



AIM New Users Guide

Fall 2011

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NAVIGATION BASICS



AIM MT Edition is a web-based application. A secure user name and password is required to log-in and use the system. The user name and password is 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.

Process	Step	Posted Date	Due Date
Records Transfer	Transfer Released: Redford, Robert 317453900	08/10/2009	

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.

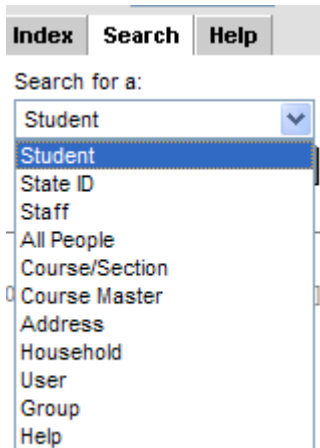
OUTLINE

The Outline is comprised of three tabs: Index, Search, and Help.

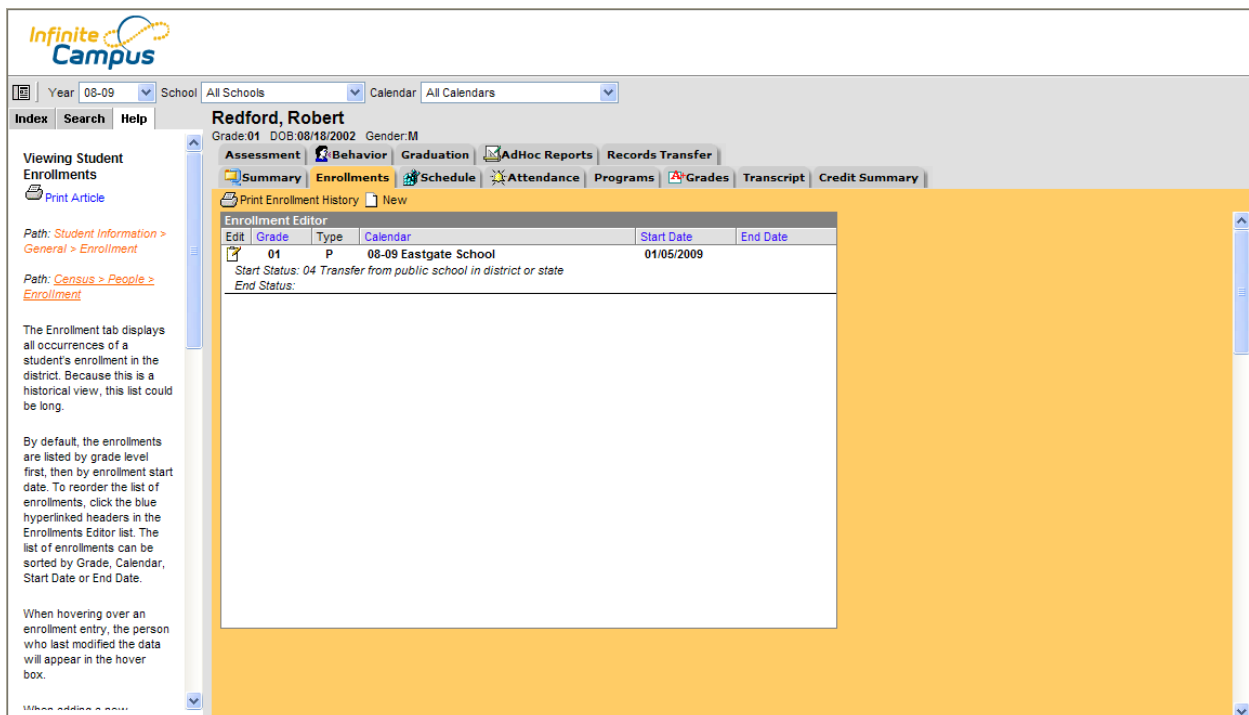
The Index tab is divided into modules. Modules are groups of similar tools. The Student Information module, for example, contains tools that help find information about students (General, Student Locator, Reports). To expand any module, click on the plus (+) sign. To select a tool, click on the tool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

- [-] Student Information
 - General
 - Health
 - [+] Special Ed
 - Student Locator
 - [+] Reports

The Search tab allows the user to search for different types of information in Campus. The types of searches allowed depend upon the rights given by the System Administrator. To search, select a search type and enter search criteria in the box.



The Help tab contains help articles specific to the tool or module in the Workspace.



WORKSPACE

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

Infinite Campus

Year: 08-09 | School: All Schools | Calendar: All Calendars

Redford, Robert
Grade: 01 | DOB: 08/18/2002 | Gender: M

Assessment | Behavior | Graduation | AdHoc Reports | Records Transfer

Summary | Enrollments | Schedule | Attendance | Programs | Grades | Transcript | Credit Summary

Person Summary Report | Person Summary Report w/ Picture

Person Information

PersonID: 1948

Name: Redford, Robert | Nickname: [Redacted]

Gender: M | Race Ethnicity: [Redacted]

State: 05: White, Non-Hispanic | Race/Ethnicity: Hispanic | Federal: No Data | Designation: [Redacted]

Race(s): White | Hispanic/Latino: No Data | Race/Ethnicity Determination: [Redacted]

Birth Date (Age: 7): 08/18/2002

Student Number: [Redacted] | State ID: 317453900

Person GUID: 4C035E28-6F5E-473F-83EA-33D66E141FC6

Comments: [Redacted]

Workspace

SEARCHING IN CAMPUS



There are two levels of search in 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 three tabs: 'Index', 'Search', and 'Help'. The 'Search' tab is active. Below the tabs, there is a section labeled 'Search for a:' with a dropdown menu set to 'Student'. Below the dropdown is a text input field containing 'redford' and a 'Go' button. A link for 'Advanced Search >>' is located below the input field. The search results section shows 'Search Results: 1' and a single result: '01 Redford, Robert [08/18/2002]'.

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 the same search interface as above. The dropdown menu is still set to 'Student'. The text input field now contains 'anders_n' and the 'Go' button is visible. The 'Advanced Search >>' link is also present. The search results section shows 'Search Results: 2' and two results: '08 Andersen, Adalberto' and '08 Anderson, Seymour'.

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

Search for a:

Student

a%n **Go**

[Advanced Search >>](#)

Search Results: 2

[08 Andersen, Adalberto](#)

[08 Anderson, Seymour](#)

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.

To search for all second grade students who are male, select 02 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 Filter was created for a context other than the current (Example: A student filter cannot be applied to a Census Person Search) You may search school-wide.

Student Search		Saved Filters	
Last Name	<input type="text"/>		Free/Reduced Meals
First Name	<input type="text"/>		
Student Number	<input type="text"/>		
SSN	<input type="text"/>		
Grade	02 <input type="button" value="v"/>		
Birth Date	<input type="text"/>		
Gender	M <input type="button" value="v"/>		
StateID	<input type="text"/>		
Person ID	<input type="text"/>		
Locker Number	<input type="text"/>		
Special Ed			
Status	<input type="button" value="v"/>		
Setting	<input type="text"/>		
Disability	<input type="button" value="v"/>		
	<input type="button" value="Search"/>	<input type="button" value="Search"/>	<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>

To search for all Free/Reduced meal students, select the Saved Filter and click Search (Under Saved Filters):

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 Filter was created for a context other than the current (Example: A student filter cannot be applied to a Census Person Search) You may search school-wide.

Student Search		Saved Filters	
Last Name	<input type="text"/>		Free/Reduced Meals
First Name	<input type="text"/>		
Student Number	<input type="text"/>		
SSN	<input type="text"/>		
Grade	<input type="button" value="v"/>		
Birth Date	<input type="text"/>		
Gender	<input type="button" value="v"/>		
StateID	<input type="text"/>		
Person ID	<input type="text"/>		
Locker Number	<input type="text"/>		
Special Ed			
Status	<input type="button" value="v"/>		
Setting	<input type="text"/>		
Disability	<input type="button" value="v"/>		
	<input type="button" value="Search"/>	<input type="button" value="Search"/>	<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>

To search for all Free/Reduced meal students who are second grade males, select the Saved Filter, select 02 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 want to use it, you can create a new Saved Filter. If a Saved Filter was created for a context other than the current (Example: A student filter 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

Search

Saved Filters

Free/Reduced Meals

Search

Edit

Copy

Delete

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.

Aldean, Jason
Grade: 05 #2 DOB: 07/22/2001 Gender: M

Assessment Behavior Graduation AdHoc Reports Records Transfer

Summary Enrollments Schedule Attendance Programs Grades Transcript Credit Summary

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

Person Information

PersonID: 838

Name: Aldean, Jason
Nickname: _____

Gender: M
Race Ethnicity: _____
State Race/Ethnicity: _____ No Image Available

Federal Designation: 6 : White
Race(s): White
Hispanic/Latino: N : No
Race/Ethnicity Determination: _____

Birth Date (Age: 10): 07/22/2001

Student Number: 2
State ID: 380621902

Person GUID: 8FFA6D27-D291-46F7-8562-20F89270EAF4

Comments: _____

- Modified by: Administrator, System 07/25/2011 15:37

Household **Secondary				
Name	Relationship	Enrollment (grade)	Phone(s)	Email

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.

Enrollment Editor					
Edit	Grade	Type	Calendar	Start Date	End Date
	05	P	11-12 Cascade School 2	08/31/2011	
Start Status: 02 Continued enrollment same school, no interruption					
End Status: _____					
	04	P	10-11 Cascade School 2	08/25/2010	06/02/2011
Start Status: 02 Continued enrollment same school, no interruption					
End Status: 100 End of year, returning to same school next year					
	03	P	09-10 Cascade School	09/02/2009	06/03/2010
Start Status: 02 Continued enrollment same school, no interruption					
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 edit the data contained on the Summary tab. The Demographics tab is used if a student has a misspelled name, incorrect birthdate or Race/Ethnicity code, or needs to have the Student Number (local ID) created or changed. 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 (discussed in the next section).

Aldean, Jason
Grade:05 #2 DOB:07/22/2001 Gender:M

Demographics | Identities | Households | Relationships | Enrollments | District Employment | D

Save | Delete | Person Summary Report | Demographics Data

Person Information
PersonID: 838

*Last Name	*First Name	Middle Name	Suffix
Aldean	Jason		
*Gender	*Birth Date (Age: 10)	Soc Sec Number	
Male	07/22/2001		

No Image Available

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:
Date Entered State School:

Nickname:

Comments:

Upload Picture

- Modified by: Administrator, System 07/25/2011 15:37

CREATING ENROLLMENTS



STUDENT LOCATOR

Path: Index/Student Information/Student Locator

The Student Locator is the preferred method for enrolling 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 for a duplicate State Student ID.

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 or the full legal lastName, firstName and gender. Select a student from the list or click on Create New Student. When doing a SSN-only search before they are allowed to create a new person.

Last Name	<input type="text"/>	Name	State ID	Gender	Birth Date	%
First Name	<input type="text"/>					
Gender	<input type="text"/>					
Birth Date	<input type="text"/>					
Middle Name	<input type="text"/>					
SSN #	<input type="text"/>					
State ID	<input type="text"/>					
<input type="button" value="Search-->"/>						

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).

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.

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 use firstName and gender. Select a student from the list or click on Create New Student. When doing a SSN-only search, the user must still do a name person.

Last Name: Chesney
 First Name: Kenny
 Gender: M
 Birth Date: [calendar icon]
 Middle Name: [text box]
 SSN #: [text box]
 State ID: [text box]
 Search-->

Name	State ID	Gender	Birth Date	%
Chesney, Kenny	36655522	M	05/09/2004	100

Philpsburg K-12 Schools 10-11 Philpsburg School
 Last Enrolled: (08/30/2010-05/27/2011) in grade 01
 Guardian Names:

Create New Student >

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.

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.

Person Info

Student Number: 1234 Generate Number

State ID: 36655522

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

Identity Info

*Last Name: Chesney *First Name: Kenny Middle Name: [text box] Suffix: [dropdown]
 *Gender: Male *Birth Date: 05/09/2004 Soc Sec Number: [text box] No Image Available

Race/Ethnicity

*Is the individual Hispanic/Latino?
 N: No [dropdown]

*Is the individual from one or more of these races?
 (check all that apply)

American Indian or Alaska Native
 Asian
 Black or African American
 Native Hawaiian or Other Pacific Islander
 White

Race Ethnicity: [dropdown]
 Race/Ethnicity Determination: [dropdown]

Date Entered US: [calendar icon] Date Entered US School: [calendar icon]
 Date Entered State School: [calendar icon]

Nickname: [text box]

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

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).

RACE/ETHNICITY

Path: Index/Census/People/Demographics

Federal Standards for racial and ethnic data used by the United States Department of Education have been modified. Districts should encourage parents of students new to the district to provide accurate information. Parents also need to know that 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. To assist the school districts in implementing the revised regulations, the OPI has developed a number of resources that can be found on the OPI Website under Race/Ethnicity changes. Select the Edit link next to Race/Ethnicity in the Person Information Editor.

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

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

START/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.

Enrollment Editor					
Edit	Grade	Type	Calendar	Start Date	End Date
	05	P	11-12 Cascade School 2	08/31/2011	
Start Status: 02 Continued enrollment same school, no interruption					
End Status:					
	04	P	10-11 Cascade School 2	08/25/2010	06/02/2011
Start Status: 02 Continued enrollment same school, no interruption					
End Status: 100 End of year, returning to same school next year					
	03	P	09-10 Cascade School	09/02/2009	06/03/2010
Start Status: 02 Continued enrollment same school, no interruption					
End Status: 100 End of year, returning to same school next year					

START/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 to. For state reporting purposes, it is important that these codes be as accurate as possible.

Enrollment Editor					
Edit	Grade	Type	Calendar	Start Date	End Date
	01	P	11-12 Cascade School 2	08/31/2011	
Start Status: 02 Continued enrollment same school, no interruption					
End Status:					
	KF	P	10-11 Cascade School 2	08/25/2010	06/02/2011
Start Status: 01 First time receiving educational services					
End Status: 100 End of year, returning to same school next year					

This record shows the student was first enrolled in the 10-11 year in Kindergarten. The student is expected to continue in the 11-12 year in grade 1.

SERVICE TYPE

Path: Index/Student Information/General/Enrollments

The student's 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)
3. N: Special Ed Services – the Special Ed Services Service Type indicates that they 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).

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 their first enrollment into public school through graduation from high school. To prevent the duplication of students, the use of legal names is strongly encouraged. However, not all students are enrolled with their legal names.



The AIM system allows multiple identities to be attached to a single State Student ID's to accommodate this. Changes to the student's name should not be made on the Demographics tab. Students who have not been entered with a legal name should have a new identity created with their full legal name.

On the Identities tab, click New. Change the student's name (either First or Last, depending upon the change needed). Click Save.

Carter, June
 Grade: 03 #17 DOB: 08/10/2003 Gender: F

Demographics | **Identities** | Households | Relationships | Enrollments | District Employment | District Assignments

Save X Delete New

Identity	Current	Effective Date	Birth Date	District
Carter, June	X	07/25/2011	08/10/2003	Cascade Public Schools

Identity Information

PersonID: 853

*Last Name: Cash *First Name: June Middle Name: Suffix:

*Gender: Female *Birth Date (Age: 8): 08/10/2003 Soc Sec Number: --

No Image Available

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:

Date Entered State School:

Nickname: *Effective Date: 08/17/2011

Comments:

RECORDS TRANSFER



The Records Transfer tool in the AIM MT Edition will be used primarily 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.

PROCESS INBOX

The Process Inbox is located on the user's main page. To access the Process Inbox at any time, click on the user's name on the Index tab. Open the record by clicking on the underlined portion of the request.

Process Inbox					
Date Range		to	Display	All Processes	
<input type="text"/>		<input type="text"/>	<input type="button" value="Find Messages"/>		
<input type="button" value="Delete Selected Messages"/>					
<input type="checkbox"/>		Process	Name	Posted Date	Due Date
<input type="checkbox"/>		Records Transfer	Transfer Released: Chesney, Kenny 366555522	08/17/2011	
<input type="checkbox"/>		Records Transfer	Waiting: Mouse, Minnie 567881540	08/05/2011	
<input type="checkbox"/>		Records Transfer	Waiting: Church, Eric 662880660	08/01/2011	
<input type="checkbox"/>		Vertical Interoperability State Resync Requested		07/18/2011	

RECORDS TRANSFER TAB

Path: Index/Student Information/General/Records Transfer

The Records Transfer tab contains information about all pending and completed transfer requests. The Transfers section shows the Request Date, the student's name, the Status, the Requesting District and the Releasing District. Open the record by clicking on the student's name.

Chesney, Kenny						
Grade:02 #1234 DOB:05/09/2004 Gender:M						
Summary	Enrollments	Schedule	Attendance	Programs	Grades	Transcript
Assessment	Behavior	Graduation	AdHoc Reports	Records Transfer		
New State Transfer Request						
Transfers						
Request Date	Name	Status	Requesting District	Releasing District		
08/17/2011	Chesney, Kenny	released	Cascade Public Schools	Philipsburg K-12 Schools		

PROCESSING REQUESTS

Transfer to a District

When a student transfers to another district, the Records Transfer wizard is activated upon enrollment in the Student Locator. Click Submit Request to initiate 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.

Student Records Transfer

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

Student:		Enrollment Type: 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

Requesting District & User					
District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	08/17/2011	Work Phone		Email	

Comments

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.

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.

Chesney, Kenny
 Grade:02 #1234 DOB:05/09/2004 Gender:M

[Summary](#) [Enrollments](#) [Schedule](#) [Attendance](#) [Programs](#) [Grades](#) [Transcript](#) [Credits](#)
[Assessment](#) [Behavior](#) [Graduation](#) [AdHoc Reports](#) [Records Transfer](#)

New State Transfer Request

Records Transfer Chesney, Kenny #
 This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

Student: Enrollment Type: 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

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	08/17/2011	Work Phone		Email	

Comments
None.

Releasing District & User

District	0556 Philipsburg K-12 Schools	Name	System Administrator	Username	admin1
Release Date	08/17/2011	Work Phone		Email	

Comments
None.

Status: Records released.

Transfer Documents

- Transcript
- Census Contact Summary
- Enrollment History
- Schedule
- Attendance Period Detail
- Assessment Summary
- Behavior Summary
- Health Condition Summary
- Health Screening Summary
- Health Immunization Summary

Data imports

- IEP
- MT Supplemental
- Special Ed Evaluation
- Special Ed Documents
- PLP
- PLP Documents
- Transcript Import Wizard
- Enrollment History Import Wizard
- Assessment Import Wizard
- Immunization Import Wizard
- Health Condition Import Wizard
- Health Screening Import Wizard
- IEP Import Wizard
- MT Supplemental Documents Import Wizard
- Special Ed Evaluation Import Wizard
- Special Ed Documents Import Wizard
- PLP Import Wizard

To import a student's enrollment history, click on 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.

Chesney, Kenny
 Grade:02 #1234 DOB:05/09/2004 Gender:M

[Demographics](#) [Identities](#) [Households](#) [Relationships](#) [Enrollments](#) [District Employment](#) [Distri](#)

Print Enrollment History New New Enrollment History

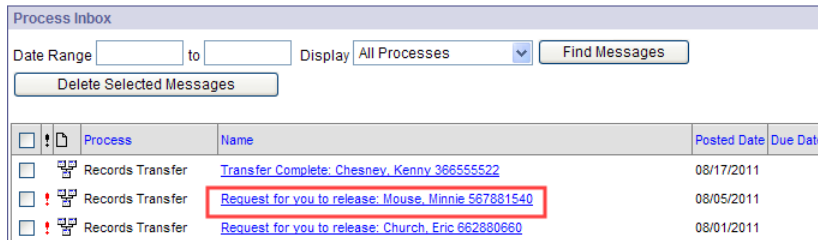
Enrollment Editor

Edit	Grade	Type	Calendar	Start Date	End Date
	02	P	11-12 Cascade School 2	08/31/2011	
Start Status: 04 Transfer from public school in district or state					
End Status:					
	01	P	Philipsburg K-12 Schools 10-11 Philipsburg School	08/30/2010	05/27/2011
Start Status: 06 Transfer from an out of state school					
End Status: 140 Transfer to public schl in another district in MT					

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 (if they use the Student Locator tool to enroll the student – a Records Transfer request is not automatically generated when a student is enrolled by File Upload method).

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.



The screenshot shows the 'Process Inbox' interface. At the top, there are search filters: 'Date Range' with two empty input boxes, 'Display' set to 'All Processes', and a 'Find Messages' button. Below the filters is a 'Delete Selected Messages' button. The main area contains a table with the following data:

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

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.

Student Records Transfer

Release or Reject a Request for Transfer Records
 An external district is requesting the release of your district's records of a student. The request has come in through the Infinite Records Exchange and so the student your district. The student has been enrolled in the new district, so please help to prevent incorrect data or enrollment overlaps.

Infinite Campus verifies that the requesting district is whom they say they are, and that the user making the request has been authenticated and authorized to make it below. You may accept or reject this request, but you are encouraged to call the requesting district to verify the user's identity.

Records Transfer Church, Eric #

Student: Enrollment Type: Primary

Last Name	Church	First Name	Eric	Middle Name	
Gender	M	Birthdate	07/24/2002	SSN	
Grade	04	School	11-12 Cascade School 2	Start Date	08/31/2011

Overlap [Edit \(08/31/2011-06/30/2012\) 11-12 Philipsburg School Grade: 04](#)

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	08/01/2011	Work Phone		Email	

Comments
None.

Releasing District & User

District	0556 Philipsburg K-12 Schools	Name	System Administrator	Username	admin1
Release Date	08/17/2011	Work Phone		Email	

Comments

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.

STUDENT INFORMATION REPORTS

Path: Index/Student Information/Reports

Enrollment Status

The 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.

Student Enrollment Status

This report lists students' enrollment start/end status and mailing address. The default calendar year is the current selected calendar.

Which students would you like to include in the report?

Grade Ad Hoc Filter

Enrollment Add Date: From [] To []

Enrollment Drop Date: From [] To []

Display Options: Start Date End Date

How would you like the report sorted?

Alpha Grade Student Number

Which calendar(s) would you like to include in the report?

active year list by school list by year

11-12
11-12 Granite High School
11-12 Philipsburg 7-8
11-12 Philipsburg School

10-11
10-11 Granite High School
10-11 Philipsburg 7-8
10-11 Philipsburg School

09-10
09-10 Granite High School
09-10 Philipsburg 7-8
09-10 Philipsburg School

08-09
08-09 Granite High School
08-09 Philipsburg 7-8
08-09 Philipsburg School

CTRL-click or SHIFT-click to select multiple

Which enrollment status would you like to include in the report?

Start Status

All
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 schli under NCLB schli 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

End Status

All
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 schli under NCLB schli choice
140:Transfer to public schli 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

Print in HTML format

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 Report

This report will list a breakdown of enrollments grouped by school, grade, gender and race/ethnicity. The report can be generated using Federal Race/Ethnicity designations or State Race/Ethnicity values. If your state has many different values for Race/Ethnicity, the Tall report format is recommended. Students with enrollments flagged as "No Show" are not included in this report.

Enrollment Effective Date* 08/31/2011

Which schools would you like to include in the report?

- All Schools
- Granite High School
- Phillipsburg 7-8
- Phillipsburg School

Which Race/Ethnicity values would you like to use?

Federal Race/Ethnicity Values
 State Race/Ethnicity Values

How would you like to format the report?

Original Format: Race/Ethnicities across the top and Grade Levels vertically
 Tall Format: Grade Levels across the top and Race/Ethnicities vertically

What types of enrollments would you like to include in the report?

P:Primary
 S:Partial
 N:Special Ed Services

Report Options:

Observe State Exclude (Do not include enrollments marked as state exclude)

AD HOC REPORTS

Path: Index/Ad Hoc Reporting/Filter Designer

Ad Hoc reports are custom reports that are built by the user. A variety of filter options can be added to narrow down the search criteria.

To create an Ad Hoc Report, under Filter Type, select Query Wizard and under Data Type, select Student. Click Create.

Name the Ad Hoc Report and select the data fields. Click Next.

Ad Hoc Query Wizard - Field Selection

*Query Name:

Short Description:

Long Description:

Ad Hoc Query Wizard - Field Selection

*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By:

All Fields

- Student
- Demographics
 - personID
 - stateID
 - otherID
 - studentNumber
 - personGUID
 - identityID
 - effectiveDate
 - lastName
 - firstName
 - middleName
 - suffix
 - alias
 - gender
 - birthdate
 - raceEthnicity
 - hispanicEthnicity
 - raceEthnicityFed
 - raceEthnicityDetermination
 - birthState
 - enrollmentID
 - grade

Selected Fields

- student.personID
- student.stateID
- student.studentNumber
- student.lastName
- student.firstName
- student.grade
- student.startDate
- student.startStatus
- student.endDate
- student.endStatus
- student.activeToday

The Operator field contains a variety of tools to refine the data. The Value Field contains the value of the Operator. Click Save.

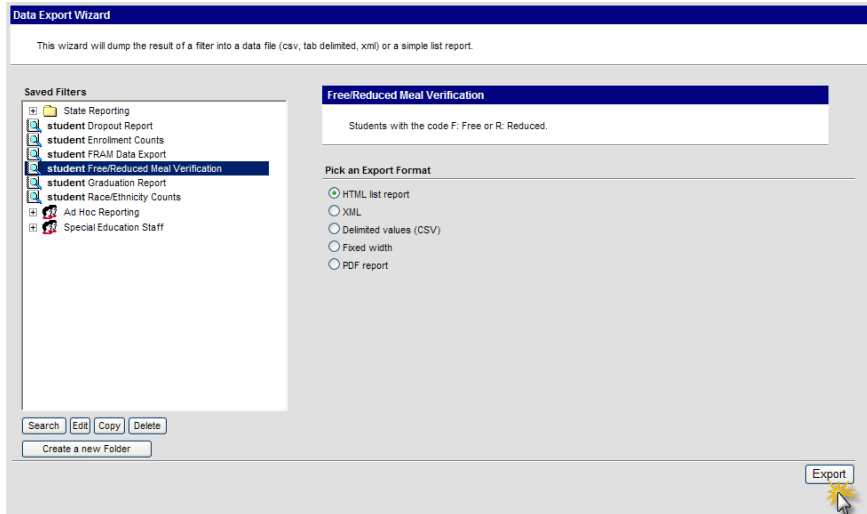
Filter the data

Field	Operator	Value
student.personID	<input type="button" value="v"/>	<input type="text"/>
student.stateID	<input type="button" value="v"/>	<input type="text"/>
student.studentNumber	<input type="button" value="v"/>	<input type="text"/>
student.lastName	<input type="button" value="v"/>	<input type="text"/>
student.firstName	<input type="button" value="v"/>	<input type="text"/>
student.grade	=	KF
student.startDate	<input type="button" value="v"/>	<input type="text"/>
student.startStatus	<input type="button" value="v"/>	<input type="text"/>
student.endDate	<input type="button" value="v"/>	<input type="text"/>
student.endStatus	<input type="button" value="v"/>	<input type="text"/>
student.activeToday	<input type="button" value="v"/>	<input type="text"/>

Save To: User Account
 Folder:

User Groups

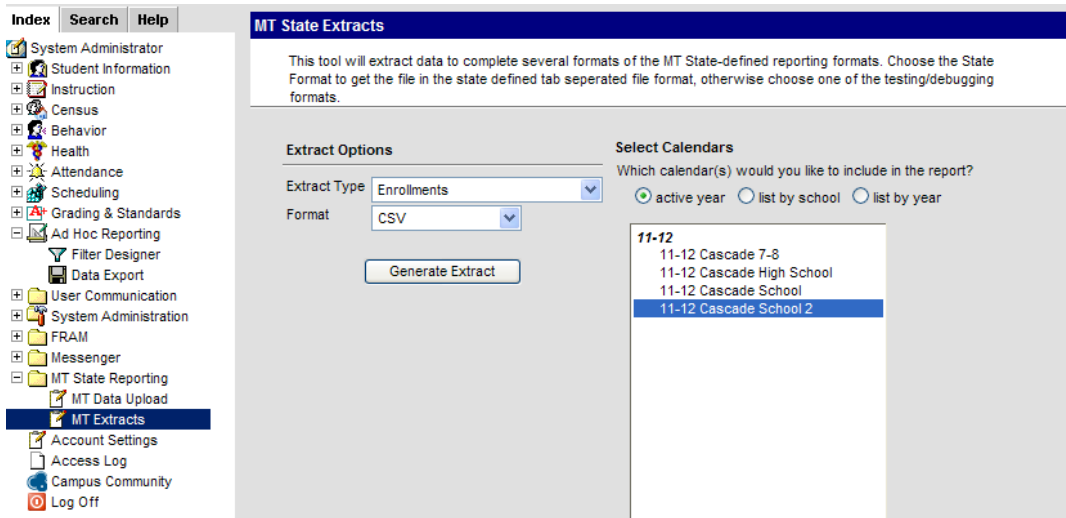
To export existing Ad Hoc Reports, click on Ad Hoc Reporting/Data Export. Choose a Saved Query Wizard Filter and an Export Format. Click Export. The report will export in a new window in the chosen format.



MT EXTRACTS

Path: Index/MT State Reporting/MT Extracts

MT Extracts can be used to verify a specific type of data that has been entered into the MT Edition of AIM. 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.





OPI AIM HELPDESK

<p>General AIM questions, collections, data elements, functionality</p>	<p>Special Ed Module</p>
<p>AIM Help Desk</p> <ul style="list-style-type: none"> • 1-877-424-6681 • 406-444-3800 • email opiaimhelp@mt.gov <p>Sara Loewen – AIM Data Unit Manager</p> <p>Nicole Thuotte – AIM Student Records Manager</p> <p>Jim Oberembt – AIM Data</p> <p>Andy Boehm – Graduate and Dropout data</p>	<p>Technical assistance with functionality</p> <ul style="list-style-type: none"> • Anne Rainey 406-444-4430 • Jan Duiker 406-444-0732 <p>Policy questions regarding completion of forms, contact one of the School Improvement Compliance Monitors</p> <ul style="list-style-type: none"> • Dick Trerise – 406-444-1579 • Dale Kimmet – 406-444-0742 • Danni McCarthy – 406-444-0452 • Francisco Román – 406-444-4426