## Student Withdraw / Transfer Checklist

| Step | Processes |
|------|-----------|
| 1 | □ Remove Homeroom<br>□ Remove Counsellor<br>□ Remove Locker Information |
| 2 | □ *if student is leaving the district*, Remove *Emergency Contacts only* |
| 3 | □ Review Conduct (School P/VP) |
| 4 | □ *If student is leaving the district* <u>AND</u> student has an IEP (), notify their case manager that the student will be *Exited* from **Student Services** |
| 5 | □ Review Transcript/Current Grades (teacher entry)<br>□ Run a copy of current Report card if you have just passed a reporting period(s) |
| 6 | □ Remove your **current year** school courses from student schedule |
| 7 | □ Remove any **course requests for the next school year** (If applicable)<br>□ **Remove Next Year School (If Applicable)** |
| 8 | □ Remove student from build view once (If Applicable) |
| 9 | □ End date any 1701 current year Programming |
| 10 | □ Review Inclusions |
| 11 | □ Delete any Group or Snapshots attached to the student |
| 12 | □ Review Journal Entries |
| 13 | □ Review Enrollment Record (**Adjust dates and entry/exit grades if necessary**) |
| 14 | □ Withdraw (out of district) or Transfer (in district) student |
| 15 | □ Final Review of student using the **Former student filter** |

## Student Withdraw / Transfer Checklist

# *Steps to complete a student withdrawal (movement out of SD73) or Transfer (movement within SD73).*

### *Step 1 Details Side Tab*
**Student** Top Tab, **Details** Side Tab
- Remove the **Homeroom**
- Remove **Counsellor**(if your school uses this feature)
- Remove **Locker Information** (if your school uses this feature)



- Remove Bus Information (if your school uses this feature)

| Demographics | Addresses | Alerts | Citizenship | Programs | Permissions | Language & Culture | Buses |
|---|---|---|---|---|---|---|---|

### Step 2. Contacts
**NEW 29/11/2021:** If the student is being **withdrawn** (moving out of district), only remove *Emergency* contacts. In the example below contacts 1 & 2 would not be deleted, but contacts 3, 4, and 5 would be.
**Student** Top Tab, **Contacts** Side Tab. Select the contacts, click **Options, Delete**



### Step 3. Conduct - School Administrators Only
**Student** Top Tab, **Conduct** Side Tab
- Update Conduct Records



### Step 4. Student Services
If student is moving out of district, notify the case managers (LART) that the student will be *Exited* out of Student Services.

### Step 5. Grades
**Student** Top Tab, **Transcript** Side Tab **AND Grades** Top Tab, **Grade Input** Side Tab
- Review (if applicable) Current Year Transcript Record
  - Questions to ask:
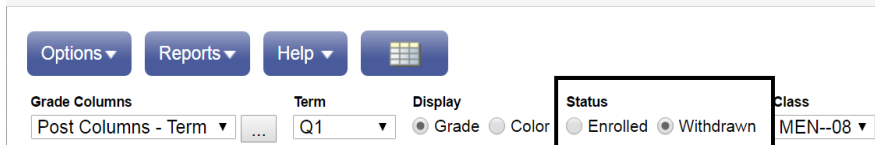    Is student withdrawing in the middle or near the end of a reporting period? Who will produce a report card?



- Update Term/Final Marks and Course End Dates(if appropriate)

## Student Withdraw / Transfer Checklist

- Run a report card (if applicable when teacher(s) have entered all marks).
  ***Please Note***:  *If a student is withdrawn just before a reporting period, it is possible to produce a report card after the student has been withdrawn.  This can be done via the "Former" Student Filter and teachers can find withdrawn students in the MyEdBC Gradebook Top Tab>Scores Side Tab. They will need to choose "Withdrawn" in the Status area of the page. Teachers can enter marks/comments and then post; however, they cannot print report cards, so the office will need to produce the report card for the withdrawn student.*



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### Step 6. Student Schedule (Current Year)
**Student** Top Tab, **Schedule** Side Tab, **Workspace** Sub-Side Tab

- If transferring a student to a school in SD73, drop the courses from the student schedule
  **Note:** The withdraw functionality will automatically drop the courses from the student schedule



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### Step 7. **Student** Top Tab, **Schedule** Side Tab, **Requests** Sub Side Tab

- If your school has begun the process of scheduling for the next school year, delete the student course requests



- Remove **Next Year school** (If withdrawing a student between February and June of the current school year)

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### Step 8. Student Schedule – Build Year - Middle/High School <u>Only</u>
If the student is being withdrawn/transferred between February and the end of the school year:
*Change view: Build View*
**Student** Top Tab, Click **Options , Refresh**
*Filter*: Students to Schedule, Search for the student, they should no longer appear on the list.

## Student Withdraw / Transfer Checklist

### Step 9. 1701 Programs



- All
- ✓ BC Student Learning Groups
- Student Designations
- General Program

**Student** Top Tab, **Membership** Side Tab, **Programs** Sub Side Tab
- End-Date any 1701 Programming Codes for the date of withdraw (Dictionary=General Program)

1 of 6 selected

All Records - General Program

| | Program | ProgSch | Start | End |
|---|---|---|---|---|
| ☐ | Core French | Barriere Elementary | 01/10/2015 | 30/06/2016 |
| ☑ | Core French | Barriere Elementary | 06/09/2016 | 29/06/2017 |
| ☐ | Ab Language & Culture | Barriere Elementary | 01/10/2015 | 30/06/2016 |
| ☐ | Ab Language & Culture | Barriere Elementary | 06/09/2016 | 29/06/2017 |
| ☐ | Ab Support Services | Barriere Elementary | 01/10/2015 | 30/06/2016 |
| ☐ | Ab Support Services | Barriere Elementary | 06/09/2016 | 29/06/2017 |

### Step 10. Inclusions
**Student** Top Tab, **Transactions** Side Tab, **Inclusions** Sub Side Tab
- Review and Update PSR inclusions (if applicable)

| Date | Expiry | Type | Year |
|---|---|---|---|
| 19/11/2015 | | Absence Letter 5 | 2016 |

### Step 11. Delete any Groups or Snapshots
**Student** Top Tab, **Membership** Side Tab, **Groups** Sub Side Tab.
- Remove student from any groups/snapshots (if applicable)

| | Group > Title | Group > Category | Type | Management Type |
|---|---|---|---|---|
| ☐ | All School Athletes | Athletic | Grade Level | Automatic |
| ☑ | Barriere FN Students | Support | Single Person | Manual |
| ☐ | French K-7 | Academic | Grade Level | Automatic |
| ☐ | RC-IC | School | Grade Level | Automatic |

### Step 12. Journal Entries
**Student** Top Tab, **Documents** Side Tab
- Remove Journal Information (if your school uses this feature)

| Date | Time | Type | Duration | Reason | Referral | Follow-up | Comment |
|---|---|---|---|---|---|---|---|
| 06/01/2017 | 2:35 PM | | 0 | | | | |

### Step 13. Review Enrollment Record
Check **Membership** Side Tab > **Enrollment** Sub Side Tab.   Review all enrolment/withdrawal details. Ensure that all dates are in chronological order and at least 1 day apart. Remove any duplicated enrolment or withdrawal records.

Barriere Elementary  -  Enrollment status: Active  -  Year of graduation: 2027

| | Type | Date | Code | Reason | Status | EnrStatus | YOG | School > Name | Admission Status Code | PSR Grade |
|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | E | 05/08/2014 | First Time Entry | | Active | Active | 2027 | Barriere Elementary | | KF |
| ☐ | W | 29/06/2012 | Reason Unknown | | Withdrawn | Active | 2027 | Barriere StrongStart Centre | | EL |
| ☐ | E | 30/11/2011 | Re-ent. Involn With. | | Withdrawn | Active | 2027 | Barriere StrongStart Centre | | EL |
| ☐ | W | 30/06/2010 | Reason Unknown | | Withdrawn | Active | 2027 | Barriere StrongStart Centre | | EL |
| ☐ | E | 07/01/2010 | First Time Entry | | Withdrawn | Active | 2027 | Barriere StrongStart Centre | | EL |

- Check **Membership** Side Tab > **Schools** Sub Side Tab.  Check for any active Secondary School Associations (SSA). If a student is maintaining this SSA association, you will need to withdraw the student as **"Active, No Primary"**

| | School > Name | Year | Type | Start | End |
|---|---|---|---|---|---|
| ☐ | @KOOL | 2015 | Secondary | 11/03/2014 | 31/07/2015 |
| ☐ | Kamloops School of the Arts | 2015 | Secondary | 15/08/2014 | 31/07/2015 |
| ☐ | @KOOL | 2016 | Secondary | 01/08/2015 | 08/09/2016 |
| ☐ | Kamloops School of the Arts | 2016 | Secondary | 10/08/2015 | 30/06/2016 |
| ☑ | @KOOL | 2017 | Secondary | 09/08/2016 | |

### Step 14. Withdraw Student (if moving out of district)

### Step 14.  Transfer Student (if moving within district)
- **Student** Top Tab, **Details** Side Tab.  Complete the indicated fields.  **Save**

Transfer pending ☐

Transfer School > Name

- **Notify receiving school**  that the student is

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available



**Withdraw Student**

Withdraw student that is: Primary

| Name | Q Select student name |
| Current Primary School | South Kamloops Secondary |
| Date | 25/10/2019 |
| Code | Q  1. Select appropriate choice |
| Reason | Q  Leave Blank |
| Status * | ▾  2. Select Withdrawn |

| Keep student in special education | ☐ | Don't check this box |
| Disable related user accounts | ☐ | Don't check this box |
| Create former school association | ☑ | Keep checked |

| PSR Grade | ▾ | Select the grade the student was in when s/he left the school |

☑ OK   ✖ Cancel     Click OK

- When the above steps are completed, withdraw the student using correct date/code/reason/status

## Step 16. Final Review

- After withdrawing/transferring the student, check the **"Former"** ⧩ Student Filter to ensure that the student appears correctly
- Run/View the Permanent Student Record to ensure that all withdrawal information is correct. Remember to check for PSR entry/exit grade
- Modify the Withdrawal record in the Membership side tab as necessary