

Integrated National Education Information System (iNEIS™)

Activity for Manage Withdrawal Student

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Introduction

This document contains step-by-step instructions for when students who are transferring to a private school or leave school without a date of return.

The activities needed to be done are as follows:

1. Withdrawal Student
 - a. Raise a Withdrawal Request Form
 - b. Update Clearance Checklist Items
 - c. Update Student Records
2. Return from Withdrawal (*if required*)
 - a. Update Student Records

1. Withdrawal Student

This function allows the user to transfer a student to private school or leave school without a date of return.

1.1 Raise a Withdrawal Request Form

Roles Involved: **School Student Registrar, Class Teacher** and **School Approver**

1. Navigate to **Records and Enrollment > Student Movement > Student Withdrawals > Withdrawal Request**
2. In **Add a New Value** tab, enter the **Student ID**
3. Click on **Add** button
4. Fill in all the required fields in the Withdrawal Request form:
 - Withdrawal Reason
 - Date of Request
 - Date of Withdrawal
5. **Save** and **Submit** the Withdrawal Request form
6. School Approver to **approve** the Withdrawal Request form
7. School Student Registrar to **complete** the Withdrawal Request form. Upon completing the Withdrawal Request form, the Clearance Checklist Items are automatically assigned.

Note:

As for **Pre-School** students, user do not have to go through step 7 as there are no Clearance Checklist Items for Pre-School career.

1.2 Update the Clearance Checklist Items

Roles Involved: **School Admin – Student Clearance** and **Class Teacher**

The user can still proceed in their subsequent activities without completing the Clearance. However, it's still advisable to complete the Clearance before proceeding.

1. Navigate to **Campus Community > Checklists > Person Checklists > Checklist Management – Person**
2. In **Find an Existing Value** tab, enter the **Student ID**
3. Click on the **Search** button
4. User will be directed to the **Checklist Management – Person** page
5. **Click on the Checklist Management 1** tab

Note:

The Clearance Checklist created will display the **Date/Time** it was created as well as the **Checklist Code**.

When the Clearance Checklist is created for Transferred and Withdrawn students, the **Comments** field will contain the Request Nbr of the Completed Request form.

6. Click on the **Checklist Management 2**
7. User will see each of the **Clearance Items** listed in this page which the students is supposed to complete.
8. Select one of the statuses from the dropdown list of the items the School Admin or teachers/persons in-charge of and update the status of the item.

Note:

There are 4 statuses available:

1. **Initiated:** The default status of all items; No action has been taken to clear this item since Clearance Checklist has been created.
2. **Not Applicable:** The item is irrelevant to the student.
3. **Work in Progress:** Action has been taken to clear the item but not yet completed.
4. **Completed:** Student has returned the item or has completed the task.

9. Click on **Save** button once user has done updating the statuses of the Clearance Items

1.3 Update the Student Records

1.3.1 Drop Class Enrollment

Roles Involved: **School Student Registrar**

This step is only applicable to students who are required to be dropped from their Class Enrollment in the term which they are withdrawing from.

1. Navigate to **Records and Enrollment > Enroll Students > Enrollment Request**
2. In **Add a New Value** tab, enter the **Student ID, Academic Career** and **Term**
3. Click on **Add** button
4. Select '**Drop**' from **Action** field
5. Select '**WITH**' from **Action Reason** field
6. Select '**Override Action Date**' checkbox
7. Select the **Action Date** when the student drop from class

8. Enter **Class Nbr**
9. Click '+' to add more **Class Nbr**
10. Click on **Save** button
11. Click on **Submit** button

Note:

User should also drop the student from the CCA career and remove the student from the Student Block.

1.3.2 Term Withdraw

Roles Involved: **School Student Registrar**

1. Navigate to **Records and Enrollment > Student Term Information > Term History**
2. In **Find an Existing Value** tab, enter the **Student ID**
3. Click on the **Search** button
4. In **Term Withdrawal** tab, select '**Withdrew**' from **Withdrawal\Cancel** field
5. Select **Withdrawal\Cancel Reason**
6. Enter **Withdrawal\Cancel Date**
7. Enter **Last Date of Attendance**
8. Click **Post Term Withdrawal** button

Note:

User should also Term Withdraw the student from the CCA Career. Once the student is Term Withdrawn, the Automatic Tuition Calculation process must be run before proceeding on updating the Student Program/Plan. Refer to [Tuition Calculation for Individual Student](#) in Online Help.

1.3.3 Update Student Program/Plan – Insert Withdrawal record

Roles Involved: **School Student Registrar**

1. Navigate to **Records and Enrollment > Career and Program Information > Student Program/Plan**
2. In **Find an Existing Value** tab, enter the **Student ID**
3. Click **Include History** checkbox
4. Click on the **Search** button

5. Click '+' to add the Withdrawal record
6. Enter **Effective Date** as date of withdrawal
7. Select '**WADM**' from **Program Action** field
8. Select **Withdrawal Reason** from **Action Reason** field
9. Click on **Save** button

Note:

User should also update the CCA record of the student.

2. Return from Withdrawal *(if required)*

This function allows the user to update the Student Records for students who are returning from Withdrawal.

2.1 Update Student Records

2.1.1 Term Activate

Roles Involved: **School Student Registrar**

1. Navigate to **Records and Enrollment > Student Term Information > Term Activate a Student**
2. In **Find an Existing Value** tab, enter the **Student ID**
3. Click on the **Search** button
4. On the **Term Activation** tab, click '+' icon
5. Click on the ***Term** lookup icon to select the term
6. Click on **Save** button

Note:

User should also Term Activate the student from the CCA Career.

2.1.2 Update Student Program/Plan – Insert Re-admit record

Roles Involved: **School Student Registrar**

1. Navigate to **Records and Enrollment > Career and Program Information > Student Program/Plan**
2. In **Find an Existing Value** tab, enter the **Student ID**
3. Click **Include History** checkbox

4. Click on the **Search** button
5. Click '+' to add the Re-admit record
6. Enter **Effective Date** as date of return
7. Select '**RADM**' from **Program Action** field
8. Select **AT1- Re-enter into Attendance Rstr Reason** from **Action Reason** field
9. Click on **Save** button

Note:

User should also update the CCA record of the student.

2.1.3 Enroll Student in Class(es)

Roles Involved: **School Student Registrar**

1. Navigate to **Records and Enrollment > Enroll Students > Enrollment Request**
2. In **Add a New Value** tab, enter the **Student ID, Academic Career** and **Term**
3. Click on **Add** button
4. Select '**Enroll**' from **Action** field
5. Enter **Class Nbr**
6. Click '+' to add more **Class Nbr**
7. Click on **Save** button
8. Click on **Submit** button

Note:

User should also enroll the student in the CCA career.