Montana GEAR UP

Change Active Students to Inactive, Transfer Active Students to Another GEAR UP School, and Transfer Inactive Students to a GEAR UP School

This document explains how to change Active Students to Inactive, to transfer Active Students to another GEAR UP School, and to transfer Inactive Students to a GEAR UP School. If you have any questions, please contact Andi Rankin at 406.444.0674.

1. Change Active Students to Inactive:
   - Go to the Student’s Summary Page and click on the Transfer/Inactive Tab
- At “New Status” ....use the pull-down to specify the student’s status as Inactive
- Enter the Date of Transfer/Inactivity
- Use the pull-down to enter the Inactive Reason
- Use the Notes section to include any comments about making the student inactive.

If the student or his/her parent(s) are listed as participating in a GEAR UP Service after the Transfer Date, you will be asked to edit the student’s or parents’ participation in those services. The reason, of course, is that the student or parent cannot participate in a service if the student is no longer at the school on those dates. So, if you receive this message, you must edit the identified services before the database will allow you to make the student inactive or to transfer a student. Follow the instruction on the next page.
• On the Student’s Summary Page, click on the Student and Parent Services Tab.
  ▪ Identify any student and parent services that have service dates after the Date of Transfer/Inactivity. The services must be revised before you can make the student inactive.

(A) Start with a Student Service that has a service date after the Date of Transfer/Inactivity. Click on that Student Service and it will take you to a page where you can revise the student’s participation in the service. You have two choices. You can either remove the student from the service by checking the box “Remove Student from this Service” and hit Submit. Or, you can revise the Student Service Hours that the student participated in that activity. For example, let’s say that the page shows that the student participated in a tutoring program for 10 hours. However, because of the Transfer/Inactivity, the student only participated in the tutoring program for 5 hours. Simply change the number of Student Service Hours from 10 to 5, check the box Bypass Transfer Check, and hit submit. That will change the Student Service Hours and remove the activity from blocking the transfer.
(B) Now, go back to the Student Summary page and select a Parent Service, if any, which has a service date after the Date of Transfer/Inactivity.

Click on that Parent Service and it will take you to a page, as shown below. You will notice that in the last column, called Remove, there is a link to remove the parent from the service. Click on that link and the parent(s) is removed from the service.
2. Transfer Active Students to Another GEAR UP School:

- Go to the Student’s Summary Page and click on the Transfer/Inactive Tab

- At “New Status” use pull-down to specify the student’s status as Transferred to GEAR UP School
- Use the pull-down to specify the school to which the student is being transferred
- Enter the Date of Transfer/Inactivity.
- Use the Notes section to include any comments about transferring the student.

If the student or his/her parents are listed at participating in a GEAR UP service after the Date of Transfer/Inactivity, you will be asked to edit the student’s or parents’ participation in those services. So, if you receive this message, follow the instructions in (A) and (B) above, as explained previously.
3. Transfer Inactive Students to Another GEAR UP School:

- Go to Find Students

Under Display Students, use the pull-down to select and display all Inactive Students
Select the Inactive Student that you want to make active by transferring the student to a GEAR UP School. Click on that student and you will be taken to one of two pages, depending upon whether the student had been previously enrolled in your school.

If the student had been enrolled at your school previously, you will be taken to the student’s Summary Page.

- At “New Status” .... use pull-down to specify the student’s status as Transferred to GEAR UP school
- Enter the Date of Transfer/Inactivity
- Use the pull-down to specify the school to which the student is being transferred
- Use the Notes section to include any comments about transferring the student.
If the student had not been previously enrolled at your school, you will be taken to a page to transfer the student.

- At “New Status” ..... use pull-down to specify the student’s status as Transferred to GEAR UP school
- Enter the Date of Transfer/Inactivity
- Use the pull-down to specify the school to which the student is being transferred
- Use the Notes section to include any comments about transferring the student.