



**Achievement in Montana (AIM)  
Montana's State Student Information  
System**

**New Users Guide**

August, 2017

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## NAVIGATION BASICS

AIM MT Edition is a web-based application. A secure user name and password are required to log-in and use the system. The user name and password are supplied and maintained by your District's System Administrator.

To access the AIM MT Edition:

1. Open a web browser
2. Enter the district's URL
3. Enter the user name and password

The Infinite Campus application is divided into three parts, the **Campus Toolbar**, the **Outline** and the **Workspace**.

The screenshot shows the Infinite Campus application interface. At the top, there is a navigation bar with the Infinite Campus logo, "District Edition", "Staging Test Site", and "Campus Toolbar". On the right side of the top bar, there are icons for "All Calendars", a notification bell, a grid icon, a help icon, and a "Log Off" button. Below the top bar is a search bar and a "District Announcements" section. The left sidebar contains a navigation menu with categories like "Student Information", "Census", "Behavior", "Health", "Attendance", "Scheduling", "Fees", "Grading & Standards", "Medicaid", "Program Admin", and "Ad Hoc Reporting". The "Outline" section is highlighted. The main workspace area displays "School Announcements" and "Process Alerts". The "Process Alerts" section includes a "Date Range" field, a "Display" dropdown set to "All Processes", and a "Find Messages" button. Below this is a table of process alerts:

<input type="checkbox"/>		Process	Name	Posted Date	Due Date
<input type="checkbox"/>		Records Transfer	<a href="#">Transfer Released: Baum, Quincie 468555808</a>	06/23/2016	
<input type="checkbox"/>		Records Transfer	<a href="#">Transfer Released: Baum, Quincie 468555808</a>	06/23/2016	
<input type="checkbox"/>		Filter Designer	<a href="#">The State of MT has just published new filter: 'Imported Copy of NicCopy of (2) ADA 2015-18 Missin'</a>	05/27/2016	

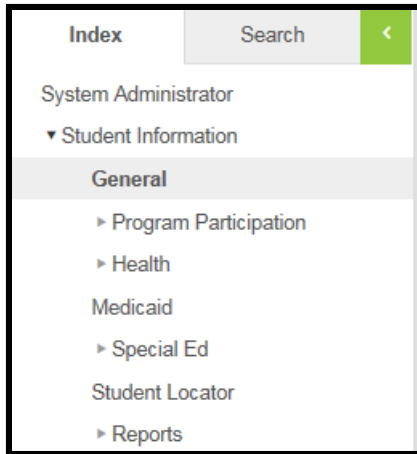
### CAMPUS TOOLBAR

The Campus Toolbar is the area that defines the Year and Calendar. To find a student, the correct Year and Calendar must be selected. The tools on the far right end of the toolbar provide quick access to hide or see calendars, to switch between applications or go to Campus Community, to get or search for help and to log off.

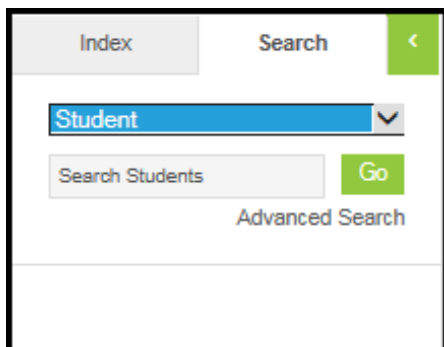
The close-up of the Campus Toolbar shows the following elements from left to right: "All Calendars" with a dropdown arrow, a notification bell icon with the number "1", a grid icon, a help icon, and a "Log Off" button. Below these are two buttons: "Campus Instruction" with a person icon and "Campus Community" with a square icon.

## OUTLINE

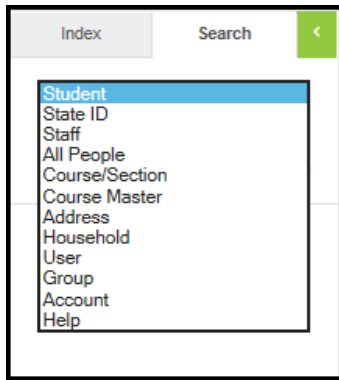
The Outline is composed of two tabs: Index and Search.



The Index tab is divided into modules. Modules are groups of similar tools. The Student Information module, for example, contains tools that help find information about students (General, Student Locator, Reports). To expand any module, click on the arrow (▶) sign. To select a tool, click on the tool name.



The Search tab allows the user to search for different types of information in Campus. The types of searches available to a user depend on the rights given by the System Administrator. To search, select a search type from the drop-down list and enter search criteria in the box.



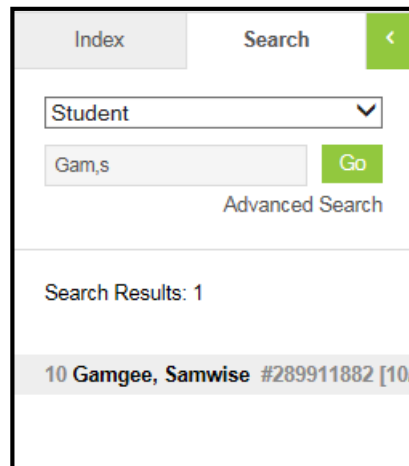
## WORKSPACE

The Workspace contains the specific record or tool that is being used.

## SEARCHING IN CAMPUS



There are two levels of search in Infinite Campus, the basic and advanced search.



## BASIC SEARCH

The basic search is used to find a specific data type with limited or open criteria. To use a basic search, click on the Search tab in the Outline. Select the specific data type and enter the criteria in the search box (last name, first name). Click Go.

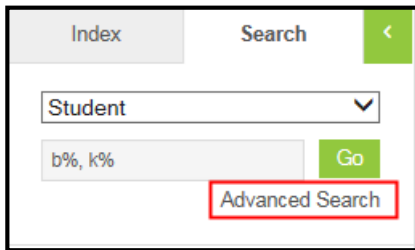
The screenshot shows a search interface with a dropdown menu set to 'Student'. Below it is a search input field containing 'Anders\_n' and a green 'Go' button. The text 'Advanced Search' is centered below the input field. Underneath, it says 'Search Results: 2'. The results list includes: '06 Andersen, Sydney H #152672526 [01/11/11]' and '04 Anderson, Nicole F #705224086 [11/11/11]'.

Wildcard searches can also be combined with a basic search.

The underscore ( `_` ) replaces one character. For example, when searching for Anderson/Andersen, use the `_` to replace the o/e: `Anders_n`. The search will return matches for both Anderson and Andersen.

The screenshot shows a search interface with a dropdown menu set to 'Student'. Below it is a search input field containing 'b%, k%' and a green 'Go' button. The text 'Advanced Search' is centered below the input field. Underneath, it says 'Search Results: 3'. The results list includes: '11 Bancroft, Kirsten B #726771620 [08/11/11]', '12 Bouldin, Kymberlee M #610753455 [04/11/11]', and '12 Brabender, Kyra M #343950190 [03/07/11]'.

The percentage symbol ( `%` ) replaces multiple characters. It can be used for all - `%` alone, for after - `b%` returns all names whose last name begins with b, or for between `b%n` returns all names that begin with b and end with n. Searching with just a `%` symbol (or `ho` entry) will return all results.

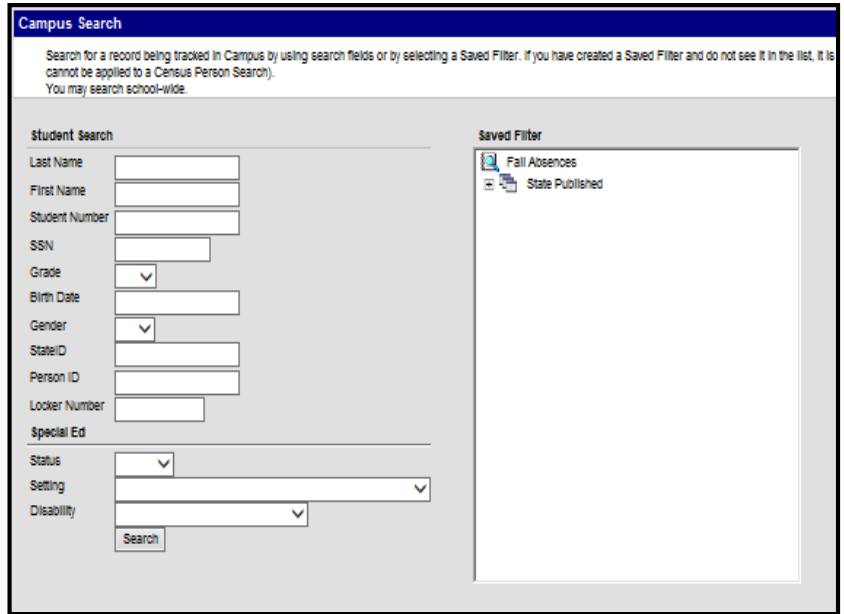


## ADVANCED SEARCH

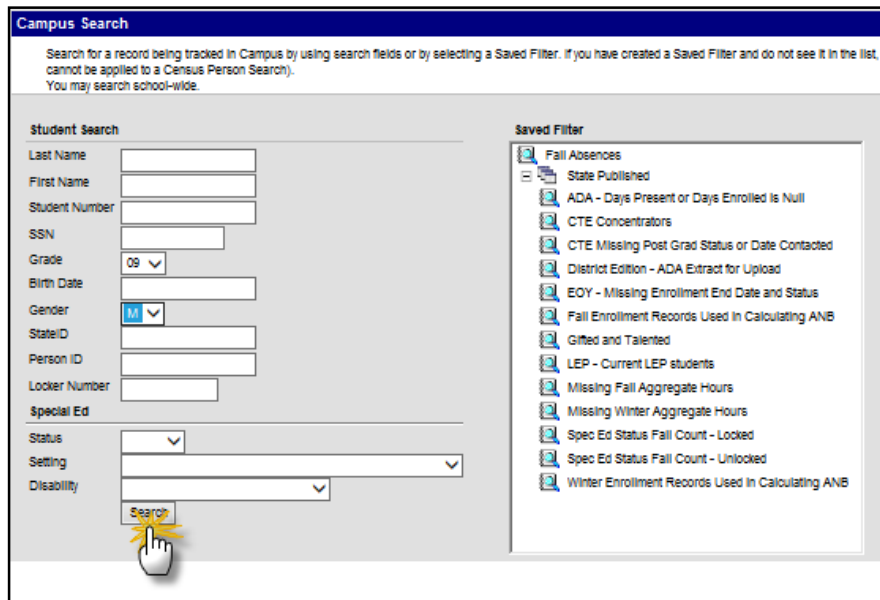
The advanced search combines a variety of data pieces to yield a more specific search result. To use the advanced search, click on the Search tab in the Outline, then click Advanced Search.

In addition to the Student Search filters there is a Saved Filter window which displays saved searches drawn from the Ad Hoc Filter tool and “State Published” reports created by OPI.

**Note:** Each AIM user can create their own Ad Hoc filters so the items displayed in the Saved Filter window will likely vary from one user to another.



The advanced search allows the user to combine a variety of data elements or Ad Hoc Reports into one search.



For example, to search for all ninth grade students who are male, select 09 from Grade and M from Gender. Click Search.

To use a saved filter, select the filter from the Saved Filter window. Click Search.

In the example below, the State Published Current LEP Students filter is selected.

**Campus Search**

Search for a record being tracked in Campus by using search fields or by selecting a Saved Filter. If you have created a Saved Filter and do not see it in the list, it cannot be applied to a Census Person Search). You may search school-wide.

**Student Search**

Last Name

First Name

Student Number

SSN

Grade

Birth Date

Gender

StateID

Person ID

Locker Number

**Special Ed**

Status

Setting

Disability

**Saved Filter**

- Fall Absences
  - State Published
    - ADA - Days Present or Days Enrolled Is Null
    - CTE Concentrators
    - CTE Missing Post Grad Status or Date Contacted
    - District Edition - ADA Extract for Upload
    - EOY - Missing Enrollment End Date and Status
    - Fall Enrollment Records Used In Calculating ANB
    - Gifted and Talented
    - LEP - Current LEP students**
    - Missing Fall Aggregate Hours
    - Missing Winter Aggregate Hours
    - Spec Ed Status Fall Count - Locked
    - Spec Ed Status Fall Count - Unlocked
    - Winter Enrollment Records Used In Calculating ANB

To search for all current LEP students who are ninth grade males, select the Saved Filter, select 09 from Grade and M from Gender. Click Search (under Student Search).

**Campus Search**

Search for a record being tracked in Campus by using search fields or by selecting a Saved Filter. If you have created a Saved Filter and do not see it in the list, it cannot be applied to a Census Person Search). You may search school-wide.

**Student Search**

Last Name

First Name

Student Number

SSN

Grade

Birth Date

Gender

StateID

Person ID

Locker Number

**Special Ed**

Status

Setting

Disability

**Saved Filter**

- Fall Absences
  - State Published
    - ADA - Days Present or Days Enrolled Is Null
    - CTE Concentrators
    - CTE Missing Post Grad Status or Date Contacted
    - District Edition - ADA Extract for Upload
    - EOY - Missing Enrollment End Date and Status
    - Fall Enrollment Records Used In Calculating ANB
    - Gifted and Talented
    - LEP - Current LEP students**
    - Missing Fall Aggregate Hours
    - Missing Winter Aggregate Hours
    - Spec Ed Status Fall Count - Locked
    - Spec Ed Status Fall Count - Unlocked
    - Winter Enrollment Records Used In Calculating ANB



# STUDENT INFORMATION



Student data is contained in three primary locations in Campus: the Summary tab, the Enrollment tab and the Demographics tab.

## SUMMARY TAB

Path: Index/Student Information/General/Summary

The Summary tab contains read-only data about a student. The information included on the Summary tab includes Name, Gender, Race/Ethnicity, Birthdate, Student Number (local ID number), and State ID.

**Darwin, Charles E**  
Grade: 12 #999100000 DOB: 01/01/1998 Gender: F

Credit Summary Assessment Behavior Graduation AdHoc Letters Records Transfer

**Summary** Enrollments Schedule Attendance Flags Grades Transcript

Person Summary Report Person Summary Report w/ Picture Print Mailing Label Print Envelope

**Person Information**

PersonID	148		
Name	Nickname		
Darwin, Charles E.C.			
Gender	Race/Ethnicity	No Image Available	
F	State Race/Ethnicity:		
	Federal	E:White	
	Designation:		
	Race(s):	White	
	Hispanic/Latino:	N:No	
	Race/Ethnicity Determination:		
Birth Date (Age: 16)	01/01/1998		
Student Number	State ID		
999100000	847929660		
Person GUID	99FCCA1E-6A49-4B32-83C3-87005AEB30F2		
Comments			

- Modified by: Administrator, System 07/28/2014 13:13

Household \*\*Secondary

Name	Relationship	Enrollment (grade)	Phone(s)	Email
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## ENROLLMENT TAB

Path: Index/Student Information/General or Index/Census/People/Enrollments

The Enrollment tab contains information about a student's current and historical enrollment into a school and/or district. The basic elements of an enrollment record are the student's Start/End Dates, Start/End Status, Grade Level, and Service Type. These elements will be outlined in more detail in the next section.

Darwin, Charles E					
Grade: 12 #999100000 DOB: 01/01/1998 Gender: F					
Credit Summary		Assessment		Behavior	
Graduation		AdHoc Letters		Records Transfer	
Summary		Enrollments		Schedule	
Attendance		Flags		Grades	
Transcript					
<a href="#">Print Enrollment History</a> <a href="#">New</a> <a href="#">New Enrollment History</a>					
Enrollment Editor					
Edit	Grade	Type	Calendar	Start Date	End Date
<input type="checkbox"/>	11	P	14-15 Granite High School	08/27/2014	
Start Status: 02 Continued enrollment same school, no interruption					
End Status:					
<input type="checkbox"/>	10	P	13-14 Granite High School	09/03/2013	05/31/2014
Start Status: 02 Continued enrollment same school, no interruption					
End Status: 100 End of year, returning to same school next year					
<input type="checkbox"/>	09	P	12-13 Granite High School	09/04/2012	05/31/2013
Start Status: 02 Continued enrollment same school, no interruption					
End Status: 100 End of year, returning to same school next year					
<input type="checkbox"/>	08	P	11-12 Phillipsburg 7-8	09/06/2011	05/25/2012
Start Status: 02 Continued enrollment same school, no interruption					
End Status: 110 Promoted to another school in the same district					
<input type="checkbox"/>	07	P	10-11 Phillipsburg 7-8	09/01/2010	05/27/2011
Start Status: 04 Transfer from public school in district or state					
End Status: 100 End of year, returning to same school next year					

## DEMOGRAPHICS TAB

Path: Index/Census/People/Demographics

The Demographics tab allows a user to correct a misspelled name, incorrect birthdate, Race/Ethnicity code, or Student Number (local ID).

NOTE: If a student changes their legal name (or it is discovered that the student is enrolled with a name other than their legal name) use the Identities tab to make those changes (see page 18).

Darwin, Charles E			
Grade: 10 #999100000 DOB: 01/01/1998 Gender: F			
Demographics		Identities	
Households		Relationships	
Enrollments		Distr	
<a href="#">Save</a> <a href="#">Delete</a> <a href="#">Person Summary Report</a> <a href="#">Demographics Data</a>			
Person Information			
PersonID 148			
*Last Name	*First Name	Middle Name	Suffix
<input type="text" value="Darwin"/>	<input type="text" value="Charles"/>	<input type="text" value="E.C."/>	<input type="text" value=""/>
*Gender	*Birth Date (Age: 16)	Soc Sec Number	
<input type="text" value="Male"/>	<input type="text" value="01/01/1998"/>	<input type="text" value=""/>	
Race/Ethnicity (Edit)			
State Race/Ethnicity:			
Federal Designation:	6:White		
Race(s):	White		
Hispanic/Latino:	N:No		
Race/Ethnicity Determination:			
Date Entered US	Date Entered US School	No Image Available	
<input type="text" value=""/>	<input type="text" value=""/>		
Date Entered State School			
<input type="text" value=""/>			
Home Primary Language			
<input type="text" value=""/>			
Language of Impact			
<input type="text" value=""/>			
Nickname			
<input type="text" value=""/>			
Comments			
<input type="text" value=""/>			
<a href="#">Upload Picture</a>			
- Modified by: Administrator, System 08/11/2014 16:50			

# CREATING ENROLLMENTS



## STUDENT LOCATOR METHOD

*Path: Index/Student Information/Student Locator*

The Student Locator is the preferred method for enrolling new students into AIM MT Edition. The Student Locator searches the state database for students previously enrolled in a Montana school district. Using the Student Locator decreases the chances of creating a duplicate State Student ID.

Name	State ID	Gender	Birth Date	%
------	----------	--------	------------	---

The student's Last Name, First Name and Gender are required for a search. A student should always be entered with their legal name. If a student has been previously enrolled in a Montana school district, but a match is not generated, try commonly used last names, nicknames, switch first and last names, or vary the gender. If a

match is still not generated, contact the OPI AIM Staff for assistance (1-877-4AIMMT1 or 1-877-424-6681).

### Tips for Success:

- No periods on Jr and Sr suffixes.
- If the first name is two names (e.g., Mary Ann) try the combined name as well as the first name only under first name.

If a match is generated, verify the student's birthdate. Hovering over the student's name will show their last enrollment and grade level. If those match the enrolling student, click on the student's name. From the Student Information screen use the Direct Method (page 15) to create a new enrollment.

**Student Locator**

**Student Search**  
 Search for a student already tracked In Campus using the fields provided. A minimum amount of data must be entered in order to search. The user must or click on Create New Student. When doing a SSN-only search, the user must still do a name based search before they are allowed to create a new per

Last Name:   
 First Name:   
 Gender:   
 Birth Date:   
 Middle Name:   
 SSN #:   
 State ID:

Name	State ID	Gender	Birth Date	%
Haggard, Merle	667371011	M	06/17/2001	100

Locally Enrolled Student, shortcut to their local records  
 Last Enrolled: (08/29/2013-) in grade 07 Cascade Public  
 Schools13-14 Cascade 7-8  
 Guardian Names:

If the student has not been previously enrolled in a Montana school district, click Create New Student. A message will pop up, warning the user that this process will create a new State Student ID. Click OK.


**Student Locator**

**Student Search**  
 Search for a student already tracked In Campus using the fields provided. A minimum amount of data must be entered in order to search. The user must enter the State ID or click on Create New Student. When doing a SSN-only search, the user must still do a name based search before they are allowed to create a new person.

Last Name:   
 First Name:   
 Gender:   
 Birth Date:   
 Middle Name:   
 SSN #:   
 State ID:

Name	State ID	Gender	Birth Date	%
No matches found				

Message from webpage

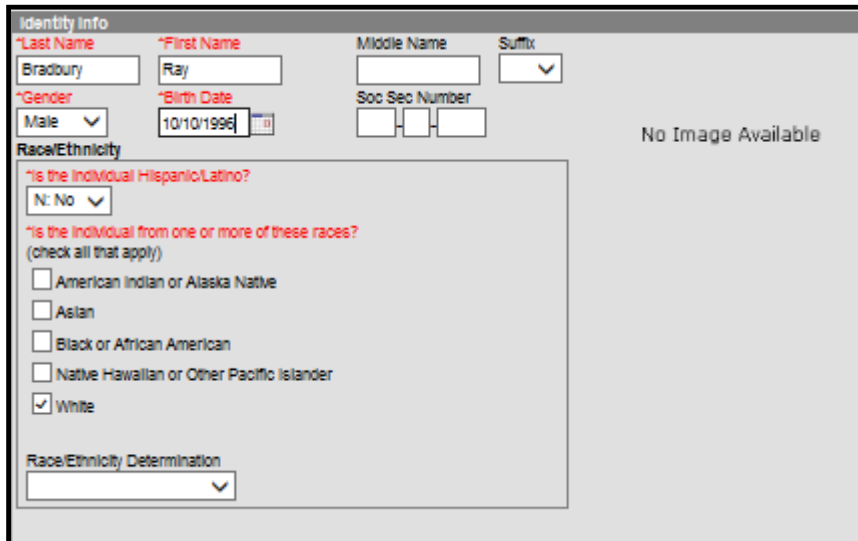
 **WARNING:** This process will create a new State ID for the student in the MT state system. This should ONLY be used if the student has NEVER been enrolled in MT. Continue?

1. Person Info: Enter the Student Number (local ID) – *optional*. If this is a new student, the State ID will populate when the record is saved.



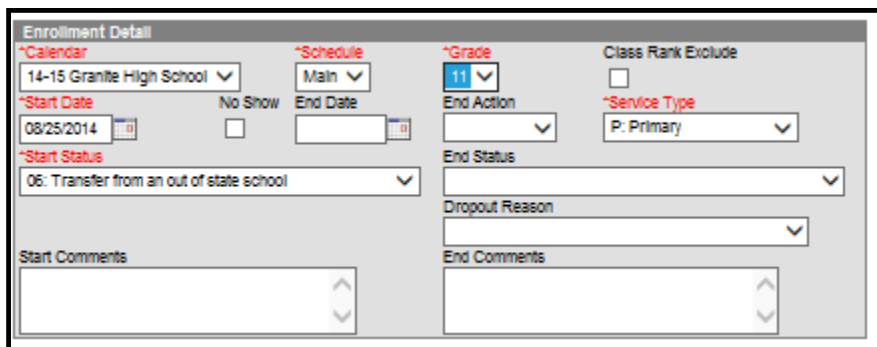
A screenshot of the 'Person Info' form. It contains two input fields: 'Student Number' with the value '2345' and 'State ID' with the value 'Pending'. There is a checkbox labeled 'Generate Number' which is currently unchecked.

2. Identity Info: Enter the required information (marked with a red asterisk (\*)).



A screenshot of the 'Identity Info' form. It includes fields for 'Last Name' (Bradbury), 'First Name' (Ray), 'Middle Name', and 'Suffix'. There are also fields for 'Gender' (Male), 'Birth Date' (10/10/1996), and 'Soc Sec Number'. A section for 'Race/Ethnicity' contains several checkboxes: 'American Indian or Alaska Native', 'Asian', 'Black or African American', 'Native Hawaiian or Other Pacific Islander', and 'White' (which is checked). There is also a dropdown for 'Race/Ethnicity Determination' and a note 'No Image Available'.

3. Enrollment Detail: Enter the student's Start Date, Start Status and Grade.



A screenshot of the 'Enrollment Detail' form. It contains fields for 'Calendar' (14-15 Granite High School), 'Schedule' (Main), 'Grade' (11), and 'Class Rank Exclude'. There are also fields for 'Start Date' (08/25/2014), 'End Date', 'End Action', and 'Service Type' (P: Primary). A dropdown for 'Start Status' is set to '06: Transfer from an out of state school'. There are also dropdowns for 'End Status' and 'Dropout Reason', and text areas for 'Start Comments' and 'End Comments'.

4. Click Save to enroll the student. The Student Records Transfer wizard will appear. Click Submit Request. Records from the sending district will be automatically requested (this feature **does not** replace an official records transfer request from the district – only information contained in the sending district's database will be sent).

Student Records Transfer					
<b>Request a Records Release</b>					
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.					
<b>Student:</b>			<b>Enrollment Type:</b> Primary		
Last Name	Chesney	First Name	Kenny	Middle Name	
Gender	M	Birthdate	05/09/2004	SSN	
Grade	02	School	11-12 Cascade School 2	Start Date	08/31/2011
<b>Requesting District &amp; User</b>					
District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	08/17/2011	Work Phone		Email	
Comments					
<input type="text"/>					
<input type="button" value="Submit Request"/>					

## DIRECT ENTRY METHOD

*Path: Index/Student Information/General*

Students who were previously enrolled in a school of the district can be enrolled in the next year by opening the enrollment record from the previous year and using it to create an enrollment in the following year.

After pulling up a student's General Information screen (Search tab, enter last name, click Go), click the Enrollments tab. Change the Year to 14-15 and select a school. Click New. Enter the 14-15 *Start Date*, *Start Status*, *Grade Level* and *Comments* (if applicable). Click Save. If the student is transferring in from another district in the state of Montana, a records request will have to be initiated (see page 21).

## RACE/ETHNICITY

*Path: Index/Census/People/Demographics*

Districts should encourage parents of students new to the district to provide accurate information on students' race and ethnicity. Parents also need to be made aware they have the right to refuse to answer the race and ethnicity questions, but a third party observer will then designate the student's race and ethnicity.

1. To enter or edit race and ethnicity information, locate the student's demographic information (Index/Census/People/Demographics). Next to the Race/Ethnicity section, click Edit.

2. Enter the appropriate Ethnicity and Race information. Both questions are required and multiple Races may be selected.

3. The Race/Ethnicity Determination field is optional. It may be used to track how a student's Race/Ethnicity was determined.

## ENROLLMENT START AND END DATES

*Path: Index/Student Information/General/Enrollments*

The student's Start and End Dates are a reflection of the actual dates that a student attends a school. The Start Date is the student's first day of attendance (not necessarily the enrollment date). A student may enroll prior to the first day of enrollment. The End Date is the student's last day of attendance (not the date the records request is received). A student may leave a district for a period of time before a records request (or other notification that the students has exited) is received. Once the notification is received, the Student's End Date should be changed to reflect the last day of attendance.

**Kaye, Danny**  
 Grade: 11 #736191463 DOB: 08/05/1998 Gender: M

District Employment    District Assignments    FS Deposit    School Choice

Credentials    Overrides    Fees    ID History    Schedule

Demographics    Identities    Households    Relationships    **Enrollments**

Print Enrollment History    + New    + New Enrollment History

Edit	Grade	Type	Calendar	Start Date	End Date
	12	P	16-17 Washington High School	08/29/2016	
Start Status: 02 Continued enrollment same school, no interruption End Status:					
	11	P	Washington High School 2016 A	09/02/2015	06/03/2016
Start Status: 04 Transfer from public school in district or state End Status: 100 End of year, returning to same school next year					

## ENROLLMENT START AND END STATUS CODES

Path: Index/Student Information/General/Enrollments

The student's Start and End Status codes are a reflection of where the student came from and where the student is going. For State reporting purposes, it is important that these codes be as accurate as possible.

See [Appendix A](#) for definitions of Enrollment Start Status codes.

See [Appendix B](#) for definitions of Enrollment End Status codes.

**Kaye, Danny D**  
 Grade: 11 #999100006 DOB: 06/04/1996 Gender: M

Credit Summary    Assessment    Behavior    Graduation    AdHoc Letters    Records Transfer

Summary    **Enrollments**    Schedule    Attendance    Flags    Grades    Transcript

Save    Delete    Print Enrollment History    + New    + New Enrollment History

Edit	Grade	Type	Calendar	Start Date	End Date
	12	P	14-15 Granite High School	08/27/2014	
	11	P	13-14 Granite High School	09/03/2013	05/31/2014
	10	P	12-13 Granite High School	09/04/2012	05/31/2013
	09	P	11-12 Granite High School	09/06/2011	05/31/2012

**General Enrollment Information**

Calendar: 13-14 Granite High School    Schedule (read only): Main

\*Start Date: No Show    End Date: No Show

\*Grade: 11    Class Rank Exclude:

End Action:    \*Service Type: P. Primary

End Status: 340: Unknown

Dropout Reason: 17: Unknown Reason

End Comments:

Next Calendar:    Next Schedule Structure:    Next Grade:

01: First time receiving educational services  
 02: Continued enrollment same school, no interruption  
 03: Re-entry to the same school after withdrawal  
 04: Transfer from public school in district or state  
 05: Transfer from public schi under NCLB schi choice  
 06: Transfer from an out of state school  
 07: Transfer from a school from out of the country  
 08: Transfer from a private school within the state  
 09: Transfer from home school within the state  
 10: Transfer from a MT state-funded school



**Kaye, Danny D**  
 Grade: 11 #999100006 DOB: 06/04/1996 Gender: M

Credit Summary Assessment Behavior Grad

Summary **Enrollments** Schedule Attendance

Save Delete Print Enrollment History

Edit	Grade	Type	Calendar
<input type="checkbox"/>	12	P	14-15 Granite High School
<input checked="" type="checkbox"/>	11	P	13-14 Granite High School
<input type="checkbox"/>	10	P	12-13 Granite High School
<input type="checkbox"/>	09	P	11-12 Granite High School

General Enrollment Information

Calendar  
 13-14 Granite High School Schedule (read only)  
Main

\*Start Date: 09/03/2013  No Show  End Date: 05/31/2014

\*Start Status: 02: Continued enrollment same school, no interruption

Start Comments

100: End of year, returning to same school next year  
 105: Change in grade level during regular school year  
 110: Promoted to another school in the same district  
 120: Transfer to a public school in the same district  
 130: Transfer to public schi under NCLB schi choice  
 140: Transfer to public schi in another district in MT  
 150: Transfer to a MT state-funded school  
 160: Transfer to a private school in the state  
 170: Transfer to a home school in the state  
 180: Transfer to a school out of state  
 190: Transfer out of the country  
 210: Medical care or treatment, eligible to return  
 220: Enrolled in a foreign exchange program  
 230: Enrolled in an early admissions college program  
 240: Withdrawn, under age for compulsory school att  
 250: Expelled, eligible to return  
 260: Unknown (grades PK-6)  
 295: Dropped out, subsequent re-enrollment  
 300: Withdrew for personal or academic reasons  
 310: Exceeded age requirement set by district policy  
 320: Removed or Expelled, without option to return  
 330: Withdrew to enroll in non-diploma program  
 340: Unknown  
 400: Graduated  
 420: Completed school with other credentials  
 500: Student died  
 510: Student is permanently incapacitated

## SERVICE TYPE

Path: Index/Student Information/General/Enrollments

The Service Type is a partial indicator of a student's enrollment status. There are three choices for Service Type:

1. **P: Primary** – the Primary Service Type indicates that the student is primarily enrolled in this school or district for educational services.
2. **S: Partial** – the Partial Service Type indicates that the student is enrolled primarily at another school or district, but receives some educational services from this school or district. (e.g., a home school student who takes a math class at the local high school or an 8<sup>th</sup> grade student with a primary enrollment at the middle school but taking a math class at the high school).
3. **N: Special Ed Services** – the Special Ed Services Service Type indicates that the only services a student receives from the school or district is Special Education services. This Service Type applies to students who receive their educational services from another type of school (e.g., home school or private school), but comes to the school or district for Special Education services. This Service Type applies most often to Pre-Kindergarten students who receive Special Education services (including speech).

A student may have a Primary enrollment at one school and a Secondary or Special Ed enrollment in another. However, a student can **never** have two primary enrollments with overlapping dates.

In this example a student has a Primary enrollment in the eighth grade at the middle school and is also taking an advanced class at the high school. The enrollment at the high school has a Service Type of S: Partial and is listed as a ninth grade enrollment (because this high school does not include the eighth grade level).

Edit	Grade	Type	Calendar	Start Date	End Date
<input type="checkbox"/>	09	S	14-15 Granite High School	08/27/2014	
Start Status: 02 Continued enrollment same school, no Interruption Attends majority of day at 7-8 school					
End Status:					
<input type="checkbox"/>	08	P	14-15 Phillipsburg 7-8	08/26/2014	
Start Status: 02 Continued enrollment same school, no Interruption					
End Status:					

In this example a student is enrolled in a home school and is taking a speech class at the local high school. Because the student is receiving only Special Ed services from the public school his Service Type is N: Special Ed. A note has been added to the student's Start Comments explaining the situation.

Edit	Grade	Type	Calendar	Start Date	End Date
<input type="checkbox"/>	09	N	14-15 Granite High School	08/24/2014	
Start Status: 00 Transfer from home school within the state Speech services only.					
End Status:					

## LEGAL NAMES/NAME CHANGES

*Path: Index/Census/People/Identities*

The AIM system is designed so that each student has only one State Student ID that stays with a student from the first enrollment into public school through graduation from high school. To prevent duplication, it is highly recommended that legal names are used in AIM. The AIM system allows multiple identities to be attached to a single State Student ID, to accommodate necessary legal name changes.

**Bell, Alexander G**  
#5678 DOB: 10/10/1996 Gender: M

Demographics **Identities** Households Relationships Enrollments

Save Delete New

Ident	Current	Effective Date	Birth Date	District
Bell, Alexander G	X	08/11/2014	10/10/1996	Phillipsburg K-12 Schools

Identity Information

PersonID: 580

\*Last Name: Bell \*First Name: Alexandre Middle Name: Graham Suffix:

\*Gender: Male \*Birth Date (Age: 17): 10/10/1996 Soc Sec Number:

Race/Ethnicity (Edit): No Image Available

State Race/Ethnicity: Federal Designation: 3:Asian

Simple corrections of typographic errors in the student's name or changes to the student's birthdate, race/ethnicity, and gender should be made on the Demographics tab.

However, if a student's legal name changed or if the student was entered with a name that is not the legal name, create a new identity on the Identities tab.

On the Identities tab, click New. Change the student's name. Click Save. The student's records will be attached to this name with a historical tie to the previous name.

## RECORDS TRANSFER



The Records Transfer tool in the AIM MT Edition is used mainly to facilitate the transfer of Special Education records. The Records Transfer tool can also be used to reconcile enrollment overlaps and provide student transfer information such as LEP data.

When a student that is new to the district is enrolled using the Student Locator, the Records Transfer Wizard opens automatically to generate a request immediately. If a student is enrolled using the direct entry method, the administrator must manually generate a Records Transfer request. The next sections explain how to enter a manual Records Transfer request and view the status of all requests.

## **PROCESS INBOX**

The Process Inbox allows a user to view the status of each Records Transfer request made through AIM.

The Process Inbox is located on the user's main page. To access the Process Inbox, click on the user's name on the Index tab. Use the pull-down menu to select Records Transfer. Click Find Messages.

**District Notices**  
No district notices at this time.

**School Notices**  
No school notices at this time.

**Process Inbox**

Date Range  to  Display

- All Processes
- Assessment Push Down
- Combine Person Merge
- Filter Designer
- Records Transfer**
- User Security
- Vertical Interoperability

<input type="checkbox"/>	<input type="checkbox"/>	Process	Name	Posted Date	Due Date
<input type="checkbox"/>		Records Transfer	<a href="#">Transfer Error: Huxtable, Theodore 100966093</a>	08/07/2014	
<input type="checkbox"/>		Records Transfer	<a href="#">Transfer Released: Knievel, Evel 419339261</a>	06/19/2014	
<input type="checkbox"/>		Records Transfer	<a href="#">Transfer Released: Zorro, Jim 399621145</a>	06/19/2014	

The list shows the current status of all records transfer requests. Click a message to open the record and view details. Details look like this:

**Student Records Transfer**

**Records Release**  
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

**Records Transfer Zorro, Jim #**

**Student:**

Last Name	Zorro	First Name	Jim	Middle Name	
Gender	M	Birthdate	01/01/2000	SSN	
Grade	06	School	12-13 Cascade School	Start Date	01/24/2013

**Enrollment Type:** Primary

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	06/18/2014	Work Phone		Email	
Comments	None				

**Releasing District & User**

District	0556 Phillipsburg K-12 Schools	Name	System Administrator	Username	support
Release Date	06/19/2014	Work Phone		Email	
Comments	None				

## RECORDS TRANSFER TAB

*Path: Search/Student/(enter student name and click Go)/Records Transfer*

On the enrollment record for a particular student, the Records Transfer tab contains information about all pending and completed transfer requests.

The Transfers section shows the Request Date, the student's name, Status, Requesting District and Releasing District. Open the record by clicking on the student's name. The detail screen is shown below.

To manually request records from a student's former district, click New State Transfer Request.

**Huxtable, Vanessa**  
Grade: 07 DOB: 07/24/2002 Gender: F

Summary Enrollments Schedule Attendance Flags Grades Transcript  
Credit Summary Assessment Behavior Graduation AdHoc Letters **Records Transfer**

New State Transfer Request

Transfers				
Request Date	Name	Status	Requesting District	Releasing District
08/13/2014	Huxtable, Vanessa	request	Cascade Public Schools	

**Records Transfer Huxtable, Vanessa #**  
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

**Student:** Enrollment Type: Primary

Last Name	Huxtable	First Name	Vanessa	Middle Name	
Gender	F	Birthdate	07/24/2002	SSN	
Grade	07	School	14-15 Cascade 7-8	Start Date	06/23/2014

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	08/13/2014	Work Phone		Email	

Comments  
None.

status: Waiting for former district to release records.

**NOTE:** When a student who has never been enrolled in the district is entered using the Student Locator, this step is not necessary as a records request will be sent automatically (see page 14). If the student was previously enrolled in the district at any time, the screen will not automatically produce a records request, so it must be manually entered.

## PROCESSING REQUESTS

### Transfer into a District - Entering a Records Transfer Request

If the student is enrolled using the direct entry method - OR - if the student was entered using the Student Locator but was previously enrolled in the district at some time in the past, the district must manually enter a records request.

To enter a manual records request, enter the Year and School. From the Search tab, enter the student's last name and click Go. The student's enrollment record opens. Click the Records Transfer tab and click New State Transfer Request.

**Banks, Tyra**  
Grade: 08 DOB: 05/13/1998 Gender: F

Summary Enrollments Schedule Attendance Flags Grades Transcript  
Credit Summary Assessment Behavior Graduation AdHoc Letters **Records Transfer**

New State Transfer Request

Transfers				
Request Date	Name	Status	Requesting District	Releasing District

Click Submit Request to initiate a transfer request. The status of a request can be verified on the Process Inbox or in the Records Transfer tab of the student's record.

**Records Transfer Banks, Tyra #**  
 Use this tool to request the release of a transfer student's records. The following information will be sent to the student's former district and they will be given the opportunity to release their records. Only an exact student match can yield a release, so it is a good idea to call the district to confirm this student was enrolled there and to let them know to expect a release request.

**Student:** Enrollment Type: Primary

Last Name	Banks	First Name	Tyra	Middle Name	
Gender	F	Birthdate	05/13/1998	SSN	
Grade	08	School	14-15 Cascade 7-8	Start Date	08/25/2014

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	08/13/2014	Work Phone		Email	

Comments

AIM processes the request and gathers records from the previous school district. Once the record has been processed by the former district, a "Transfer Released" message will appear in the Process Inbox or on the student's Records Transfer tab. Click on the student's name. A list of available documents and imports will be listed below the transfer information.

**Student Records Transfer**

**Records Release**  
 This is a Records Release containing the student information, the requesting district/user and the releasing district.

**Records Transfer Knlevel, Evel #**

**Student:** Enrollment Type: Primary

Last Name	Knlevel	First Name	Evel	Middle Name	
Gender	M	Birthdate	09/09/2003	SSN	
Grade	09	School	13-14 Cascade High School	Start Date	01/13/2014

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	01/13/2014	Work Phone		Email	

Comments  
None.

**Releasing District & User**

District	0556 Phillipsburg K-12 Schools	Name	System Administrator	Username	support
Release Date	01/13/2014	Work Phone		Email	

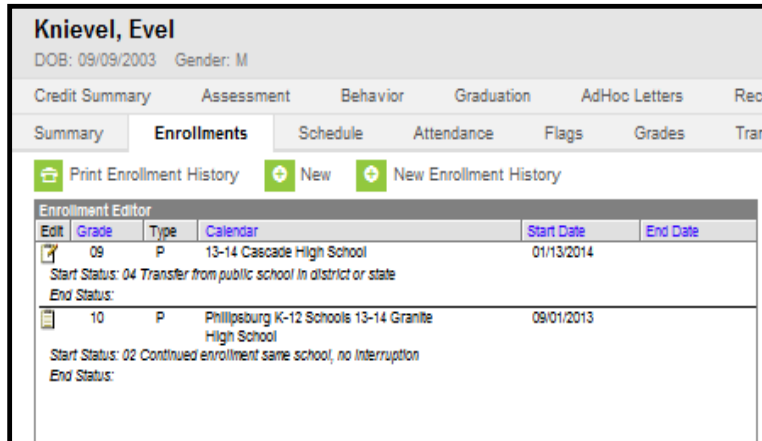
Comments  
None.

**Status: Records released.**

Transfer Documents	Data imports
Transcript	IEP
Census Contact Summary	MT-Supplemental
Extended-Census-Summary	Special-Ed-Evaluation
Enrollment History	IEP-Documents
Schedule	PLP
Attendance Period Detail	PLP-Documents
Assessment Summary	LEP
Behavior Summary	LEP-Services
Health Condition Summary	LEP-Accommodations
Health Screening Summary	Transcript Import Wizard
Health Immunization Summary	Extended-Census-Import Wizard
	Enrollment History Import Wizard
	Assessment Import Wizard
	Immunization Import Wizard
	Health Condition Import Wizard
	Health Screening Import Wizard
	IEP-Import Wizards
	MT-Supplemental Documents Import Wizard
	Special-Ed-Evaluation Import Wizard
	Special-Ed-Documents Import Wizard
	PLP-Import Wizard
	PLP-Documents Import Wizard
	LEP-Import Wizard

Transfer Documents are PDF records that can be printed and added to a student's paper file. Data Imports are wizards that import data directly into the district's AIM MT Edition database.

To open a document or activate a wizard, click on the link. Documents that are not available for import will be listed in strikethrough text.

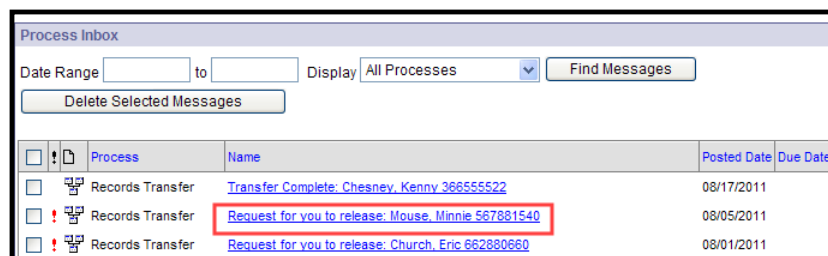


To import a student's enrollment history, click the Data Import called Enrollment History Import Wizard. The Wizard will display the student's enrollment history in the releasing district. Click Save to import the data. The enrollment history record will now display in the new district's database.

## Transfer out of District

When a student transfers out of the district, a transfer message will be generated by the new district when they enroll the student. (Using the Student Locator, the message was generated automatically; using the direct entry method, the district must have entered a transfer request manually.)

The message "Request for you to release:" will appear in the Process Inbox (or click on the student's Records Transfer tab). Click on the underlined link to open the request.



There are three options on the Student Records Transfer.

1. **Release records** – an acknowledgement that this student has left the district and enrolled into the receiving district. The records in the database will transfer to the new school.
2. **Reject Request** – this should only be used if the student has not actually left the district or if there is a legal reason to withhold the records. In the case of common names, the new district may have accidentally enrolled the wrong

student. Please call the receiving district or the OPI AIM Staff to resolve the overlap.

3. **Ignore Request** – this should never be used. If there is not time to process the request, click on another module or tool in the application and come back to it later. The request may contain important information that the receiving district needs for the student.

## END DATES AND OVERLAPS

The Records Transfer tool can aid in reconciling enrollment overlaps. When a student transfers to a new district, the transfer request shows the student's Start Date in the new district. If there is an overlap in enrollment, the Records Transfer request will appear with a warning.

The screenshot displays the 'Student Records Transfer' interface. At the top, there is a header 'Student Records Transfer' and a sub-header 'Release or Reject a Request for Transfer Records'. Below this, there is explanatory text about the request process. The main section is titled 'Records Transfer Church, Eric #' and contains a form for student information. The student's name is Church, Eric, with a middle name field. The enrollment type is 'Primary'. The birthdate is 07/24/2002, and the SSN is blank. The school is '11-12 Cascade School' and the start date is '08/31/2011'. A red box highlights a warning: 'Overlap Edit (08/31/2011-06/30/2012) 11-12 Philipsburg School Grade: 04'. Below this, there are sections for 'Requesting District & User' and 'Releasing District & User', each with fields for district name, system administrator, username, request/release date, work phone, and email. The requesting district is '0280 Cascade Public Schools' and the releasing district is '0556 Philipsburg K-12 Schools'. Both have a system administrator named 'admin1'. The request date is '08/01/2011' and the release date is '08/17/2011'. There are also comment fields for both districts.

Click Edit to return to the Enrollments tab and correct the error. Once the enrollment overlap has been fixed, return to the Process Inbox or Records Transfer tab and complete the records transfer.

The End Date for a student should always be the last date the student was in attendance at a school, not the date the records request is received. If a student leaves without notice a school may carry the student according to district policy. Once the student has been located (either receives a Records Transfer request in AIM, a records request from the receiving district, notice from OPI, the parent or another reliable source), enter the End Date as of the last day of actual attendance (if the district has already ended the student's enrollment according to district policy, the End Date may need to be changed to reflect the student's last day of actual attendance).



# DATA VERIFICATION



Using the appropriate data verification tools ensures that the data entered is accurate. Inaccurate data can result in missed financial payments, missing assessment labels and/or incorrect AYP calculations. AIM data is used for public reporting of school information and in making policy decisions at the state and federal levels. The data is also posted on the OPI GEMS website.

## STUDENT INFORMATION REPORTS

Path: Index/Student Information/Reports

## Enrollment Status

The Student Enrollment Status report is a student level report that can filter by Year, Grade, Start/End Date and/or Start/End Status. Select the criteria and click Generate Report.

## Enrollment Summary Report

The Enrollment Summary Report is an aggregate report that shows the number of students by grade, gender and ethnicity as of a specified date. The reporting options on this report are more limited.

## Enrollment Summary Details Report

The Enrollment Summary Details Report is a detailed version of the Enrollment Summary Report that offers much more filtering options to choose from.

## AD HOC REPORTS

*Path: Index/Ad Hoc Reporting/Filter Designer*

Ad Hoc reports are custom reports that are built by the user or the State and are used to verify/view data. A variety of filter options can be added to narrow down the search criteria. And a variety of formats are available for printing or sorting. Refer to the following guides for further instruction on Ad Hoc Reporting:

[AD Hoc Reporting](#)

[State Published Ad Hoc Reports](#)

**NOTE:** To view a list of useful reports that were prepared and saved for district use by the OPI, expand the **+State Published** list in the Saved Filters box.

## MT EXTRACTS

*Path: Index/MT State Reporting/MT Extracts*

Use MT Extracts to verify a specific type of data that has been entered into the MT Edition of AIM. From Index, expand MT State Reporting and select MT Extracts. Choose the Extract Type, the Format and the Year(s)/School(s). Click Generate Extract. The extract will open in a new window in the format selected.

The screenshot shows the 'MT State Extracts' web application interface. At the top, there is a blue header with the text 'MT State Extracts'. Below the header is a grey box containing the instruction: 'This tool will extract data to complete several formats of the MT State-defined reporting formats. Choose the State Format to get the file in the state defined tab separated file format, otherwise choose one of the testing/debugging formats.' The main content area is divided into two sections: 'Extract Options' and 'Select Calendars'. In the 'Extract Options' section, there are two dropdown menus: 'Extract Type' set to 'Enrollments' and 'Format' set to 'CSV'. Below these is a 'Generate Extract' button. In the 'Select Calendars' section, there is a question: 'Which calendar(s) would you like to include in the report?'. Below this are three radio button options: 'active year' (selected), 'list by school', and 'list by year'. A list box below the radio buttons shows the selected year '15-16' and three schools: 'Adams Middle School 2016 A', 'Jefferson Elem School 2016 A', and 'Washington High School 2016 A', with the last one highlighted in blue.

# ADDITIONAL REFERENCE GUIDES

The [AIM website](#) contains numerous reference guides, including a guide specifically covering each data collection during the year.

**Montana Office of Public Instruction**  
Denise Juneau, State Superintendent  
opi.mt.gov

Contact Search Calendar

Home Programs Educator Licensure **Reports & Data** Curriculum & Assessment Resources Finance & Grants Employment

Home » Reports&Data » AIM » Achievement in Montana (AIM)

**Welcome to ...**

- AIM Reference Guides
- AIM File Upload Templates
- AIM General Information
- AIM Data Dictionary
- AIM Trainings
- AIM Technical References
- AIM Policy References
- AIM Additional Resources

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**EPASS INSTRUCTIONS**

**ePass**

[Creating an ePass Account](#)

[ePass File Transfer Instructions](#)

[EPASS MONTANA](#)

[GO BACK](#)

### Achievement in Montana (AIM)

**OPI AIM Help Desk:**  
1-877-424-6681  
[opiainhelp@mt.gov](mailto:opiainhelp@mt.gov)

- AIM COLLECTION SCHEDULE
- AIM COLLECTION CHECKLIST
- AIM NEW USER GUIDE 2014-15
- AIM STAFF DIRECTORY
- AIM SPECIALIST UPDATE FORM

### AIM Data Collection Guides

- PREVIOUS YEAR GRADUATE, COHORT AND DROPOUT VERIFICATION AND CERTIFICATION
- BEGINNING OF YEAR VERIFICATION AND ENROLLMENT COLLECTION
- FALL COUNT – ENROLLMENT, AGGREGATE HOURS & COUNT DATE ABSENCE COLLECTION
- FALL PROGRAM PARTICIPATION COLLECTION**
  - [FRAM Direct Entry or File Upload](#)
  - [LEP Tool Guide](#)
  - [MT Programs - Job Corp, Youth Challenge and MTDA](#)
  - [Program Participatiopn Collection Guide](#)
  - [Program Participation Verification Guide](#)
- FALL CTE COLLECTION
- ASSESSMENT REGISTRATION COLLECTION
- SPRING COUNT – ENROLLMENT & AGGREGATE HOURS COLLECTION
- TEST WINDOW COUNT – ENROLLMENT, AGGREGATE HOURS & COUNT DATE ABSENCE COLLECTION
- TEST WINDOW PROGRAM PARTICIPATION COLLECTION
- SPRING CTE COLLECTION
- END OF YEAR ENROLLMENT & ADA COLLECTION
- END OF YEAR PROGRAM PARTICIPATION COLLECTION

## OPI AIM HELPDESK

General AIM questions, collections, data elements, functionality	Special Ed Module
<p><b><u>AIM Help Desk</u></b></p> <ul style="list-style-type: none"> <li>• 1-877-424-6681</li> <li>• 406-444-3800</li> <li>• email <a href="mailto:opiaimhelp@mt.gov">opiaimhelp@mt.gov</a></li> </ul> <p>Candi Standall – <i>AIM Student Records Specialist</i></p> <p>Jennifer Straw – <i>AIM Student Records Specialist</i></p> <p>Andy Boehm – <i>Graduate and Dropout Data Specialist</i></p> <p>Eric Meredith – <i>LEP Data Specialist</i></p>	<p><b>Technical assistance with functionality</b></p> <ul style="list-style-type: none"> <li>• Mary Graff - 406-444-0685</li> <li>• Anne Rainey - 406-444-4430</li> </ul> <p><b>Policy questions regarding completion of forms, <i>contact one of the School Improvement Compliance Monitors</i></b></p> <ul style="list-style-type: none"> <li>• Dale Kimmet - 406-444-0742</li> <li>• Danni McCarthy - 406-444-0452</li> <li>• Marla Swanby - 406-444-0044</li> <li>• Jenifer Cline - 406-444-4426</li> </ul>