

*AIM User Guide:
Achievement
In Montana
(AIM)
New User Guide*

THE AIM SYSTEM IS DESIGNED TO COLLECT DEMOGRAPHIC, ENROLLMENT, PROGRAM PARTICIPATION, AND ASSESSMENT DATA FOR EACH STUDENT. THE PROGRAM ALSO TRACKS SPECIAL EDUCATION STUDENTS IEP DATA AND ALL STUDENTS' MOVEMENT FROM SCHOOL TO SCHOOL AND DISTRICT TO DISTRICT WITHIN MONTANA. IT ALLOWS FOR TIMELY REPORTING AND DATA ACCURACY THROUGH STANDARDIZED REPORTING CAPABILITIES. THIS SYSTEM ALLOWS SCHOOL DISTRICTS TO SUBMIT THE REQUIRED STUDENT INFORMATION ELECTRONICALLY. THE AIM SYSTEM PROVIDES THE OPI, THE STATE OF MONTANA, FEDERAL ENTITIES, AND THE EDUCATION COMMUNITY TIMELY AND ACCURATE DATA ABOUT THE PROGRESS OF OUR STUDENTS, SCHOOLS, SCHOOL DISTRICTS AND THE STATE.

AIM CONTACT INFORMATION

TOLL FREE - 877-424-6681
406-444-3800 OR

[Submit an AIM Help Desk Ticket](#)

Achievement In Montana (AIM) New User Guide

[AIM User Guide](#)

This guide is designed to help new AIM users understand the basics of navigating Infinite Campus. It includes primary topics such as how to search within Infinite Campus, how to locate student enrollment and demographics information, creating enrollments, starting and end dating enrollments, records transfers, and how to run ad hoc reports.

The [OPI AIM website](#) contains numerous additional guides which are organized by data collection schedules and by topic. It also includes a helpful AIM data dictionary as well as commonly used importing templates for data collections. There is also an email subscription wizard which we recommend all AIM users subscribe to in order to receive important information on OPI AIM announcements and updates.

NOTE: Please be sure to update our [District AIM Contact Form](#) whenever there is a staff change which affects how the OPI AIM staff communicates with your school/district on AIM data and collections. It is important to keep this information as accurate and up to date as possible.

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OPI AIM Website

All new users of the AIM/Infinite Campus student information system should spend some time becoming familiar with the various resources available on the [OPI AIM Website](#). It is also recommended that this webpage is bookmarked and revisited frequently. The homepage of the OPI AIM Website includes the AIM Support Staff contact information, the [AIM Annual Collection Schedule](#), a subscription link to receive the AIM Unit emails, an [AIM Contacts Form](#) for districts to fill out, and additional pertinent information which may assist AIM users in navigating their AIM data reporting throughout the school year.

There are also a series of tabs which are links to important additional resources:
(Click on the blue headings below to be directed to those webpages.)

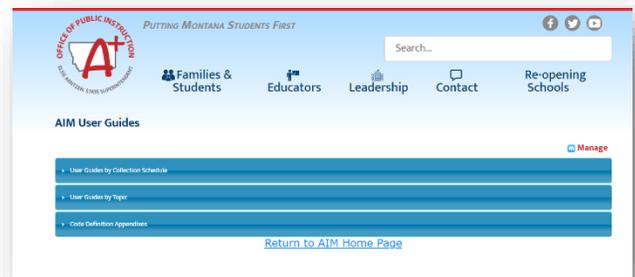


AIM User Guides: This tab will direct users to the collections of all of the AIM User Guides which are organized by *User Guides By Collection Schedule* and *User Guides By Topic*. There is also a link to the [Definition Appendixes](#). Please check this webpage frequently to ensure you are using the most current version of an AIM User Guide.

AIM Upload Templates: This tab will direct users to the templates which are required for student data uploads. These are for users who have a third-party student information system and must upload their data into AIM/Infinite Campus.

AIM General Information: This tab provides a description for the flow of AIM Data from Districts to the State.

AIM Data Dictionary: This tab provides helpful information pertaining to AIM student reporting data definitions. Entering student data into AIM/Infinite Campus requires some understanding of unique



AIM Upload Templates

All imports, except the Student Demographic import, require Student State and Student Enrollment file upload. Once these two have been completed for every

Required Templates:

- Student Demographic Template
- Student Enrollment Template

Additional Templates By Collection:

- Fall Enrollment Count Template
- Program Participation Template
- Free Reduced Application Management (FRAM) Import Template
- English Learners (EL) Template
- Spring Enrollment Count Template
- Career and Technical Education (CTE) Template
- Test Window (TW) Enrollment Count Template
- End of Year (EOY) Attendance Totals Template

terms relative to specific data collections. This tool allows users to look up a term with which they are unfamiliar and locate definitions. It is organized alphabetically.

Infinite Campus Update Schedule & References: This tab provides information regarding updates that are done to the AIM/Infinite Campus system throughout the year. Viewing these dates allows users to plan accordingly when there are planned outages. There is also helpful link listed pertaining to notes on update packages.

AIM Webinars: This tab provides users with access to all the AIM Unit’s recorded webinars. For each AIM data collection there are typically two webinars hosted so districts can walk through the collection processes and ask any questions they may have. The webinar is then posted here for later viewing. There is also a Webinar Schedule provided so that districts can plan for upcoming webinars.

AIM Policy References: This tab provides links to many of the Administrative Rules of Montana (ARM) and Montana Code Annotated (MCA) definitions which pertain to the OPI AIM Unit’s collection of student data.

OFFICE OF PUBLIC INSTRUCTION
PUTTING MONTANA STUDENTS FIRST
EAST MONTANA STATE SUPERINTENDENCY

Search...

Families & Students | Educators | Leadership | Contact | Re-opening Schools

AIM Webinars

These webinars are tailored to help districts navigate the AIM user guides and various data collections which occur throughout the year.
NOTE: Webinar dates may be subject to change. Please be aware that these webinars are recorded to allow them to be viewed at a later time. To help minimize background noise and disruptions, we ask that district staff set all microphones to be muted unless speaking or asking a question.

AIM Webinar Schedule | **AIM Recorded Webinars** | Manage

2020-2021 School Year	AIM Collection	Collection Dates *Open	District Webinars
	Beginning of Year verification	8/12/20-10/9/20	Wed. 8/5/20 & Th. 8/6/20
	Fall EI Assessment verification	8/12/20-10/19/20	Wed. 8/5/20 & Th. 8/6/20
	Previous Year Grad, Colort, Dropout Verif & Cert.	9/14/20-10/9/20	Wed. 9/9/20 & Th. 9/10/20
	Fall CLE Collection	10/7/20-12/31/20	Wed. 9/23/20 & Th. 9/24/20
	Fall Enrollment Count/MAEF AIRS	10/9/20-10/29/20	Wed. 9/30/20 & Th. 10/1/20

AIM 2020-21 Recorded Webinars

AIM 2019-20 Recorded Webinars

AIM Additional Resources: This tab provides addition links to important sites such as the MAEFAIRS website and TEAMS website.

What is Infinite Campus:

The state of Montana Office of Public Instruction (OPI) adopted the Infinite Campus software application as its statewide student information system (SIS). The OPI calls the state level SIS ‘Achievement In Montana’ (AIM). The name of the company who owns the Infinite Campus software is also called Infinite Campus.

The ‘State Edition’ of Infinite Campus is used by the OPI staff and contains the state-reported student data from all Montana districts. Access is strictly controlled and monitored.

The ‘District Edition’ of Infinite Campus is used by a majority of Montana districts as their complete local SIS. District Edition users have access to all Infinite Campus tools, functions, features, programs, community support and direct Infinite Campus support.

The ‘Montana Edition’ of Infinite Campus is provided to certain districts at no cost so that these schools who don’t use Infinite Campus as their local SIS can submit their data up to the State Edition of Infinite Campus for state reporting. Users of Montana Edition have fewer tools available to them in Infinite Campus since it is provided to them at no cost. This also limits their access to customer support at Infinite Campus. Districts wishing to have access to all features and full customer support should contact the AIM Unit at the OPI for information on how to make Infinite Campus their complete SIS.

The ‘Montana Edition – Valued Added’ is typically used by small districts as their main local student information system. Districts use it to maintain their basic set of enrollment, demographic, programs and special education IEP data. The ‘value added’ feature of this edition also allows districts to maintain students’ daily attendance and marks data. Campus Instruction, which is the teacher portal, is not available to Value Added users. These users also do not have access to customer support through Infinite Campus. Districts wishing to have access to all features and full customer support should contact the AIM Unit at the OPI for information on how to make Infinite Campus their complete SIS.

Infinite Campus Community (for District Edition users)

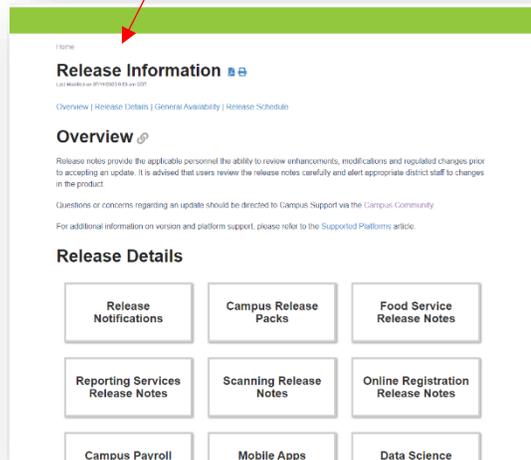
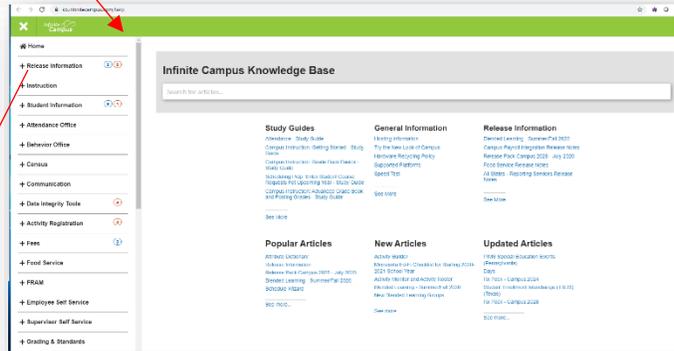
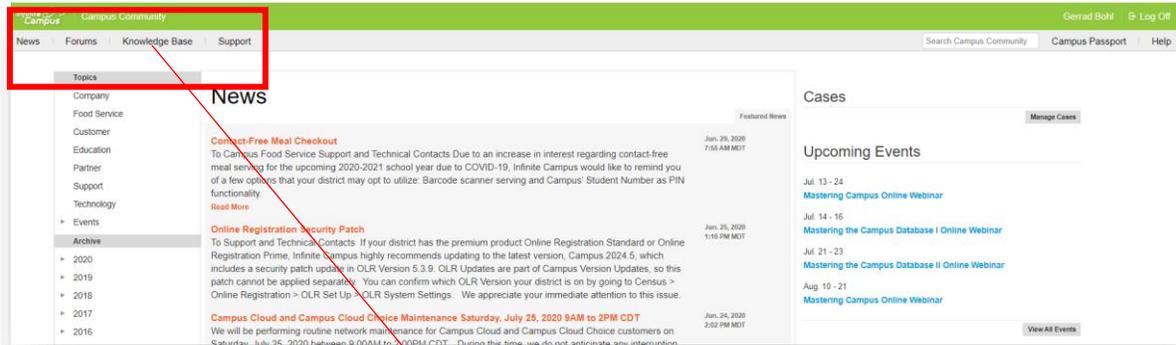
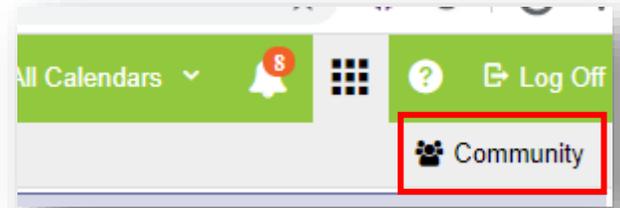
Infinite Campus offers their own portal with helpful informational tools such as Infinite Campus instructions, how-to-videos, and forums for Infinite Campus users. Campus community is accessible by signing into your Infinite Campus site and navigating to the Community icon in the upper right-hand corner.

Once you are signed into Campus Community, you will land on the **News** homepage where additional links for the **Forums** and the **Knowledge Base** product tool can be found.

The **Knowledge Base** tool allows users to search for guides or videos on specific Campus tools or modules.

By clicking on **Knowledge Base**, you will be taken to the Knowledge Base search engine. Here, you can search for specific articles.

You can select from topics on the left side of the screen as well, such as **Release Information**, which will bring you to another screen to search for specific release information.



INFINITE CAMPUS NAVIGATION BASICS

Infinite Campus is a web-based Student Information System (SIS). District Edition users and MT Edition users of Infinite Campus store important student data such as student demographics, enrollments, program participation, assessment data, as well as special education and IEP data, which is synced to the State Edition of Infinite Campus. A secure **username** and **password** are required to log-in and use the system. The username and password are supplied and maintained by your District's System Administrator and should be assigned to you only; ***do not share sign-in information between users.***

To access Infinite Campus:

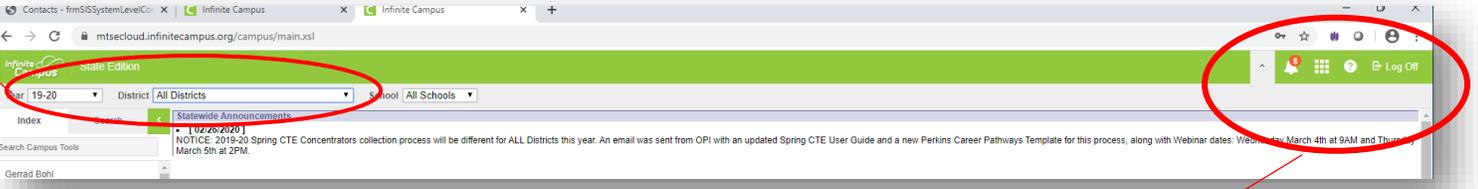
1. Open a web browser (Internet Explorer has some compatibility issues. Chrome, Edge, and Firefox are friendly browsers.)
2. Enter your district's URL. (If this is bookmarked it will need to be updated periodically.)
3. Enter your **username** and **password**.

Once you are logged in, the screen area in the Infinite Campus application is divided into three parts: the **Campus Action Toolbar**, **Index/Search Outline**, and **Main Workspace**.

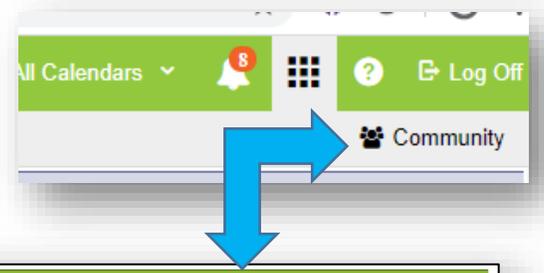
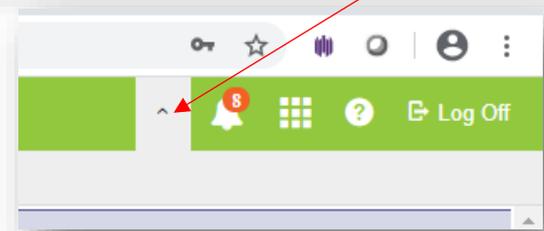
The screenshot displays the Infinite Campus application interface. At the top left is the Infinite Campus logo and 'State Edition'. A green bar at the top right contains the text 'Campus Action Toolbar'. Below this is a navigation bar with dropdown menus for 'Year' (18-19), 'District' (All Districts), and 'School' (All Schools). On the left side, there is a navigation menu with 'Index' and 'Search' tabs, and a list of categories: Student Information, Census, Behavior, and Attendance. A red box highlights the 'Index/Search' text in this menu. The main content area is titled 'Main Workspace' and contains a 'Statewide Announcements' section with a date '[10/13/2018]' and a link 'LINK TO AIM HELP AT OPI.MT.GOV'. Below this is a 'Process Alerts' section with a 'Date Range' field, a 'Display' dropdown set to 'All Processes', and a 'Find Messages' button. A 'Delete Selected Messages' button is also present. At the bottom, there is a table header with columns for 'Process' and 'Name'.

Campus Action Toolbar:

The Campus Toolbar is within the Action Bar area, and it is where you will find the fields for the **Year** and **Calendar**. 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**.



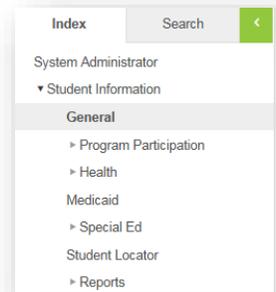
The **red arrow** to the right indicates where the **Year** and **Calendar** fields can be accessed if they are not appearing in the Campus Toolbar. The bell-shaped icon is **notifications**. The square grid icon is the link to **Campus Community** which appears as 'Community' when it is selected and is indicated by the **blue arrow** to the right. (Campus Community is a very helpful portal, offering instructions, videos, and forums for Infinite Campus users.) The circle icon with a question mark is the **help** menu. And the last icon is the **Log-Off** function. **It is best to always Log-Off before closing your browser when you are finished working in Infinite Campus.*



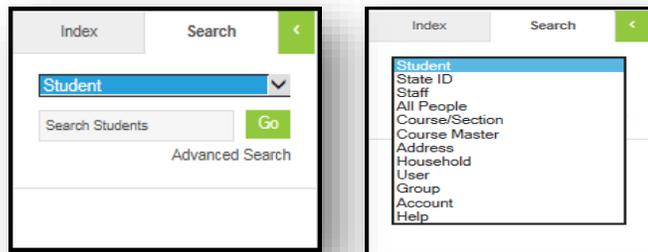
Index/Search Outline:

The Outline on the left side of the screen 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, pictured right, contains tools that help find information about students (General, Student Locator, Reports). To expand any module, click on the name of the module. To select a tool, click on the tool name. Also, by selecting **Student Information** and then **General**, you are able to view the Summary demographics for a student. If you look further down the **Index** tab you will come to **Census**. Select **Census**, then **People**, and you are able to access the **Demographics** tab for a student.

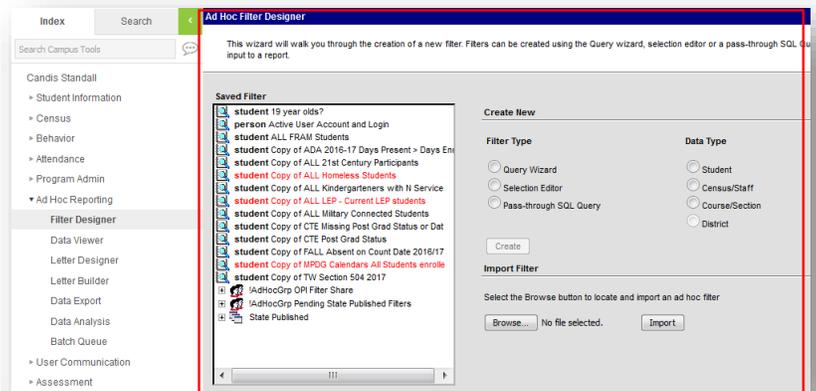


The **Search** tab, which is next to the **Index** tab, allows the user to search for different types of information in Campus. The types of searches available to a user depend on the rights given by the System Administrator. To search, select a search type from the drop-down list and enter search criteria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



Main Workspace:

The Workspace contains the specific record or tool that is being used. Pictured here is an example of an Ad Hoc Filter. When no tools are being used, the Process Alerts screen will appear here.



Searching in Infinite Campus

There are two options of searching within 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**. To find a student, *the correct Year and Calendar must be selected.* (If you are unsure of the correct year or Calendar, a search by People will yield results of anyone that matches the name entered.) Select the specific data type from the drop-down menu and enter the criteria in the search box (last name, first name). Click **Go**. It will generate a list of matches to the name you searched.

Note: **Wildcard searches** can also be attempted with a basic search by entering part of the last name, and part of the first name if correct spelling is not known.

- The underscore (_) can be used to replace one character in the name. 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 percentage symbol (%) replaces multiple characters. It can be used for all - % alone, or 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 no entry) will return all results.

Advanced Search:

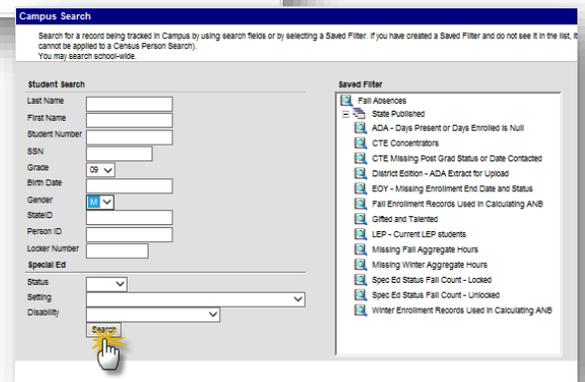
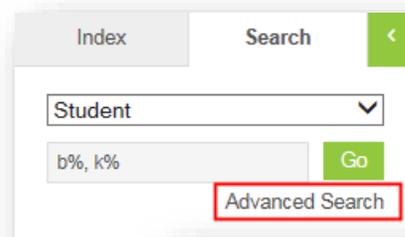
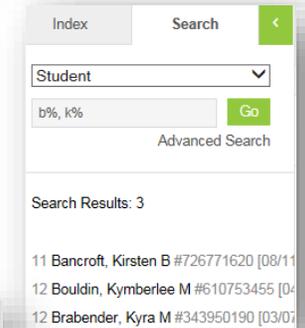
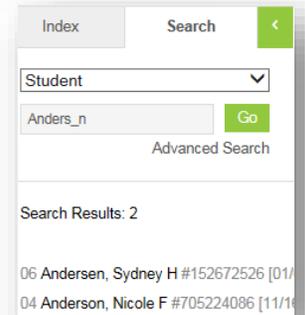
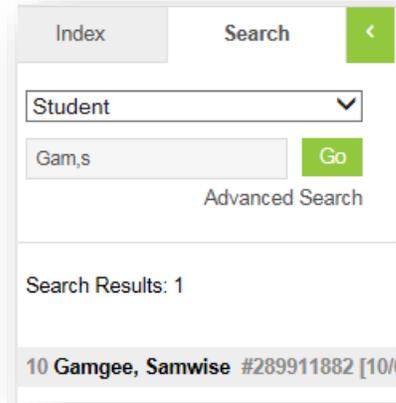
The **advanced search** combines a variety of data pieces to yield a more specific search result. To use the advanced search, click on the **Search** tab in the **Outline**, then click **Advanced Search**.

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**.

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

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.



Student Information

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

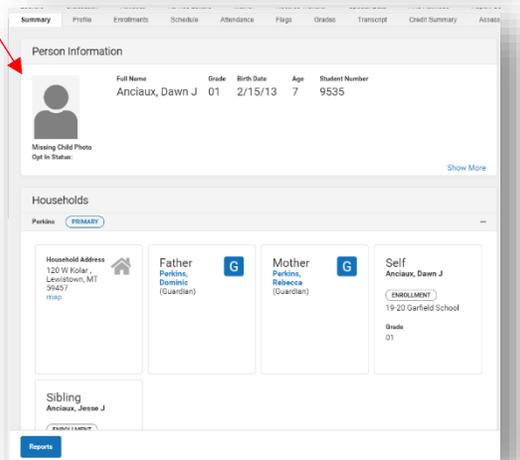
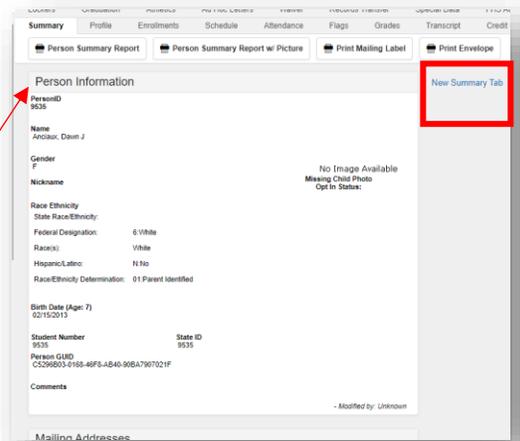
Summary Tab:

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

The **Summary** tab contains data about a student and is available in two formats. The 'Classic Summary Tab' is pictured right and contains information such as the **Name, Gender, Race/Ethnicity, Birthdate, Student Number (local ID number), State ID, Household Information, and a visible photo if the photo has been uploaded.**

There is also a *new summary* format which is available by clicking the **New Summary Tab** in the top right corner in the Classic Summary view. This new summary format is will include the same summary details as above.

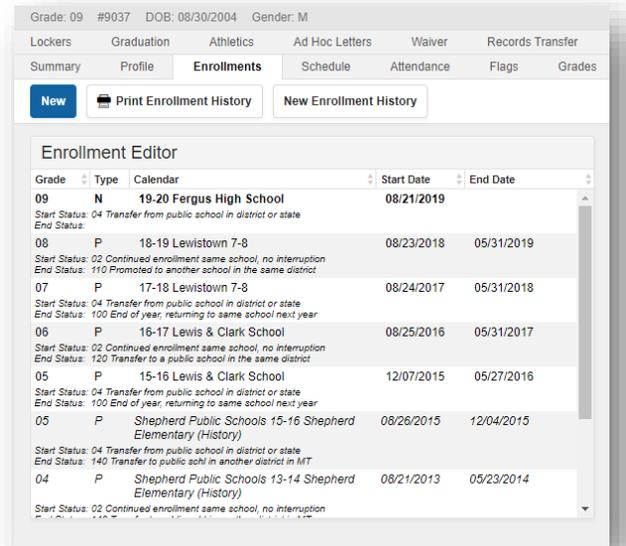
NOTE: **Gender** refers to the **legal sex** of the student as it appears on their birth certificate or other legal documentation, which may not be the same as how they personally identify. For reporting purposes, enter the legal gender of the student. *A new identity should be created for those students where the gender value has been legally changed.*



Enrollment Tab:

Path: *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.



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 12-14). Do not delete a previous identity, add a new one instead, unless an error was made when entering the identity, in which case modifications can be done in the Demographics tab.

Creating Enrollments

Student Locator Method: (Likely Used By District Edition or MT Value Added Users)

Path: Index/Student Information/Student Locator

The **Student Locator** is the preferred method for enrolling new students into Infinite Campus. 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.**

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.

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.

(Continue to the next page)

Person Information

PersonID: 10075

*Last Name: Allen | *First Name: Elizabeth | Middle Name: Rudi Lyn | Suffix: | Upload Picture

*Gender: F: Female | *Birth Date (Age: 7): 10/02/2012 | Soc. Sec. Number: | | |

Race/Ethnicity (Edit)

Federal Designation: 6:White

Race(s): White

Hispanic/Latino: N:No

Race/Ethnicity Determination: 01:Parent Identified

Birth Country: |

Date Entered US: | Date Entered US School: |

Date Entered State School: |

Home Primary Language: | Select a Value: |

Language of Impact: |

Nickname: |

Comments: |

- Modified by: Unknown

Student Locator

Student Search

Last Name: Haggard | First Name: Marie | Gender: M | Birth Date: 06/17/2001

Name	State ID	Gender	Birth Date	%
Haggard, Marie	657371011	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:

Create New Student >

Student Locator

Student Search

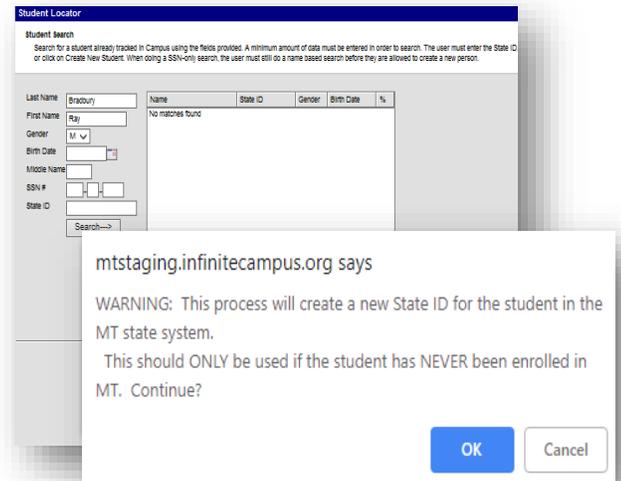
Last Name: | First Name: | Gender: | Birth Date: | Middle Name: | SSN #: | State ID: |

Search-->

Create New Student >

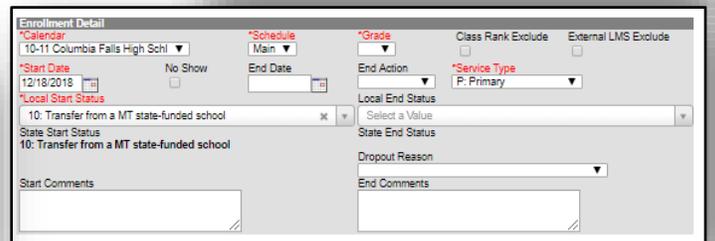
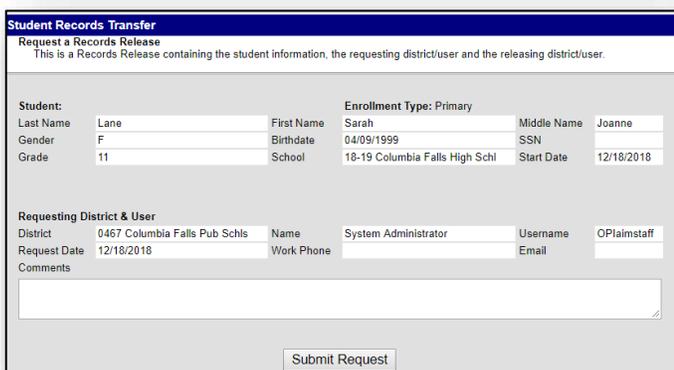
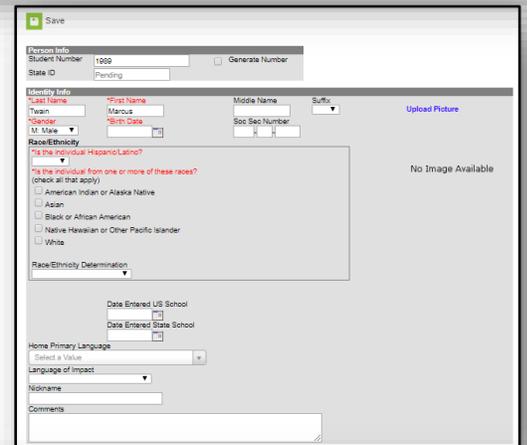
A) If a match is generated, verify the child's birthdate. Hovering over the child's name will show their last enrollment and grade level. If those match the enrolling child, click on the child's name. From the Student Information screen use the [Direct Entry Method](#) to create a **New Enrollment**. Proceed to the next page. (The [Enrolling a Student in AIM](#) user guide is also helpful with this process.)

B) If the child 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**. **Proceed below:**



After clicking OK, the following information will need to be entered in order to create a new student in the system:

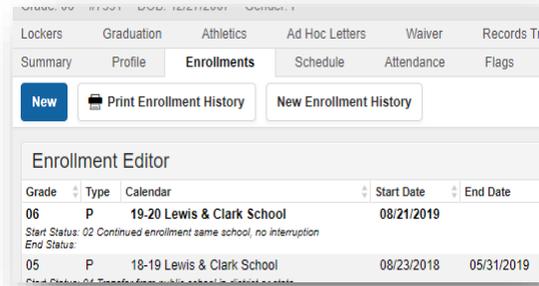
- Person Info:** Enter the Student Number (local ID) – *optional*. If this is a new student, the **State ID will populate when the record is saved**.
- Identity Info:** Enter the required information (marked with a red asterisk (*)).
- Enrollment Detail:** Enter the student's Start Date, Start Status and Grade.
- Click **Save** at the top of the page 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).



Enrollment Start & End Dates, Status Codes, Service Types, & Identities

Path: Index/Student Information/General/Enrollments

The student's **Start** and **End Dates** reflect 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*.

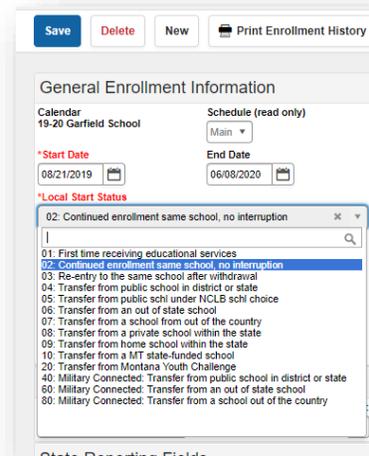


Enrollment Start and End Status Codes:

Path: Index/Student Information/General/Enrollments

The student's **Start and End Status codes** reflect 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.

NOTE: Occasionally, schools may have an overlap in End Dates and Start Dates, for example, when a student transfers from one school to another. This will create a flag in the system during enrollment counts which will require either one or both schools to make an adjustment to the end or start dates.



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

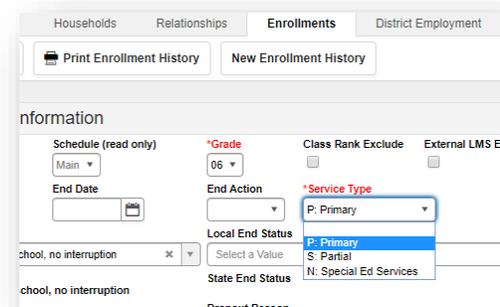
See [Appendix B](#) for definitions of **Enrollment End Status codes**.

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:

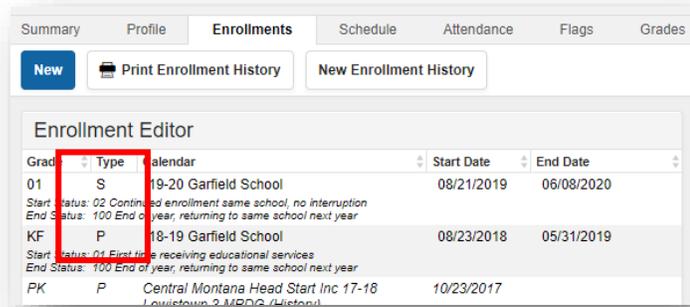
- 1. P: Primary** – the Primary Service Type indicates that the student is primarily enrolled in this school or district for educational services and is considered full-time.
- 2. S: Partial** – the Partial Service Type indicates that the student is enrolled primarily at another school or district, but 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 8th grade student with a primary enrollment at the middle school but taking a math class at the high school). This is considered part-time enrollment.
- 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 also applies most often to Pre-Kindergarten students who receive Special Education services (including speech).***



NOTE: 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 the example to the right 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).

Another example could be that 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 should be added to the student's Start Comments explaining the situation.



Grade	Type	Calendar	Start Date	End Date
01	S	19-20 Garfield School	08/21/2019	06/08/2020
Start Status: 02 Continued enrollment same school, no interruption End Status: 100 End of year, returning to same school next year				
KF	P	18-19 Garfield School	08/23/2018	05/31/2019
Start Status: 01 First time receiving educational services End Status: 100 End of year, returning to same school next year				
PK	P	Central Montana Head Start Inc 17-18 Louisiana 2 MRDC (Historical)	10/23/2017	

Identities, Legal Names/Name Changes:

Path: Index/Census/People/Identities

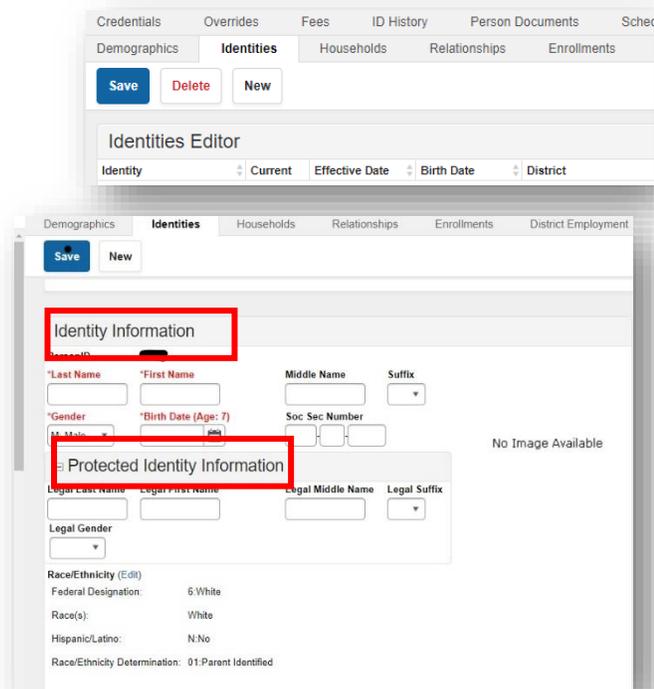
Infinite Campus is designed so that each student has **only one State Student ID** that stays with a student from the first enrollment into public school through graduation from high school. To prevent duplication, it is highly recommended that legal names are used in Infinite Campus. The system allows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

Scenario A: Student has a legal name change, or district realizes student was not enrolled with legal name.

Fix: Create a new identity record for the student with new name. This allows there to be a history of the name change in the system and searching using either the old or new name will bring up the same student.

1. Click the **Search** Tab.
2. Select **All People** from the search criteria box.
3. Enter the student's last name, then click **Go**.
4. Click the **Identities** Tab.
5. Click **New**.
6. Enter the student's new legal name information under the **Identity Information** section. (**NOTE:** If the student has a preferred name or gender which is different than their legal name or gender, you may enter it under the **Identity Information** section and then enter the legal name or gender under the **Protected Identity Information** section. This is only necessary if their preferred name and gender do not match their legal name or gender.)
7. Click **Save**.
8. Refresh your search results by clicking **Go** under the **Search tab** again for the name to change under Search Results or at the top of the screen.

NOTE: The information recorded under the '**Identity Information**' section of the 'Identities tab', is what is recorded at the state level of the AIM system for state reporting and is the name that will show up on local reports and teacher rosters etc. If the student has a



The screenshot shows the 'Identities Editor' interface. The 'Identity Information' section is highlighted with a red box and contains fields for Last Name, First Name, Middle Name, Suffix, Gender, Birth Date (Age: 7), and Soc Sec Number. The 'Protected Identity Information' section is also highlighted with a red box and contains fields for Legal Last Name, Legal First Name, Legal Middle Name, Legal Suffix, and Legal Gender. Below these sections, there is a 'Race/Ethnicity (Edit)' section with fields for Federal Designation, Race(s), Hispanic/Latino, and Race/Ethnicity Determination.

preferred name or gender which is different than their legally documented name or gender, enter it under the **Identity Information** section and then enter the legal name or gender under the **Protected Identity Information** section. This is only necessary if their preferred name or gender do not match their legally documented name or gender.

Scenario B: Student has a preferred name or gender that is different from their name or gender on a legal document. I.e., student's birth certificate says female, but the student identifies as male.

Fix: Create a new identity record for the student with the preferred name or gender. This allows there to be a history of the name change in the system and searching using either the old or new name will bring up the same student.

1. Click the **Search** Tab.
2. Select **All People** from the search criteria box.
3. Enter the student's last name, then click **Go**.
4. Click the **Identities** Tab.
5. Click **New**.
6. Enter the student's preferred name information under the **Identity Information** section and then enter the legal name or gender under the **Protected Identity Information** section. This is only necessary if their preferred name and gender do not match their legal name or gender.
7. Click **Save**.
8. Refresh your search results by clicking **Go** under the **Search tab** again for the name to change under Search Results or at the top of the screen.

NOTE: The information recorded under the '**Identity Information**' section of the 'Identities tab', is what is recorded at the state level of the AIM system for state reporting, and is the name that will show up on local reports and teacher rosters etc. If the student has a preferred name or gender which is different than their legally documented name or gender, enter it under the **Identity Information** section and then enter the legal name or gender under the **Protected Identity Information** section. This is only necessary if their preferred name or gender do not match their legally documented name or gender.

Records Transfer

The **Records Transfer** tool in Infinite Campus 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.

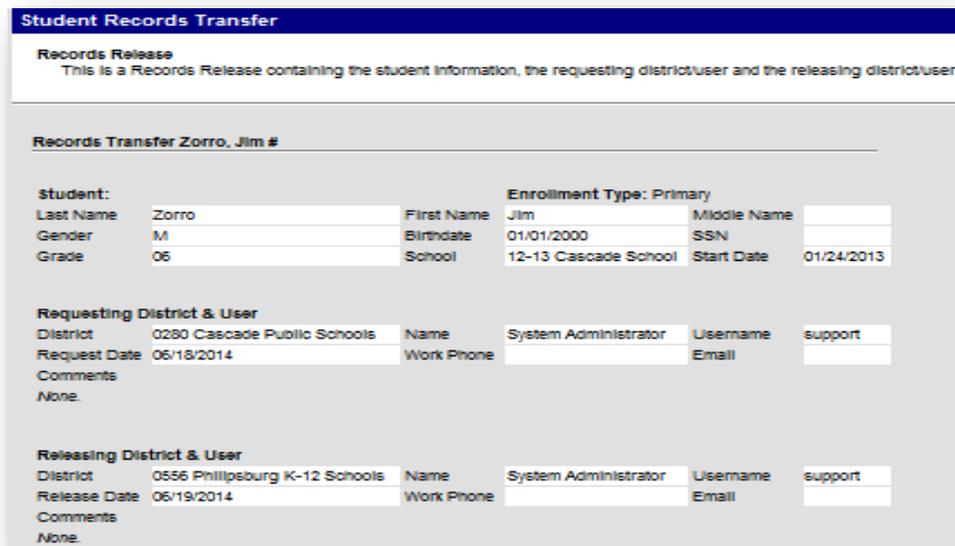
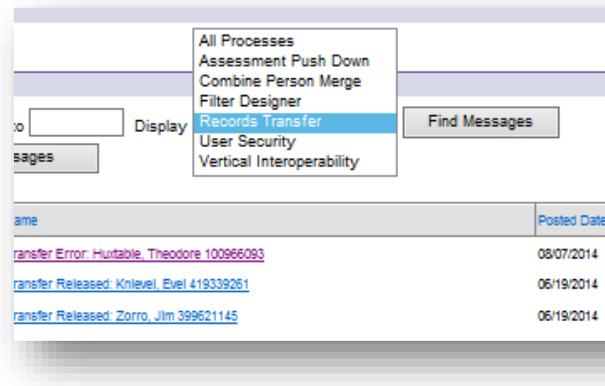
When a student that is new to the district is enrolled using the Student Locator, the Records Transfer Wizard opens automatically to generate a request immediately. **If a student is enrolled using the direct entry method, the administrator must manually generate a Records Transfer request.** The next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

View a Records Transfer Request:

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

The **Process Inbox** is located on the user's Main Work page. To access the Process Inbox:

1. Click on the user's name on the **Index** tab.
2. Use the pull-down **Display** menu to select **Records Transfer**.
3. Click **Find Messages**.
4. The list shows the status of all records transfer requests. Click a message to open the record and view details. Details look like this:



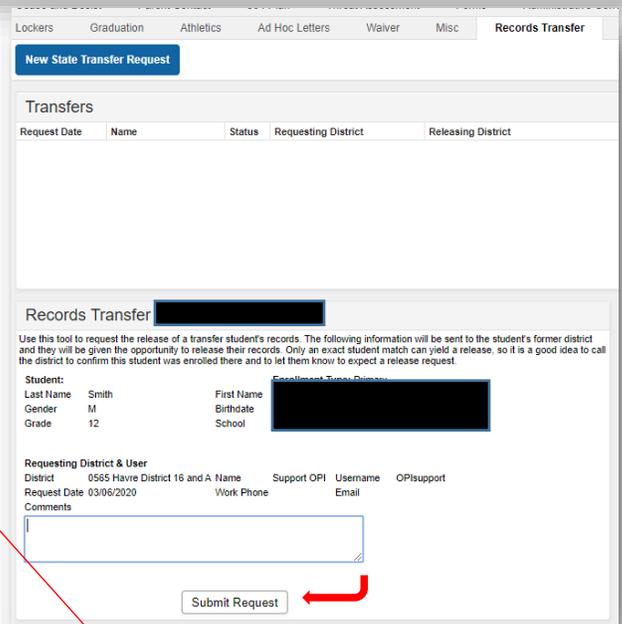
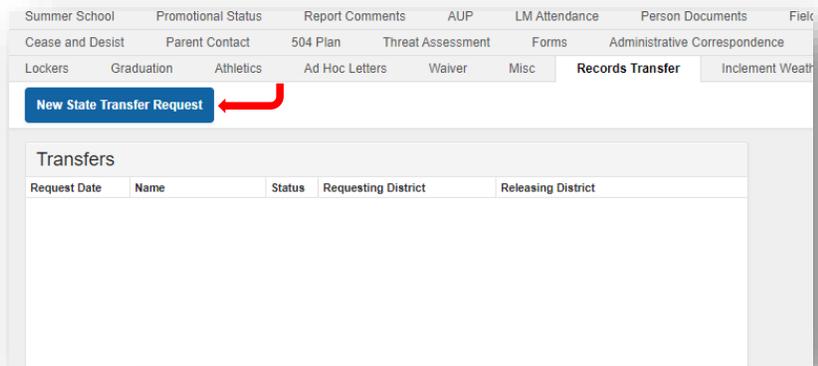
Processing Records Transfer Requests

A. Transferring into a District: Manually Request a Records Transfer

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

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. 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.

1. Click the **Search** tab.
2. Select **Student** from the drop-down menu.
3. Enter the student's last and first name. Click **Go**.
4. The **Records Transfer** tab should appear at the top with various other tabs. It contains information about all pending and completed transfer requests.
5. To *manually request records* from a student's former district, click **New State Transfer Request**.
6. 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. Infinite Campus 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. If the request is still pending, the status will read: *Waiting for former district to release records*.
7. Click on the **Transfer Released** link. A list of available **Transfer Documents and Data Imports** will be listed below the transfer information. ***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 Infinite Campus database.



8. To open a **Transfer Document** or activate a wizard, click on the blue links listed. Items that are not available for import or download will be listed in strikethrough text.
9. To import a student's enrollment history, click the **Data Import Wizard** called the **'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.

B. Transferring Out of a District

- When a student transfers out of the district, a **transfer message** will be generated by the new district when they enroll the student. (If the new district used the **Student Locator**, the message was generated automatically; if they used 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** on the Main Work page when you sign in. (Or search for a specific student and click on the student's **Records Transfer**). Click on the blue 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.

Process	Name	Posted Date	Due Date
Records Transfer	Transfer Complete: Chesney, Kenny 366555522	08/17/2011	
Records Transfer	Request for you to release: Mouse, Minnie 567881540	08/05/2011	
Records Transfer	Request for you to release: Church, Eric 662880660	08/01/2011	

End Dates & 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**.

To fix an Overlap:

1. Click **Edit** to return to the Enrollments tab, or go directly to the **Enrollments tab** and correct the error.
2. Once the enrollment overlap has been fixed, click **save** and return to the **Process Inbox** or **Records Transfer tab** and complete the records transfer.

The screenshot shows the 'Student Records Transfer' interface. At the top, there is a section titled 'Release or Reject a Request for Transfer Records' with explanatory text. Below this, the 'Records Transfer Church, Eric #' section contains a table with the following data:

Student:	Enrollment Type:
Last Name: Church	Primary
First Name: Eric	Middle Name:
Gender: M	Birthdate: 07/24/2002
Grade: 04	School: 11-12 Cascade School
Start Date: 08/31/2014	Overlap: Edit (08/31/2011-08/30/2012) 11-12 Philipsburg School Grade: 04

Below the table, there are sections for 'Requesting District & User' and 'Releasing District & User', each with fields for District, Name, System Administrator, Username, Request Date, Work Phone, and Email.

Important: 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).

The screenshot shows the 'Enrollments' interface. At the top, there are tabs for Summary, Profile, Enrollments, Schedule, Attendance, Flags, and Grades. Below the tabs are buttons for Save, Delete, New, Print Enrollment History, and New Enrollment History. The 'General Enrollment Information' section contains the following data:

Calendar	Schedule (read only)	*Grade	Class Rank Exclude	External
HHS 2017-18	Main	12	<input type="checkbox"/>	<input type="checkbox"/>
*Start Date: 08/30/2017	End Date: 05/25/2018	End Action:	*Service Type: P: Primary	Local End Status: 400: Graduated
*Local Start Status: 02: Continued enrollment same school, no interruption				

Adding New Student Enrollments (Montana Edition Users)

Montana Edition users of Infinite Campus utilize a third-party student information system to record their student data. This data must be imported into AIM/Infinite Campus to be reported to the state. The [AIM File Imports Guide](#) provides instruction on how this is done. It is important to note that a Demographics Upload must first be completed before completing a Student Enrollment Upload. This will likely be used for larger ME districts. Smaller ME districts can also use the Direct Entry Method detailed above.

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/Infinite Campus 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.

The Following are a few useful tools for running Student Information Reports

Enrollment Status:

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:

Path: Index/Student Information/Reports/Enrollment Summary

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:

Path: Index/Student Information/Reports/Enrollment Summary Details

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

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/extract 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](#)

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. [State Published Ad Hoc Reports](#)

The screenshot shows the 'Student Enrollment Status' report configuration interface. It includes dropdowns for 'All Schools' and 'All Calendars'. The main area is divided into several sections: 'Which students would you like to include in the report?' with options for 'Grade' (All Students, KP, NH, P1, PK) and 'Ad Hoc Filter'; 'Enrollment Add Date' and 'Enrollment Drop Date' with date pickers; 'Display Options' for 'Start Date' and 'End Date'; 'How would you like the report sorted?' with options for 'Alpha', 'Grade', and 'Student Number'; 'Which enrollment status would you like to include in the report?' with radio buttons for 'State Start/End Status' and 'Local Start/End Status'; and two scrollable lists for 'Start Status' and 'End Status'. A 'Report Format' dropdown is set to 'PDF', and a 'Generate Report' button is at the bottom.

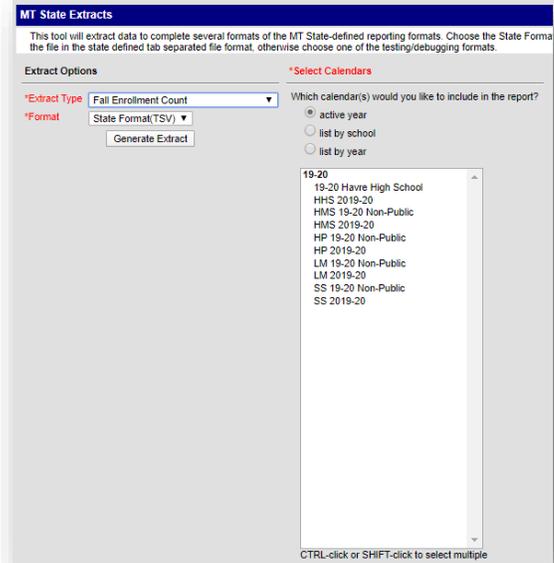
The screenshot shows the 'Enrollment Summary Details Report' configuration interface. It includes a date picker for 'Enrollment Effective Date' set to '03/05/2020'. The 'Grade(s)' section has a dropdown for 'Select one or more grade levels'. The 'Ad Hoc Filter' section has a dropdown for 'Select an Ad Hoc Filter'. The 'What types of enrollments would you like to include in the report?' section has checkboxes for 'P.Primary', 'S.Partial', and 'N.Special Ed Services', with 'N.Special Ed Services' checked. There are also checkboxes for 'Observe State Exclude' and 'Federal Race/Ethnicity values'. The 'Which Race/Ethnicity values would you like to use?' section has radio buttons for 'Federal Race/Ethnicity values' and 'State Race/Ethnicity values'. The 'Which status types would you like to include in the report?' section has radio buttons for 'State Start/End Status' and 'Local Start/End Status'. The 'Which enrollment status would you like to include in the report?' section has two scrollable lists for 'Start Status' and 'End Status'. A 'Next' button is at the bottom.

MT Extracts:

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

Use **MT Extracts** to verify a specific type of data that has been entered in Infinite Campus.

1. Select the **Index** tab.
2. Select **MT State Reporting**.
3. Select **MT Extracts**.
4. Choose the **Extract Type**, the **Format** and the **Year(s)/School(s)**.
5. Click **Generate Extract**. The extract will open in a new window in the format selected.



The screenshot shows the 'MT State Extracts' tool interface. At the top, it states: 'This tool will extract data to complete several formats of the MT State-defined reporting formats. Choose the State Format the file in the state defined tab separated file format, otherwise choose one of the testing/debugging formats.' Below this, there are two main sections: 'Extract Options' and '*Select Calendars'. In the 'Extract Options' section, there are two dropdown menus: '*Extract Type' set to 'Fall Enrollment Count' and '*Format' set to 'State Format(TSV)'. A 'Generate Extract' button is located below these dropdowns. The '*Select Calendars' section has three radio button options: 'active year' (selected), 'list by school', and 'list by year'. Below these options is a scrollable list of school and year identifiers, including '19-20', '19-20 Havre High School', 'HHS 2019-20', 'HMS 19-20 Non-Public', 'HMS 2019-20', 'HP 19-20 Non-Public', 'HP 2019-20', 'LM 19-20 Non-Public', 'LM 2019-20', 'SS 19-20 Non-Public', and 'SS 2019-20'. At the bottom right of the list, it says 'CTRL-click or SHIFT-click to select multiple'.

Additional AIM User Guides to Review for New AIM Primary or AIM Backup Staff

- [Creating and Modifying Users](#)
- [Data Security](#)
- [Setup for Dropout, Graduate, and Cohort Data Validation and Certification](#)
- [Behavior- Setting Up Access to Validate and Certify Behavior Data](#)

For further assistance, contact the AIM Help Desk at
1-877-424-6681 or [Submit an AIM Help Desk Ticket](#)