



END OF YEAR ENROLLMENT & PROGRAM PARTICIPATION COLLECTION CHECKLIST

Must be completed by June 19, 2026, for students enrolled at any time in the 2025-26 school year. The Enrollment Collection Certification includes all enrollments in grades PK through 12, student demographics (age, gender, race/ethnicity). The Program Participation Collection Certification includes Primary enrollments and student participation in state and federal programs (a full list of programs is identified at the end of this guide) for students enrolled at any time in the 2025-26 school year.

STEP ONE: ENROLLMENT

PATH: Student Information>General>Enrollments

PATH: Reporting>Data Validation>Validation Groups or Data Validation Reports

Use the End of Year Enrollment Validations to review Enrollment counts and student demographics.

The screenshot displays the 'Validation Groups' interface. At the top, there is a breadcrumb trail: 'Reporting > Data Validation > Validation Gr'. Below this, there is a search bar and a table of validation rules. The table has two columns: 'Name' and 'Description'. Two rules are visible:

Name	Description
All Year Students Missing Federal Race Ethnicity (State)	Students missing Federal Race Ethnicity
All More Than One Identity - Same Effective Date (State)	Students with more than one Identity record with the same effective date. Review other records: Delete errors and change records.

Three pop-up windows are overlaid on the main interface:

- Gender:** Shows a dropdown for 'Gender' set to 'M: Male' and a dropdown for 'Pronouns'.
- Race/Ethnicity:** Shows a dropdown for 'Race/Ethnicity' set to 'N: No'. Below it, there is a question: 'Is the Individual Hispanic/Latino?' with a dropdown set to 'N: No'. Another question: 'Is the Individual from one or more of these races? (check all that apply)'. There are checkboxes for 'American Indian or Alaska Native', 'Asian', 'Black or African American', 'Native Hawaiian or Other Pacific Islander', and 'White', with 'White' checked. Below this is a 'Race/Ethnicity Determination' dropdown set to '01: Parent Identified'.
- General Enrollment Information:** Shows fields for 'Schedule (read only)', 'Grade' (dropdown set to '02'), 'Class Rank Exclude' (checkbox), and 'External LMS Exclude' (checkbox). It also has fields for 'Start Date' (08/20/2025), 'End Date', 'End Action', 'Service Type' (dropdown set to 'P: Primary'), 'State Start Status' (dropdown set to '02: Continued enrollment same school, no interruption'), and 'Dropout Reason'.

Use the Enrollment Roll Forward/Enrollment End Batch Wizard(s) to roll students forward and end students in the current year. Districts using Infinite Campus as their SIS are recommended to complete the school year (grades, attendance, etc.) prior to ending student enrollments.

Enrollment Roll Forward Wizard

PATH: Student Information>General Student Administration>Enrollment Roll Forward Wizard

This tool allows districts to create enrollments for the ensuing year en masse. This can be done at any time. Enrollments for students who are verified transfers prior to the first day of school in the ensuing year should have their new enrollment deleted and an appropriate end date/end status created in the current year.

1. LEFT SIDE: Select current year (Source) Calendar(s), Current Year (Source) Grades (either select students who will be staying in the current school next year OR students who will be moving as a group to another school), Source Service Type (recommend all three), and Source Structure.
2. RIGHT SIDE: Select next year's Start Status, Destination Calendar, Destination Grade (leave blank unless rolling a single grade), next year's school Start Date (recommended).
3. Click Run Test to make sure everything looks okay – then Run.

The Enrollment Roll Forward Wizard assists in the promotion, retention or demotion of currently enrolled students into the next calendar and next grade level. This tool is safe to run repeatedly. Each student is rolled only once. If a student already has an existing enrollment in the next calendar, that student is not included in the enrollment roll again. Before using this tool, ensure calendars have been rolled forward using the Calendar Wizard. NOTE: If you are using School Boundary settings on your households, different logic is used. For more information, [click here](#).

Select Source Calendars

- 25-27 Flathead High School
- 25-27 Gordon Elem Jun/junior
- 25-28 Cornelia Hedges 4-5
- 25-28 Cornelia Hedges 6-9
- 25-28 Edgerton School 4-5
- 25-28 Edgerton School 6-9
- 25-28 Emerald School 4-5
- 25-28 Emerald School 6-9
- 25-28 FHS Aquila
- 25-28 FHS ESA
- 25-28 FHS LEC
- 25-28 Flathead Peace Academy
- 25-28 OHS Aquila
- 25-28 OHS LEC

Select Local Start Status

Continue enrollment same school, no interruption (Valid)

(OPTIONAL)

Select Destination Calendar

25-27 Flathead High School

Select Destination Grade

Select Destination Structure

112n

Start Date Override

If school days for the next school year have been finalized and Calendar Check has been run, this date does not have to be entered. The first term date of the next school year is automatically selected. If Calendar Check has not been run, enter the Start Date Override as the first instructional day of the next school year.

6/20/2025

Allow Duplicate Primary Enrollments

Totals Only

Show Warnings

Include students whose enrollments end on the last day of the last term

Select Source Grades

01 02 03 04

05 06 07 08

09 10 10n 11

11n 12 12n 1st

2nd 3rd 4th 5th

6 6n 7 7n

8 8n 9 9n

10 10n 11 11n

PK PK1 PK2 PK3

Source Add Hoc Student Filter

Source Service Type

Primary

Partial

Special Ed Services

Select Source Structure

112n

Enrollment End Batch Wizard

PATH: Student Information>General Student Administration>Enrollment Roll Forward Wizard

This tool ends enrollments in the current school en masse. This process should only be done after the end of the school year (and after grading is complete for District Edition schools).

1. LEFT SIDE: Select the Current Year Calendar(s) and the Grade(s). Only select the grade(s) that have the same End Date and Local End Status (e.g., for a K-5 school, select KG, 01, 02, 03, and 04 – as they will have a Local End Status of 100: End of year, returning to same school next year and grade 05 will have a Local End Status of 110: Promoted to another school in the same district).
2. RIGHT SIDE: Enter the End Date (last day of student instruction) and Local End Status (same for all selected grade(s)). End Action is not required for State Reporting purposes. Graduation may also be entered. Students who complete alternative graduation programs (End Status 410: Graduation Alt Authorized by MCA) or State Minimum (Diploma Type 05: State Minimum) may require manual adjustment.

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STEP TWO A: ENTER PROGRAM PARTICIPATION DATA (PROGRAMS)

PATH: Student Information>Program Participation OR English Learners OR State Programs

1. Program Participation: Section 504
 - a. Click New or select an existing record.
 - b. Enter Start Date and/or End Date (plan dates can cross school years – e.g., 11/4/2025 Start Date and 11/3/2026 End Date). End Date is only required if End Date is known (set in plan) or plan has ended.
 - c. Click Save.

The image shows two overlapping screenshots of a web application. The top screenshot is the 'Section 504 Editor' form, which has a header with 'New', 'Save', 'Delete', and 'Print Summary Report' buttons. Below the header are fields for 'Start Date', 'End Date', and 'Created By'. The bottom screenshot is the 'Section 504 Detail' form, which has fields for '*Start Date' (set to 11/04/2024) and 'End Date' (set to 11/03/2025), and a 'Comments (up to 255 characters)' text area.

2. Program Participation: English Learners (EL)
 - a. Enter Program Status (Pending/EL/Exited EL).
 - b. Enter Identified Date.
 - c. Enter Program Exit Date (if Program Status is Exited EL).
 - d. Add Title III as a Service (districts with a Title III grant).
 - e. If a parent refuses service, add an MT EL Services record.

The image shows three overlapping screenshots of a web application. The leftmost screenshot is the 'Active EL Record' form, which has a dropdown for '*Program Status' (set to EL), an 'Identified Date' field (set to 03/04/2024), and several monitoring and notification checkboxes. The middle screenshot is the 'Census Information' form, which has a warning message and fields for 'Home Primary Language' (set to Spanish), 'Language of Impact' (set to Spanish), and 'First Entered US School'. The rightmost screenshot is the 'EL Services Detail' form, which has a '*Start Date' field (set to 03/04/2024), an 'End Date' field, a '*Service Type' dropdown (set to 01: Title III), and a 'Parent Refused Services' checkbox (checked) with a 'Date Refused' field (set to 09/15/2025).

Note: Home Primary Language and Language of Impact must be entered on Demographics tab before an EL record may be saved.

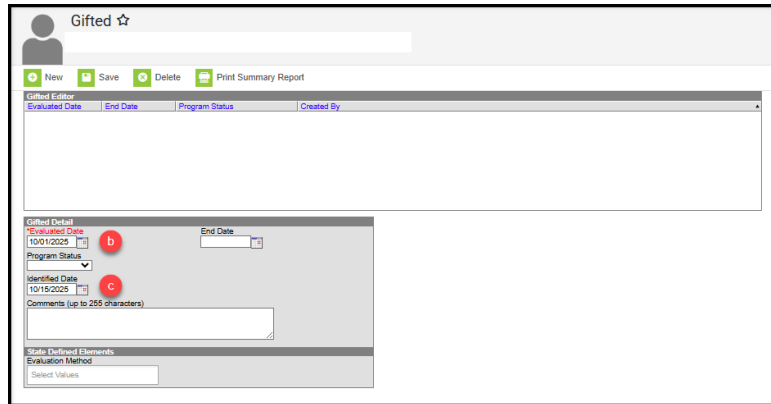
3. Program Participation: Homeless
 - a. Click New.
 - b. Enter Start Date/End Date
 - i. End Date should be 6/30 of the current school year.
 - c. Indicate Nighttime Residence.
 - d. Check Unaccompanied Youth if it applies to the homeless student.
 - e. Click Save.

The image shows the 'Homeless Detail' form. It has a '*Start Date' field (set to 03/29/2025) and an 'End Date' field. Below these are fields for '*Program Status' (set to 01: Homeless) and '*Primary Night Time Residence' (a dropdown menu). To the right is an 'Unaccompanied Youth' field with a 'No'/'No' dropdown. At the bottom is a list of residence types: 01: Shelters, 02: Doubled-up (Living with another family), 03: Unsheltered (Cars, park, campgrounds), and 04: Hotels/Motels.

4. Program Participation: Gifted

- a. Click New.
- b. Enter Evaluated Date.
- c. If student is eligible for Gifted Services, enter Identified Date (this is not an indicator of participation, only an indicator of eligibility in the current district).
- d. Click Save.

Note: If a student is re-evaluated, enter an End Date in the initial record and create a new record with the updated Evaluated Date and Identified Date (if applicable).



STEP TWO B: ENTER PROGRAM PARTICIPATION DATA (ENROLLMENT)

PATH: Student Information>General>Enrollments

1. Enrollments: Title I, Title I Part A, Title I Part D, Immigrant, 21st Century, Military Connected Status and Foreign Exchange.
 - a. Title Programs – check Title I for students participating in a Targeted Title I Program, along with corresponding Instructional or Support Services (students in a Schoolwide Title I program are automatically reported as Title I), check Title I Part A for students receiving neglected youth services, and/or select Title I Part D Service.
 - b. Immigrant – Check the box for Immigrant students and enter Date Immigrant entered US School (will need to enter Home Primary Language on the student’s Demographics tab first).
 - c. 21st Century Participant – Check the box for students participating in 21st Century programs between June 1, 2025, and June 30, 2026. Students participating in a 21st Century summer program that begins on or after June 15, 2026, should be reported as 21st Century participants for the 26-27 school year.
 - d. Foreign Exchange – Check the box for students who are in the United States school as Foreign Exchange students.
 - e. Military Connected Status – Select an appropriate status for students with military connections.

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STEP TWO C: FRAM ELIGIBILITY

PATH: FRAM>Application Processing>Eligibility

- a. Click New or select an existing eligibility record.
- b. School Year is 25-26.
- c. Enter Start Date and End Date (End Date should be no more than 30 days into the following school year).
- d. Select Eligibility Type (Meal), Eligibility (Free, Reduced, Paid), and Certified Type.
- e. If the eligibility determination is the result of a direct certification file, check Direct.
- f. Click Save.

STEP TWO D: UPLOAD ENROLLMENT AND PROGRAM PARTICIPATION

PATH: Reporting>MT State Reporting>MT Data Upload

Create an upload file from your Student information System Vendor or using the Student Demographic Template, Student Enrollment Template, Program Participation Template, Section 504 Template, English Learners (EL) Template and Free Reduced Application Management (FRAM) Import Template. Upload the files in *.tsv format.

1. MT Data Upload: Student Demographics, Student Enrollments, Program Participation, Section 504, and English Learners (EL).
 - a. Select either Validate and Test File or Upload File (recommend using Validate and Test File prior to upload for data validation purposes).
 - b. Choose file and Submit to Batch.

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- c. The upload results will show under Batch Queue List. Review the report and correct errors by repeating the steps above or using Step Two A to hand enter corrections/omissions.

2. FRAM Eligibility Import Wizard

Use the FRAM Eligibility Import Wizard guide to upload FRAM data.

STEP THREE: RESYNC DATA

PATH: System Settings>Data Interchange Administration>Resync State Data - Batch

Before continuing with Step 4 do a complete resync of data to ensure full sync with the state.

Category	Last Resync	Results
State	04/30/2024 17:00:20	Processed: 1 Errors: 0
School	04/30/2024 17:00:20	Processed: 40 Errors: 0
Calendar	04/30/2024 17:00:20	Processed: 3 Errors: 0
CourseSection	04/23/2024 08:59:52	Processed: 2615 Errors: 0

<input checked="" type="checkbox"/>	TestAccommodations	04/08/2024 09:20:44	Processed: 0 Errors: 0	●
<input checked="" type="checkbox"/>	TranscriptCourseSE	04/08/2024 09:20:44	Processed: 0 Errors: 0	●
<input checked="" type="checkbox"/>	VaccineShot	04/08/2024 09:20:44	Processed: 0 Errors: 0	●
<input checked="" type="checkbox"/>	PersonIdentityNoStateIDOnly	04/08/2024 09:20:44	Processed: 0 Errors: 0	●
<input checked="" type="checkbox"/>	SchoolInstructionMode	04/08/2024 09:20:44	Processed: 31 Errors: 0	●

STEP FOUR: VALIDATE DATA

PATH: Reporting>Data Validation>Validation Groups OR Data Validation Reports

Search for “End of Year Enrollment” and/or “End of Year Program”. There are separate validations for Enrollment and Program Participation. Further, Program Participation validations may be either a “Count” (student numbers) or a “List” (student names). Work with program staff to ensure both counts and students are accurate for each program.

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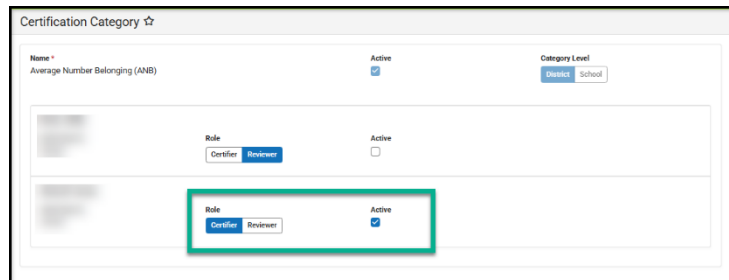
STEP FOUR: CERTIFY DATA

PATH: *Reporting>Data Certification>Certification Category AND Certification Event*

Follow these steps to complete data certification.

Certification Category

1. Select a Certification Category.
2. Current certifier has the Role of Certifier and Active is checked (recommend one certifier per certification category).
3. To remove a Certifier, un-check Active (it is recommended to change role from Certifier to Reviewer).
4. To change from Active Certifier to Active Reviewer (or vice-versa), click Role (blue highlight is selected Role).
5. To add a new Certifier, click Add Member.
 - a. Enter Staff Name or Staff State ID (SEID).
 - b. Click Name, choose Role, and select Active.
 - c. Click Save.



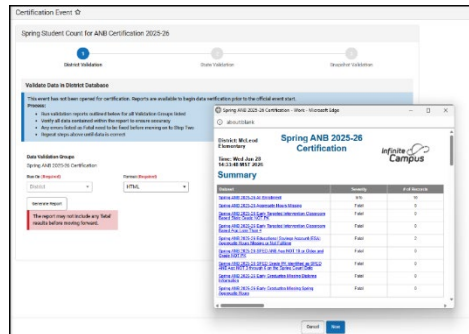
The screenshot shows a web interface for managing certification categories. At the top, it says "Certification Category ☆". Below that, there are fields for "Name" (with a star icon), "Average Number Belonging (ANB)", and "Active" (with a checked checkbox). To the right, there are "Category Level" buttons for "District" and "School". Below these fields is a table with two rows. Each row has a "Role" column with buttons for "Certifier" and "Reviewer", and an "Active" column with a checkbox. In the second row, the "Certifier" button and the "Active" checkbox are highlighted with a green rectangular box.

Certification Event

Districts must validate their data at the District, then the State – before taking a snapshot and completing data certification. Click Start Certification to begin the process.

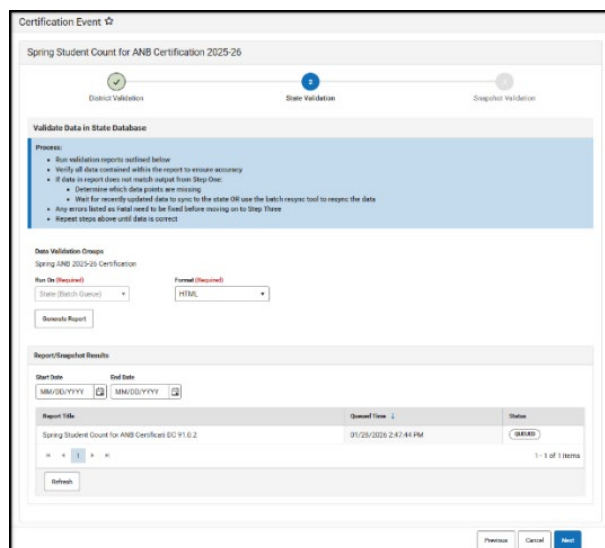
Step 1: District Validation

Click Generate Report to run the Certification validation at the District. The state identifies errors that will prevent a district from certifying. If there are errors on the District Validation you will not be able to continue with Certification. Clear the errors, then re-run the District report. Once the report is clear, continue to Step 2.



Step 2: State Validation

Click Generate Report to run the Certification validation at the State. The results will queue in the Report/Snapshot Results. Click Refresh until the report Status shows Completed. Click the Report Title to review results. If there are errors on this report, data is not fully synced. Return to the Resync Data step above and complete a full data resync. Once that step is completed, start with Step 1 again. Once the State Validation is clear, continue to Step 3.



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Step 3: Snapshot Validation

Click Take Snapshot to create a district snapshot. The results will be generated in the Report/Snapshot Results table below. Open the snapshot to review data. If the snapshot is accurate, click Next to continue to Step 4.

Spring Student Count for ANB Certification 2025-26

District Validation State Validation Snapshot Validation

Validate Data in Snapshot

Process

- Click Take Snapshot!
- Refresh snapshot once used Complete - then click back to view report
- Verify all data contained within the snapshot to ensure accuracy
- If data in report does not match output from Step One and Two, repeat steps and then Retake Snapshot and review new snapshot
- Repeat steps above until data is correct

State Snapshot Options

State Snapshot Format: **HTML**

No snapshot data available

Take Snapshot

Report/Snapshot Results

Start Date: MM/DD/YYYY End Date: MM/DD/YYYY

Report Title	Created Time	Status
No records available.		

Refresh

Step 4: Certify and Submit

Review Steps 1-3 are completed.

When satisfied with the results of the snapshot created, click Submit Certification to State.

Certification Event

Reporting Data Certification Certification Event

Spring Student Count for ANB Certification 2025-26

District Validation State Validation Snapshot Validation Certify and Submit

Certify and Submit to State

Process

- Verify that all items below show Completed
- Click Submit Certification to State

VALIDATION TYPE	STATUS
District Validation	COMPLETED
State Validation	COMPLETED
Snapshot Validation	COMPLETED

Previous Cancel Submit Certification to State

Enrollment Notes

- Districts may not remove a student from the cohort (marked as a transfer) unless the district follows the process outlined below. If the district does not have the required documentation to support a student transfer the student must be counted as a dropout:
 - To remove a student from the cohort, a school or LEA must confirm, in writing, that the student transferred out, emigrated to another country, transferred county juvenile detention facility, or is deceased. To confirm that a student transferred out, the school or LEA must have official written documentation that the student enrolled in another school or in an educational program that culminates in the award of a regular high school diploma. A student who is retained in grade, enrolls in a HiSet program, is incarcerated in an adult prison or jail, or leaves school for any other reason may not be counted as having transferred out for the purpose of calculating graduation rate and must remain in the adjusted cohort (ESEA sections 1111(h)(1)(C)(iii)(II) and 8101(23), (25) (20 USC 6311(h)(1)(C)(iii)(II) and 7801(23), (25))). The district should have a process in place to verify that a student has enrolled in the school they have transferred to. Examples include:
 - In state transfers - Obtain official written documentation that the student has enrolled and attended (the student should have an active AIM enrollment in the new school);
 - Out of state transfers - Obtain official written documentation that the student has enrolled and attended (the school must offer an educational program that will result in a regular high school diploma);
 - Out of county transfers - Document that the student left the country, not necessarily that the student enrolled in another educational program (out of country programs may not be equivalent to US programs);
 - Homeschool transfers - Obtain official written documentation from the county superintendent that the student completed the registration process for homeschool on or after the student's last day of attendance in the district (a prior year homeschool record is not sufficient);
 - Private school transfers - Obtain official written documentation that the student has enrolled and attended (the student should have an active AIM enrollment in the new school for transfers to a state accredited private school);
 - Student died - Obtain local confirmation from the family or an obituary. A death certificate is not required.
- There are new options for student graduation. Please see [Alternative Graduation Options](#) on the AIM Webpage for more information.

Program Participation List

- Section 504 – Section 504 is a plan developed to provide services and/or accommodations for a regular education student so the student may have an equal opportunity to participate in the educational program, including extra-curricular activities.
- English Learner (EL) – Students who are not achieving academically due to the level of their English language proficiency.
- Title I – Federal program to provide additional academic support and learning opportunities to help low-achieving children master challenging curricula and meet state standards in core academic subjects. Only Targeted Title I students are identified in AIM. The OPI automatically counts all students in Schoolwide Title I schools as Title I participants.

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- Title I Part A – Student must be enrolled in a school receiving Title I Part A funds and a local Neglected Program. The students identified should be receiving services provided by a public or private residential facility (other than a foster home).
- Title I Part D – Student must be enrolled in a school receiving Title I Part A funds. The students identified should be receiving services provided by a public or private residential facility that is operated primarily for the care of children who have been adjudicated as delinquent or in need of supervision. This also includes students in an adult correctional institution.
- Immigrant – An Immigrant student is a student aged 3 through 21, was not born in any State; and has not been attending one or more schools in any one or more states for more than 3 full academic years.
- 21st Century - Students participating in 21st Century programs between June 1, 2025, and June 30, 2026, should be indicated as a 21st Century participant. Students participating in a 21st Century summer program that begins on or after June 15, 2026, should be reported as 21st Century participants for the 26-27 school year.
- Foreign Exchange - A Foreign Exchange student is a student who maintains residency and citizenship in a foreign country, which the student has no intention of abandoning and is qualified to pursue a full course of study.
- Gifted & Talented - Children of outstanding abilities who are capable of high performance and require differentiated educational services beyond those normally offered in public schools to fully achieve their potential contribution to self and society. The children identified include those with demonstrated achievement or potential ability in a variety of worthwhile human endeavors.
- Homeless – A student is considered homeless if they lack a fixed, regular, and adequate nighttime residence, including shared housing (due to loss of housing, economic hardship, or other similar reason), are living in motels, hotels, trailer parks or campgrounds due to lack of adequate alternative accommodations, are living in emergency or transitional shelters, or are awaiting foster care placement. Students must continue to receive services for the entire school year, even after obtaining housing.
- Military Connected – Military Connected student means a student enrolled in a school district who is a dependent of an active-duty member of: The United States Military (Army, Navy, Air Force, Marines, or Coast Guard), Active-Duty National Guard, Active-Duty Reserve Force of the US Military, or transitioning out of Active-Duty to National Guard or Reserve
- FRAM – Students may receive free or reduced-price meals if household income is within the limits on the Federal Income Eligibility Guidelines or the student is directly certified through the State’s DCA application.

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