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.

Steps *To use the district-to-district transfer document process:*

1. District requesting an IEP, SP, or ETR be transferred to them (**RECEIVING DISTRICT**) first add the student(s) to SameGoal in their district. If the receiving district integrates SameGoal with their student information system (SIS), this usually happens automatically one day after the student has been entered in the SIS.
2. **RECEIVING DISTRICT** communicates the following information to the district it requires the document(s) from (**SENDING DISTRICT**):
   - Student Name
   - Documents to be sent
   - **Email** or **Username** of the new owner in the **RECEIVING DISTRICT** that the document should be transferred to
   - **SIS Student Id** in the **RECEIVING DISTRICT**.
3. **SENDING DISTRICT** Administrator logs into SameGoal and transfers the document(s) via the DTD transfer procedure (instructions below).
4. **RECEIVING DISTRICT** Administrator logs into SameGoal to ensure documents were transferred successfully.

District-to-District Transfer Procedure

Steps   *To transfer document(s):*

1. Once the above information has been provided, **SENDING DISTRICT** visits **Students/create new** menu on the left side.
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 menu along the top in the blue bar and select **Transfer to Another District**.
5. Fill in the **RECEIVING DISTRICT** information.
    - Domain: Select the correct district domain from the dropdown menu of the **RECEIVING DISTRICT**. NOTE: This can only be done after the District-to-District Setup Form has been completed and the relationship has been established by SameGoal.
    - **SIS Student ID**: The **SIS Student ID** number of the **RECEIVING DISTRICT**.
    - **Owner Email or Username**: The **Email** or **Username** of the teacher who will be 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.

Resolve Documents Associated with Wrong Student

"I'm the receiving district and the documents are in the wrong student record!"

This may happen if the incorrect **SIS Student ID** was inputted when transferring the student documents.

If the last name of the two students are the same or similar and can be found on the same page when searching in **All** or **Students/Create new** in the left menu, collapse the two records to the correct **SIS Student ID** and undelete the deleted record once the documents have been moved. Similar to the steps below without changing the last name of the student with the incorrect documents.

If the last names are not close together change the incorrect student's last name, collapse the records, undelete the incorrect student, and restore their last name.

Steps *To resolve documents associated with the wrong student:*

1. Search for the student with the incorrect documents from **Students/create new** in the left menu.
2. Click the **Basics** tab.
3. Change the student's last name to the last name of the student that should have the documents in their record (e.g. If Holly Jones has all of Annie Adam's documents, go into Holly Jones and change her last name to Adams).
4. Click **Update student**.
5. Go back to **Students/create new** in the left menu and search for the last name of the student that should have the documents (e.g. Adams).
6. Check the checkbox of the two records that need to be combined/collapsed (e.g. Adams, Annie and Adams, Holly).
7. Click the **Actions** dropdown menu and select **Collapse Student Records**.
8. Choose the correct **SIS Student ID** (e.g. Annie Adam's ID - 956482).
9. Click **Collapse**. This will merge all the documents into the desired student record and bring you back to the search page.
10. From the search page click the **deleted** checkbox, then click **Search**.
11. Click the checkbox next to the name of the student that was just deleted (e.g. Adams, Holly).
12. Go to **Actions** and select **Undelete**.
13. Unclick the **deleted** checkbox and click **Search** again.

14. Click the name of the student you just undeleted (e.g. Adams, Holly).

15. Click the **Basics** tab and change the last name back (e.g. Holly Adams back to Holly Jones).

16. Click **Update student** and you're done! The documents will be in the correct student record and the other student will be restored.