
Quick Reference Guide:

Records Transfer for AIM Administrators

This guide explains how AIM Administrators can set up access to the Records transfer Tool for district users.

Topics covered in this Quick Reference Guide include:

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



This guide helps AIM Administrators set up accounts for District staff, including SPED Staff, to access the Records Transfer tools. The main purpose of the records transfer tool is to transfer 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:

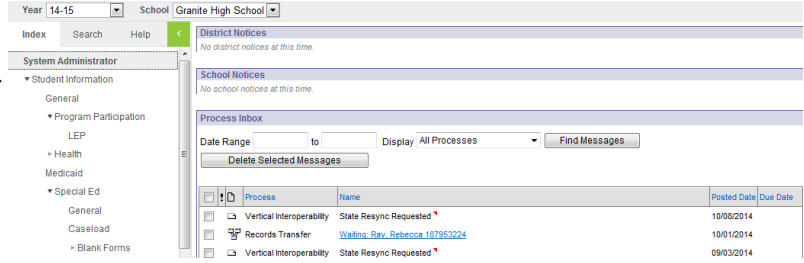
- 1. I want the Special Education teacher to transfer records. How do I add this functionality?**
 - User Groups have been established for Records Transfer. Add the Special Education teacher to that group. *page 2*
- 2. How does the receiving district know who initiated the transfer?**
 - Adding the 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*

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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.



Amici, Donald

#2345 DOB: 12/14/1997 Gender: M

Summary Enrollments Schedule Attendance Flags Grades Transcript

Credit Summary Assessment Behavior Graduation AdHoc Letters **Records Transfer**

+ New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District
10/15/2014	Amici, Donald	request	Philpsburg K-12 Schools	

Year 14-15 School Granite High School

Index Search Help <

User: **tlabbe**
Person: Carey, Drew M

User Account **User Groups** Tool Rights Calendar Rights

Save

User Group Membership

<input checked="" type="checkbox"/> +GHS	<input type="checkbox"/> +P7	<input type="checkbox"/> +PS
<input checked="" type="checkbox"/> -GHS	<input type="checkbox"/> -P7	<input type="checkbox"/> -PS
<input checked="" type="checkbox"/> 0GHS	<input type="checkbox"/> 0P7	<input type="checkbox"/> 0PS
<input type="checkbox"/> Ad Hoc Read Only	<input type="checkbox"/> Ad Hoc Reporting	<input checked="" type="checkbox"/> All Users
<input type="checkbox"/> Attendance Clerks	<input type="checkbox"/> Counselors	<input type="checkbox"/> Disciplinary Staff
<input type="checkbox"/> Health Staff	<input type="checkbox"/> Master Schedulers	<input type="checkbox"/> MTE_all_tools
<input type="checkbox"/> Principals	<input type="checkbox"/> Read Only	<input type="checkbox"/> Records Transfer
<input checked="" type="checkbox"/> Registrars (Census)	<input checked="" type="checkbox"/> Special Education Admin	<input type="checkbox"/> Special Education Staff
<input type="checkbox"/> Sped Read Only	<input type="checkbox"/> State Reporting Staff	<input type="checkbox"/> Teachers

To add the **Records Transfer** tools to a user's account, *click* the **Search** tab. *Select User*. Type the user's last name then *click Go* to find the individual. In the **Search Results** box, click 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.

User: **tlabbe**
Person: Carey, Drew M

User Account **User Groups** Tool Rights Calendar Rights

Save

User Group Membership

<input checked="" type="checkbox"/> +GHS	<input type="checkbox"/> +P7	<input type="checkbox"/> +PS
<input checked="" type="checkbox"/> -GHS	<input type="checkbox"/> -P7	<input type="checkbox"/> -PS
<input checked="" type="checkbox"/> 0GHS	<input type="checkbox"/> 0P7	<input type="checkbox"/> 0PS
<input type="checkbox"/> Ad Hoc Read Only	<input type="checkbox"/> Ad Hoc Reporting	<input checked="" type="checkbox"/> All Users
<input type="checkbox"/> Attendance Clerks	<input type="checkbox"/> Counselors	<input type="checkbox"/> Disciplinary Staff
<input type="checkbox"/> Health Staff	<input type="checkbox"/> Master Schedulers	<input type="checkbox"/> MTE_all_tools
<input type="checkbox"/> Principals	<input type="checkbox"/> Read Only	<input checked="" type="checkbox"/> Records Transfer
<input checked="" type="checkbox"/> Registrars (Census)	<input checked="" type="checkbox"/> Special Education Admin	<input type="checkbox"/> Special Education Staff
<input type="checkbox"/> Sped Read Only	<input type="checkbox"/> State Reporting Staff	<input type="checkbox"/> Teachers

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Records Transfer Bourdain, Anthony #

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: Last Name Bourdain First Name Anthony Middle Name J
 Gender M Birthdate 07/28/1999 SSN
 Grade 08 School 13-14 Philipsburg 7-8 Start Date 09/03/2013

Enrollment Type: Primary

Requesting District & User
 District 0556 Philipsburg K-12 Schools Name System Administrator Username support
 Request Date 10/15/2014 Work Phone (406)444-2561x256 Email sysadmin@school.org

Comments

Submit Request

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 **Index** tab. Click **Census**.

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

Carey, Drew M
 DOB: 08/07/1977 Gender: M

Demographics | Identities | Households | Relationships | Enrollments | District

Save Delete Person Summary Report Demographics Data

Comments Upload Picture

- Modified by: Administrator, System 10/15/2014 15:11

Person Identifiers

Local Student Number Generate Number
 Student State ID
 Local Staff Number
 Staff State ID 002679
 Person GUID 519C98C3-7E9C-41B6-9475-4C0E9DA56061

Personal Contact Information		Messenger Preferences Contact Reasons					
Contact Information	Private	Emergency	Attendance	Behavior	General	Priority	Teacher
Email: dcarey@pburg.k12.mt.us	<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: (509) 431 - 5555 x	<input checked="" type="checkbox"/>						
Other Phone: () - x	<input type="checkbox"/>						
Work Phone: (406) 859 - 4444 x	<input type="checkbox"/>						
Pager: () - x	<input type="checkbox"/>						

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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, 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. 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	Malia	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

Overlap [Edit \(08/25/2010-06/03/2011\) 10-11 Cascade 7-8](#)

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
Request Date	07/15/2011	Work Phone	(406)555-9876	Email	lingalls@school.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, Limited English Proficiency status information and limited *Enrollment History*. Sharing the responsibility for the **Records Transfer** process allows those involved with the transfer to communicate directly when there are questions and/or concerns regarding the information transferred.

Contact the OPI AIM Helpdesk at 1-877-424-6681 or
opiainhelp@mt.gov for assistance.

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