

---

**Quick Reference Guide:**

## **Records Transfer**

*This guide will help districts utilize the Records Transfer function in the MT Edition.*

*Topics covered in this Quick Reference Guide include:*

- *Enrolling New Students*
- *Process Inbox*
- *Transfer Documents*
- *Records Transfer Tab*



This guide is designed to walk districts through the process of initiating and completing a records transfer for a student new to the district. Use of the Process Inbox and Records Transfer tab is described below, as well as the procedure for importing and/or printing transfer documents. The transfer of records allows a student's Special Education records to transfer as live data – reducing the data entry burden on the receiving district.



Before beginning, consider the following:

- 1. We have a new student from a neighboring district – how do I request a transfer of records in AIM?**
  - Using the Student Locator will help a district begin the records transfer process. *page 2*
- 2. What is the Process Inbox and how do I use it?**
  - The Process Inbox is a "message center" used to facilitate the movement of students both in and out of a district. *page 3*
- 3. I accidentally deleted the request in my Process Inbox – can I get it back?**
  - The records contained in the Process Inbox can be accessed through the Records Transfer tab on the student's record. *page 5*
- 4. A district has requested records for a student that is still enrolled in my district – how do I handle this request?**
  - The Records Transfer tool can be used to notify a district they have requested records for the wrong student. *page 7*
- 5. How do I import the Special Education documents from the previous district?**
  - Special Education records can be imported using the Data Imports wizards. *page 8*

July 2011

## Records Transfer

The **Records Transfer** tool is activated when the **Student Locator** is used to enroll a student.

The student must have been previously enrolled in a Montana district for the records transfer tool to work.

Expand the **Student Information** module and select **Student Locator**.

Enter the student's *Last Name*, *First Name* and *Gender*. Click **Search**.

Use the results box to determine the most appropriate match. Click the student's name to begin the enrollment process.

Enter the student's personal information, including *Student Number* (local ID number – not required) *Last Name*, *First Name*, *Middle Name* (not required), *Gender*, *Birthdate*, and *Race/Ethnicity* (only the first two questions are required).

Enter the student's enrollment information, including *Calendar*, *Schedule*, *Grade*, *Start Date*, *Start Status* and *Service Type*.

Click **Save**.

July 2011

**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	Palin	First Name	Sarah	Middle Name	Louise
Gender	F	Birthdate	02/11/1996	SSN	
Grade	09	School	10-11 Cascade High School TST	Start Date	03/14/2011

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	03/24/2011	Work Phone		Email	

Comments

The **Student Records Transfer Wizard** will appear once the record is saved.

This request is sent to the school the student came from.

Comments, including additional contact information, may be added before clicking **Submit Request**.

## Process Inbox

The **Process Inbox** displays the status of requests after they have been submitted. To access the **Process Inbox**, click the **User Account Name** (should be the name listed at the top of the **Index** tab).

Access to the **Process Inbox** is dependent upon user rights.

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

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

**Process Inbox**

Date Range  to  Display: All Processes

<input type="checkbox"/>	Process	Name	Posted Date	Due Date
<input type="checkbox"/>	Records Transfer	Waiting: Palin, Sarah 775740471		03/24/2011

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

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

**Process Inbox**

Date Range  to  Display: All Processes

<input type="checkbox"/>	Process	Name	Posted Date	Due Date
<input type="checkbox"/>	Records Transfer	Transfer Released: Palin, Sarah 775740471		03/24/2011

After the receiving district releases the records, the **Process Inbox** message will change from *Waiting* to *Transfer Released*. Click the link to complete the records transfer.

**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
- IEP
- MT Supplemental
- Special Ed Evaluation
- Special Ed Documents
- PLP
- PLP Documents

To view the **Transfer Documents**, click a document name. The document will open as a PDF in a separate window.

**Records Transfer Palin, Sarah #**

**Student:**

Last Name	Palin	First Name	Sarah	Middle Name	Louise
Gender	F	Birthdate	02/11/1996	SSN	
Grade	09	School	10-11 Cascade High School TST	Start Date	03/14/2011

**Enrollment Type:** Primary

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	03/24/2011	Work Phone		Email	

Comments  
None.

**Releasing District & User**

District	1051 Townsend K-12 Schools	Name	System Administrator	Username	admin1
Release Date	03/24/2011	Work Phone		Email	

Comments  
None.

**Status: Records released.**

<b>Transfer Documents</b>	<b>Data imports</b>
<ul style="list-style-type: none"> <li>Transcript</li> <li>Census Contact Summary</li> <li>Enrollment History</li> <li>Schedule</li> <li>Attendance Period Detail</li> </ul>	<ul style="list-style-type: none"> <li>Transcript Import Wizard</li> <li>Enrollment History Import Wizard</li> <li>Assessment Import Wizard</li> <li>Immunization Import Wizard</li> <li>Health Condition Import Wizard</li> </ul>

The **Records Transfer Wizard** allows access to a variety of records. Most MT Edition schools will only have enrollment and/or IEP records.

**Transfer Documents** are records that are imported as a PDF. **Data Imports** are records that are imported as live data elements.

Click the **Data Import** record.

The *IEP Plan Import* and the *Special Ed Evaluation Import* require the "locked" box to be checked.

Follow the on-screen guidance to complete the import.

Import as PDF only

**IEP Plan Import**

\*Plan Type: MT IEP 08/31/2010 - 08/30/2011

MT IEP

Start Date: 08/31/2010 End Date: 08/30/2011 Locked

**IEP Services Import**

Do not import the following service.

\*Service: **Counseling**

Counseling

Service Provider: **Lonni McDonald**

Service Position: **School Psychologist** Display on Print

Back Next

**Data imports**

- 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
- PLP Documents Import Wizard

**Data Imports** will import the records as live data. In the case of an IEP or Evaluation Report, the documents can be used as if they were created in your district.

Items in blue are available for import. If the IEP Import Wizard or Special Ed Evaluation Import Wizard is black and has a line through it, either the student was not in Special Ed at the prior district or the documents were not locked and, therefore, did not transfer.

If you are certain the student had an IEP at the previous district, contact the releasing district to verify that the documents were locked.

Palin, Sarah L.  
Grade: 09 DOB: 02/11/1996 Gender: F

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

Assessment | Behavior | Graduation | AdHoc Reports | **Records Transfer**

New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District
03/24/2011	Palin, Sarah	released	Cascade Public Schools	Townsend K-12 Schools

**Records Transfer Palin, Sarah #**

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

**Student:** Enrollment Type: Primary

Last Name	Palin	First Name	Sarah	Middle Name	Louise
Gender	F	Birthdate	02/11/1996	SSN	
Grade	09	School	10-11 Cascade High School TST	Start Date	03/14/2011

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	03/24/2011	Work Phone		Email	

Comments

Please lock the student's IER and Evaluation and re-send the documents.

Thank you!

If the student is in Special Education, re-request the student's transfer records from the prior district.

Click **Search**. **Search for a: Student**. Enter the student's last name and click **Go**.

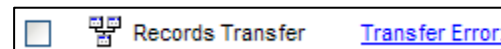
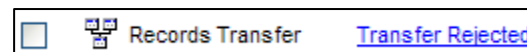
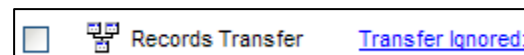
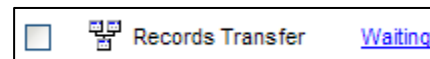
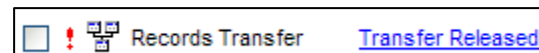
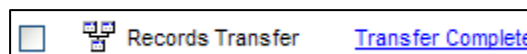
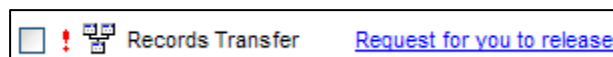
Click the **Records Transfer** tab and **New State Transfer Request**.

Enter comments (if necessary) and click **Submit Request**.

Repeat the instructions above once the transfer is re-released.

## Process Inbox Messages

- **Request for you to release:** - a district has requested you to release records for a student
- **Transfer Complete:** - you have completed the steps to release records to a requesting district
- **Transfer Released:** - a district has released a transfer request initiated by your district
- **Waiting:** - waiting for a district to respond to a transfer request initiated by your district
- **Transfer Ignored/Rejected/Error** – a district has chosen not to take action on your request, or the student was not previously enrolled in a MT Edition/District Edition school.



## Deleted Process Inbox Messages

If the **Records Transfer** notice is deleted from the **Process Inbox**, or a student has been previously enrolled in the district, navigate to the student's **Records Transfer** tab to process a new request or view the status of a pending request.

## Transfers for Exiting Students

If a student *leaves* the district and enrolls in another MT public school, the receiving district should initiate a records request through the MT Edition.

The request will appear in the district's **Process Inbox**.

Access to the **Process Inbox** depends upon user rights.

The screenshot shows a web interface with three sections: District Notices, School Notices, and Process Inbox. The Process Inbox section includes a 'Date Range' field, a 'Display' dropdown menu set to 'All Processes', and a 'Find Messages' button. Below these is a 'Delete Selected Messages' button. A table lists the following records:

<input type="checkbox"/>	<input type="checkbox"/>	Process	Name	Posted Date	Due Date
<input type="checkbox"/>		Records Transfer	<a href="#">Request for you to release: Cronkite, Walter 253073970</a>	03/24/2011	
<input type="checkbox"/>		Vertical Interoperability State Resync Requested		08/10/2010	
<input type="checkbox"/>		Records Transfer	<a href="#">Transfer Released: Midler, Bette 578818560</a>	08/06/2010	
<input type="checkbox"/>		Vertical Interoperability State Resync Requested		08/05/2010	

Click the link to open the **Records Transfer Wizard**.

The wizard will show the student's personal information, including *Start Date* into the new school and the name of the *Requesting District*.

If the student does not have an *End Date*, or the *End Date* overlaps with the new school, an overlap warning will appear. The student's *Start Date* at the receiving district is listed above that warning.

Click **Edit** to resolve the overlap.

The screenshot shows the 'Records Transfer Cronkite, Walter #' wizard. It displays student information: Last Name: Cronkite, First Name: Walter, Middle Name: A, Gender: M, Birthdate: 11/04/1995, SSN: [redacted], Grade: 11, School: 10-11 Cascade High School. The 'Requesting District & User' section shows District: 0280 Cascade Public Schools, Name: System Administrator, Username: admin1, Request Date: 03/24/2011. The 'Releasing District & User' section shows District: 1051 Townsend K-12 Schools, Name: System Administrator, Username: admin1, Release Date: 03/24/2011. An 'Overlap' warning is highlighted in red, indicating a conflict between the student's current school's end date (08/25/2010) and the new school's start date (05/27/2011). Buttons at the bottom include 'Release Records', 'Reject Request', and 'Ignore Request'.

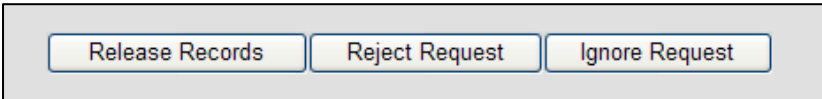


## Student End Dates

The student's *End Date* in a district should be the last day he/she was physically in attendance at your school. If the student's *Start* or *End Dates* conflict with those of the other district, please contact the other district to resolve the overlap. No student may hold a primary enrollment in two districts at the same time.

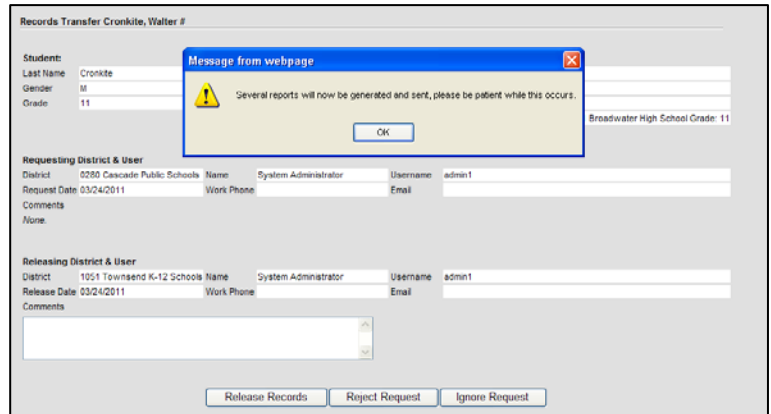
## Request Options

Once the overlap is resolved (if applicable), there are three options: **Release Records**, **Reject Request** or **Ignore Request**.



The first option is to **Release Records**.

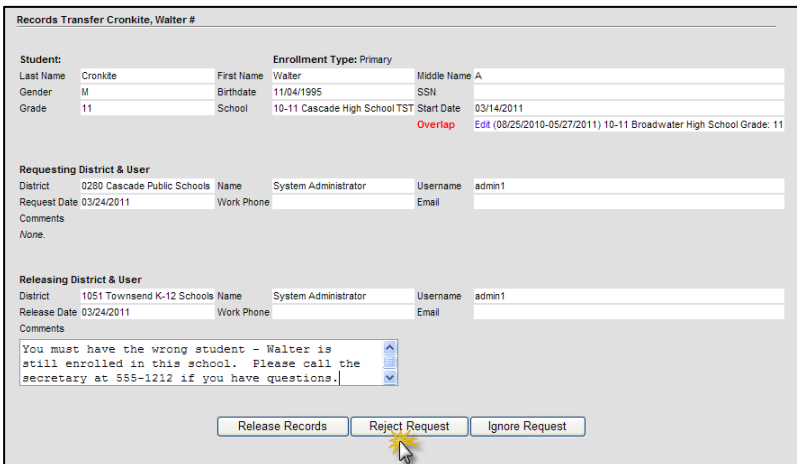
If the student appears to be the correct student and the overlaps are resolved, click **Release Records**. The records are then sent to the receiving district.



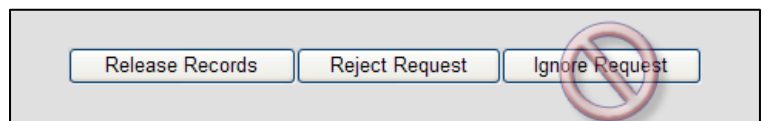
The second option is to **Reject Request**.

If a district has attempted to enroll a student that has not transferred (this may occur in instances where a student has a common name that generated a large number of matches through **Student Locator**) rejecting the request is appropriate. It is recommended that a district enter comments about the transfer before clicking **Reject Request**.

There may also be legal reasons (e.g., protection order, witness protection) for rejecting a request. These determinations are made at the district level.



The third option is to **Ignore Request**. It is not recommended that districts use this function.

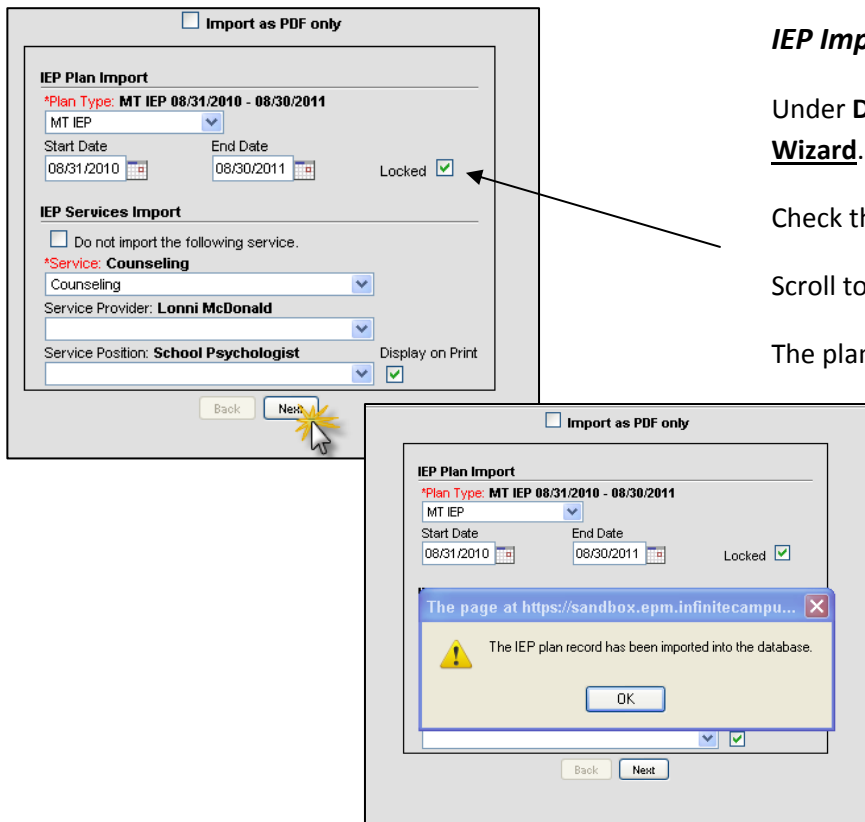
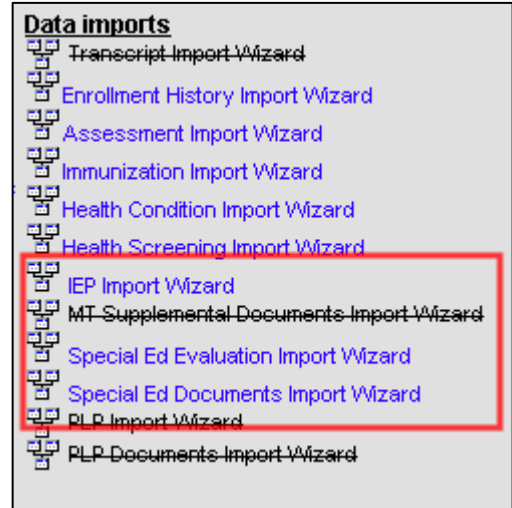


July 2011

## Importing Special Education Records

Special Education documents may be accessed using the following Import Wizards:

- IEP Import Wizard
- MT Supplemental Documents Import Wizard
- Special Ed Evaluation Import Wizard
- Special Ed Document Import Wizard



### IEP Import Wizard

Under **Data Imports**, click **IEP Import Wizard**.

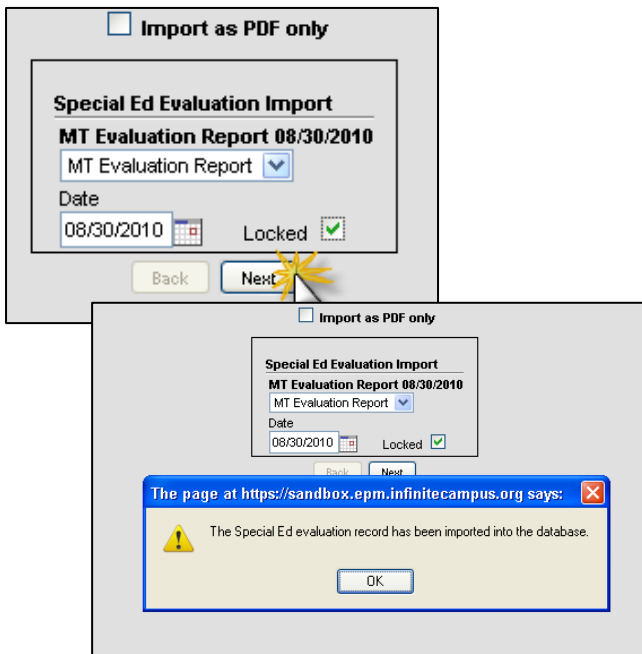
Check the "Locked" box.

Scroll to the bottom and click **Next**.

The plan will import – click **OK**.

If the *IEP Import Wizard* is black and has a line through it, either the student does not have an active IEP in the prior school, or the IEP is not locked and the plan did not transfer.

If you have any questions, contact the student's prior school district.



### Special Ed Evaluation Import Wizard

Under **Data Imports**, click **Special Ed Evaluation Import Wizard**.

Check the box **Locked**.

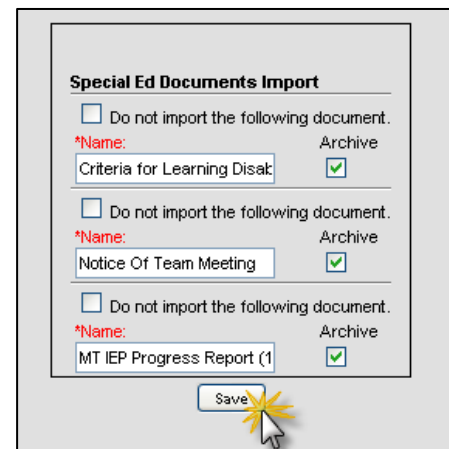
Scroll to the bottom and click **Next**.

The plan will import – click **OK**.

### Special Ed Documents Import Wizard

Under **Data Imports**, click **Special Ed Documents Import Wizard**.

Click **Save**.



The documents may now be accessed under the student's Special Education records on the **Documents** tab.

