

Accessing the System

To access the application, please login to Single Sign-On at <https://sdeweb01.sde.ok.gov/SSO2/Signin.aspx> using your “Username” and “Password” associated with your account.

Once you are logged into Single Sign-On, locate the application titled “Student Transfer System” and click on it. You will be required to agree to the FERPA agreement prior to being allowed to access the transfer system.

Navigating the System

Once you open the application, you will see the home screen. You can navigate through the system by clicking on the navigation links on the left-hand side of the screen.

Home - View status dashboard for your district(s).

New Transfer - Submit a new student transfer request.

Search Transfers - Search for existing transfers in the application.

Open Transfers Queue - View and process Open transfers to your resident district(s).

Intra District Transfer Queue – view and process Intra district transfers.

View Notifications - View notifications regarding your transfers.

District Reports - View reports associated with your transfers.

Navigate Directly to a Specific Transfer

On the right-hand side of the page header you will see the “Quick Access” feature.

Quick Access:

You can navigate directly to a specific transfer by typing in the number of the transfer that you wish to view or edit and clicking “Go”.

Please Note: Only student transfers associated with your assigned district/school will be accessible.

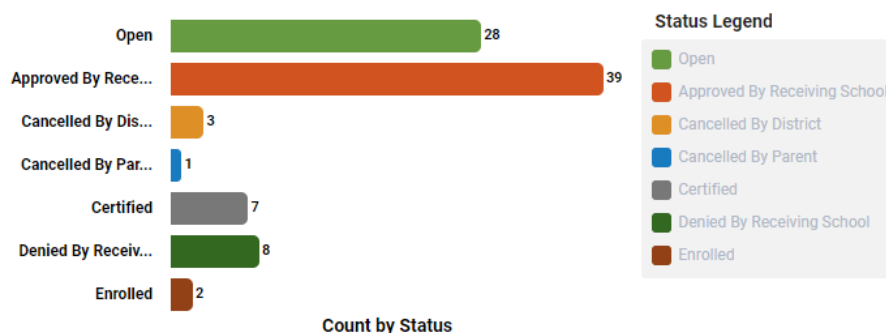
Home

This screen provides the ability to view the current status of the transfers associated with your entire district or individual schools within your district. At the bottom of the page under “Status Dashboard” you should see “District” and “School”.

If you are assigned more than one district, click on “Select...”. This will provide a popup to specify the district for which you wish to display data.

If you wish, you may use the “School” dropdown list to filter the dashboard to show only transfer counts for a specific school within the district. If you have access to the entire district you may choose “Entire District” to display district-wide data.

The Status Dashboard will provide you with a breakdown of the current status of all Open, Emergency and Virtual Transfers for the currently selected district/site for the current school year. Below is a sample of the transfer count data:



Please Note: The total counts displayed in the dashboard include all transfers where the current district is either the sending OR receiving district.

Clicking on one of the bars in the graph will take you to a detailed list of the transfers that comprise the total count.

New Transfer

The “New Transfer” screen will allow you to submit a new transfer request for a student. Follow the instructions below to complete the transfer form:

Step 1: Transfer Information

Select the appropriate Transfer Type. There are three different types of transfers to choose from.

- Open – a standard, inter-district student transfer between two non-virtual school districts or from a virtual district to the student’s resident district
- Virtual Charter – a student transfer to one of the State-recognized virtual charter districts
- Intra – a student transfer from one site to another in same district.

The school year will default to the current school year. Beginning June 1st of each year, you will also see the upcoming school year in the selection list. This will allow you to begin submitting transfer requests for the upcoming school year. Intra transfers for the next school year will open on January 1st.

Specify the application date and time. This should be set to the date and time that the request was officially received by the district from the parent/guardian.

To proceed to the next step, click “Next”.

You may click “Cancel Request” at any point in the process to discard the request and reset the form.

Step 2: Receiving District

Click on “Select...”. This will provide a popup to select the receiving district.

Once a district has been selected, you may optionally pick a school from the selected district (if the receiving school is known). If this is an Intra transfer, you must select a receiving site.

To proceed to the next step, click “Next”.

Step 3: Sending District

Click on “Select...”. Follow the same steps as from “Receiving District” to select the district that the student is currently enrolled in.

Only districts that you are authorized to manage will be displayed within the “Sending District” list. If you are assigned to only one district, the district will be automatically selected for you.

Again, you may optionally select the specific school that the student is currently attending, if known. If an Intra transfer, you must select the sending site.

To proceed to the next step, click “Next”.

Step 4: Student Info

This step will allow you to search for and select the student that is requesting a transfer. You may search by the students First and Last name, or by using their Student Testing Number (STN). Type in the student’s information then click on “Search”.

A list of students that match the specified criteria will be displayed. Click on the correct student. The selected student’s information will be populated in the form. Confirm the information is for the correct student.

If the student has an IEP in place, click on “Yes” and specify the IEP conference date in the field provided.

To proceed to the next step, click “Next”.

Step 5: Parent Info

Fill in all required information for the parent/guardian of the student. This will include their first name, last name, street address, city, zip code and home phone.

Please Note: Specify the email address of the parent/guardian, if known. An email will be sent to the parent notifying them of the transfer request submission.

To proceed to the next step, click “Next”.

Step 6: Additional Info

Depending on the type of transfer (Open, Virtual, Intra) that you are currently submitting, there will be a series of questions for you to answer. Click “Yes” or “No” as appropriate for each question.

If you are satisfied with the transfer data, click “Save” to submit the new transfer request.

You may review the transfer data prior to submission by clicking on the title of a previous step. Navigate through the form by clicking “Next” on each step until you reach the end of the form and click “Save” when you are ready to submit the transfer request.

Once the transfer has been submitted, a popup banner will appear temporarily at the top of the page displaying the new transfer number assigned to the submitted request.

Search Transfers

This screen will allow you to search for existing transfer requests associated with your district using a variety of search criteria. From the list of search results, you may:

- Open an individual transfer for view or edit
- Directly update the status of one or more transfers within the list

When the screen is loaded, the “District/School Selection” tab is selected by default.

Setting Your Search Criteria

Select the sending and/or receiving district for which you wish to retrieve transfers.

Show Me Transfer Requests Where the Student is Transferring:

FROM the Following Sending District/School: ?

District: School: ?

Select...

AND/OR

TO the Following Receiving District/School: ?

District: School: ?

Select...

Please Note: If you specify ONLY a sending district, the search will return all transfers where that district was specified as the sending district. If you specify ONLY a receiving district, the search will return all transfers where that district was specified as the receiving district. But, if you specify BOTH a sending AND receiving district, only transfers where BOTH the sending and receiving districts match your criteria will be returned.

***IMPORTANT:** Open transfers that are currently in the Open/Intra Transfer Queue will not be visible in either the search results or via the “Quick Access” feature until a transfer decision has been specified.*

Specifying Additional Filters for your Search

If you wish to further narrow the criteria for your search, click on the “Filter Options” tab. Below are some of the criteria that may be applied:

- Include transfers where no school was specified.
- Transfer Type (Open, Emergency, Virtual, Intra)
- Transfer Number (See the section below on searching for transfers by their “Legacy” transfer ID)
- School Year
- Student Testing Number (STN)
- Student First and/or Last Name

Searching for a Specific Transfer by the “Legacy” ID

- 1) Select the “Transfer Type” of the transfer.
- 2) Type the “old” transfer number in the “Transfer Number” text box.
- 3) Be sure to click on the “Legacy” check box to search by the legacy transfer number.

District/School Selection Filter Options

☐ Include transfers where no school was specified? ?

Transfer Status:

☐ Open	☐ Denied By Receiving School
☐ Approved By Receiving School	☐ Enrolled
☐ Cancelled By District	☐ Finalized/Closed
☐ Cancelled By Parent	☐ Graduated
☐ Certified	☐ Pending Approval By Resident School
☐ Created In Error	☐ Pending Review By OSDE

Transfer Type: Open Transfer Number: 123456 Legacy School Year: Select a year...

- 4) Click “Search”. Your transfer should be displayed.
- 5) Click on the Transfer Number in the search results to open it for viewing.

Viewing and Working with your Search Results

After you have setup your search criteria and clicked the “Search” button, a list of transfers that match your criteria will be displayed.

You may open any of the transfers in the list by clicking on the Transfer Number. When the transfer detail page opens, you will be able to either view or [edit the transfer details](#) based on your permission level.

If you have been granted permission, you may directly update the status of one or more transfers within the search results by clicking on the current status for the transfer. A popup will be displayed showing you the currently [available status options](#). Select the new status option and click “Save” to update the transfer to the new status.

Open/Intra Transfers Queue

This screen displays a current list of all unprocessed incoming Open/Intra transfer requests for your district and school(s). You can view and process transfers within the queue as well as manage the current processing status for the district queue. The school year will default to the current school year. Beginning June 1st of each year, you will also see the upcoming school year in the selection list. This will allow you to begin processing transfer requests for the upcoming school year.

Updating the Queue Status

When you open the queue, the queue status is set to “In Progress” by default. You can change the status (if you have permission) by simply clicking on the current queue status and selecting the new status. Below are the available statuses and their meaning:

- In Progress – The queue is being actively worked. Transfers may be processed in order of the application date for each grade level. For example, you will only be able to update the status of the first transfer (oldest application date) for 1st grade. After that transfer has been updated, the next transfer, if any, for 1st grade will be made available for update, and so on.

Transfers that are available for update will have a blue background and the Transfer Number and Status links will be active. Inactive transfers will have a gray background and the links will be disabled.

- At Capacity – The district has reached their defined student capacity. Once capacity is reached, districts must still process student transfers meeting certain criteria according to Oklahoma statute. When the district specifies that they are at capacity by changing to this status, all student transfers that MAY meet the statutory criteria will be made available for update.
- Student Waitlist – The district has reached capacity AND has also processed all transfers that may meet statutory criteria for consideration regardless of capacity. Setting the queue to this status leaves all remaining transfers in the queue, but “on hold” pending the district changing the status to “In Progress”.

Viewing/Editing the Status of a Transfer in the Queue

You may open any of the transfers in the list by clicking on the Transfer Number. When the transfer detail page opens, you will be able to either view or [edit the transfer details](#) based on your permission level.

If you have been granted permission, you may directly update the status of one or more transfers within the search results by clicking on the current status for the transfer. A popup will be displayed showing you the currently [available status options](#). Select the new status option and click “Save” to update the transfer to the new status.

View Notifications

Here you will be able to view all notifications regarding student transfers associated with your assigned district and schools.

When you open the notification list, it will display all open notifications for the last 30 days. Any notifications over 30 days old are automatically closed. The list includes information about the transfer associated with the notification, such as transfer type, the student associated with the transfer, and a message containing information regarding the event that occurred for the transfer. If you wish to see the full transfer details, click on the transfer number in the first column and the details will be displayed.

If you have permission, you can manually close one or more transfers to remove them from the list. To close specific notifications, check the “Close” checkbox in the right-hand column next to the transfer(s) that you wish to close. To close all transfers in the list, check the “Close All” checkbox in the list header. The checkbox next to all transfers will be checked/unchecked based on the “Close All” selection. Once you have selected notifications that you wish to close, click on the “Save” button at the bottom of the list.

District Reports

The “District Reports” section allows you to view and/or submit reports associated with a specific district. When you open the screen, you will see to report groupings; “Submissions” and “Reports”. The “Submissions” group displays the various reports that districts are required to submit on a regular schedule. The “Reports” section contains a set of informational reports that may be of benefit to the districts for analysis or research.

Statement of Open Transfers (Annual)

Districts are required to review and certify the Statement of Open Transfers on an annual basis. This is generally performed after the end of the school year and prior to the beginning of the next school year.

When you open the report, a banner is displayed at the top of the page indicating whether the report is currently open for submission or not. To view the report, select a district (if you are authorized for more than one district). The current status of the report submission process will be displayed:

- **Complete All Open Transfers** – there are one or more Open transfers that have not been finalized. You can use the application search tools to identify the unfinalized transfers. Once you have completed the transfer approval/denial process for all transfers, return to the report.

- Enter First Day of School – there are one or more Open transfers that have not had the student’s first day of school specified. A list of transfers requiring the date will be displayed. Fill in the date for each transfer, then click the “Save” button to complete the step.

The first day of school for a student MAY be specified when an Open transfer’s status is changed to “Enrolled”. However, it is not required at that time.

- Certification – all transfers are complete and ready for the review and certification process. To review the report, click on the annual transfer report link (Under “Available Reports”) for the current school year. The report will appear. Once you have reviewed and agree that the information is accurate, click on the “Certify” button to certify the report and complete the process. Once the certification process has been completed, the form will display the certification date/time. If the transfer data changes after the certification has been completed, you may reperform the certification process by clicking on the “Release” button and reperforming the required certification steps.

Open Transfer Extension (Annual)

Districts are required to report on an annual basis whether enrollment for students previously approved on Open transfers will be extended for the next school year. This is generally performed after the end of the school year and prior to the beginning of the next school year (May and June).

When you open the report, a banner is displayed at the top of the page indicating whether the report is currently open for submission or not. To view the report, select a district (if you are authorized for more than one district). The report will display a list of active transfers (transfers that were approved/extended in the previous school year that should be considered for re-extension) and new transfers (transfers approved during the current school year). For each transfer in the list, indicate whether the district intends to approve or deny the extension of the transfer for the next school year. If you choose to deny the extension, indicate the reason for denial. Once you have specified a decision for all transfers, click the “Save” button to complete the reporting process.

District Capacity (Quarterly)

Districts must report to SDE, on a quarterly basis, the capacity that each site within the district has to accept new student transfers. The reporting period for each quarter extends from 15 days before and after the first day of each quarter.

When you open the report, a banner is displayed at the top of the page indicating whether the report is open for the currently selected school quarter. To view the report, select a district (if you are authorized for more than one district). You can use the “Previous” and “Next” quarter links to navigate between different school quarters. The currently selected school year and

quarter is displayed in the dark blue bar between the navigation links. Once you have navigated to the current quarter, follow the process below to complete the submission process:

- Select the school from the “School” dropdown for which you wish to submit capacity data
- For each grade offered at the selected school, specify the:
 - Total Capacity – the total capacity of students for the grade
 - Inter District Capacity – the number of inter district transfer students that the site has capacity to accept for the grade level – available seats.
 - Intra District Capacity – the number of intra district transfer students that the site has capacity to accept for grade level – available seats. If a school does not have multiple sites and therefore no intra transfers – you must put a zero place holder in each spot.
- When you have specified all data for the current school, click the “Save” button at the bottom of the screen.
- Repeat the process for each school in the district.

Incoming Open Transfer Results (Quarterly)

Districts must certify, on a quarterly basis, the results of all Open transfer requests submitted to the district. The reporting period for each quarter begins 15 days before the first day of each quarter.

When you open the report, a banner is displayed at the top of the page indicating whether the report is open for the currently selected school quarter. To view the report, select a district (if you are authorized for more than one district). You can use the “Previous” and “Next” quarter links to navigate between different school quarters. The currently selected school year and quarter is displayed in the dark blue bar between the navigation links. Once you have navigated to the current quarter, follow the process below to complete the submission process:

- A graph is displayed showing a summary of the status of all incoming transfers received by the district for the current quarter.
- Click on the “Approved” status count in the graph to view a detailed list of approved transfers. Review the list for accuracy.
- Click on the “Denied” status count in the summary graph. A detailed graph showing a breakdown of the reason for denial for the transfers is displayed on the right and a list of denied transfers is displayed below. Review the list for accuracy.
- Click on the “Other” status count in the summary graph. A detailed graph showing the current status of non-finalized transfers is displayed on the right and a list of associated transfers is displayed below. **If any of the transfers in the list are currently in an open status, they MUST be finalized before you can certify the report.**
- After you have reviewed all of the report data, click on the “Certify” button to complete the report for the current quarter. If the transfer data changes after the certification has been completed, you may reperform the certification process by clicking on the “Release” button and reperforming the required certification steps.

Recent Student Transfers

This report displays the last two completed transfers processed within the system for a student or students.

To view the report, select a district (if you are authorized for more than one district). You can filter as broad or narrow as you desire based on the criteria that you specify:

- District – you will see all students within the district
- School – you will see all students within the selected district and school
- STN, First and Last Name – you will see only students that match the specified STN or have the specified first and last name

Once you have specified your search criteria, click “View Students”. A list of students matching your criteria will be displayed. Click on a student to see the recent transfers reported for the student.

Outgoing Students By Quarter

This report displays a list of all students that transferred from the district for the specified quarter.

To view the report, select a district (if you are authorized for more than one district). You can use the “Previous” and “Next” quarter links to navigate between different school quarters. The currently selected school year and quarter is displayed in the dark blue bar between the navigation links. As you navigate between quarters, the list of transfers for the currently selected quarter are displayed.

Editing a Transfer

When a specific transfer is opened, your ability to modify the transfer details will be restricted based on your role and permissions within the system and based on the current status of the transfer. There are three data restriction classes:

- View Only – all data is viewable only. No modification is permitted.
- Restricted Edit – limited data modification is allowed. Specific field editing is allowed, while other data is read-only.
- Edit – most or all data is editable.

The transfer detail page contains the same basic information as we entered on the new transfer form with the following exceptions.

Status History:

This section will display all status changes that have occurred for the current transfer, when they occurred, and who initiated the change. The latest status change is listed first.

Notifications:

This section displays all notifications related to the current transfer that are visible by the current user. By default, notifications that are closed are hidden from view. To see closed notifications, change the “Show Closed” option to “Yes”.

Download Documents:

In the upper-right corner of the transfer details screen, you will see a link to “Download Documents”. Click on this link to display a list of available forms and data exports for the current transfer.

If you have permissions to edit a transfer, you will see buttons allowing you to save your changes to the transfer in the lower right-hand corner of the screen. Click “Save” to save your current changes and remain in the current transfer. Click “Save and Close” to save your changes and automatically close the transfer details and return to your previous screen. You may click “Cancel” at any time to discard your changes and close the transfer without saving.

Delegating Superintendent Permissions

If the district superintendent elects to, they may delegate permission to perform duties to other district staff. This may be done by adding the selected staff to the “Super Delegate” role for the Student Transfer System within SSO. See the [District Superintendent SSO Manual](#) for instructions on managing users and roles.

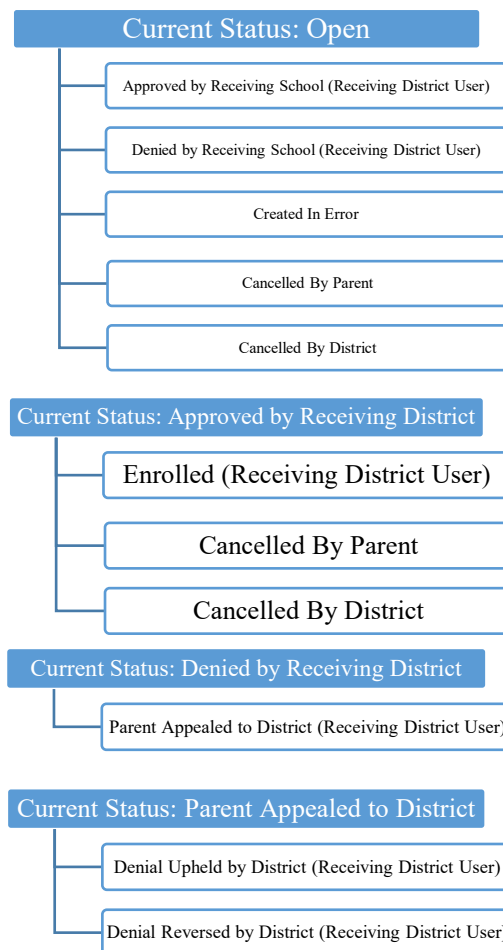
Transfer Status Options

If you have permission to update the status of a transfer, there will be certain status options available to you based on:

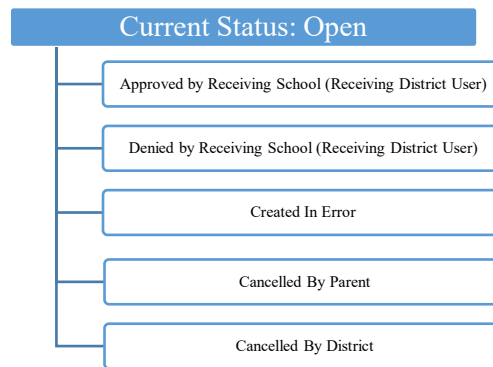
- the type of transfer
- the current status of the transfer
- your association with the current transfer

Below is a diagram with the flow of status options for each transfer type.

Open Transfers:



Virtual Charter Transfers:



Approval of a virtual transfer by the sending district/school is not required for the first virtual charter transfer for a student for each school year.

