## Student Records Transfer Standards

### Description
To provide instruction on transferring student records from one district to another using Infinite Campus.

<table>
<thead>
<tr>
<th>KDE Contact (Data Steward)</th>
<th>Data steward contacts provided throughout document by content area</th>
<th>September 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definitions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Former District</td>
<td>District from which student is transferring; student was previously enrolled in this district</td>
<td></td>
</tr>
<tr>
<td>New District</td>
<td>District to which student is transferring; student is enrolling in this district</td>
<td></td>
</tr>
</tbody>
</table>

**ITEMS TO NOTE:**
- Partial/Secondary and No Show enrollments will not transfer.
- The National Records Exchange will only import basic demographic information, NOT state specific data. State-specific data such as Gifted & Talented records will not be included through National Records Exchange.
- Be aware that running import wizards multiple times for a student can result in duplicate records.

### Data Standard
**Reg sites, data use, etc.**
- **Student identification** - identifying students and being able to track students as they transfer from one district or another is important for tracking a student’s progress.
- **Student Records Transfer** - the locator function allows Kentucky districts to transfer education records with the students. This helps teachers see the student’s background to better meet the student’s educational needs.
- **Prevents Duplicate Students** — failure to link prior education records to a new enrollment creates duplicate students in Infinite Campus. Fixing these duplicates is much more difficult than setting the student up correctly initially; there can also be costs associated with data clean-up.
- 704 KAR 3:285, KRS 159.170, 702 KAR 7:125, 704 KAR 7:090, OAG 82-44

### How is data used
- National Reporting
- Federal Reporting
- State Reporting
- School District Funding
- Data sharing between systems: CIITS; Kentucky Longitudinal Data System

### Noted Changes for current year
New data standard for 2016-17

### Available Ad-Hoc & Reports
- Campus Community
- Data Standards
### Former (Originating) District: Preparation for transfer

- a. The former (originating) district must end-date the enrollment of the student before releasing the records for attendance data to transfer and all other transfer functionality to work correctly.
- b. Any completed IEP must be locked by the former district before release.
- c. An ILPA must be locked by the former district before release.

### New District enrolls student and initiates student records transfer

1. Look for the student in the Student Locator
   - a. Student Information > Student Locator > Enter last name, first name and gender
   - b. Click Search

2. Select appropriate student; if you hover over student’s name, you will see the student’s most recent enrollment in the state.

3. Enter required fields
   - a. **Last Name** will populate from student’s previous enrollment
   - b. **First Name** will populate from student’s previous enrollment
   - c. **Gender** will populate from student’s previous enrollment
   - d. **Birth Date** will populate from student’s previous enrollment
   - e. **Race/Ethnicity**: Select student’s race from drop list
   - f. **Calendar** will default to School Year and School selected
   - g. **Schedule**: Select appropriate schedule
   - h. **Grade**: Select student’s current grade
   - i. **Start Date**: Enter date student enrolls in your school (first day of attendance)
   - j. **Start Status**: Select R21: Transfer from a KY school outside of district or other appropriate status
   - k. **Start Comments**: Type note naming prior school (Optional)
   - l. **Service Type**: Select appropriate Service Type from drop list

4. Click **Save**. Student Records Transfer will show former district enrollment information.
NOTE: The Records Transfer screen will not automatically populate when attempting to enroll a student who was previously enrolled in the New District. There will also be other rare occasions the Student Records Transfer screen simply does not appear. In both these situations, you must manually request the student’s records. (See Manual Records Request on next page)

5. Click **Submit Request**

Status will then appear on screen

The New District’s Process Inbox and the student’s Records Transfer tab will both display a waiting status until the Former District responds. At this stage of the transfer, the New District will not be able to tell what district the student previously attended based on the information in the Process Inbox.

**Manual Records Request**
Search for the student, then go to Student Information > General > Records Transfer tab. Click **New State Transfer Request** then click **Submit Request**.
**Former District responds to the records request**

Process Inbox will display a Request to release records

1. Select the link *(Request for you to release: Student’s Name)*
2. Click Release Records

NOTE: The Overlap indicator appears if a student’s enrollment in his/her former district has not been ended. Overlaps can be resolved by selecting the Edit link located in the Overlap field. The user will be redirected to the student’s enrollment tab where the enrollment can be properly end-dated before the records are released. Return to step 1.

3. Click OK
The available information that will transfer for the student will appear.

**NOTE:** 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.

**New District receives released records from former district**

Records transfers can be accessed in two areas of IC:
- Process Inbox - New District will receive notice of released records in the Process Inbox
- Student Information > General > Records Transfer

**NOTE:** User group tool rights must be given to allow access to both of these areas. See [Campus Community](#) for more information on the suggested tool rights.

Select the link from the Process Inbox or Records Transfer tab to see available transfer documents and import wizards.

Transfer Documents are PDF documents available for download, saving and/or printing. Data Imports are wizards that can be run to transfer data directly from the former district database to the new district database.
NOTE:
- If an item has been crossed out such as PLP Import Wizard above, then the student’s record did not contain this item in the former district.
- Be aware that running import wizards multiple times for a student can result in duplicate records.
- Student records can be transferred to a partial enrollment without the student’s withdrawal from the original (primary) enrollment.

### 1B KY State Reporting Import Wizard

**Campus Path:**
Process Inbox | Transfer Released link  
Student Information > General > Records Transfer

**Data Steward:**
Cheri Meadows, Kathie Anderson, Joseph McCowan

This import wizard will import student data elements from the former district found on the Enrollment Tab | State Reporting Section, Gifted and Talented Section and Attendance from the Former District into the new district database. Elements included in this wizard are:

<table>
<thead>
<tr>
<th>KY State Reporting Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Exclude</td>
</tr>
<tr>
<td>Resident District</td>
</tr>
<tr>
<td>Home Language</td>
</tr>
<tr>
<td>Homeless</td>
</tr>
</tbody>
</table>

**Step 1:** Click on the KY State Reporting Import Wizard.  
The user will need to import all records from this wizard.
After clicking on the **KY State Reporting Import Wizard**, the users will be able to review the following screens:
Using this wizard, the receiving district can change the special education status to “Active” in the Special Education section of the Enrollments tab. Receiving districts can also remove the Special Ed Exit Status and Special Ed Exit Date as well.

The KY State Reporting Import Wizard will populate the Homeless indicator, Living Status and Unaccompanied Youth indicator from the former district’s database to the new district’s database. The values from when the student was identified as homeless should be used for the entire school year.

- If a student transfers school to school in the same district within the same academic year, the Homeless indicator, Living Status and Unaccompanied Youth indicator must be manually entered in the new enrollment.

**Gifted and Talented Status**

![Gifted and Talented Status](image)

**Attendance Transferred Summary from Last Enrolled District**

<table>
<thead>
<tr>
<th>Present</th>
<th>175.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absences</td>
<td>1.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Absent</th>
<th>1.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absent</td>
<td>0.0</td>
</tr>
<tr>
<td>Absent</td>
<td>0.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EMD Absence</th>
<th>0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absent</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Step 2: Click “Save” to import**

The KY reporting records have been imported into the database.
Step 3: If Gifted & Talented (GT) data was populated, confirm the GT data imported correctly to the Gifted & Talented tab found under Student Information>General.

- Notify the GT Coordinator so he/she can review the student’s GT record. The services in the record should be reviewed and changed if the services from the former district are not offered in the student’s new (current) district.

The GT Coordinator should notify all personnel working with the student so appropriate services can be offered to the student and a Gifted Student Service Plan (GSSP) can be created. The GSSP should then be given to the parents/guardian to notify them of the services being offered to the student.

<table>
<thead>
<tr>
<th>1C</th>
<th>Enrollment History Import Wizard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Path:</td>
<td>Process Inbox</td>
</tr>
<tr>
<td>Data Steward:</td>
<td>Student Information &gt; General &gt; Records Transfer</td>
</tr>
</tbody>
</table>

This import wizard allows a user to select any of a student’s previous enrollments for import to ensure proper tracking of prior enrollment history which has a direct effect on state reporting. Enrollment History is necessary to verify school entry information on the Demographics tab, 9th grade entry on the Graduation tab, number of days enrolled in a KY school for KEES and number of days enrolled for school accountability.

NOTE: It is easy to create duplicates with this import wizard, therefore, pay close attention to the data that is imported. Review the data carefully before clicking SAVE.

Fields imported using this wizard include:
### Enrollment History Fields

<table>
<thead>
<tr>
<th>Calendar Name</th>
<th>End Status</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Name</td>
<td>Grade</td>
<td>Start Date</td>
</tr>
<tr>
<td>End Comments</td>
<td>Service Type</td>
<td>Start Status</td>
</tr>
<tr>
<td>End Date</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 1D Special Ed Evaluation Import Wizard

**Campus Path:**

Process Inbox | Transfer Released link  
Student Information > General > Records Transfer

**Data Steward:**

Joseph McCowan

This wizard will import the student’s most recent locked Evaluation/Eligibility Determination from the former district to the new district database. When complete, the Evaluation/Eligibility Determination will be available as an editor-based document in the student record: Student Information > Special Ed > General > Documents tab.

**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

**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
- LEP Import Wizard

**Status: Records released.**

**NOTE:** If no KY Evaluation/Eligibility Determination exists, the most recently locked historical evaluation-type document will be transferred as a locked, editor-based document in the following order of priority:

1. KY Evaluation (2015) or  
2. Conference Summary (2014) or  
3. Conference Summary (2013) or  
4. Conference Summary (Pre-2013) or  
5. KY ESR

**Do not Select Import as PDF only.**

**Note:** Do NOT select "Import as PDF only".

1. Select the **Locked** indicator
2) Click Next
3) Click OK on dialog box

4) Path: Student Information > Special Education > General > Documents
Verify in student record that the Evaluation/Eligibility Determination is now available as an editor-based document.

Note: If “Import as PDF only” was selected, the document will be imported as a PDF, not as an editor-based document.

This import wizard will import any special education FDF (non-editor-based) documents attached to the student record from the former district to the new district database. When complete, the documents will be available as PDFs in the student record: Student Information > Special Ed > General > Documents tab.

1) Select any documents that do not need to be imported by selecting the “Do not import the following document” indicator
2) Deselect the “Archive” indicator if the document does not need to be archived when imported.
3) Click “Save”
4) Click “OK” on dialog box

5) Path: Student Information > Special Education > General > Documents
   Verify in the student record that the requested documents are now available.

Note: These documents will open as a PDF in Adobe outside the IC system. Changes cannot be made to the documents.

IEP Import Wizard

Campus Path: Process Inbox | Transfer Released link
Student Information > General > Records Transfer

Data Steward: Joseph McCowan

This wizard will import the student’s most recent locked KY IEP from the former district to the new district database. When complete, the KY IEP will be available as an editor-based document on the Special Education Documents tab.
Note: Do not select “Import as PDF only”

1) The services related to the IEP being imported will be listed
2) Select “Locked”
3) Each Service must be mapped to a service within the receiving district by selecting the appropriate item from the drop list
4) Each Position can be mapped to a provider or position within the receiving district by selecting the appropriate item from the drop list
5) Click “Next” to import the IEP
6) Select “OK”

7) Path: Student Information > Special Education > General > Documents
Verify in student record that the KY IEP is now available as an editor-based document
1G LEP Records Transfer

**Campus Path:** Process Inbox | Transfer Released link
Student Information > General > Records Transfer

**Data Steward:** Gary Martin

**Former (Originating) District: preparing for transfer**

a. The former (originating) district must end-date the enrollment of the student before releasing the record for all transfer functionality to work correctly.

b. The former (originating) district must end-date LEP Accommodations and LEP Services. See section 1D and 1E in the LEP Data Standard for instructions on how to end-date LEP Services and Accommodations.

**Receiving District Runs Import Wizards**

User clicks on **LEP Import Wizard**

![Transfer Documents and Data Imports Diagram]

**NOTE:**

- If an item has been crossed out such as PLP Import Wizard above, then the student’s record did not contain this item in the former district.
- Be aware that running import wizards multiple times for a student can result in duplicate records.
a. Once user has verified information is correct, they choose “Save”. A confirmation pops up:

![Confirmation dialog]

b. An additional box pops up confirming the user wants to close the save dialog; click yes.

![Confirmation dialog]

c. User is now redirected back to the summary/import screen.
The Extended Census Import Wizard populates First US School and other key demographic information such as Primary Home Language. If the home language is NOT English, the Extended Census import is relevant to LEP.

Note that the user has the ability here to view the value in the receiving district (current value) as well as the imported value (from former district) and to choose one of these values.
### Transcript Import Wizard

**Campus Path:** Process Inbox | Transfer Released link

**Student Information > General > Records Transfer**

**Data Steward:** Jessi Carlton

Not all schools transcript the same classes – i.e. some schools transcript non-high school classes while others do not.

Best practice would be to view the transcript by clicking the Transcript button before running the Transcript Import Wizard to determine which records you want to import. Each transcript entry will need to be evaluated individually to determine if it should be imported and what credit group should be assigned.

When you are ready to begin, click Transcript Import Wizard.

![Image of Transcript Import Wizard](image)

Many fields must be considered on each entry imported to the transcript. Adjustments may be made to align entries to the new school’s policies:

- **Credit Multiplication Factor** – RARELY USED – If credits issued by former district are not on the same scale as credits issued by the new district, this field can be used to change credits en mass.
- **Don’t Import** – If checked, entry will not be imported.
- **Grade** – Should not be edited, but used to determine whether to import entry.
- **Course Number** – If using Multi-Year Academic Planning (MYAP), change course number to appropriate local school course number.
- **Score** – Adjustment can be made to match local score group.
- **GPA Weight** – KHEAA requires GPA Weight equal credits attempted for KEES.
- **GPA Value** – Weighted GPA value - Adjustments may be needed based on the school’s grading policies.
- **GPA Max** – If GPA Value was adjusted, an adjustment may be necessary.
- **Unweighted GPA Value** – KHEAA requires a standard 4.0 scale.
- **Earned** – Adjustments may be needed based on your school’s policies.
- **Attempted** – Adjustments may be needed based on your school’s policies.
- **Transcript Credit** – Select the appropriate credit group. This must be selected on each imported entry.
NOTE: If a student transfers during the school year with an AP or DC course, the receiving district will need to manually add this difficulty level to the transcript entry for the current school year to ensure KEES money is calculated correctly.

**Assessment Import Wizard**

**Campus Path:** Process Inbox | Transfer Released link  
Student Information > General > Records Transfer

**Data Steward:** Raymond Carter

A new district can import national, state and local tests from a student’s former district. National and state assessment records created by KDE will not need mapping or additional setup. A former district’s local assessments may require additional setup by the new district.
For each assessment, the new district will need to select the test name for each score. Make sure to select the same name in order to transfer only state test to state test and national test to national test. Select the test name to import for each of the student’s assessments. The list may be lengthy depending on the number of tests the student has taken. The new district SHOULD NOT alter the Date, Scale Score, or any other variable of the test.

Note: Once you select the parent test, the droplist will only contain the applicable child test or sub-test.

When you have finished selecting all the tests you would like to import, click Save.
School nurses may not have access to import immunization records, therefore it is important all health-related imports be processed. Click on the Wizard, review the data and click **Save**.
School nurses may not have access to import health condition records, therefore it is important all health-related imports be processed. Click on the Wizard, review the data and click **Save**.

School nurses may not have access to import health screening records, therefore it is important all health-related imports be processed. Click on the Wizard, review the data and click **Save**.
<table>
<thead>
<tr>
<th></th>
<th>PLP Import Wizard</th>
</tr>
</thead>
</table>
| **Campus Path:** | Process Inbox | Transfer Released link  
|                  | Student Information > General > Records Transfer |
| **Data Steward:** | April Pieper, Jarrod Slone |

Guidance Coming Soon!

<table>
<thead>
<tr>
<th></th>
<th>PLP Documents Import Wizard</th>
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