



WIAA AD Transfer Tracker Playbook - Updated 9/1

Getting Started

If you're a FinalForms customer, your parents will note if they are transferring from another school when they fill out the registration forms at the beginning of the season. The information provided in the New Student Registration and WIAA Transfer Eligibility Forms will automatically populate into the Transfer Eligibility Worksheet.

If you're not a FinalForms customer, you must manually enter the student by following the steps below. We promise it'll be easier than ever before!

1. Login
2. Click **MANAGE > STUDENTS**
3. Click 
4. Work with the Student's Parents to complete the New Student information. Be sure to include **Transferring From** and **Sport History** information in the yellow box.

Accessing the Worksheet

1. Return to the **MANAGE > STUDENTS** page and find the transferring student. Click  to the left of the student's name to access the WIAA Student Transfer Eligibility Worksheet.
2. Under **Transfer Athletic Eligibility Status** click 
3. Follow the steps on the WIAA Student Transfer Eligibility Assessment Page

STEP 1 - Confirm Sending School

1. Confirm the information for the student's previous school and Athletic Director is correct. The email address placed here will be utilized to provide the sending school AD with access to the student's worksheet.

Note: You can edit the sending school contact information at any point prior to the sending school signing the assessment. If there is no sending school contact available due to a student being homeschooled, some foreign exchange situations, etc. Please input Justin Kesterson or



Jenee James' information as directed into the Sending School section to verify the information for your student.

STEP 2 - Verify Transfer Information

1. Complete all questions and provide all relevant information and attachments.
2. **Note the Official Date Of Transfer Question.** This is a question that will not be provided by the parent form. It will automatically be filled in with the Student Enrollment Record Start Date. This date will begin the 12 month clock on the student's eligibility.

***Note:** If you are a FinalForms customer this information will be filled out by the parent and student and they will be asked to sign off that the information is correct. You can edit this information if needed within the worksheet itself.*

STEP 3 - Initial Determination

1. Review the "Assistance in Applying the WIAA Transfer Eligibility AD Checklist" and select the Determination(s) that you feel best applies to the student.
2. Provide your name as listed under the Signature Box to validate that the information is correct to the best of your knowledge.
3. Click the [Send Worksheet Verification Request](#) button to notify the Sending School AD that they can review and verify the information. There is a pop-up window that shows to verify you want to take this action.

STEP 4 - Sending School Signature

The Sending School Athletic Director will receive an email notification at the email provided at the beginning of the worksheet. The link in this email will provide them with direct access to the worksheet to review. Once the sheet is accessed, the Sending School AD will:

- Review all of the information.
- Provide comments, questions and disputes in the easy to use comment/chat box.
- Once all information is reviewed, the Sending School Athletic Director provides their name as listed under the Signature Box to validate that the information is correct to the best of their knowledge.

The sending school confirmation will complete the Transfer process. If required, the receiving school AD can initiate a Hardship Appeal by following the steps.

Changing the Status of a Transfer

Use the following steps to change the status of a Transfer Student.

1. Click **Manage > Students**.
2. Click the **Edit button** in the student's row.
3. Scroll to the *Administrator-Only Options* section of the page.
4. Click **Edit Record**.
5. Either check or uncheck the box next to **Transfer In:** to update to the desired status. Fill in any other required fields if necessary.
6. Click **Update Enrollment** to save your changes to the Enrollment History.

Reference Guide

Transfer Icons will be shown as follows on the “Manage Students Page”:



Student Assessment is complete and they have been determined Eligible



Student Assessment is Incomplete or Student has been determined Not Eligible



Student has been determined Eligible after the required wait period

Transfer Icons will be shown as follows for Coaches Rosters:



Student Assessment is complete and they have been determined Eligible



Student Assessment is Incomplete or Student has been determined Not Eligible



Student has been determined Eligible after the required wait period



Note: The Student record will be Yellow and then the Individual Sports will show as Red or Green based on the past 12 months of playing the specific sport.

Printing the Assessment

You can download the Student's assessment by clicking **Print Assessment**. The sections of the assessment will be automatically expanded to view in the PDF.

Uploading and Viewing Attached Documents

As you are completing the assessment, check that the necessary documents are uploaded. Documents can be viewed and uploaded by clicking the **View Documents** button in the upper right corner of the assessment.

Restarting an Assessment

An assessment can be restarted at any time prior to the sending school signing the assessment. If an assessment needs to be restarted after completion; please contact the WIAA.