District-to-District Transfer

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District-to-District Transfer Process

Administrators may transfer documents to any district that uses SameGoal so long as both districts do not disable District-to-District Transfer in their administrative settings.

RECEIVING DISTRICT:

Steps *To initiate the District-to-District Transfer document process:*

1. First add the student to SameGoal in your district. If your district integrates SameGoal with your SIS, this usually happens automatically one day after the student has been entered in the SIS.
2. Get in contact with the Transfer Coordinator from the sending district.
3. Communicates the following information to the sending district:
    - Student name
    - Documents to be sent
    - **Email** or **Username** of the new document owner in the receiving district that the document should be transferred to
    - **SIS Student Id** in the receiving district.
4. Once the documents have been transferred, log in to SameGoal to ensure documents were transferred successfully.
    - If they were not, you may need to check that they were not associated with the wrong student.

SENDING DISTRICT:

Steps *To transfer documents:*

1. Once the above information has been provided, go to the **Students / create new** page.
2. Search for and click the student's name whose records you are transferring.
3. Check all the documents you wish to transfer. If you want to check all of them, use the checkbox dropdown menu and select **All**.
4. Click the **Share** dropdown and select **Transfer to Another District**.
5. Fill in the receiving district information:
    - Domain
    - **SIS Student ID** (student ID in the receiving district)
    - **Owner Email or Username** (email or username of the new document owner at the receiving district)
6. Click **Transfer Document**. This will transfer the documents to the receiving district. The sending district will keep their original documents, meaning both districts will have copies.

Transfer Coordinator Contact Information

In order to transfer documents, representatives from both the sending and receiving districts need to work together to communicate the student's ID and the email of the user who will receive the documents.

In order to help facilitate this communication between districts, if a district has provided District-to-District Transfer Coordinator contact information, it's visible to users from other districts when initiating District-to-District Transfers.

Steps *To view contact information:*

1. While logged in as an administrative user, select the documents to be transferred.
2. Click **Share** > **Transfer to Another District**.
3. While on the **Transfer to Another District** page, search for the other district.
4. If the district has provided contact information, it will be included along with the district information in the search results.

Tip If you need contact information for a transfer coordinator at the other district and it is not included in the search results, you will need to contact the district directly.

Tip If you contact SameGoal's Helpdesk inquiring about District-to-District contact information, you will be pointed toward the Transfer Coordinator contact if it has been provided.

Resolve Documents Associated with Wrong Student

If documents were transferred from another district and are appearing on the wrong student, this may be because the incorrect **SIS Student ID** was used when the sending district transferred the documents.

Steps *Resolve documents associated with the wrong student:*

1. Contact the sending district and have them redo the District-to-District Transfer. Make sure you provide them with the correct **SIS Student ID**.
2. Delete the documents that were incorrectly associated with the wrong student.
3. You may also initiate a purge of the documents incorrectly associated with the wrong student to permanently delete them from the wrong student forever.