

---

**Quick Reference Guide:**

## **Creating Households**

*This guide will explain the basic process for creating households in AIM.*

*Topics covered in this Quick Reference Guide include:*

- *Enrolling Students*
- *Adding Adults*
- *Adding Addresses*
- *Census Wizard*
- *Contact Information*
- *Non-Household Relationships*
- *Adding/Removing Household Members*
- *Splitting Households/Students with two Households*



Households are created in Infinite Campus to link students, parents/ guardians and addresses for import into Special Education forms. Households are defined as the group of adults a student resides with – and students may have multiple households. Households define location and relationships. Follow the steps below to successfully create households.



Steps for Creating Households:

- 1. Enrolling Students**
  - Students must be enrolled before they can be added to households.
- 2. Adding Adults**
  - Use the Census/Add Person tool to add adults.
- 3. Adding Addresses**
  - Use the Census/Add Address tool to add addresses for households. Addresses may be mailing, physical or both.
- 4. Assembling Households**
  - Use the Census Wizard tool to combine students, adults and addresses into households.
- 5. Contact Information**
  - Contact information may be added to individual household members if the IEP team wishes to include this information in their Special Education forms.
- 6. Non-Household Relationships**
  - Adults not residing in the student's household may be associated with the student.

## STEP 1 – Enrolling Students

Use the **Student Locator** or the File Upload method to enroll the student in the correct *Grade* and *Calendar*.

(path: Index, Student Information, Student Locator)

Edit	Grade	Type	Calendar	Start Date	End Date
	04	P	14-15 Philipsburg School	08/27/2014	
<i>Start Status: 02 Continued enrollment same school, no interruption</i>					
<i>End Status:</i>					
	03	P	13-14 Philipsburg School	09/03/2013	05/31/2014
<i>Start Status: 04 Transfer from public school in district or state</i>					
<i>End Status: 100 End of year, returning to same school next year</i>					

**Person Search**  
Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Person.

\*Last Name:   
First Name:   
Middle Name:   
Birth Date:   
Gender:

## Step 2 – Adding Adults

Use the **Add Person** tool in the **Census** module to add adults that live in the student's household(s).

From the **Index**, expand **Census** and click **Add Person**.

Enter the person's last name and click **Search**.

If the person does not appear on the screen details, click **Create New Person** at the lower righthand corner of the screen.

Enter *Last Name*, *First Name* and *Gender*.

Click **Save**.

Repeat for all adults associated with the student's household(s).

**NOTE:** Do **not** create students using the **Add Person** tool – use the **Student Locator**.

**New Person**  
Person Creation  
Fill out the form to create a new Person in Campus. Click save to create the person, afterwards, they will appear in the list below.

**Person Information**  
\*Last Name: Redford    \*First Name: David    Middle Name:    Suffix:    <br>  
\*Gender: Male    Birth Date:    Soc Sec Number:    <br>

**Race/Ethnicity**  
Is the individual Hispanic/Latino?    <br>  
Is the individual from one or more of the these races? (check all that apply)  
 American Indian or Alaska Native  
 Asian  
 Black or African American  
 Native Hawaiian or Other Pacific Islander

Save

Index    Search    Help    <    **Add Address**

**Address Search**  
Search for an address already tracked in Campus us

House/P.O. #: 1227    X  
Street Name:    <br>  
Street Tag:    <br>  
Apt #:    <br>  
City:    <br>  
Home Phone: ( ) - - X  
Search    <br>  
New Address

### STEP 3 – Add Address

Use the **Add Address** tool in the **Census** module to add an address for the student's household.

From the **Index**, expand **Census** and click **Add Address**.

Enter only the *House/P.O.* number. Click **Search**.

If no match exists, click **New Address** at the lower righthand side of the screen.

**Address Creation**

Address Creation  
Fill in the fields below. This will create a new Address object in the database and then continue on to the next Process Step.

---

**Address Information**

P.O. Box	Number	Prefix	Street	Tag	Direction	Apt
<input type="checkbox"/>	1227		Rimrock Rd			
City	State	Zip	County	Location Code		
Happyville	MT	59233				
Latitude	Longitude	Tract	Block			

Comments

District

Complete the **Address Information** fields as applicable.

Click **Save** at the lower righthand side of the screen.

**Note:** For a P.O. Box, check *P.O. Box*, enter *Number, City, State* and *Zip*.

#### STEP 4 – Census Wizard

Use the **Census Wizard** Tool in the **Census** module to assemble the household.

From the **Index**, expand **Census** and click **Census Wizard**.

Index Search Help <

**Census Wizard**

Step 1 - Assemble New or Select Household  
This wizard will walk you through the process of creating a new household or editing an existing household. Start by searching for a household, person, or address.  

- To Edit a household, simply click on the Household name in the search results.
- To Assemble a new household, select people and/or addresses in the search results.

If you enter a first and last name, you can create and link in a new person into the household. If you enter a house number and street you can create a new address.

<b>Person Search</b>	<b>Household</b>
Last Name	
First Name	
Student Number	
Birth Date	
Gender	
Middle Name	
Suffix	
<b>Address Search</b>	
House/P.O. Number	
Street Name	
Apt Number	
City	
<b>Household Search</b>	
Household Name	
Home/Other Phone	
Search	Clear Search Fields

Continue - Step 2 > Clear Household

Under **Person Search**, enter the student's *Last Name*.

Click **Search** (under **Person/Address/Household Search**).

Click the student's name from the **Census Wizard Search Results**.

If the parent/guardian's name(s) also appear in the *Search Results*, click their name(s) to add them to the household.

If the parent/guardian's name(s) are different than the student, enter their last name.

Click **Search** and add them to the household.

The screenshot shows the 'Census Wizard' interface. On the left, there's a search bar with 'Household' selected and 'Bowen' entered. Below it, 'Advanced Search' is visible. The main area is titled 'Census Wizard' and contains instructions for 'Step 1 - Assemble New or Select Household'. It lists two options: 'To Edit a household, simply click on the Household name in the search results.' and 'To Assemble a new household, select people and/or addresses in the search results.' Below these instructions, there are two columns: 'Person Search' and 'Assembling a New Household'. The 'Person Search' column has fields for Last Name (Redford), First Name, Student Number, Birth Date, Gender, Middle Name, Suffix, Address Search (House/P.O. Number, Street Name, Apt Number, City), and Household Search (Household Name, Home/Other Phone). The 'Assembling a New Household' column shows a list of search results: 'New Household', 'Redford, Robert [01/16/2004]', and 'Redford, David'. A mouse cursor is pointing at 'Redford, David'.

Enter the *House/P.O. Number* under **Address Search**.

Under **Person/Address/Household Search**, click the *Address* from the **Census Wizard Search Results**.

Click the *Address* from the **Census Wizard Search Results**.

If the student has more than one address, repeat the search and add the second address to the household.

This screenshot is similar to the previous one but shows a different search result. In the 'Assembling a New Household' panel, the search results list includes 'New Household', '1227 Rimrock Rd, Happyville' (which is highlighted with a red box), 'Redford, Robert [01/16/2004]', and 'Redford, David'. A mouse cursor is pointing at '1227 Rimrock Rd, Happyville'. In the 'Person Search' panel, the 'Last Name' field is filled with 'redford'. The 'House/P.O. Number' field in the 'Address Search' section is filled with '1227'.

**Assembling a New Household**

- X New Household
- X 1227 Rimrock Rd , Happyville ✓
- X Redford, Robert [01/16/2004] ✓
- X Redford, David ✓

Continue - Step 2 »    Clear Household

Verify that the following are in the household box:

- **Student**
- **Parent/guardian(s), and;**
- **Address(es)**

Click **Continue – Step 2.**

Enter *Household Phone Number.*

Enter *Start Date* for the **Address** and click *Mailing* (if applicable).

**Census Wizard - Edit Household Membership**

**Step 2: Editing Household Data**  
Edit the attributes common to the household and edit details specific to each person and address.

**Household**

Household Name (Override)  Household Phone Number (406) 555 - 1212 x  Private

**Household Locations**

Address	Start	End	Private	Secondary	Mailing
1227 Rimrock Rd , Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Household Members**

Name	Birthdate	Gender	Start	End	Private	Secondary
Redford, Robert	01/16/2004	M	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redford, David		M	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save & Continue - Step 3 »

For multiple addresses, click *Mailing* and *Secondary* for a P.O. Box and nothing for the physical address.

**Household Locations**

Address	Start	End	Private	Secondary	Mailing
1227 Rimrock Rd , Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P.O. Box 99, Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Census Wizard - Edit Household Membership**

**Step 2: Editing Household Data**  
Edit the attributes common to the household and edit details specific to each person and address.

**Household**

Household Name (Override)  Household Phone Number  Private

**Household Locations**

Address	Start	End	Private	Secondary	Mailing
1227 Rimrock Rd , Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P.O. Box 99, Happyville MT 59233	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Household Members**

Name	Birthdate	Gender	Start	End	Private	Secondary
Redford, Robert	01/16/2004	M	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redford, David		M	08/01/2014	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter *Start* dates for all **Household Members**.

Click **Save & Continue – Step 3**.

Find the line that says *Relationships to Student*.

Complete *Relationship*, *Start Date* and mark the boxes for *Guardian*, *Mailing* and *Portal* as appropriate.

Click **Save & Done**.

**NOTE:** Only complete this information for the student. Do **not** attempt to complete this information for adult household members.

**Census Wizard - Edit Relationships**

**Step 3 - Edit Relationships of Household Members**  
Edit the relationships between the family members.

**Relationships to Redford, David**

Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Redford, Robert	01/16/2004	M	father/child	08/01/2014	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Relationships to Redford, Robert**

Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Redford, David		M	father/child	08/01/2014	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows a user interface for a person's profile. At the top, there are tabs for 'Index', 'Search', and 'Help'. Below these is a search bar with 'All People' selected and a 'Go' button. The search results show 'Redford, David' and 'Redford, Robert [01/16/2004]'. The main profile view for 'Redford, David' includes a 'Demographics' tab, a 'Person Information' section with fields for Last Name (Redford), First Name (David), Middle Name, Suffix, Gender (Male), Birth Date, and Soc Sec Number. There are also buttons for 'Save', 'Delete', and 'Person Summary Report'.

### STEP 5 – Contact Information (Optional)

Districts may choose to enter contact information for adult household members, including contact phone and/or email.

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

Click the name of the person under **Search Results**.

Scroll down to the **Personal Contact Information** section and enter *phone number(s) and/or email*.

Click **Save**.

The screenshot shows the 'Personal Contact Information' form. It has a table with columns for 'Contact Information', 'Private', and 'Messenger Preferences Contact Reasons' (Emergency, Attendance, Behavior, General, Priority, Teacher). Below the table are input fields for Email, Cell Phone, Other Phone, Work Phone, and Pager. There is also a 'Preferred Language' dropdown menu and a 'Comments' text area. The form is modified by 'Unknown'.

Contact Information	Private	Messenger Preferences Contact Reasons					
		Emergency	Attendance	Behavior	General	Priority	Teacher
Email: d_redford@yahoo.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secondary Email:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cell Phone:	<input type="checkbox"/>						
Other Phone:	<input type="checkbox"/>						
Work Phone:	<input type="checkbox"/>						
Pager:	<input type="checkbox"/>						



## STEP 6 – Non Household Relationships (Optional)

Click the **Search** tab. Select **All People**. Enter the student's last name and click **Go**.

Click the student's name from **Search Results**. The **Demographics** tab should be the first tab visible (if not, return to the **Index**, expand **Census** and click **People**).

The screenshot shows the Infinite Campus interface. At the top, there are tabs for 'Index', 'Search', and 'Help'. The 'Search' tab is active. Below it, a dropdown menu is set to 'All People'. A search box contains 'Redford' and a 'Go' button is next to it. Below the search box, it says 'Advanced Search'. The search results show 'Redford, David' and 'Redford, Robert [01/16/2004]'. The 'Redford, Robert' entry is highlighted. To the right, the 'Redford, Robert' profile is shown. It includes 'Grade: 03', 'DOB: 01/16/2004', and 'Gender: M'. The 'Demographics' tab is selected, showing fields for 'PersonID: 545', '\*Last Name: Redford', '\*First Name: Robert', '\*Gender: Male', and '\*Birth Date (Age: 10): 01/16/2004'. There are also fields for 'Middle Name', 'Suffix', and 'Soc Sec Number'. Below this, 'Race/Ethnicity' information is displayed: 'State Race/Ethnicity: 6:White', 'Federal Designation: 6:White', 'Race(s): White', 'Hispanic/Latino: N:No', and 'Race/Ethnicity Determination: 03:Observer Determined'.

The screenshot shows the 'Person Search' form in the Infinite Campus interface. The form is titled 'Person Search' and has a subtitle 'Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Person.' The form includes fields for '\*Last Name' (Griffith), 'First Name', 'Middle Name', 'Birth Date', and 'Gender'. A 'Search' button is at the bottom left of the form. The search results area is empty and displays 'No Person matches found.' At the bottom right of the form, there is a 'Create New Person' button.

Click the **Relationships** tab.

Click **New Non-Household Relationship**.

Enter the person's last name and click **Search**.

If the person already exists, click the name to add them to the student.

If the person does not exist, click **Create New Person**.

Enter *Last Name*, *First Name* and *Gender*. Click **Save**.

After adding the person, click From the **New Person** screen, **click New Non-Household Relationship**. Enter the last name, and **click Search**.

When the person's name appears in the Person Search results, click the name to add the relationship to the student, then click the red X to return to the Relationships screen.

Select *Relationship*, enter *Start Date* and check *Guardian, Mailing and Portal*, if appropriate.

Click **Save**.

To add *Relationships*, return to the **Index**. Expand **System Administration** and **Census**. Click **Relationship Type**.

Click **New**. Type the *Name* and click **Save**.

Students may live among more than one household (parents divorced, student in foster care, etc).

These students need two households created.

Create additional households for the student using the same process shown above.

A slight variation occurs when the student lives with one parent, but has visitation with another parent, in another town.

On the second step of the **Census Wizard**, mark the student *Secondary* under **Household Members** – this is the student's secondary household (this is not their primary residence).

**Census Wizard - Edit Household Membership**

**Step 2: Editing Household Data**  
Edit the attributes common to the household and edit details specific to each person and address.

**Household**  
Household Name (Override)  Household Phone Number (406) 555 1212 x  Private

**Household Locations**  
Address 123 Washington Ave , Anywhere MT 55555 Start 08/01/2011 End  Private  Secondary  Mailing

**Household Members**

Name	Birthdate	Gender	Start	End	Private	Secondary
Judd, Wynonna	05/10/2005	F	08/01/2011	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Judd, Dad		M	08/01/2011	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save & Continue - Step 3 »

**Kent Household**

Household Info | Addresses | Members

Save | Delete

**Household Information**  
Name  Phone Number ( ) - x Private   
Comments

- Modified by: Administrator, System 08/27/2014 16:25

Search Results: 1 households

**Kent (4 members)**

- 125 Parkhill Street , Someplace
- Kent , Mom (guardian)
- Kent , Clark A #999100011 [07/25/199...]
- Kent , Father
- Kent , Gramma

### Adding/Removing Household Members

Household members should **never** be deleted – unless they were added in error.

Click the **Search** tab. Select **Household**.

Click **Go**.

Click the **Members** tab.

Click the name of the member to remove from the household.

Enter an *End Date* and click **Save**.

The screenshot shows the 'Kent Household' interface with the 'Members' tab selected. At the top, there are tabs for 'Household Info', 'Addresses', and 'Members'. Below the tabs are three buttons: 'Save', 'Delete', and 'Find New Member'. A table titled 'Household Member Editor' lists members with columns for Name, Start Date, End Date, Secondary, and Private. The 'Kent, Gramma' row is highlighted. Below the table is a 'Household Member Detail' section for 'Kent, Gramma', showing a Start Date of 08/01/2014, an End Date of 10/12/2014, and checkboxes for Secondary and Private.

Name	Start Date	End Date	Secondary	Private
Kent, Clark A	08/01/2014			
Kent, Father	08/01/2014			
Kent, Gramma	08/01/2014			
Kent, Mom	08/01/2014			

**Household Member Detail**  
Name: Kent, Gramma  
Start Date: 08/01/2014  
End Date: 10/12/2014  
Secondary:   
Private:

The screenshot shows a dialog box titled 'Household Relationships' with the 'Infinite Campus' logo. The text inside reads: 'You are about to end the household membership for Gramma Kent in this household. What would you like to do with the household relationships.' There are three radio button options: 'Keep the relationships. (You can manually end or delete these relationships later.)', 'End the relationships by adding an end date. 08/27/2014', and 'Delete the relationships. (Warning: this will leave no historical record of these relationships.)'. At the bottom are 'Ok' and 'Cancel' buttons.

When prompted, choose the appropriate action.

Click **Ok**.

## Splitting Households

If a student's household separates into two distinct households, create a new household for the exiting parent.

First, exit the leaving parent from the household following the instructions above.

The *End Date* should be at least yesterday for two separate households to appear in the **Search Results**.

The screenshot shows the 'Kent Household' interface with the 'Members' tab selected. Below the tabs are 'Save', 'Delete', and 'Find New Member' buttons. The 'Household Member Editor' table lists members with their names, start dates, end dates, and checkboxes for 'Secondary' and 'Private' status.

Name	Start Date	End Date	Secondary	Private
Kent, Clark A	08/01/2014			
Kent, Father	08/01/2014	12/27/2014		
Kent, Gramma	08/01/2014	10/12/2014		
Kent, Mom	08/01/2014			

Below the table is the 'Household Member Detail' section for 'Kent, Father', showing 'Start Date' (08/01/2014), 'End Date' (12/27/2014), and checkboxes for 'Secondary' and 'Private'.

The screenshot shows a dialog box titled 'Household Relationships' with the following text: 'You are about to end the household membership for Gramma Kent in this household. What would you like to do with the household relationships.' There are three radio button options: 'Keep the relationships. (You can manually end or delete these relationships later.)', 'End the relationships by adding an end date. (08/27/2014)', and 'Delete the relationships. (Warning: this will leave no historical record of these relationships.)'. 'Ok' and 'Cancel' buttons are at the bottom.

When prompted, choose **Keep the relationships**.

Click **Ok**.

Follow the instructions above to create a second household for the student.

The student will have two separate households.

The screenshot shows a search interface with tabs for 'Index', 'Search', and 'Help'. A dropdown menu is set to 'Household' and a text input field contains 'Kent'. A 'Go' button is visible. Below the search bar, it says 'Advanced Search'. The search results are listed as follows:

- Search Results: 2
- Carey (2 members)
  - 567 1st St West, Somewhere
  - Carey, Mom
  - Carey, Mariah #15 [10/03/2001]
- Carey (2 members)
  - 432 W Anderson Ave , Somewhere
  - Carey, Dad
  - Carey, Mariah #15 [10/03/2001]

For further assistance, contact the AIM Help Desk at [opiaimhelp@mt.gov](mailto:opiaimhelp@mt.gov) or 1-888-424-6681.