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**Quick Reference Guide:**

## **Records Transfer (for AIM Administrators)**

*This guide will help AIM Administrators set up district users who will use the Records Transfer tools.*

*Topics covered in this Quick Reference Guide include:*

- *User Account Setup*
- *Adding email and phone contacts for Records Transfer users*



This guide will help AIM Administrators set up accounts for District staff (including SPED Staff) who will have access to the Records Transfer tools. The purpose of the records transfer is to allow certain Special Education records to transfer as live data – reducing the data entry burden on SPED staff as students move from one district to another within the state.



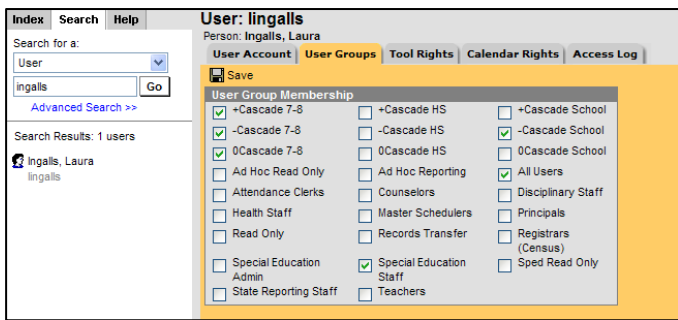
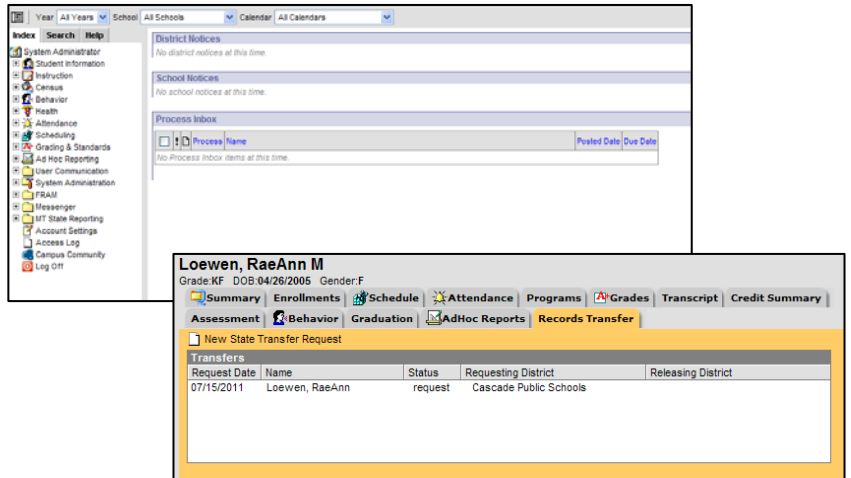
Before beginning, consider the following:

- 1. I want the Special Education teacher to transfer records. How do I add this functionality?**
  - User Groups have been established for Records Transfers. Add the Special Education teacher to that group. *page 2*
- 2. How does the receiving district know who originated the transfer?**
  - Adding the email and phone number of the person using the Records Transfer functionality will facilitate the process if questions arise. *page 3*
- 3. What is the advantage of allowing other users access to the Records Transfer tools?**
  - Records Transfers in AIM are only required for the transfer of Special Education documents between districts. Assigning that functionality to users involved with Special Education services will expedite the transfer of records. *page 4*

## Adding Users to a Group

The **Records Transfer** group gives a user access to the **Process Inbox** and the **Records Transfer** tab.

**NOTE:** The **Process Inbox** cannot be limited by calendar (if a user has access to the **Process Inbox** they will see all transfers in the district, not just those for the calendars to which they have been assigned).

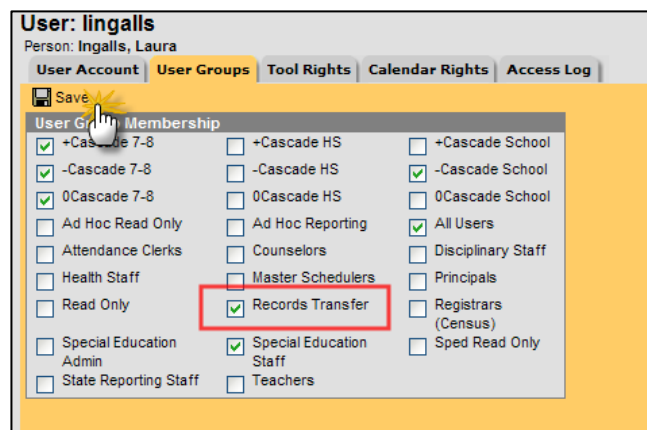


To add the **Records Transfer** tools to a user's account, click the **Search** tab. *Search for a:* **User**. Enter the user's last name and click **Go**.

Click the user's name. Then click the **User Groups** tab.

Click the box next to **Records Transfer**. Click **Save**.

**NOTE:** The **Process Inbox** will only show transfers generated *after* this tool is added to the user's account. To view previous transfer requests the user must navigate to the student's **Records Transfer** tab.



July 2011

**Obama, Malia A**  
 Grade: 07 DOB: 07/04/1998 Gender: F

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

New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District
07/15/2011	Obama, Malia	request	Cascade Public Schools	Philpsburg K-12 Schools
07/15/2011	Obama, Malia	request	Philpsburg K-12 Schools	

**Records Transfer Obama, Malia #**  
 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 has identified themselves as coming from 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 the request using the user account listed below. You may accept or reject this request, but you are encouraged to call the requesting district to verify the user's identity.

**Student:** Last Name: Obama, First Name: Malia, Middle Name: Ann  
 Gender: F, Birthdate: 07/04/1998, SSN: NO ACCESS  
 Grade: 07, School: 10-11 Cascade 7-8, Start Date: 08/25/2010

**Enrollment Type:** Primary

**Requesting District & User**  
 District: 0280 Cascade Public Schools, Name: Laura Ingalls, Username: lingalls  
 Request Date: 07/15/2011, Work Phone: , Email:   
 Comments: None.

**Releasing District & User**  
 District: 0556 Philipsburg K-12 Schools, Name: Helen Keller, Username: hkeller  
 Release Date: 07/15/2011, Work Phone: , Email:   
 Comments:

## Adding Contact Information for Users

Adding a user's *email* and *phone* contact information to the **Demographics** tab will allow the sending or receiving district access to that information when using the **Records Transfer** tools.

Click the **Search** tab. *Search for a: All People*. Enter the person's last name and click **Go**.

Click the person's name. From the **Demographics** tab, scroll to the **Personal Contact Information** section.

Enter the person's email and phone. Click **Save**.

**Keller, Helen**  
 Gender: F

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

Save X Delete Person Summary Report Demographics Data

Date Entered State School

Nickname

Comments

Upload Picture

- Modified by: Administrator, System 07/15/2011 13:57

**Person Identifiers**

Local Student Number   Generate Number

Student State ID

Local Staff Number

Staff State ID

Person GUID: 8D7A64CD-06EB-4A3B-A715-E13E08040812

**Personal Contact Information**

Other Phone  Private  Work Phone (406) 555 1234

Cell Phone  Private  Pager

Email: hkeller@school.k12.mt.us

Preferred Language: en\_US: US English

Comments

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## Records Transfer Facilitation

The **Records Transfer** will now show both the *Requesting* and *Releasing District* – complete with contact information.

If either district has questions regarding the transfer, the Special Education staff members may contact each other directly – taking the System Administrator out of the process.

**Records Transfer Obama, Malla #**  
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. The student has identified themselves as coming from your district. The student has been enrolled in the new district, so please help to prevent incorrect 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 to make the request using the user account listed below. You may accept or reject this request, but you are encouraged to call the requesting district to verify the user's identity.

Student:		Enrollment Type: Primary			
Last Name	Obama	First Name	Malla	Middle Name	Ann
Gender	F	Birthdate	07/04/1998	SSN	NO ACCESS
Grade	07	School	10-11 Philipsburg 7-8	Start Date	04/18/2011
<b>Overlap</b> <a href="#">Edit (08/25/2010-06/03/2011) 10-11 Cascade 7-8</a>					

**Requesting District & User**

District	0556 Philipsburg K-12 Schools	Name	Helen Keller	Username	hkeller
Request Date	07/15/2011	Work Phone	(406)555-1234	Email	hkeller@school.k12.mt.us
Comments None.					

**Releasing District & User**

District	0280 Cascade Public Schools	Name	Laura Ingalls	Username	lingalls
Release Date	07/15/2011	Work Phone	(406)555-9876	Email	lingalls@aschool.k12.mt.us
Comments <input type="text"/>					



## Records Transfer Responsibility

The Records Transfer process in AIM does not replace a district's responsibility to transfer records. The only records that transfer (with the exception of a school using the District Edition of Infinite Campus) are Special Education records and limited *Enrollment History*. Sharing the responsibility for the **Records Transfer** process allows those connected to the transfer to communicate directly when there are questions and/or concerns regarding the information transferred.