

Transfer Assignment Process

When to use the transfer assignment function?

If an educator left the district before the end of the school year and a replacement educator has taken over their assignment(s), or if a semester long course ends before the end of the semester.

Things to remember:

You must add the Replacement Educator to the October Educator file after you have completed the transfer. You will receive error code CRS00002 – Educator School Record Missing if the Replacement is not the the October Educator file.

***Transfer assignment can only be done in a latest trial of the October Assignment file.**

**The two files necessary for this function are the October Educator and October Assignment files.

***DO NOT END DATE ORIGINAL EDUCATOR UNTIL AFTER TRANSFER ASSIGNMENT IS COMPLETED.

1. In the latest trial of the October Assignment, select records.



The screenshot shows the '2018 October Assignment' interface. It features a 'New Trial' button and a 'Latest Trial' section. The 'Latest Trial' section displays the following information:

- Created: 12-27-2017 12:31pm
- Last Activity: Validated at 12-27-2017 12:31pm
- Buttons: Save, Download, Revalidate, Certify, Delete
- Summary Cards:
 - Errors (0) Warnings (24)
 - Records (772) (circled in green)
 - Reports

Below the 'Latest Trial' section is a 'Submitted: Certified Trial' section with the following information:

- Created: 10-16-2017 4:45pm
- Last Activity: Validated at 10-16-2017 4:50pm
- Certification Date: 10-16-2017 4:51pm
- Send Status: Sent
- Buttons: Download, Delete, Edit Trial Name
- Summary Cards:
 - Errors (0) Warnings (24)
 - Records (772)
 - Reports

2. On the left of the screen under Records, select Course Assignments.



The screenshot shows the 'Records' section of the interface. It displays the following information:

- Records**
- [Course Assignments](#) 104 (circled in green)
- [Student Assignments](#) 668
- Buttons: Download, Append/Replace

- Search for the educator that you are replacing and click View
*You can search either Educator SSN, Last Name, or First Name

Sort on multiple columns
Showing 1-7 of 7 |<< << Page 1 of 1 Go >> >>| Rows per page: 500

Search:

<input type="checkbox"/>	Violations	ReportingSchoolCode ^	EDSSN	LastName	FirstName
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		

Delete Delete & Revalidate Add a record

- Click the Transfer Assignment button

Edit Delete Delete & Revalidate Next>

Element	Value
CollectionVersion	2018Oct1.0CrAssign
CurrentSchoolYear	2018
ReportingDistrictCode	
ReportingSchoolCode	1050
EDSSN	
LastName	
FirstName	
PosCode	60 - TEACH
CTEProgType	
AssignNum	3902
LocCourseNum	H9016
LocCourseName	Health
LocSecNum	7
CourseNum	085300 - HEALTH
AssignStartDate	
AssignEndDate	
CourseSeqNum	
CourseGradeLevel	13 - HS
CourseSem	1 - FirstSem
CourseDeliverySys	
CourseProgCode	
CourseMins	1
CourseCredit	
Caseload	

[Student Assignments](#)
[Transfer Assignment](#)

5. Select the assignment(s) that will be reassigned by checking the check box.
 - 7a. Enter the end date of the Original Educator
 - 7b. Complete the Replacement Educator fields
 - 7c. Click Transfer Assignment

Transfer Assignment

Educator SSN and Name: Original educator name and SSN will display here

<input type="checkbox"/>	Assignment Number	State Course Number	Local Course Number	Local Course Name	Sequence	Semester
<input checked="" type="checkbox"/>	3902	085300	H9016	Health		1

Course/Assignment End Date (mm/dd/yyyy)

Replacement Educator

Provide required information on the educator for which the chosen assignment(s) are to be transferred. Multiple assignments can be transferred to an educator; however, you can only transfer assignments to a single educator at a time. This process may be repeated for additional educators. (Attention: Checking the No Replacement button indicates this assignment ends with no replacement.)

* Replacement Educator SSN (No Dashes)

Replacement Educator First Name

Replacement Educator Last Name

* Course/Assignment Start Date (mm/dd/yyyy)

* Required if "No Replacement" (below) is not checked.

No Replacement: There is no replacement for these assignments.

Transfer Assignment(s)

6. The replacement educators name will then display at the top as the teacher of record.

Transfer Assignment

Educator SSN and Name:

<input type="checkbox"/>	Assignment Number	State Course Number	Local Course Number	Local Course Name	Sequence	Semester
<input type="checkbox"/>	3475	115870	H3300	Pre-Calculus		1

7. Open the latest trial of the October Educator file to end date the Original Educator and add a start date the Replacement Educator. **(If the Replacement is not in the October Educator file, Please add them at this time).**

- 7a. Select Records

Home > > 2018 October Educator

New Trial

Latest Trial

Created: 03-29-2018 2:58pm
Last Activity: Validated at 03-29-2018 2:58pm

[Save](#) [Download](#) [Revalidate](#) [Certify](#) [Delete](#)

Errors (0) Warnings (0) **Records (208)** Reports

Submitted: Certified Trial

Created: 01-25-2018 12:15pm
Last Activity: Validated at 01-25-2018 12:15pm
Certification Date: 01-25-2018 12:15pm
Send Status: Sent

[Download](#) [Delete](#) [Edit Trial Name](#)

Errors (0) Warnings (0) **Records (208)** Reports

8. On the left of the screen under Records, select Schools.



9. Search for the educator you are replacing and click View.

**You can search either Educator SSN, Last Name or First Name

Sort on multiple columns
Showing 1-7 of 7 |<< << Page 1 of 1 Go >> >>| Rows per page: 500

Search:

<input type="checkbox"/>	Violations	ReportingSchoolCode ^	EDSSN	LastName	FirstName
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		
<input type="checkbox"/>	View	1	1050		

Delete Delete & Revalidate Add a record

10. Click Edit to add an end date in the Early End Date field for the original educator.

Element	Value
CollectionVersion	2018Oct1.0EdSchool
CurrentSchoolYear	2018
ReportingDistrictCode	
ReportingSchoolCode	1050
EDSSN	
LastName	
FirstName	
PosCode	60 - TEACH
CTEProgType	
FTE	0
Salary	0
CTEMonth	
LateStartDate	
EarlyEndDate	
CourseComm	

11. Enter the Early End Date in the MM/DD/YYYY format and click SAVE. Repeat for Replacement Educator by enterign a start date.

Remember to also update your Student Information System.

Element	Value
CollectionVersion	* 2018Oct1.0EdSchool
CurrentSchoolYear	* 2018
ReportingDistrictCode	*
ReportingSchoolCode	* 1050
EDSSN	*
LastName	
FirstName	
PosCode	* 60 - TEACH
CTEProgType	- -- no value --
FTE	* 0
Salary	* 0
CTEMonth	
LateStartDate	(MM/DD/YYYY)
EarlyEndDate	(MM/DD/YYYY)
CourseComm	

(* = required)

12. Click revalidate, and if there are zero errors, click certify.

Home > > 2018 October Assignment

New Trial

Latest Trial

Created: 12-27-2017 12:31pm
Last Activity: Validated at 12-27-2017 12:31pm

Scan Download **Revalidate** **Certify** Delete

Errors (0)
Warnings (24)

Records (772)

Reports

Submitted: Certified Trial

Created: 10-16-2017 4:45pm
Last Activity: Validated at 10-16-2017 4:50pm

Certification Date: 10-16-2017 4:51pm
Send Status: Sent

Download Delete Edit Trial Name

Errors (0)
Warnings (24)

Records (772)

Reports