



## CALENDAR CREATION CHECKLIST

This checklist and procedures must be completed before the start of the school year.

This collection is for accurately creating the calendars for the next school year. This collection includes calendar information with start and end dates, calendar types for all schools, grades, and configurations, grade levels served, terms by grading period, period schedules (including early release or alternate days), and pupil instruction related (PIR) days. Calendar information is used for calculating aggregate hours and PIR time for both Accreditation and School Finance.

### Calendar Creation

Calendars are the defining elements for a school, or portion of a school. Calendars are created based on attendance (grade levels that attend at different times), students (part-time, extracurricular), or program (preschool, alternative). Follow these steps to create the calendar(s) for a school:

- ✓ Roll Calendars from the prior year or create new Calendars.
- ✓ Create Calendars for separate programs (e.g., alternative schools, offsite locations, or extracurricular participation).
- ✓ Enter Calendar information.
- ✓ Verify grade levels (for the calendar, properly mapped to state grade).
- ✓ Enter Terms and term dates.
- ✓ Create period schedules (for regular and alternative days).
- ✓ Create Days (map to appropriate period schedules, identify PIR dates).

#### Collection Implications:

- Districts must meet the minimum aggregate hours requirements in 20-1-101 and 20-1-301, MCA.
- Districts must meet the in-service requirements in ARM 10.55.714.

### Calendar Wizard

PATH: *Scheduling & Courses*>*Calendar Setup*>*Calendar Wizard*

It is recommended to roll calendars forward from the prior year, unless there are significant changes that require starting with blank calendars.

1. Select *Create new Calendars by rolling forward selected data* to copy a calendar from a prior year.

**Calendar Wizard**  
Copy, Rollforward, or Create new Calendar-linked Data  
This wizard will walk you through the creation of new school calendars by rolling data forward, or copying an existing calendar. Days will only roll forward if there are matching schedule structures and period schedule names in the new calendar.  
Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow down the system while it runs. Please try to run this tool during off-peak hours.

Select Wizard Mode

Create new blank Calendars  
 Create new Calendars by rolling forward selected data (last-years data will be added to a newly created calendar).  
 Copy data into Existing Calendars

< Back   Next >

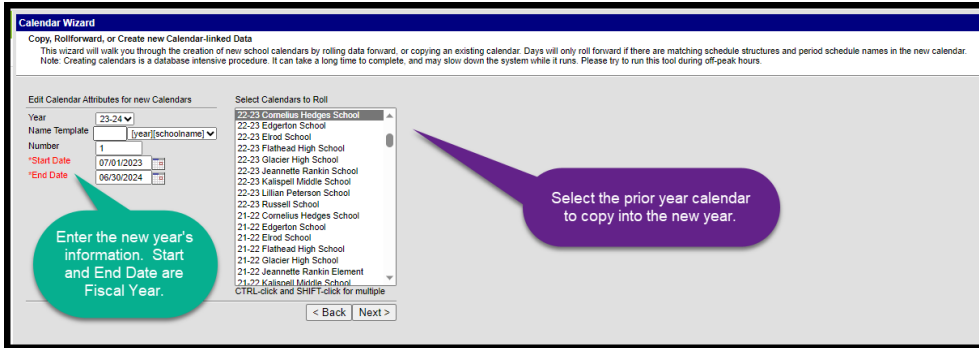
#### AIM Unit Contact Information

(406) 444-3800

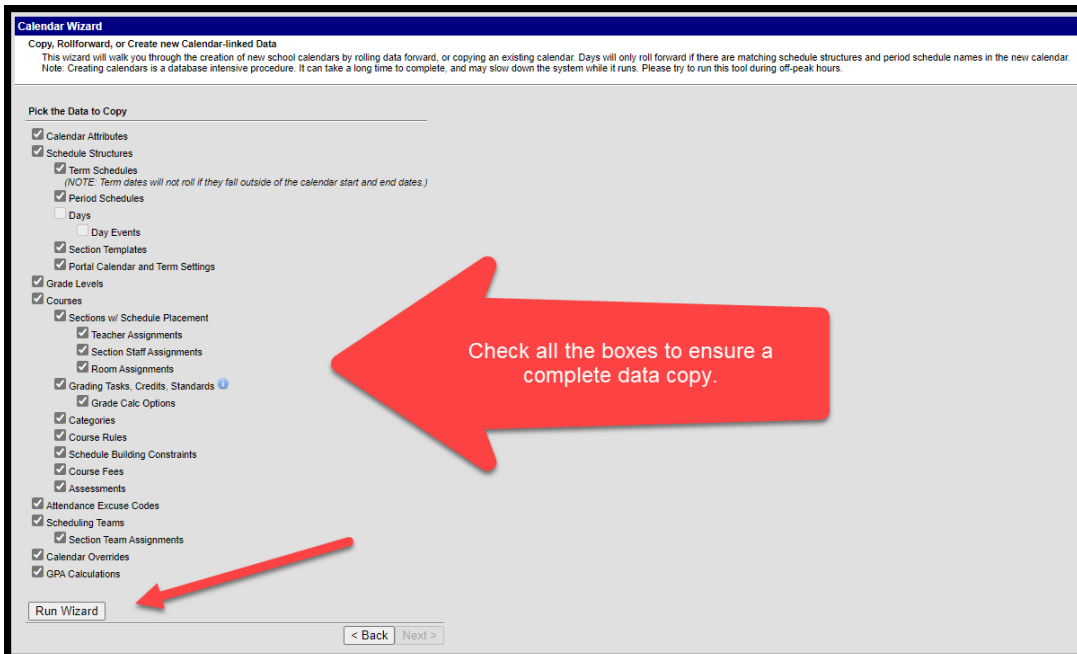
[opiamhelp@mt.gov](mailto:opiamhelp@mt.gov)

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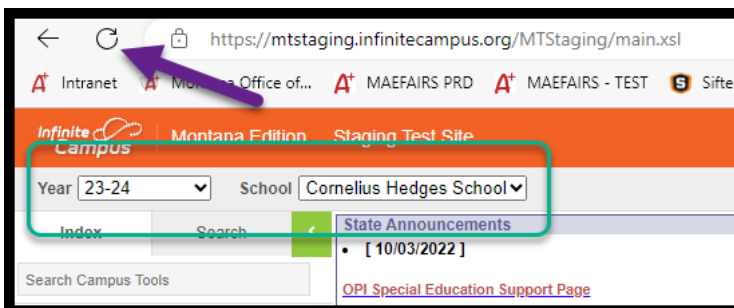
2. Enter the information for the new year on the left side of the screen. Select the prior year calendar to copy from the right side of the screen.



3. To ensure that data is properly copied from one year to the next, check all the boxes under Pick the Data to Copy. Click Run Wizard.



4. Refresh the screen and navigate to the next year's calendar.



## Calendar Information Tab

1. Select Start and End Dates to reflect the fiscal year.
2. Select the appropriate type:
  - **I: Instructional** – Regular school calendar.
  - **A: Alternative** – Alternative education programs that don't follow the regular instructional calendar.
  - **F: Offsite** – Programs that are not held at the same location as the school the calendar is associated with (e.g., Attendance Centers).
  - **O: Other** – Extracurricular Participation.
3. Select the appropriate Days Per Week.
  - Select **Traditional 5-Day Week** for consistent Monday-Friday schedules.
  - Select **4-Day Week** for consistent 4-day school week schedules.
  - Select **Modified 4-Day Week** if large portions of the school year, but not all, are 4-day weeks.
    - Example 1: One week a month is 5 days, and the rest of the weeks are 4 days would be a Modified 4-Day Week schedule.
    - Example 2: The first half of the semester is 5-day weeks and the second half is 4-day weeks would be a Modified 4-Day Week schedule.
    - Example 3: For weeks with a Monday holiday, (i.e. Labor Day) going to school that Friday instead of Monday would **NOT** be a Modified 4-Day Week schedule.

The screenshot shows the 'Calendar Information' form for '24-25 Florence-Carleton HS'. The form includes fields for Calendar ID (115), Parent Calendar ID (102), School (0977 Florence-Carleton HS), Name, Start Date (07/01/2024), End Date (06/30/2025), Student Day (395), Teacher Day (450), Whole Day Absence (300), Half Day Absence (197), Type (I: Instructional), and Days Per Week. A dropdown menu for Days Per Week is open, showing options: Traditional 5-day week, Full 4-day week, Modified 4-day week (some Fridays), and Other (Preschool/Kindergarten/SPED Only). Red circles with numbers 1, 2, and 3 highlight the Start Date, Type, and Days Per Week fields respectively.

## Grade Levels

- Grade Levels must match the OPI approved grade levels for the school. Note: The grade levels for a calendar may be a range with the approved grade level if separated for instructional time purposes (e.g., this calendar may be split into separate KF-02 and 03-05 calendars due to differences instructional time – but the grade levels must still be within the approved range).
- Verify that the grade level Name matches an approved State Grade Level Code.

**23-24 Cornelius Hedges School**

Calendar | **Grade Levels** | Schedule Structure | Terms | Periods | Days | Calendar GPA | Copy Section Placements

New Save Delete

Name	Seq
KG	1
G1	2
G2	3
G3	4
G4	5
G5	6

**Grade Level Detail**

Name (locked) [G1]

\*Sequence Number [2]

\*State Grade Level Code [01: Grade 1] **B**

Standard Day [ ]

Maximum Membership Days [ ]

Whole Day Absence (minutes) [ ]

Half Day Absence (minutes) [ ]

Maximum Approved School Choice Applications [0]

Grade Code [ ]

Exclude from cumulative GPA/Rank calculations

Exclude from state reporting

**A**

The district may name the grades as they wish, but must be mapped to an appropriate State Grade Level Code.

## Terms

Districts must enter the grading period terms for the selected calendar.

**23-24 Cornelius Hedges School**

Calendar | Grade Levels | Schedule Structure | **Terms** | Periods | Days | Calendar GPA | Copy Section Placements

Save Term Schedule/Terms New Term Schedule/Terms Delete Term Schedule/Terms

**Term Schedule/Terms Editor**

Name [Trimesters]

**Term Schedule Detail**

Name [Trimesters] Primary

**Term Detail**

Name	Sequence	Start Date	End Date
T1	1	08/30/2023	11/22/2023
T2	2	11/27/2023	03/01/2024
T3	3	03/04/2024	06/06/2024

Add Term

## Periods

The requirements for Periods depend on the level of the Calendar and the Accreditation of the school. District Edition applications may have some deviations based on the needs of the school. This is the minimum required for state reporting:

- Elementary K-6 and Elementary K-8, where the 7-8 is not separately accredited – single attendance period with a non-instructional period for courses (e.g., “specials” that must be recorded separately when they are taught by separate instructors).
- Elementary 7-8 where the 7-8 is separately accredited – must report an accurate period schedule to reflect the student’s participation and hours in the additional program requirements of an accredited middle school.
- High School – must report an accurate period schedule to reflect the student’s participation and hours in the program requirements of an accredited high school. The calendar will look very similar to the middle school calendar.
- Lunch, recess, and any other non-instructional time that happens during the regular school day is to be added in the Lunch Time field. Only use the Non-Instructional check box for periods that occur before or after the regular school day.

**Period Schedule Info**

\*Name: Main      \*Sequence: 1      Exception/Special Day:       Instructional Minutes: 630      School Day: 630

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**Period Info**

*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
EB Period	1	07:30 AM	08:18 AM	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1st Period	2	08:18 AM	09:30 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
2nd Period	3	09:30 AM	10:30 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
3rd Period	4	10:30 AM	11:30 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
4th Period	5	11:30 AM	01:00 PM	30	<input type="checkbox"/>	<input type="checkbox"/>
5th Period	6	01:00 PM	02:00 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
6th Period	7	02:00 PM	03:00 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
7th Period	8	03:00 PM	03:55 PM	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MHSA Act	9	04:00 PM	06:00 PM	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add Period

If there are days with other schedules (e.g., early out) create additional Period Schedules for those days.

## Days

The Days tab is used to designate days as school days (regular or shortened), PIR (in-service), or non-school days for the year.

- Select Day Reset. Enter Start Date (first PIR Day before school), End Date (last PIR Day after the last day of school), and check the Day boxes (M-TH for a 4-day week, M-F for a 5-day week).

**23-24 Whittier School**

Calendar    Grade Levels    Schedule Structure    Terms    Periods    **Days**    Calendar GPA    Copy Section

Day Reset    Print    Multi Day Event

August 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Event on this Day

**Auto Create Calendar Days**

Day Reset

This tool will generate a Day record for each day in the Calendar. If your calendar dates are year-round, or larger than the days you need to track, enter a smaller date range to only create Day records for days that have instructional meaning for the Schedule Structure. If this function is performed on an existing calendar, all days and day events will be lost outside the range you choose (Unless you choose "Fill Missing Days Only").

\*Start Date: 08/30/2023

\*End Date: 06/06/2024

Duration: 0

Fill Missing Days Only

Mon     Tue     Wed     Thu     Fri     Sat     Sun

Create Days

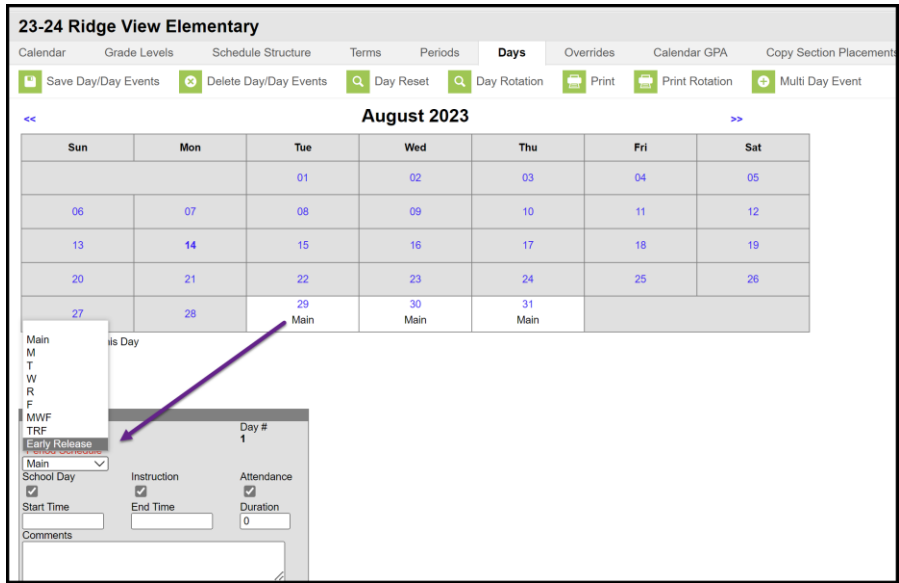
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- To change a Day:
  - From a Regular Day to Shortened Day: Select a Day and change the Period Schedule by selecting a new schedule.



- To enter a PIR/Parent Teacher Conference Day: Select a day, check School Day, enter a Day Event for IS: In Service or PT: Parent Teacher Conference, and enter Duration (360 is a full day). Day Event, with Duration, must be entered to count for state reported PIR time.

**Note:** There may be other codes for PIR/Parent Teacher Conference days in the MT/District Edition, but the event must be entered with the code IS: In Service and a Duration not less than 120 minutes to be counted for state reporting.

**Day Detail**

Date: 08/28/2023      Day #: Not an instructional day.

*\*Period Schedule*

Main (dropdown)

School Day  (1)      Instruction       Attendance

Start Time:      End Time:      Duration: 0

Comments:

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**Day Events**

Type: IS: In Service (dropdown) (2)      Duration: 360 (3)      Inst. Minutes:

Add DayEvent

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**Blended Learning Groups** ?

Add Group

- To enter a Non-Instructional Day: Select a day, un-check School Day, Instruction and Attendance (entering a Day Event is optional).

**Note:** For Days with both PIR (In-Service) or Parent Teacher Conference (PT) and Instruction (School Day/Attendance) leave School Day, Instruction, Attendance checked and enter the PIR (In-Service) with the Duration of the PIR. Day Event, with Duration, must be entered to count for state reported PIR/PT Conference time.

### Copying Data to Another Calendar

Districts that have multiple elementary, middle, or high school calendars where the calendar information is the same across the district can copy calendar information from one calendar to another using the Calendar Wizard. The Period Schedule(s) must first be copied to all calendars before Terms and Days can be copied.

PATH: *Scheduling & Courses>Calendar Setup>Calendar Wizard*

- Select Copy data into Existing Calendars.

- Select Copy/Append Other Data Elements or Overwrite Terms/Days:

**Note:** Overwrite Terms/Days requires the Period Schedule names to be identical between calendars. If the Period Schedules are not identical, use Copy/Append other data elements.

- Select the Source Calendar and the Destination Calendar(s)

- Select Period Schedules and click Run Wizard. Refresh page.



## Student Demographics and Enrollments

Student Demographics and Enrollments are the basis for all state reporting. Demographic information, for example, is used to create subgroups for Assessment and Dropout, Graduate, and Cohort reporting. Enrollments track the time period for student enrollment in a district as well as the type of enrollment. Enrollment Start and End Dates and Service Type affect, for example, inclusion in Federal reporting, requirements for assessment, and eligibility for ANB counts (financial reporting).

Steps:

- ✓ Roll enrollments forward from a prior year.
- ✓ Use the Student Locator to find students enrolled in another Montana district or facility.
- ✓ Use the MT Data Upload tool to import Student Demographics and Enrollments from a 3<sup>rd</sup> party Student Information System.
- ✓ Verify accuracy of student race/ethnicity, date of birth, home primary language (EL or Immigrant) and/or Language of Impact (EL).
- ✓ Exit students who have transferred or are no longer receiving educational services.

Collection Implications:

- Student enrollment information is used for both State and Federal Reporting:
  - Enrollments drive budget limits for districts – Average Number Belonging (ANB).
  - Enrollments determine funding for special State programs (e.g., State Major Maintenance Aid, Transformational Learning, Indian Language Immersion Program).
- Student enrollment information is also used for both State and Federal Reporting:
  - Students identified as American Indian are eligible for additional State Funding (e.g., American Indian Achievement Gap payment).
  - Student race/ethnicity is a subgroup for assessment.

### Enrollment Roll Forward

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

Create new enrollment records by rolling student enrollments from the prior year using the Enrollment Roll Forward Wizard.

- Select prior year calendar(s), grades to roll forward, Service Types, Schedule Structure from the fields on the left.
- Select current year Local Start Status, Destination Calendar, and Destination Structure from the right.
- Leave Destination Grade and Start Date Override blank. Next grade is determined by the sequence of grades in the grade levels tab.
- Start Date is the first date in the Term Schedule.
- Click Run Test to test the roll forward and Run to complete the task.

#### AIM Unit Contact Information

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**Enrollment Roll Forward**

The Enrollment Roll Forward tool 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](#).

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**Select Source Calendars**

- 22-23 Belgrade High School
- 22-23 Belgrade Middle School
- 22-23 Ridge View Elementary
- 22-23 Saddle Peak Elementary
- 22-23 Story Creek Elementary
- SS 21-22 Belgrade High School
- SS 21-22 Belgrade Middle School
- SS 21-22 Ridge View Elementary
- SS 21-22 Saddle Peak Elementary
- 21-22 Belgrade High School
- 21-22 Belgrade Middle School
- 21-22 Ridge View Elementary
- 21-22 Saddle Peak Elementary
- 21-22 Story Creek Elementary
- SPE 21-22 Belgrade High School

CTRL-click and SHIFT-click for multiple

**Select Local Start Status**

02: Continued enrollment same school, no interruption (Val)

**(OPTIONAL)**

**Select Destination Calendar**

23-24 Belgrade High School

**Select Destination Grade**

▼

**Select Destination Structure**

Main

**Start Date Override**

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

Allow Duplicate Primary Enrollments

Totals Only

Show Warnings

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

**RUN TEST**      **RUN**

## Student Locator

PATH: *Student Information*>*Student Locator Wizard*

New students may be added using the *Student Locator* tool. Enter the student's Last Name, First Name and Gender. Matches will appear in the search results.

- If there is a potential match, hover over the result to see additional information and verify the match.
- If there's no match, click Create New Student.

\* If there's no match and you are sure that the student was previously enrolled, try other names, nicknames, or contact the AIM Unit for Assistance.

Student Last Name, First Name, Gender, Birthdate, Race/Ethnicity, Calendar, Schedule, Grade, Start Date, Local Start Status and Service Type are required (fields in red).

The image shows two overlapping screenshots of the software interface. The background screenshot is the 'Student Locator Wizard' with a 'Save' button at the top. The foreground screenshot is the 'Enrollment Detail' form, which contains the following fields:

- Enrollment ID**
- Calendar**: Adams Elem School 2024 A
- Schedule**: 1
- Grade**: [Dropdown]
- Class Rank Exclude**:
- External LMS Exclude**:
- Service Type**: P. Primary
- Start Date**: [Date field]
- Local Start Status**: 01: First time receiving educational services
- State Start Status**: 01: First time receiving educational services
- Dropout Reason**: [Dropdown]
- Start Comments**: [Text area]
- End Comments**: [Text area]

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## File Upload Process

PATH: *Reporting>MT State Reporting>MT Data Upload*

Districts that use a 3<sup>rd</sup> party Student Information System (SIS) may use the file upload process to enroll students. Upload the Student Demographics file, followed by the Enrollment file.

Extract the upload file from the district's SIS or create a text, tab delimited file from one of the AIM templates. Instructions for using the templates are embedded in the template file.

Select the Import Type, the Work to Perform and choose the file to be uploaded. Click Submit to Batch.

Review the Validate and Test results file located in the Batch Queue List located at the bottom of the page to identify and correct import errors and/or warnings. Select Refresh on the Batch Queue to retrieve the latest status of the Batch. When the Batch has completed processing, select "Get the report" to retrieve the Import Results Summary file.

For Student Demographic Uploads ONLY: Review New Student State ID File to ensure Student State IDs have been provided for students who previously did not have one. After the Import Results have been reviewed, please click the Refresh State ID File button, and select the New Student State ID file that corresponds to the date/time the Import completed processing. Click Generate to retrieve the new Student State ID file.

This process is not complete until a Batch Resync is triggered:

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

Queued Time	Report Title	Status	Download
08/17/2023 06:46:16 AM	MT Data Upload	Completed	<a href="#">Get the report</a>

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