



District Transfers

Training Guide



ProgressBook®
Special Services

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Lesson Objectives

- **Transfer student tasks from your district to another district**
- **Import student tasks from another district**
- **Review transfer history**
- **Delete pending transfers**

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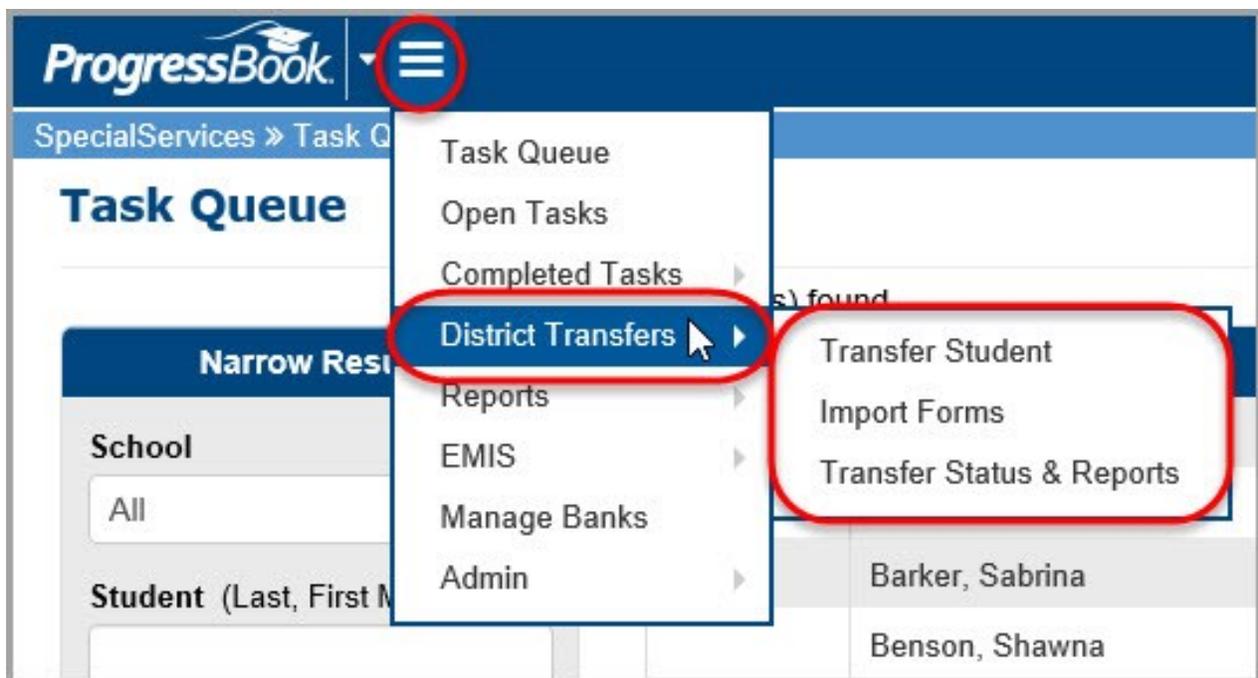


Access & Navigation

If you have the District Transfers privilege assigned to your role, you are able to transfer a student's tasks from your district to another district, import a student's tasks into your district, review transfer history, and delete a pending transfer.

Note: You can only use the District Transfers option if the destination district and the origin district both use ProgressBook SpecialServices.

Once you are logged into SpecialServices, click  to access the main menu, and then select **District Transfers**.



From here, you can choose from three options: **Transfer Student**, **Import Forms**, or **Transfer Status & Reports**.



Transfer Student

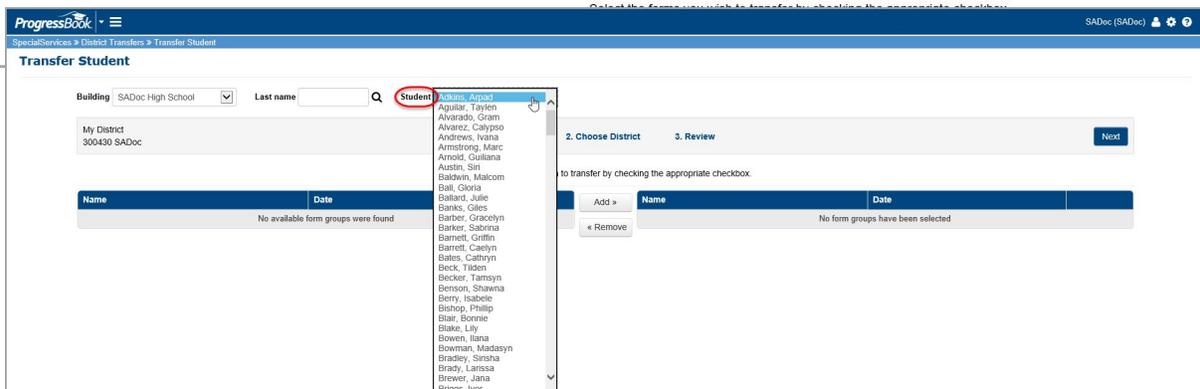
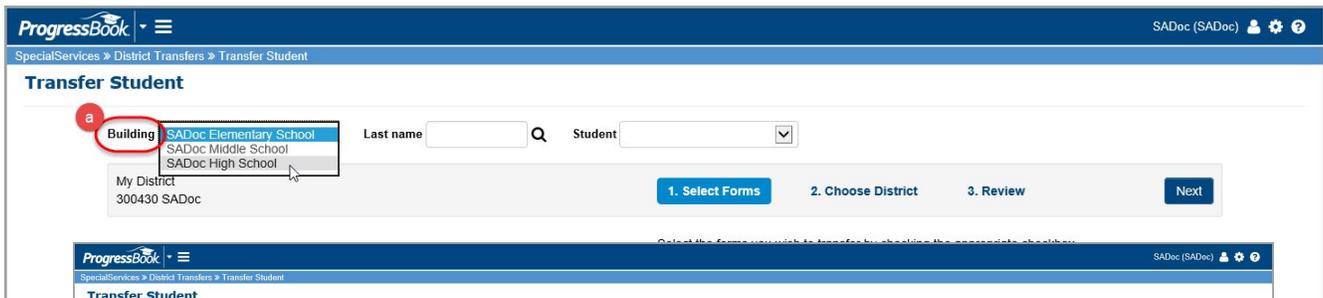
When a student transfers to another district, you can send tasks from your district to that district if it also uses ProgressBook SpecialServices.

1. Navigate to **District Transfers** and click **Transfer Student**.

If you can view students in one or multiple schools and you have no classes assigned to you, the **Building** drop-down list displays. You can perform the following steps to select the student:

- a. In the **Building** drop-down list, select a school.

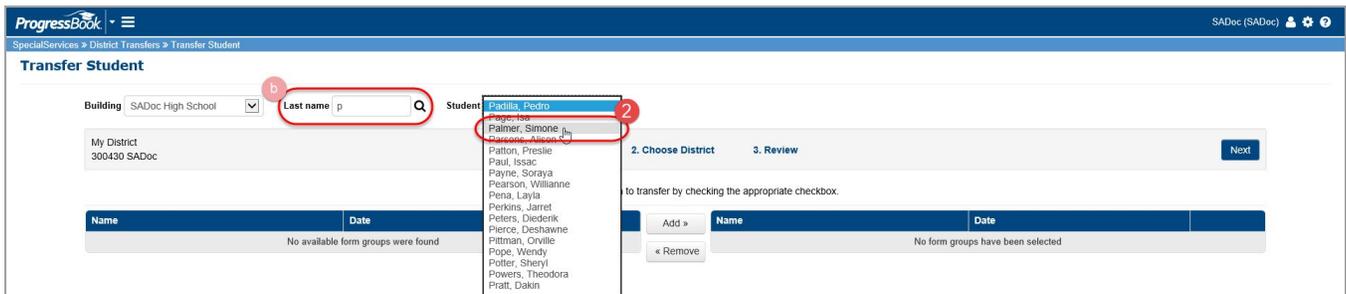
The **Student** drop-down list populates with students who are assigned to the selected school.



b. Optional: To further narrow your search, in the **Last name** field, enter all or part of the student's last name, and then click **Q**.

The **Student** drop-down list populates with only the students whose last names match or most closely match the criteria entered in the **Last name** field.

2. In the **Student** drop-down list, select the student you want to transfer.



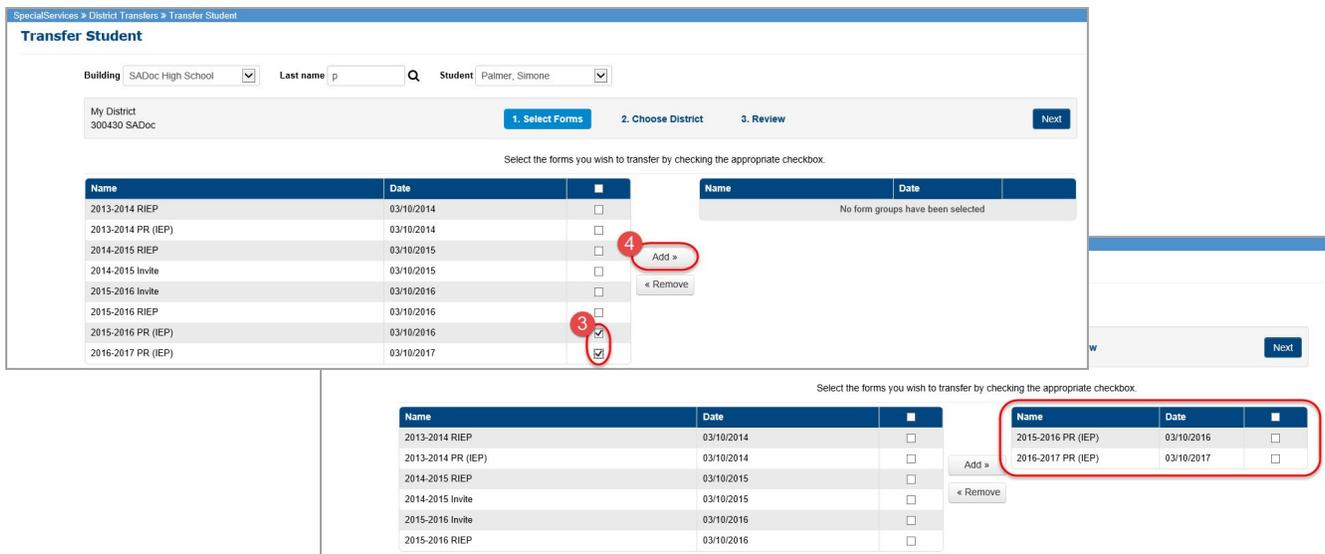
The tasks you can transfer for that student display.

Note: Only **Classic View** and **Task View** form set types are available for transfer. SSEM archived for set types are not available for transfer.

3. In the row of each task you want to transfer to another district, select the check box. To select all of the tasks, select the check box at the top of the column.

4. Click **Add>>**.

The tasks you selected to transfer display in a grid on the right side of the screen.



Note: To remove a task from the grid on the right side of the screen, in the appropriate row, select the check box, and then click **<<Remove**. The task displays in the grid on the left side of the screen.

- Once you have selected all the tasks you want to transfer, click **Next**.

SpecialServices » District Transfers » Transfer Student

Transfer Student

Building: SADoc High School | Last name: p | Student: Palmer, Simone

My District: 300430 SADoc

1. Select Forms | 2. Choose District | 3. Review

Select the forms you wish to transfer by checking the appropriate checkbox.

Name	Date	<input type="checkbox"/>	Name	Date	<input type="checkbox"/>
2013-2014 RIEP	03/10/2014	<input type="checkbox"/>	2015-2016 PR (IEP)	03/10/2016	<input checked="" type="checkbox"/>
2013-2014 PR (IEP)	03/10/2014	<input type="checkbox"/>	2016-2017 PR (IEP)	03/10/2017	<input type="checkbox"/>
2014-2015 RIEP	03/10/2015	<input type="checkbox"/>			
2014-2015 Invite	03/10/2015	<input type="checkbox"/>			
2015-2016 Invite	03/10/2016	<input type="checkbox"/>			
2015-2016 RIEP	03/10/2016	<input type="checkbox"/>			

Buttons: Add >, << Remove

The **Choose District** step of the **Transfer Student** screen displays.

- To locate the district to which you want to transfer the tasks, in the **Enter search criteria** field, enter all or part of the identifying information.

Note: You can search for the district by entering all or part of the district's name, address, city, county, or state identification number (IRN).

The results of the search display below the **Enter search criteria** field.

- In the search result grid, in the row of the district to which you want to transfer the student's tasks, click **>**.

The row becomes highlighted to indicate that you have selected it.

- Click **Next**.

ProgressBook | SADoc (SADoc)

SpecialServices » District Transfers » Transfer Student

Transfer Student

Building: SADoc High School | Last name: pal | Student: Palmer, Simone

My District: 300430 SADoc

1. Select Forms | 2. Choose District | 3. Review

Enter criteria to search for the transfer district. Your search term will search district names, addresses, counties and IRNs.

new city

District IRN	District Name	Address	City	State	Zip	County	Phone	Fax
000700	New City School	1516 Salem Ave	Dayton	OH	45406	Montgomery	9372777155	9372777017

The **Review** step of the **Transfer Student** screen displays.

8. Verify that the correct student, tasks, and district are selected. To make any changes to the selected options, click the link for the step to which you would like to return, and modify the options as necessary.
9. To process the transfer, click **Finish**.

The transfer may take a few moments. When the transfer process is complete, a confirmation message displays.

ProgressBook | SADoc (SADoc)

SpecialServices » District Transfers » Transfer Student

Transfer Student

Building: SADoc High School | Last name: pal | Student: Palmer, Simone

My District: 300430 SADoc

1. Select Forms | 2. Choose District | 3. Review | Finish

Please confirm your transfer selections.

Student: Palmer, Simone
District: New City School - 000700

Finalized Group Name	Finalized Date	IEP/EMIS Set
2015-2016 PR (IEP)	3/10/2016 12:00:00 AM	False
2016-2017 PR (IEP)	3/10/2017 12:00:00 AM	False



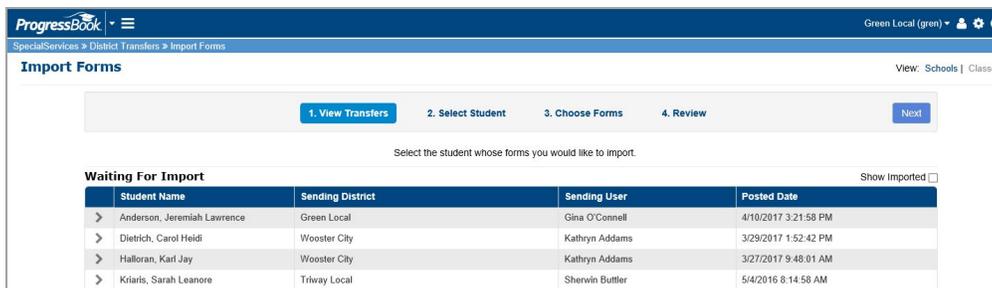
Import Forms

In addition to the ability to transfer student tasks from your district to another ProgressBook SpecialServices district, administrators can also import the tasks and store them as part of the student’s information in SpecialServices. After you import the task, you can view it from the **Completed Tasks** screen.

Note: The information from the imported forms does not appear on the EMIS extract. To use any of the information on valid forms for the current year, you must create a new task from the imported task or create a new page within a task using a page from the imported task (see the ProgressBook Creating Tasks Training Guide).

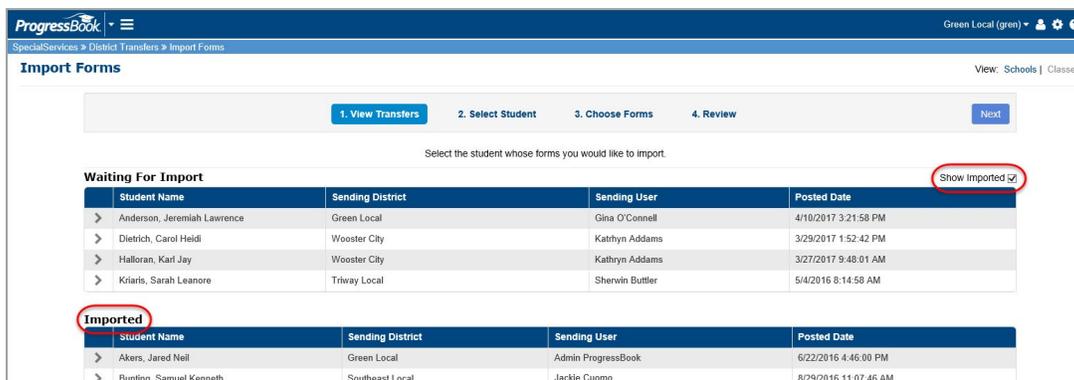
1. Navigate to **District Transfers** and click **Import Forms**.

The **View Transfers** step of the **Import Forms** screen displays, listing the names of students whose tasks have been transferred from another district.

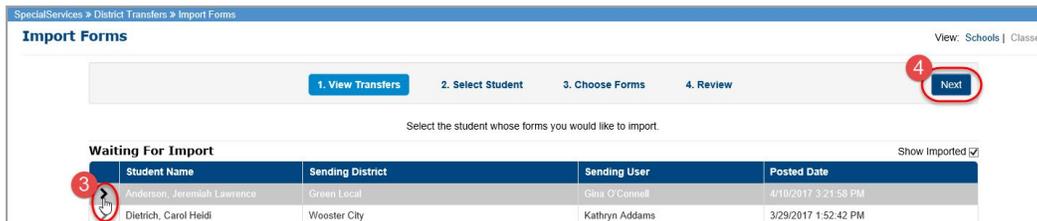


2. Optional: To include students with tasks you have already imported, select the **Show Imported** check box at the top of the table.

An updated list displays.

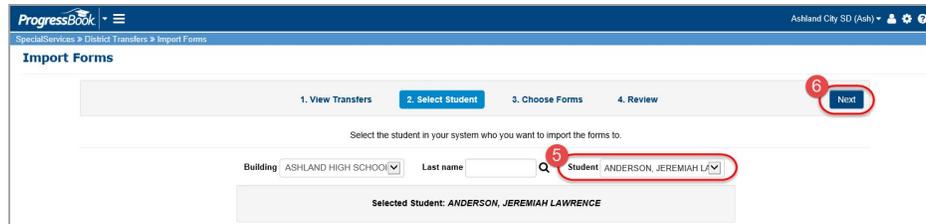


- In the row of the student whose tasks you want to import into SpecialServices, click  .
The row becomes highlighted to indicate that you have selected it.
- Click **Next**.



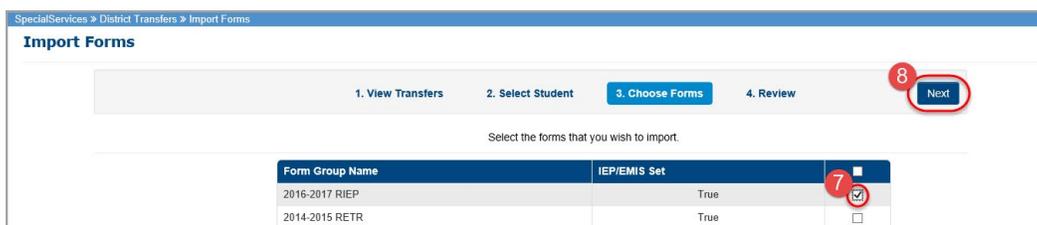
The **Select Student** step of the **Import Forms** screen displays. The student whose name matches the name associated to the task you are importing is selected by default.

- Verify that the student to whom you want to import the task is selected in the **Student** drop-down list. If not, select the appropriate student.
- Click **Next**.



The **Choose Forms** step of the **Import Forms** screen displays, listing the forms available to import for the student selected in [step 3](#).

- In the row of the task (form group) you want to import, select the check box.
Note: To select all of the tasks, select the check box at the top of the column.
- Click **Next**.



The **Review** step of the **Import Forms** screen displays.

9. Verify that the correct information displays in the **To Student** and **From Student** fields. To change any of the selected information, click the link of the step to which you would like to return, and modify your selections as necessary.
10. To import the selected task, click **Finish**.

ProgressBook | Ashland City SD (Ash)

SpecialServices » District Transfers » Import Forms

Import Forms

1. View Transfers 2. Select Student 3. Choose Forms 4. Review Finish

Please confirm your import selections.

To Student: ANDERSON, JEREMIAH LAWRENCE
From Student: Anderson, Jeremiah Lawrence

Finalized Group Name	IEP/EMIS Set
2016-2017 RIEP	True

From this point, you can perform any of the following actions:

- View the imported task on the **Completed Tasks** screen in SpecialServices
- Create a new task using the task you imported (see **Create New Tasks from Existing Tasks** in the *ProgressBook SpecialServices Creating Tasks Training Guide*)
- Create a new page in an existing task using a page from the task you imported (see **Create New Pages from Existing Pages** in the *ProgressBook SpecialServices Creating Tasks Training Guide*)



Transfer Status & Reports

You can view the transfer history of the student task imported into or transferred out of your district.

1. Navigate to **District Transfers** and click **Transfer Status & Reports**.

The **Transfer Status & Report** screen displays.

Note: The **Results Filter** area auto-populates with the current date and the **Outbound** option selected.

The screenshot displays the 'Transfer Status & Reports' interface within the ProgressBook system. The top navigation bar includes the ProgressBook logo, a menu icon, and user information (SADoc (SADoc) with user, settings, and help icons). The breadcrumb trail reads 'SpecialServices > District Transfers > Transfer Status & Reports'. The main heading is 'Transfer Status & Reports'. Below this is a 'Results Filter' panel with the following elements:

- Student:** An empty text input field.
- Start Date:** A date input field containing '4/13/2016' with a calendar icon to its right.
- End Date:** A date input field containing '4/13/2017' with a calendar icon to its right.
- Transfers:** Two radio button options: 'Outbound' (which is selected) and 'Inbound'.
- Include:** Two checkbox options: 'Deleted' and 'Imported', both of which are currently unchecked.
- Show Transfers:** A blue button located at the bottom of the filter panel.

2. Search for the transfer history records you want to view using one or both of the following methods:
 - In the **Student name** field, enter the student's name
 - In the **Start date** and **End date** fields, enter the start and end dates between which the transfer occurred
3. Select one of the **Transfers** options:
 - **Outbound** – Lists the students whose tasks have been sent to another district
 - **Inbound** – Lists the students whose tasks have been imported into your district
4. Optional: You can select the **Include Deleted** and/or **Include Imported** check boxes to include those student transfer records in your results.
5. Click **Show Transfers**.

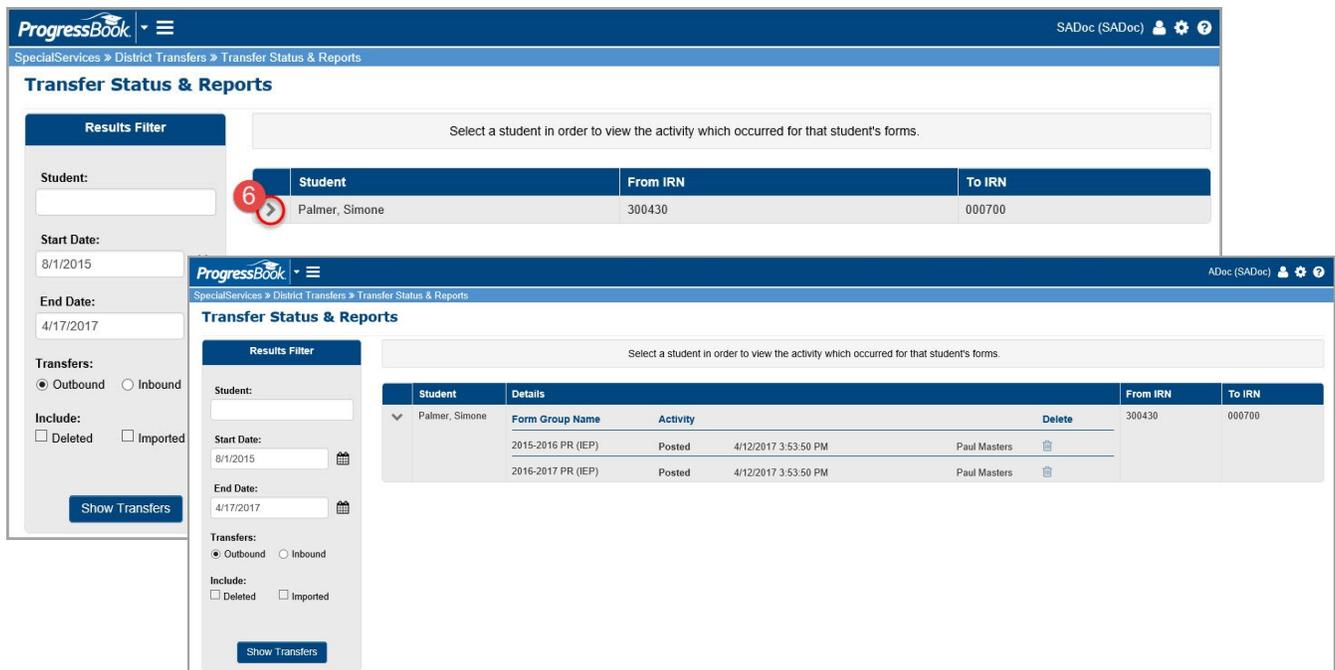
The screenshot shows the 'Transfer Status & Reports' page in ProgressBook. The page header includes 'ProgressBook' and 'Ashland City SD (Ash)'. The breadcrumb trail is 'SpecialServices > District Transfers > Transfer Status & Reports'. The main heading is 'Transfer Status & Reports'. Below this is a 'Results Filter' section. It contains a 'Student' text input field, a 'Start Date' field with a calendar icon (set to 8/1/2015), and an 'End Date' field with a calendar icon (set to 4/13/2017). Underneath are 'Transfers' options with radio buttons for 'Outbound' and 'Inbound' (the 'Inbound' option is selected). Below that are 'Include' options with checkboxes for 'Deleted' and 'Imported' (the 'Imported' checkbox is checked). At the bottom of the filter section is a 'Show Transfers' button. Red circles with numbers 2, 3, 4, and 5 are overlaid on the Student field, the Transfers options, the Include options, and the Show Transfers button respectively.

The transfer history records that meet the criteria you selected display.

- To view the details of the transfer history, in the row of the student for whose transfer history you want to view, click .

The following information displays below the student's name:

- **Form Group Name** – the name of the transferred task
- **Activity** – the status of the transfer (see [Transfer Activity Statuses](#))
- The date and time the **Activity** took place
- The user who performed the transfer activity
- **From IRN** – where the transfer originated
- **To IRN** – where the transfer was received



The screenshot displays the ProgressBook interface for 'Transfer Status & Reports'. It features a 'Results Filter' sidebar on the left with fields for Student, Start Date, End Date, Transfers (Outbound/Inbound), and Include (Deleted/Imported). A 'Show Transfers' button is at the bottom of the sidebar. The main content area shows a table with columns for Student, From IRN, and To IRN. A red circle with the number '6' highlights the first row, which is for 'Palmer, Simone'. Below this, a detailed view for the selected student shows a table with columns for Form Group Name, Activity, Date/Time, and User. The table lists two activities: '2015-2016 PR (IEP)' and '2016-2017 PR (IEP)', both with a status of 'Posted' and performed by 'Paul Masters'.

Student	From IRN	To IRN
Palmer, Simone	300430	000700

Student	Details	From IRN	To IRN											
Palmer, Simone	<table border="1"><thead><tr><th>Form Group Name</th><th>Activity</th><th>Delete</th></tr></thead><tbody><tr><td>2015-2016 PR (IEP)</td><td>Posted</td><td>4/12/2017 3:53:50 PM</td><td>Paul Masters</td></tr><tr><td>2016-2017 PR (IEP)</td><td>Posted</td><td>4/12/2017 3:53:50 PM</td><td>Paul Masters</td></tr></tbody></table>	Form Group Name	Activity	Delete	2015-2016 PR (IEP)	Posted	4/12/2017 3:53:50 PM	Paul Masters	2016-2017 PR (IEP)	Posted	4/12/2017 3:53:50 PM	Paul Masters	300430	000700
Form Group Name	Activity	Delete												
2015-2016 PR (IEP)	Posted	4/12/2017 3:53:50 PM	Paul Masters											
2016-2017 PR (IEP)	Posted	4/12/2017 3:53:50 PM	Paul Masters											

Transfer Activity Statuses

Posted – the forms have been posted to the destination district

- For students transferred into your district, you can import forms that appear as **Posted**
- For students transferred out of your district, **Posted** indicates the forms are available for import by the administrator at the destination district

Imported – the forms have been imported into SpecialServices

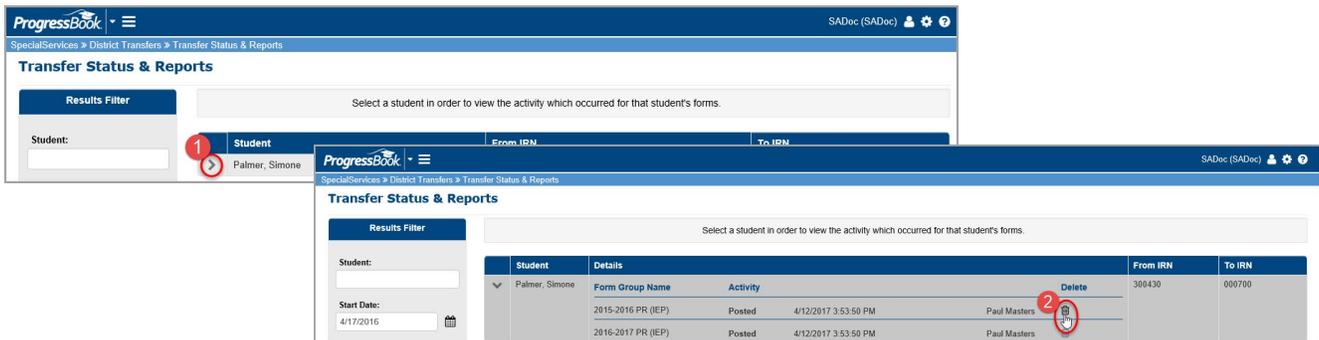
Delete – the forms have been deleted and are not available for import into SpecialServices

Delete a Pending Transfer

You can delete any tasks mistakenly sent into your district or transferred out of your district from the **Transfer Status & Reports** screen.

1. On the **Transfer Status & Reports** screen, in the row of the student whose transfer transaction you want to delete, click .

The transfer history information displays below the student's name.



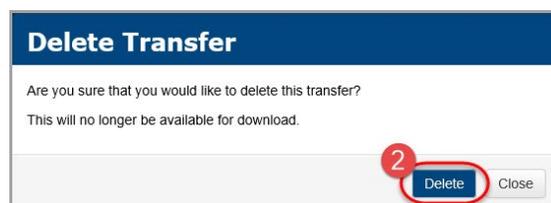
The screenshot shows the ProgressBook interface for 'Transfer Status & Reports'. A search filter is set to 'Palmer, Simone'. Below the search results, a table displays transfer history for the student. The table has columns for Student, Details, From IRN, and To IRN. The 'Details' column includes Form Group Name, Activity, Date, and User. A 'Delete' button is visible in the 'Details' column for the second row, which is circled with a red '2'.

Student	Details	From IRN	To IRN
Palmer, Simone	2015-2016 PR (IEP) Posted 4/12/2017 3:53:50 PM Paul Masters	300430	000700
	2016-2017 PR (IEP) Posted 4/12/2017 3:53:50 PM Paul Masters		

2. In the row of the transfer transaction, click .

A message displays asking if you are sure you want to delete the transfer and reminding you that the transfer will no longer be available for download.

Click **Delete**.



The dialog box is titled 'Delete Transfer' and contains the text: 'Are you sure that you would like to delete this transfer? This will no longer be available for download.' At the bottom, there are two buttons: 'Delete' and 'Close'. The 'Delete' button is circled with a red '2'.

In the row of the form set you deleted, a **Deleted** activity type displays in the **Activity** column with the date, time, and name of the user who deleted the transfer information.

The task no longer displays on the **Transfer Student** or **Import Forms** screens.

The screenshot shows the ProgressBook interface for 'Transfer Status & Reports'. On the left is a 'Results Filter' sidebar with fields for Student, Start Date (4/17/2016), End Date (4/17/2017), Transfers (Outbound selected), and Include (Deleted and Imported). The main table has columns: Student, Details, From IRN (300430), and To IRN (000700). The 'Details' column is expanded for 'Palmer, Simone' and contains a table with columns: Form Group Name, Activity, Date/Time, and User. The row for '2015-2016 PR (IEP)' with activity 'Deleted' on '4/12/2017 3:53:50 PM' by 'Paul Masters' is circled in red.

Student	Details	From IRN	To IRN									
Palmer, Simone	<table border="1"><thead><tr><th>Form Group Name</th><th>Activity</th><th>Delete</th></tr></thead><tbody><tr><td>2015-2016 PR (IEP)</td><td>Deleted</td><td>4/12/2017 3:53:50 PM Paul Masters</td></tr><tr><td>2016-2017 PR (IEP)</td><td>Posted</td><td>4/12/2017 3:53:50 PM Paul Masters</td></tr></tbody></table>	Form Group Name	Activity	Delete	2015-2016 PR (IEP)	Deleted	4/12/2017 3:53:50 PM Paul Masters	2016-2017 PR (IEP)	Posted	4/12/2017 3:53:50 PM Paul Masters	300430	000700
Form Group Name	Activity	Delete										
2015-2016 PR (IEP)	Deleted	4/12/2017 3:53:50 PM Paul Masters										
2016-2017 PR (IEP)	Posted	4/12/2017 3:53:50 PM Paul Masters										