

## **Transfer Student Record Process**

When students transfer from one Local Education Agency (LEA) to another, use the following steps to move the students' historical data to the new school. Before performing this process, the student must first be transferred out of the previous school/LEA, and then enrolled in the new school/LEA using the Enroll New Student screen.

*Note:* This process is performed by the NEW/receiving school, NOT the sending school. sis.org/admit withdraw.html to determine the appropriate transfer process based on the student's scenario.

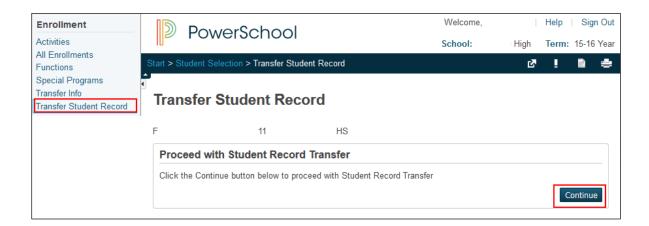
## **Security Settings**

Security settings must be configured in order for a person to have access to this process. Please make sure that security page permissions are set properly for only those you wish to have access to this process (e.g. Data Managers, Registrars).

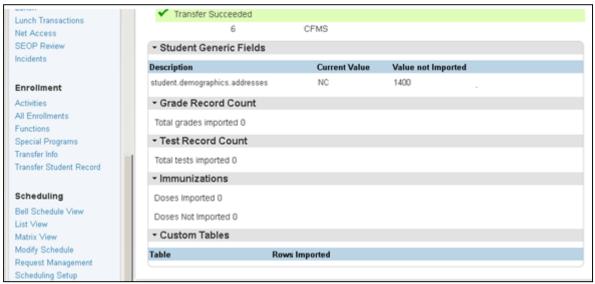
## **Transfer Student Record Process**

Navigation: Start Page > Select Student > Enrollment > Transfer Student Record

Important: The Enrolling New Student (QRD) process (located under <a href="http://www.nc-">http://www.nc-</a> sis.org/admit withdraw.html) must be completed by the receiving school before proceeding to the **Transfer Student Record** process.

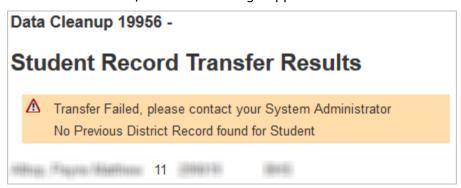


1. Verify correct student is selected and click **Continue**. 2. The following screen will be displayed once the **Transfer Student Process** is complete.



If the import is successful, the "Transfer Succeeded" message will appear and list the number of records imported, along with any individual fields that did not import.

If the import was not successful, an error message appears.



Contact the previous school to verify the student has been transferred out of school and the fields on the **Scheduling Setup** page have been properly set (refer to **Transfer Out of School**, located under <a href="http://www.nc-sis.org/admit withdraw.html">http://www.nc-sis.org/admit withdraw.html</a> for more information on the fields to be updated by the sending school).

**Note:** In some cases, district customizations in PowerSchool resulting in duplicate fields can prohibit successful data transfers. In such cases, if the student has been verified as transferred <u>and</u> the transfer process is still unsuccessful, please confirm whether the sending school has customizations in their PowerSchool instance or contact <u>Home Base</u> Support Center for assistance.

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