

Enrich[®] Electronic Student Record Transfer: Quick Start Guide for Transferring Students between School Districts

Sending AU

1. Locate Student Record / Profile
2. Select Transfer Records
3. Select Send Record
4. Select receiving state and district
5. Select available (All) Tests, Files Programs, all Plans and Actions *or* under Programs, at a minimum, select only the current IEP and the associated IEP Meeting
6. Click Transfer
7. Document the Transfer Number
8. When transfer is complete, sending user will receive an email notification

Receiving AU

1. Student must be added to Enrich either via SIS or Manual Entry
2. Locate Student Record / Profile
3. Select Transfer Records
4. Receive Records – hold for email saying files are there
5. Enter the Transfer Number, press Enter/Next
6. Confirm transfer info – correct student
7. Select Receive
8. Receiving user will receive an email when the transfer is completed
9. Go back to Student's Profile/Transfer Records
10. Under Received Records, click on View
11. Accept "all" files in Tests and Files categories. Status will change to Accepted
12. Select Close
13. Note date of the earliest Program item to determine Start Date to use for Transfer Disability & Consent Dates. This is due to same validation and logic used when doing a Path 3 process where you have to get consent, etc prior to having an IEP so therefore this action must happen either before or on same day as IEP.
14. Navigate to Student's Program tab and select Start Program
15. Select Special Education>Start Transfer Disability & Consent Dates item
16. Enter Transfer Date (Date the transferred student enrolled)
17. Enter Start Date based on date in Step 13
18. Select Save – leave everything blank at this point (Must do this so you can see contents in Files tab)
19. Go to Files Tab
20. Find dates and disability for Transfer Disability & Consent Dates item by looking at files. Can use IEP or Consent for Evaluation, Eligibility Determination, etc. Information needed is:
 - a. Date of Consent for Evaluation
 - b. Eligibility Determination
 - i. Disability or Disabilities
 - ii. Date the disability was determined
 - c. Date of Consent for Services
21. Navigate to student's Programs tab and reopen the Transfer Disability & Consent Dates action

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22. Enter all data and Outcome Date (which must be the date of Eligibility Determination)
23. Save and Close
24. Go to Student's Profile tab
25. Click on Transfer Records
26. If only bringing in current IEP, select "Accept" for the Meeting associated with the current IEP and complete:
 - a. Involvement: Special Education
 - b. Item: Meeting
 - c. Transfer Date
 - d. Select Next
27. Go back to Student's Profile>Transfer Records
28. Accept IEP
 - a. Involvement: Special Education
 - b. Item: select the correct IEP (preschool, school age, transition)
 - c. Enter Transfer Date
 - d. Select Next
29. Must resolve items on IEP
 - a. Select Validate to determine which fields must be completed.
 - b. Select the transferred meeting to associate with the IEP
30. Finalize
31. From Program Tab, Select Manage Team and identify Team Lead and Primary Service Provider
32. If necessary, can now Amend the IEP by following the AU process when amending the Enrich IEP

Note: Refer to Enrich's Student Record Transfer Quick Reference October 2015 for a more comprehensive guide on using the student record transfer process between Enrich school districts.