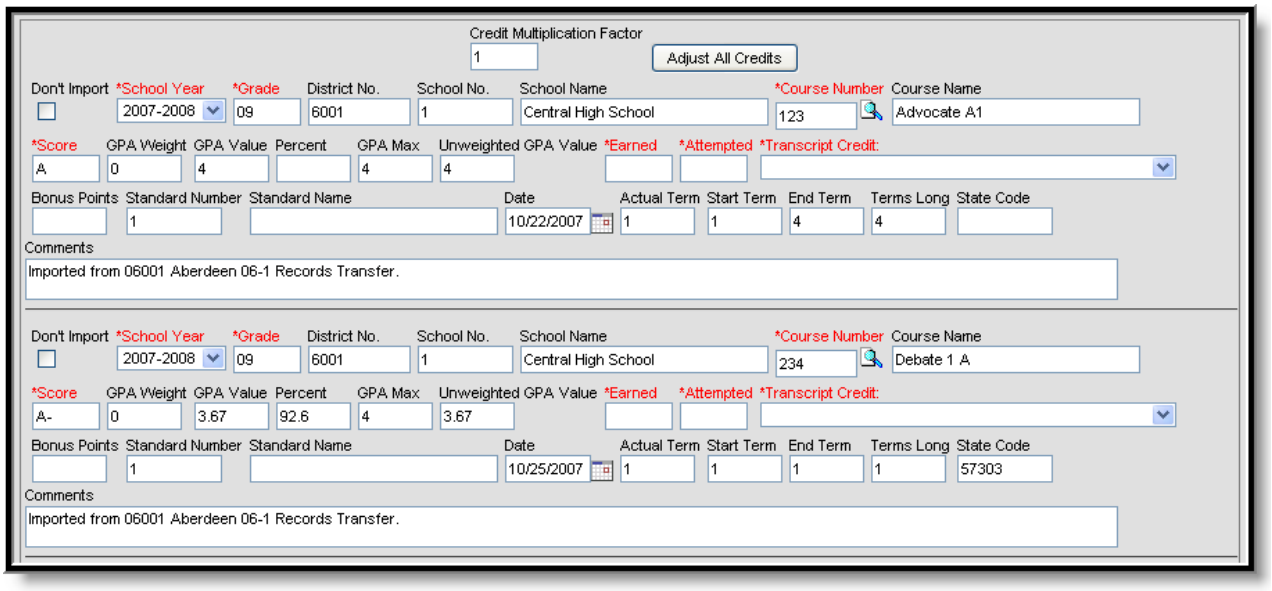
If the Default for Transfer preference is set on a transcript, this transcript is the default transcript sent when performing a records transfer via the National Records Exchange or Student Records Transfer. Only one transcript report per school can be marked as Default for Transfer.

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 This field is only available for states using SCED course codes.
		SCED Course Identifier This field is only available for states using SCED course codes.

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.



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.

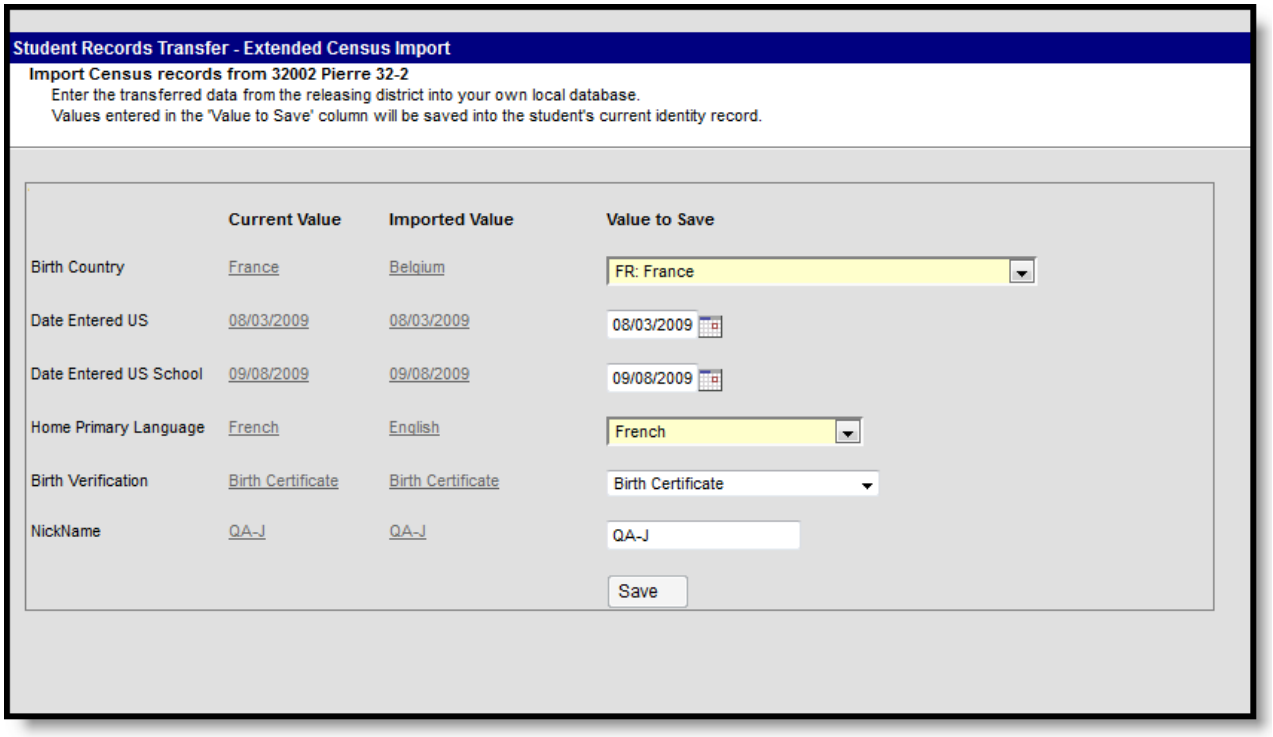
If flagged, the **Don't Import** checkbox indicates that the selected transcript entry will not be imported as part of the student's transcript history.

> 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	



Extended Census Import Wizard

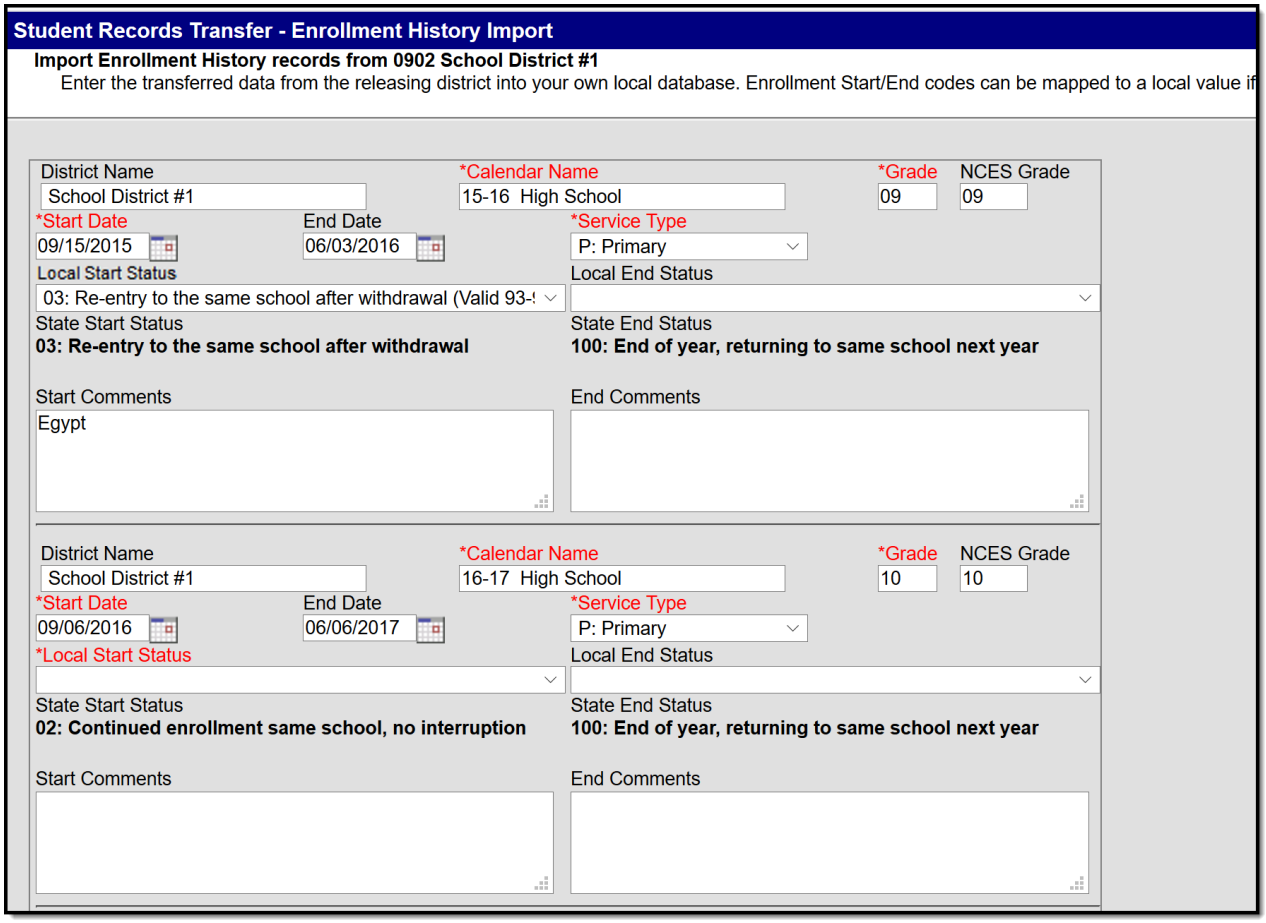
Enrollment History Import Wizard

The following fields from the student's Enrollment record 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 Action
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.



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
Local Start Status is not a required field when data is transferred, but it is required on the student's enrollment record. Local Start Status populates based on the State Start Status transferred from the prior district. 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: • Is an exact match of the sending district's State Start Status on description. • Has the same State Start Status mapped. • The end year is either null (blank) or after the end year of the enrollment. 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. 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.	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: • Is an exact match of the sending district's State End Status on description. • Has the same State End Status mapped. • The end year is either null (blank) or after the end year of the enrollment. 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. 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.

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

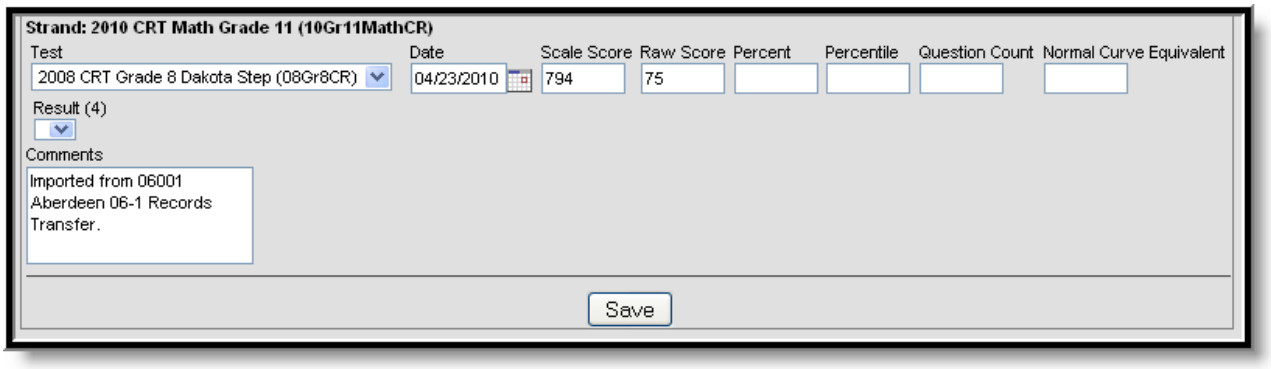
At this time, Assessment records are not included as part of a National Records Exchange request. NRE users will only receive an assessment summary for the student.

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	

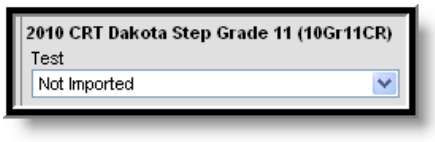
Assessment information, including test scores, can be mapped and imported to the new district as long as the new district has already established the proper test structure.

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.

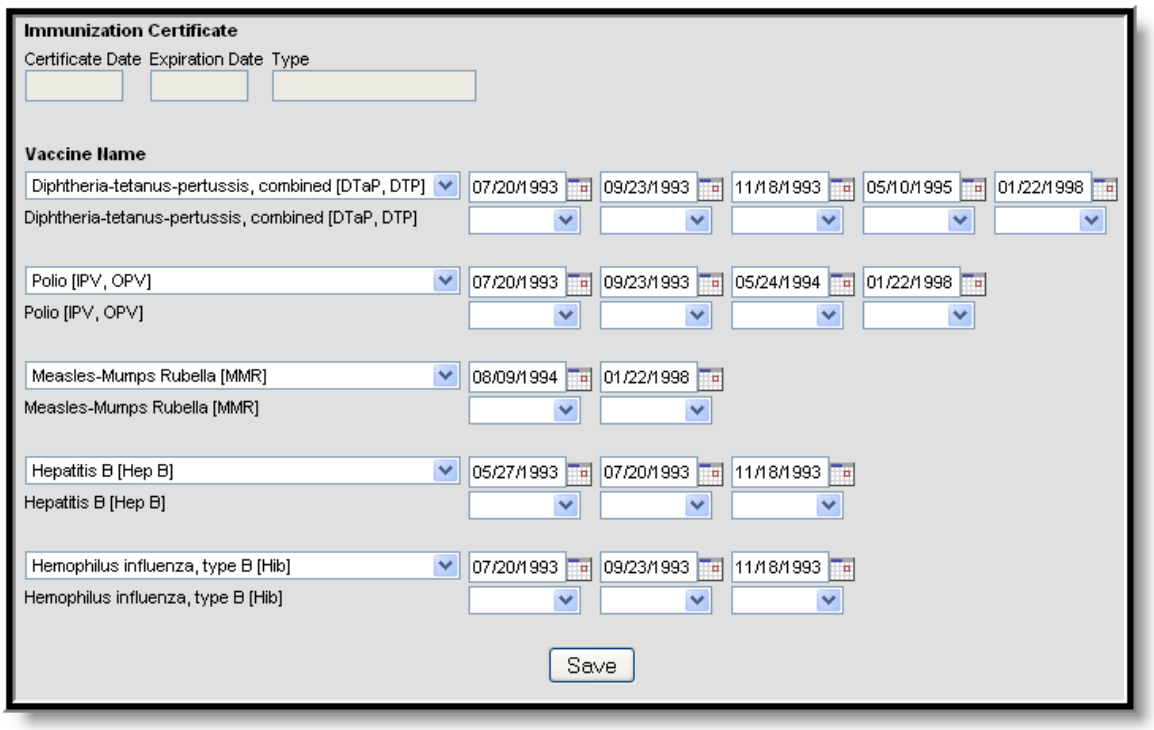


Excluding a Test from Import

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 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.

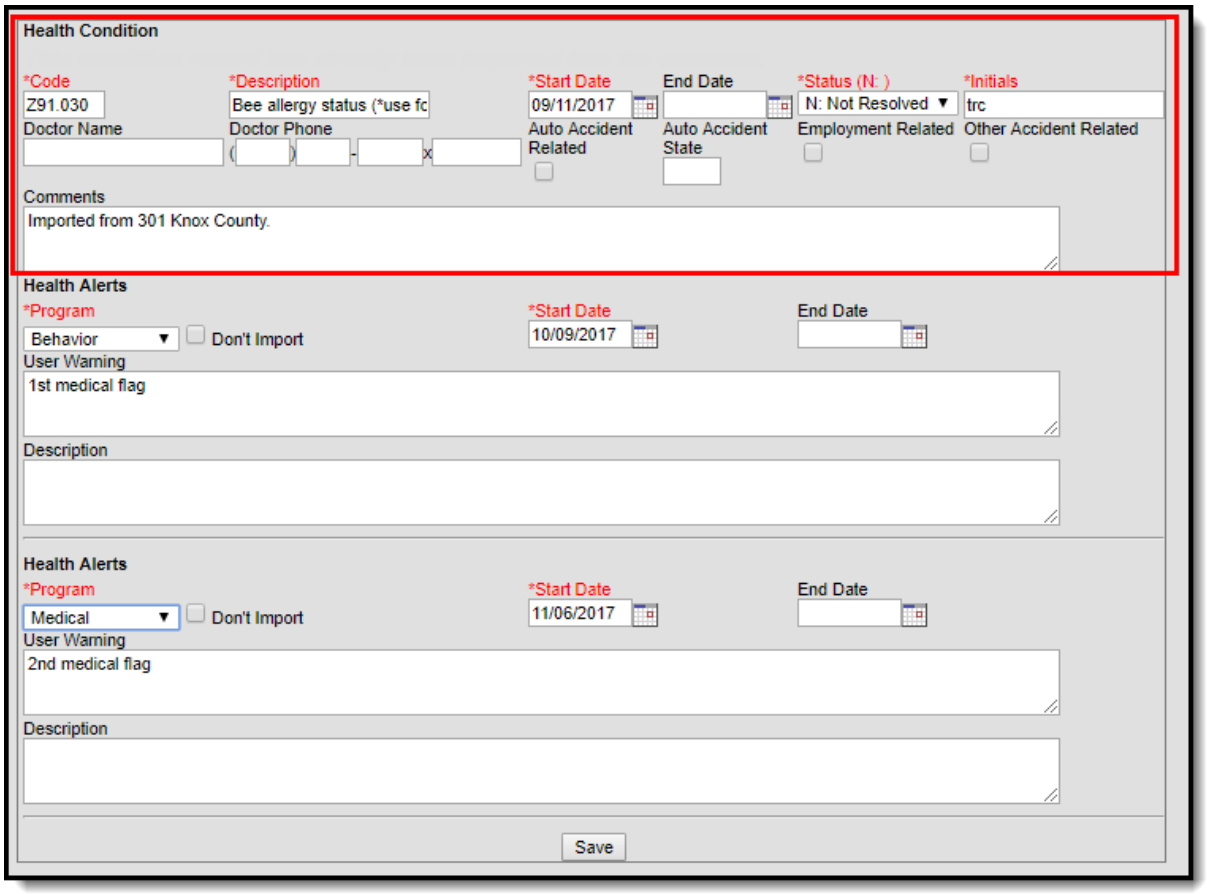
Vaccine names are core fields in Campus and should not vary between districts; however, if necessary, the **Vaccine Name** field allows the user to specify the vaccine to which the record should be mapped.

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.		



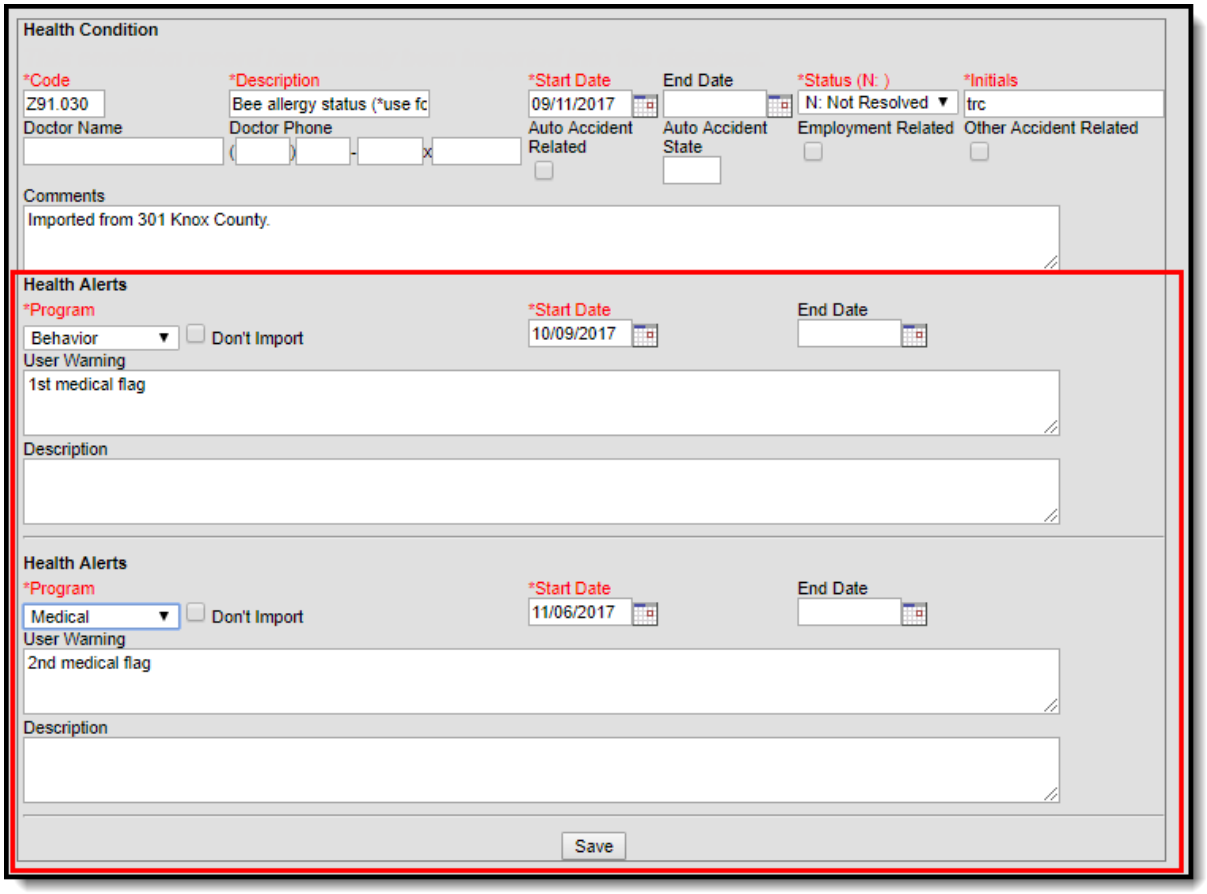
Health Conditions Import Wizard - Health Condition

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 Conditions Import Wizard - Health Alerts

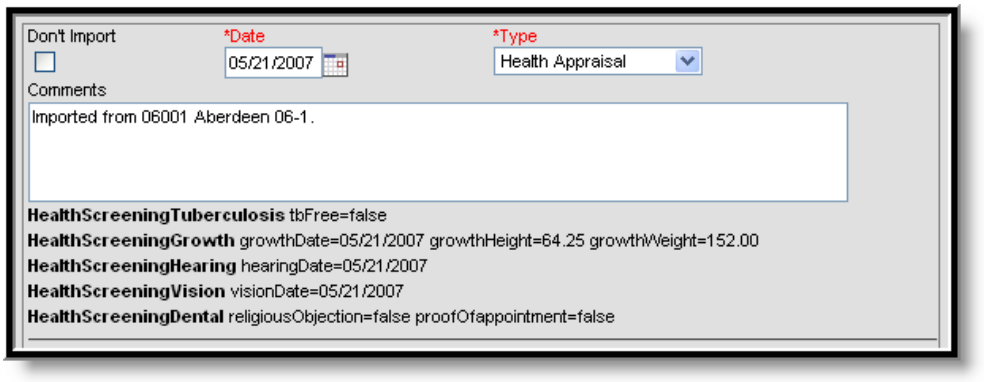
Fields in red are required for the record to properly save.

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:

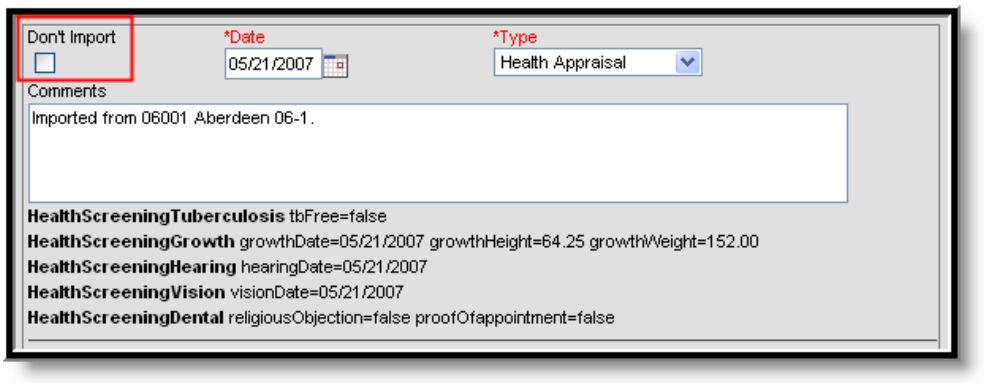
Health Screenings
All data entered for a student in the health Screenings tab can be imported to the new district. Each screening type and associated field data will transfer.



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.



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.

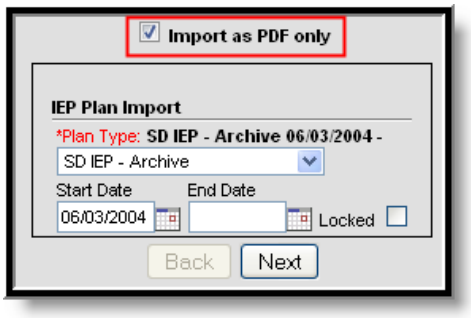
IEP Import

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.

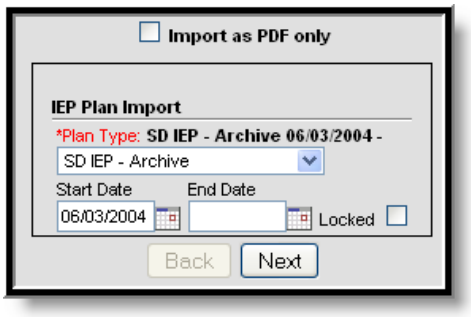
> Bolded text indicates values sent from the former district. These values are NOT imported into the new district.

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.



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.

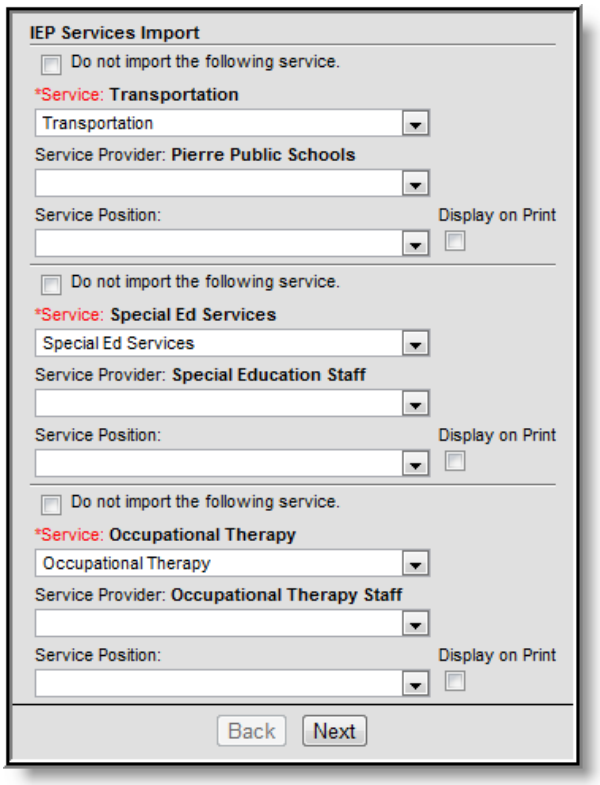


IEP Plan Import

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.

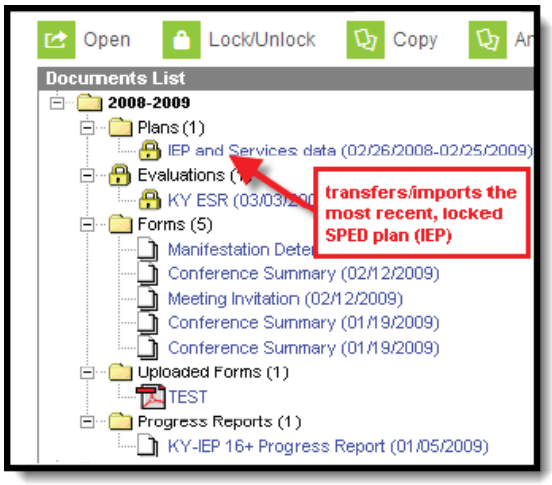
Each **Service** associated with the plan will be included in the import. If the service should be imported, it must be mapped to a similar item within the district. If a service should not be imported, the **Do Not Import the following service** checkbox should be flagged.



IEP Services Import

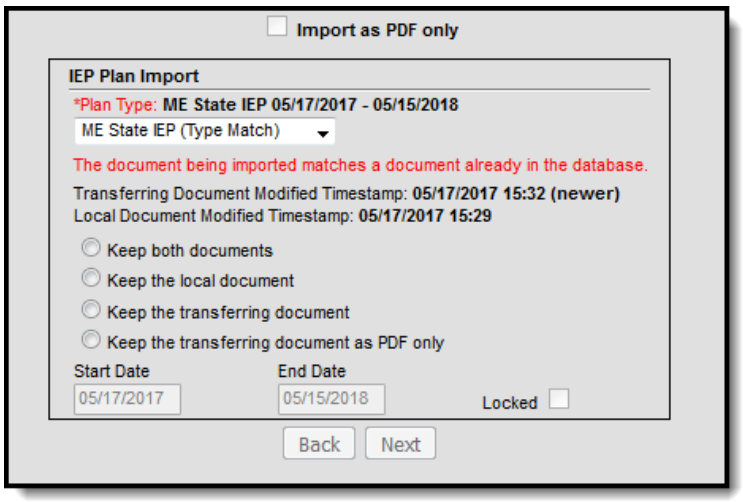
The **Service Provider** and **Service Position** fields may be mapped, as desired. The **Display on Print** checkbox should be flagged if the Service Position field should display when the plan is printed in lieu of the Service Provider's name.

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 Comparison Options

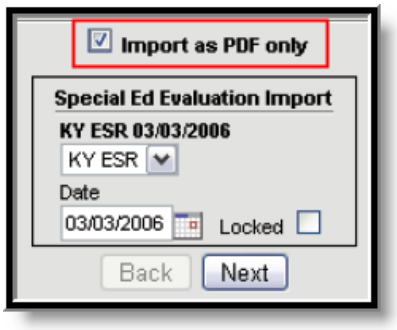
Special Education Evaluation Import Wizard

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 be NOT be imported to the Plan area of the Documents tab and will NOT be editable.



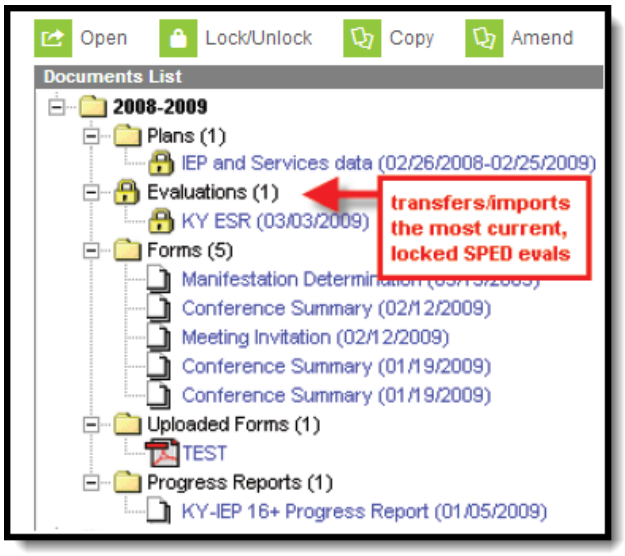
Special Ed Evaluation Import

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.

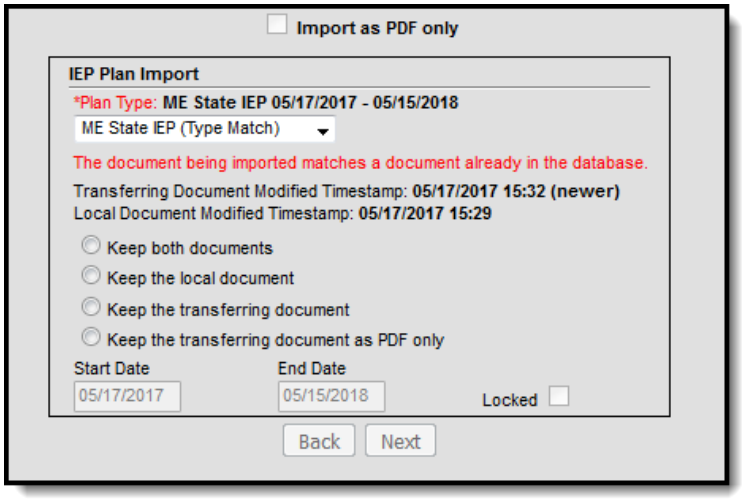
The **Locked** checkbox should be flagged if the new district would like the import the evaluation in locked format so only an administrator with the proper tool rights can modify it.

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 Comparison Options

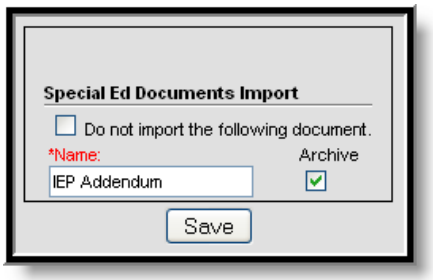
Special Education Documents Import Wizard

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.

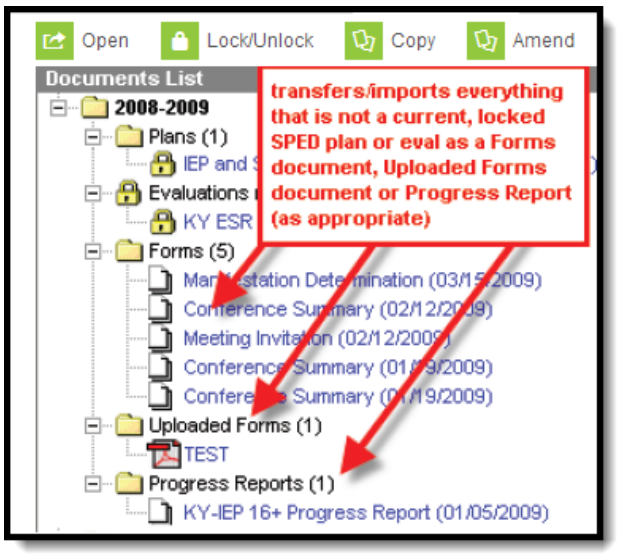
Users have the option to exclude documents from the import process by flagging the **Do not import the following document** checkbox, as necessary.

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



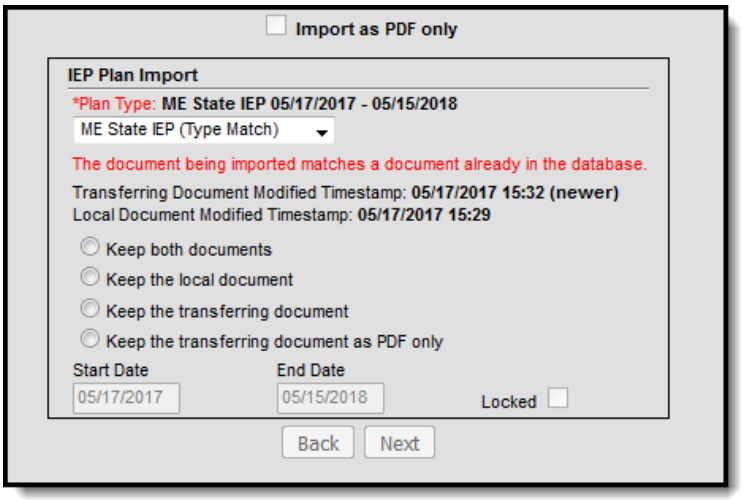
Special Ed Documents Import

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

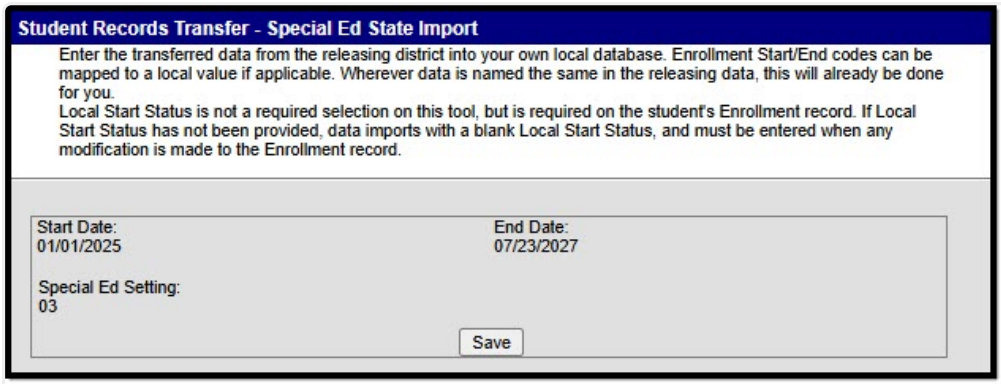
If a document that has the same name as a document already in the system is imported, the Student Records Transfer compares the last modified date on the form. Several import options are available:



Import 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.



Special Education Summary Import Wizard

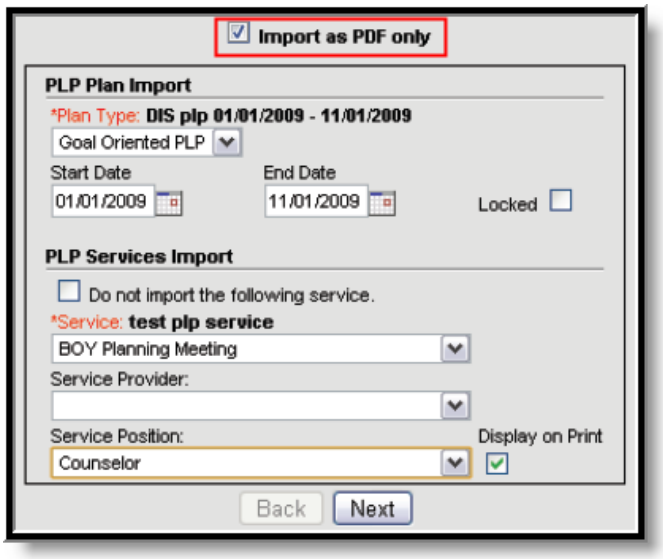
Click **Save** to import the Special Education Summary record.

PLP Plan Import Wizard

PLP data is pulled from the Plan folder of the PLP Documents tab in the old district.

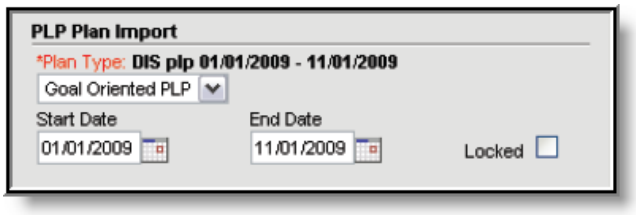
PLP Plan Import
The former district sends a student's most recent, active, and locked PLP plan for import into the new district database. The plan includes all related services. When not null, these items are sent to the new district: **Plan Type** name, **Start Date/End Date** of plan, names of all **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.

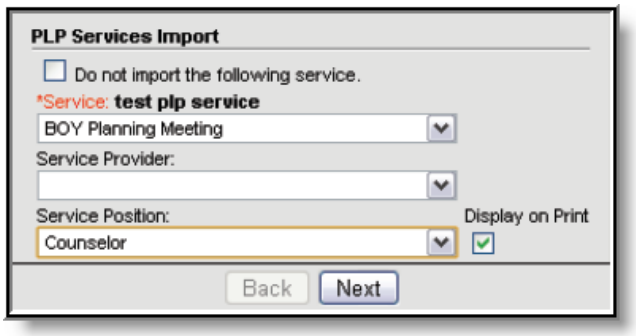


PLP Plan Import

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

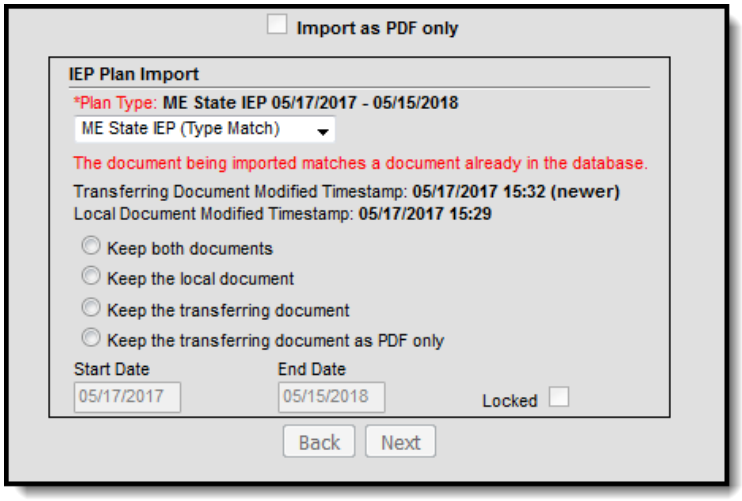
The **Service Provider** and **Service Position** fields may be mapped, as desired. The **Display on Print** checkbox should be flagged if the Service Position field should display when the plan is printed in lieu of the Service Provider's name.

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 Comparison Options

PLP Documents Import Wizard

All existing materials are transferred from the PLP Documents tab in the former district.

PLP Documents Import

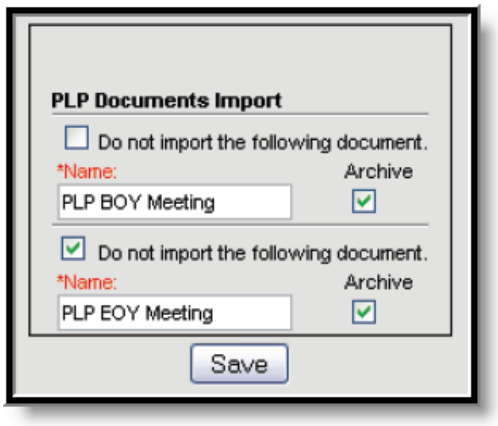
The former district sends ALL existing PLP documents related to the student, including any documents stored in the Plans, Forms, Uploaded Forms and historical folders.

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 in transferred in a separate import wizard and not through this import.

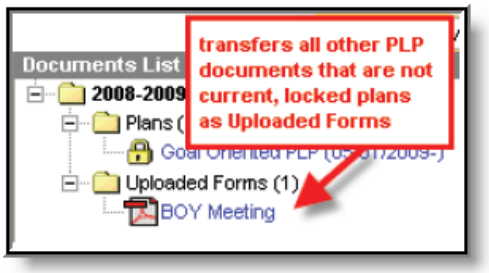
Users have the option to exclude documents from the import process by flagging the **Do not import the following document** checkbox, as necessary.

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



PLP Documents Import

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

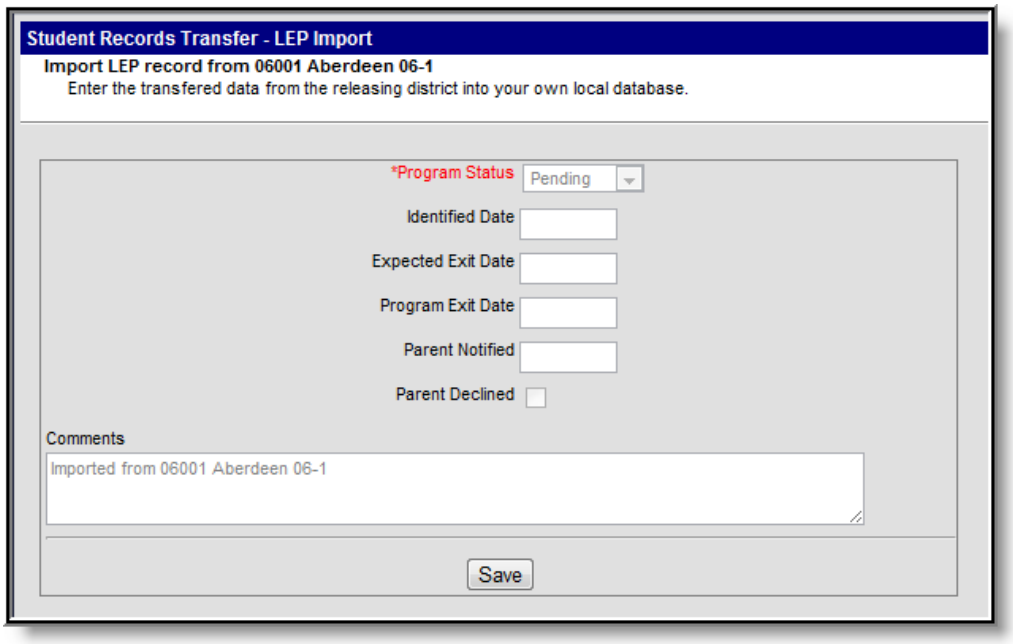
EL Import Wizard

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
Information about the specific transfer request	• transferID • transferGUID • state • status
Information about the district and user requesting the records	• requestDistrictID • requestStateLinked • requestDate • requestDistrictNumber • requestDistrictName • requestName • requestUserID • requestUserName • requestUserPhone • requestUserEmail • requestCertInfo • requestStateDistrictID • requestComments
Comparison of the student's state ID and person IDs at all levels (both districts and state)	• stateID • requestPersonID • statePersonID • releasePersonID
Basic student information	• studentLastName • studentFirstName • studentMiddleName • studentGender • studentBirthdate • studentSSN • studentGrade • studentStartDate • studentServiceType
Information about the district and user releasing the records	• releaseStateLinked • releaseDate • releaseDistrictNumber • releaseDistrictName • releaseName • releaseUserID • releaseUserName • releaseUserPhone • releaseUserEmail • releaseStateDistrictID • releaseComments

Description	Transfer Objects
The student records transferred when released See the What is Transferred During a Student Records Transfer? section for details.	• 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
	• reportCard3XML • reportCard3FOP • reportCard3Name • reportCard4XML • reportCard4FOP • reportCard4Name • stateReportingXML • lepXML • lepFOP • lepServiceXML • lepServiceFOP • lepAccommodationXML • lepAccommodationFOP
Exchange information	• requestDdistrictGUID • releaseDistrictGUID

All items are not applicable to all states.