

AIM User Guide:
*AIM Beginning of Year
Verification Process*

THE TIMELY ENTRY OR UPLOAD OF STUDENT DATA INTO AIM/INFINITE CAMPUS IS NECESSARY TO MEET DEADLINES FOR STATE AND FEDERAL REPORTING PURPOSES. SUBMITTING DATA BY POSTED DEADLINES IS IMPORTANT AS THIS WILL DIRECTLY IMPACT THE FUNDING FOR ALL SCHOOLS IN THE STATE OF MONTANA.

LINKS:

- APPENDIX A: [START STATUS CODES](#)
- APPENDIX B: [END STATUS CODES](#)
- [UPLOAD TEMPLATES](#)

CITATION:

- [MCA 20-9-311. CALCULATION OF AVERAGE NUMBER BELONGING \(ANB\)](#)
- [ARM 10.20.102 CALCULATION OF AVERAGE NUMBER BELONGING \(ANB\)](#)

AIM Beginning of Year Verification Process

[AIM User Guide](#)

THE BEGINNING OF YEAR VERIFICATION PROCESS ESTABLISHES CALENDARS AND ENROLLMENTS FOR THE NEW SCHOOL YEAR. SCHOOLS ARE REQUIRED TO ENROLL ALL STUDENTS IN AIM/INFINITE CAMPUS WHO ATTEND AT LEAST ONE DAY OF CLASS OR WHO RECEIVE SPECIAL EDUCATION SERVICES FROM THE DISTRICT. THIS GUIDE EXPLAINS THE BASIC PROCESSES FOR VERIFYING CALENDARS AND ENROLLING STUDENTS INTO SCHOOLS FOR THE NEW SCHOOL YEAR.

Contents

FAQ:	2
CHECKLIST.....	3
STATE PUBLISHED ADHOC LIST:	3
MT EDITION UPLOAD TEMPLATES:.....	3
A. ENROLLMENT VERIFICATION	4
1. VERIFYING CURRENT YEAR ENROLLMENTS	4
2. SUMMER TRANSFERS	5
B. SUMMER GRADUATES.....	5
C. NEW ENROLLMENTS.....	6
STUDENT LOCATOR METHOD FOR ENTRY OF NEW ENROLLMENTS	6
<i>Early Kindergarten Entries</i>	7
D. FILE UPLOAD OF ENROLLMENTS FOR MONTANA EDITION	7
E. DATA VERIFICATION	9
STUDENT INFORMATION REPORTS	9
AD HOC REPORTING.....	9
ENROLLMENT VERIFICATION REPORT	10
ENROLLMENT OVERLAP REPORTS	10
RESYNC STATE DATA.....	10

FAQ:

- **HOW DO I PROPERLY EXIT STUDENTS WHO TRANSFERRED OVER THE SUMMER FOR GRADE K - 6?** Delete the student's current year enrollment and update the previous year's End Status to reflect the transfer.
- **HOW DO I PROPERLY EXIT STUDENTS WHO DID NOT RETURN AFTER THE SUMMER FOR GRADE 7 - 12?** Students should have at least a single day of enrollment in the CURRENT YEAR even if they did not return.
- **HOW DO I RECORD SUMMER GRADUATES?** Summer graduates are recorded like regular graduates – change the previous year's enrollment End Status to 400: Graduated, and enter Diploma Date, Diploma Type and Diploma Period.
- **IF I USE THE MONTANA EDITION OF INFINITE CAMPUS, HOW DO I GET STATE IDs FOR NEW STUDENTS?** Obtain State IDs from the student's prior district or from the Student Locator. Districts may upload a Student Demographic file to locate State IDs, however, using the Student Locator reduces the potential for duplication.
- **WHAT ARE THE CORRECT ENROLLMENT START STATUS CODES FOR STUDENTS?** Start Status codes should accurately reflect the prior enrollment status of the student. See [Appendix A Enrollment Start Status](#) for examples
- **WHICH ENROLLMENT SERVICE TYPE DO I CHOOSE?** Service Type indicates level of educational service the student is receiving from the district. See Appendix D for a list of codes and definitions
- **HOW DO I VERIFY THE ENROLLMENT DATA I ENTERED?** The Student Information reports and Ad Hoc Reporting tools can be used to verify data entry.
- **HOW DO I KNOW THE DATA IS CORRECT AT THE STATE LEVEL?** Use Data Utilities to re-sync data and the State Enrollment Verification report to compare data.

Checklist

[INFINITE CAMPUS RESOURCE: BEGINNING OF SCHOOL YEAR PROCESS](#)

- Modify previous years' student enrollments for summer transfers.
- Modify previous years' student enrollments for summer graduates.
- Assign/locate state IDs for new students.
- Request record transfers for new students (required for Special Ed students).
- End date in AIM/Infinite Campus for any staff members who have left.
- To prepare for Fall Count, confirm that all American Indian students are identified.
 - *Index>Student Information>Reports>Enrollment Summary*
- Verify that all students have an enrollment and no overlaps:
 - *Index>Student Information>Reports: >Duplicate IDs and >Enrollment Status and >Enrollment Summary and >State Enrollment Verification And State Enrollment Overlap*
- Verify data using State Published Ad Hoc Reports:
 - *Index>Ad Hoc Reporting>Filter Designer>>+State Published*

State Published Adhoc List:

TBD

MT Edition Upload Templates:

- [Student Demographic Template](#)
- [Student Enrollment Template](#)

A. Enrollment Verification

[INFINITE CAMPUS RESOURCE: ENROLLMENTS](#)

PATH: SEARCH > STUDENT > ENROLLMENT TAB

Enrollment records should be verified at the start of each school year.

1. Verifying CURRENT YEAR Enrollments

PATH: INDEX > STUDENT INFORMATION > REPORTS > ENROLLMENT SUMMARY DETAIL

1. Navigate to the **Index** tab.
2. Select **Student Information**.
3. Select **Reports**.
4. Select **Enrollment Summary Detail**.
5. Enter the **Enrollment Effective Date**. (first day of instruction)
6. Select the **Grade(s)** that should be included in the report.
7. Select **Enrollment Service Types** to associate with the student enrollments.
8. Select **Calendar(s)**.
9. Select **Enrollment Status Types** to use.
10. Select the desired **Start and End Statuses**.
11. Select the **Next** button.
12. Choose a **Format** for the report - **PDF** or **CSV**.
13. Select either the **Generate Report** button or the **Submit to Batch** button.
14. The search results should show a list of students that are enrolled in that school for the **CURRENT YEAR** school year. Change the school to check for enrollments.

✓ For students in grades PK to 6 that do not return –

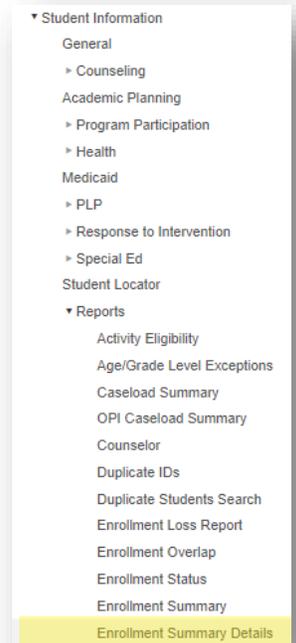
- a. CURRENT YEAR enrollments should be deleted if the student did **not** attend class in the CURRENT YEAR.
- b. The PREVIOUS YEAR's enrollment end status should be amended to reflect the student's current status. Change the **Local End Status**, use [Appendix B: AIM Enrollment End Status Codes](#) for reference and add a note in 'End Comments' with the student's transfer information.

✓ For students enrolled in grades 7 to 12 that do not return and their whereabouts are unknown-

- a. A single day enrollment for the CURRENT YEAR is required when for students that did not return and their whereabouts are unknown.
- b. The enrollment for CURRENT YEAR should be created for one day with a start date and end date for the first day of school. Select one of the 300 series end status options and enter a drop out reason code.

✓ For students enrolled in grades 7 to 12 that do not return and the school knows they transferred-

- a. A single day of enrollment is not required in the CURRENT YEAR.
- b. The CURRENT year enrollment should be deleted and the PREVIOUS YEAR's enrollment end status should be amended to reflect the student's transfer status.



2. Summer Transfers

Adjust enrollments for students who transferred during the summer.

- ✓ **For students in grades PK to 6 that do not return –**
 - a. CURRENT YEAR enrollments should be deleted if the student did **not** attend class in the CURRENT YEAR.
 - b. The PREVIOUS YEAR's enrollment end status should be amended to reflect the student's current status. Change the **Local End Status**, use [Appendix B: AIM Enrollment End Status Codes](#) for reference and add a note in 'End Comments' with the student's transfer information.
- ✓ **For students enrolled in grades 7 to 12 that do not return and their whereabouts are unknown-**
 - a. A single day enrollment for the CURRENT YEAR is required when for students that did not return and their whereabouts are unknown.
 - b. The enrollment for CURRENT YEAR should be created for one day with a start date and end date for the first day of school. Select one of the 300 series end status options and enter a drop out reason code.
- ✓ **For students enrolled in grades 7 to 12 that do not return and the school knows they transferred-**
 - a. A single day of enrollment is not required in the CURRENT YEAR.
 - b. The CURRENT year enrollment should be deleted and the PREVIOUS YEAR's enrollment end status should be amended to reflect the student's transfer status.

B. Summer Graduates

MONTANA HIGH SCHOOL COMPLETER AND DROPOUT DATA COLLECTION HANDBOOK

Enrollments for student who completed graduation requirements after the end of the **PREVIOUS YEAR**, but **prior to** the first day of school in the **CURRENT YEAR** are counted as graduates from the previous year.

1. Select **PREVIOUS YEAR** and a **high school**.
2. Select the **Search** tab and enter the student's last name then select **Go**.
3. Select the **Enrollments** tab and choose the **PREVIOUS YEAR** enrollment record. (example: if 19-20 is the previous year, then select the 19-20 enrollment for that year.)
4. Change the *End Status* to *400: Graduated* and select **Save**.
5. Select the **Graduation** tab.
6. Enter the *Diploma Date*, *Diploma Type* and *Diploma Period* and select **Save**.

Note: The diploma type '**04: Completed IEP Goals**' should be selected when a student is graduating through completing their IEP goals, not by completing district graduation credit requirements. The diploma period is '**03: Four years or with an IEP allowing for longer**' if the student completes graduation requirements prior to the first day of school in the CURRENT YEAR.

C. New Enrollments

[INFINITE CAMPUS RESOURCE: ENROLLMENTS](#)

Student Locator Method for Entry of New Enrollments

[INFINITE CAMPUS RESOURCE: STUDENT LOCATOR](#)

The **Student Locator** is the preferred method for entering enrollments for students new to the district.

1. Set the **Year** to **CURRENT YEAR** and select the school.
2. From the **Index**, select **Student Information**.
3. Select **Student Locator**.
4. Enter the student's Last Name, First Name and Gender.
5. Select **Search**.
6. Use the other identifiers (Name, State ID, Gender, Birth Date or % which is a wildcard search character) to help identify a match. Hover over the record to see information about the student's last enrollment.
 - If the student is located –
 - Select the student's name.
 - Enter the Student Number (Local ID) – if assigned by the district.
 - Enter the **Identity Info** and **Enrollment Detail**. **The fields in red are required.**
 - Select **Save**.
 - If the student has never been enrolled in a Montana school-
 - The student name will not appear, so Select **Create New Student**.
 - Enter the Student Number (Local ID) – if assigned by the district.
 - Enter the **Identity Info** and **Enrollment Detail**. **The fields in red are required.**
 - Select **Save**.
 - If you know a student has an existing **State ID** but are unable to find the ID using the **Student Locator**, an existing State ID may not show as a match in the **Student Locator** for a variety of reasons:
 - Nickname versus full name (e.g., Jonathan-Johnny, Michael-Mike, Elizabeth-Liz or Beth or Libby)
 - Transposed First Name/Last Name or Gender.
 - It is suggested that a variety of options are attempted when searching for a student to ensure a duplicate State ID is created. Please call the AIM Help Desk for help with locating students you believe already exist within Infinite Campus. 1-406-444-3800.

Student Locator

Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search, you must enter the student's State ID, or full legal Last Name, First Name, and Gender. Hover the cursor over each field to see the required data.

Last Name	First Name	Gender	Birth Date	Middle Name	SSN #	State ID
<input type="text"/>						

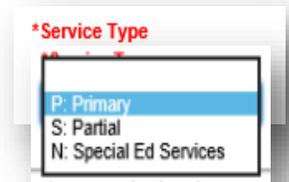
Name	State ID	Gender	Birth Date	%
------	----------	--------	------------	---

The 'Start Status' and 'Service Type' Fields:

Start Status codes should accurately reflect the last active enrollment of a student. [See Appendix A.](#)

Service Types should accurately reflect the type of service the student is receiving from the school.

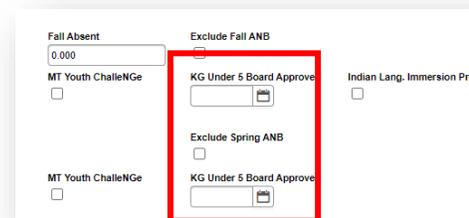
- **P: Primary** - Student is enrolled in the school to receive education services
- **S: Partial (Secondary)** - Student is primary enrolled in another school but participates in an accredited educational program at this school
- **N: Special Ed Only** - Student receives Special Education Services (PK students or students concurrently enrolled at a private or home school)



Early Kindergarten Entries

[MCA 20-7-117](#) requires that students who have not reached age 5 on or before September 10 of the current school year must have special permission from the School Board to be enrolled in a regular Kindergarten program and counted for ANB. This applies anytime during the year.

- For Kindergarten enrollment under 5, enter the board approval date under the Fall and/or Spring Aggregate Hours fields in the enrollment tab for the student. In order to be counted for ANB, this date must be entered.
- Navigate to the Ad Hoc Filter State Published Folder and locate the ad hoc titled: **ALLEN KG Less than 5 Years Old** Run this ad hoc to see a list of KG students who will need this date entered sometime before the fall enrollment count. If no date is entered by the fall enrollment count, their grade levels must be changed to PK.



D. File Upload of Enrollments for Montana Edition

Montana Edition users of Infinite Campus utilize a third-party student information system to maintain their student data. Montana Edition users can upload their demographic and enrollment data from their third-party student information system into Infinite Campus for state reporting purposes. **Read through all steps below first before performing an upload.**

[INFINITE CAMPUS RESOURCE: STATE REPORTING GUIDE](#)

Student Demographic Upload

The first option for Montana Edition using the File Upload method is to create an extract file from the district's Student Information System in the *.tsv or *.txt format.

NOTE: Perform the *Student Demographic* file upload before the *Enrollment* file is uploaded.

1. Using the file exported from your local student information system (SIS), copy and paste the data into the [Student Demographic Template](#).
2. After you delete the first three rows, the first line should be a 'header' row. Make sure any lines before this header row are deleted. This header row should be entered in row 1, and start with column A, entering 'HD', hit (tab), enter the date in the format of MM/DD/YYYY, hit (tab), enter military time in the format of HH:MM:SS, hit (tab) enter 'MT9.1' Go to file and save as a *.txt file.

3. Open the *.txt file and remove any spaces in the first header row *after* MT9.1

- Place the cursor after MT9.1 and use the keyboard to select 'End'.
- If the cursor moved down the line, use your backspace button to remove the spaces.

4. Go to file and save as a *.txt file once you have removed all spaces after MT9.1

5. In Infinite Campus from the **Index**, select **MT State Reporting** and select **MT Data Upload**.

6. From **Import Type**, select *Student Demographics*.

7. Under **Work to Perform**, select *Validate and Test File*. (This will only test the file- no data will be changed or uploaded at this point.)

8. Browse for the *.txt file.

9. Select **Upload**.

10. Check the Import Results Summary for Errors and Warnings. Files with warnings should be corrected before any data is imported, however the import can still occur. When an error message appears, that data needs to be corrected before the import can take place.

11. When all *Errors* have been cleared and *Warnings* checked, upload the file again but change the **Work to Perform** field to *Upload File*. (This will change student data.) **NOTE:** Never test or upload more than one file at a time. Allow the system to complete one file at a time before proceeding. Each file tested or imported MUST have a different name for the file, otherwise the wizard will not know it is a new file.

Note: To capture the file of new state IDs:

After uploading the Student Demographics file, the upload status report will be visible. The report contains a link to download the file with new state IDs.

- Select *Click Here*.
- The report shows the new state IDs.
- Save the file for future reference and enter the information in your third-party local Student Information System.
- After updating your Student Information System, proceed to upload the Student Enrollment extract from your third-party SIS. **Do not proceed with a Student Enrollment import until after first doing your demographics upload and after importing the new State ID's into your third-party SIS.**

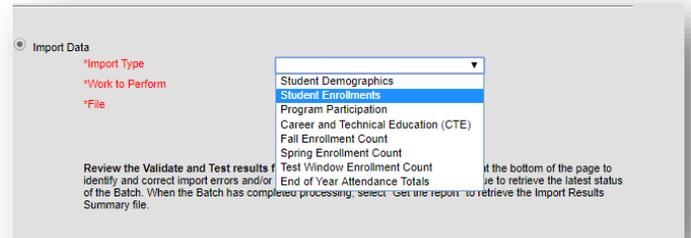
Warnings Detail - No matching student found

If the Warning Detail lists "No matching student found", Infinite Campus will create a new state ID for the student when the Student Demographics file is uploaded.

- Do not** upload the Student Demographics file if you think there is already a state ID for this student, to avoid duplication. Instead, check the student locator to identify the state ID.
- (This must be done BEFORE uploading the Student Enrollment file) If a state ID is needed, upload the Student Demographics file and save the report of new state IDs that AIM generates (instructions below). Use the file of new IDs to upload into the district local SIS, or enter the IDs manually in the local SIS.

12. Follow steps 1-11 above using the [Student Enrollment Template](#). This time, however, select *Student Enrollments* for the **Import Type**. **NOTE:** An error will occur during an enrollment upload if a student already has an enrollment in Infinite Campus and another enrollment upload is done. Be sure that the start date in the file matches the start date of the enrollment in infinite Campus. **A duplicate enrollment will occur if the start dates do not match.**

ID	08/01/2011	15:48:21	MT9.1					
SD	0280	119459608	50	Paisley Brad		M	02/03/2004	
SD	0280	125662052	68	Yearwood Trisha		F	03/19/2001	
SD	0280	149165791	45	Millsap Ronnie		M	11/24/2004	
SD	0280	166135951	64	Williams Hank		Jr	04/24/2002	
SD	0280	180735107	41	Lynn Loretta		F	12/20/2003	
SD	0280	188415691	55	Seals Dan		M	02/22/2006	
SD	0280	193009537	12	Brooks Garth		M	09/05/2006	
SD	0280	195299033	28	Gill Vince		M	04/23/2001	
SD	0280	196400321	54	Rich Charlie		M	01/09/2002	
SD	0280	210904318	17	Carter June		F	08/10/2003	
SD	0280	212117740	67	Judd Wynonna		F	05/10/2005	
SD	0280	214063709	31	Harris Emmylou		F	10/27/2001	
SD	0280	218199532	52	Pickler Kellie		F	12/05/2005	
SD	0280	223236465	37	Krauss Allison		F	11/15/2005	
SD	0280	240183925	70	Brown Zac		M	03/10/2004	
SD	0280	250939665	46	Montgomery John Michael		M	02/12/2003	
SD	0280	281099467	43	McCoy Neal		M	11/27/2004	
SD	0280	282085655	15	Carey Mariah		F	10/03/2001	
SD	0280	287077795	22	Coe David Allen		M	10/29/2005	



E. Data Verification

The first step in the data verification process is to make sure the data is correct at the district level before syncing it to the state level. This may involve a dialogue with specific program staff, including the Title I Director, SPED Director, lunch staff, etc.

Student Information Reports

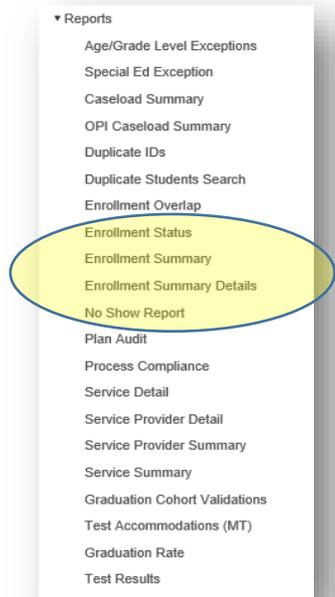
[INFINITE CAMPUS RESOURCE: AVAILABLE REPORTS](#)

PATH: INDEX > STUDENT INFORMATION > REPORTS

1. From the **Index**, select **Student Information**, and then select **Reports**.

These reports should be run to verify enrollment data.

- The **Enrollment Status** report lists students by name, according to set criteria. You can choose parameters for the report.
- The **Enrollment Summary** report gives a count of students by *School, Grade, Race/ Ethnicity* and *Gender* as of a specific date.
- The **Enrollment Summary Details** report is a detailed version of the Summary report and offers many more filtering options to choose from.



Ad Hoc Reporting

PATH: INDEX > AD HOC REPORTING > FILTER DESIGNER > STATE PUBLISHED

Ad Hoc reports generate information on certain sets of student data. For example, you can generate a list of students that are enrolled in a specific program.

1. Choose a **Year** and **School**.
2. From the **Search** tab, Select **Advanced Search**.
3. Under **Saved Filter** expand the *State Published* list.
4. Determine what information the ad hoc is reporting by reading the description box on the right.
 - a. Click on the ad hoc.
 - b. A screen will appear on the right, with a definition for the ad hoc.
5. Select a Filter and Select **Search**.
 - a. Click **Test** to see a pop-up list of students or
 - b. Click **Search** to see the results in the outline under Search Results.
 - c. This allows you to click on each student and do the work to enter their end dates and statuses.



Enrollment Verification Report

[INFINITE CAMPUS RESOURCE: VERIFICATION REPORT](#)

After syncing enrollment data to the State, run the State Enrollment Verification Report to check for differences between data entered in the MT Edition application and data that has synced to the State.

1. From the **Index**, expand **Student Information** and then **Reports**.
2. Select **State Enrollment Verification**.
3. Choose the items you want to see to verify schools grade and select **Generate Report**.
4. This report will show you differences between the District and the Sate.
5. Correct any errors and perform another **State Resync**.

Enrollment Overlap Reports

[INFINITE CAMPUS RESOURCE: ENROLLMENT OVERLAP](#)

PATH: INDEX > STUDENT INFORMATION > REPORTS > ENROLLMENT OVERLAP

PATH: INDEX > STUDENT INFORMATION > REPORTS > STATE ENROLLMENT OVERLAP

1. From the **Index**, select **Student Information**, select **Reports**, select either **Enrollment Overlap** or **State Enrollment Overlap**.
2. Select the **CURRENT YEAR** and school from the top drop down.
3. Enter desired **Enrollment Dates** in the calendar date fields, if desired.
4. Select either the **Districts** (state edition) to include in the report or the **Schools** (district edition) to include in the report.
5. Select the students to include by choosing appropriate **Grade Levels**.
6. Select the **Enrollments** to include.
7. Click the **Generate Report** for the report lists the students who have overlapping enrollment records.

Resync State Data

[INFINITE CAMPUS RESOURCE: RESYNC STATE DATA](#)

PATH: INDEX > SYSTEM ADMINISTRATION > DATA UTILITIES > RESYNC STATE DATA

A data resync is required for all file uploads and recommended before data collection due dates.

1. Select the current **Year** and **All Schools** from the Action Bar at the top.
2. Select **Index**, then **System Administration**.
3. Select **Data Utilities**.
4. Select **Resync State Data** from the drop down.
 - Check the box for **Enrollment** and **Graduation**. All associated boxes will automatically populate.
5. Select **Send Resync**, located at the bottom of the page.

AIM HELP DESK AT
877-424-6681 OR 406-444-3495 OR
[Submit an AIM Help Desk Ticket](#)