AIM User Guide: Achievement In Montana (AIM) New User Guide

THE AIM SYSTEM IS DESIGNED TO COLLECT DEMOGRAPHIC, ENROLLMENT, PROGRAM PARTICIPATION, AND ASSESSMENT DATA FOR EACH STUDENT. THE PROGRAM ALSO TRACKS SPECIAL EDUCATION STUDENTS IEP DATA AND ALL STUDENTS' MOVEMENT FROM SCHOOL TO SCHOOL AND DISTRICT TO DISTRICT WITHIN MONTANA. IT ALLOWS FOR TIMELY REPORTING AND DATA ACCURACY THROUGH STANDARDIZED **REPORTING CAPABILITIES. THIS SYSTEM** ALLOWS SCHOOL DISTRICTS TO SUBMIT THE REQUIRED STUDENT INFORMATION ELECTRONICALLY. THE AIM SYSTEM PROVIDES THE OPI, THE STATE OF MONTANA, FEDERAL ENTITIES, AND THE EDUCATION COMMUNITY TIMELY AND ACCURATE DATA ABOUT THE PROGRESS OF OUR STUDENTS, SCHOOLS, SCHOOL DISTRICTS AND THE STATE.

AIM CONTACT INFORMATION TOLL FREE - 877-424-6681 406-444-3800 or Submit an AIM Help Desk Ticket

# <u>Achievement In Montana (AIM)</u> <u>New User Guide</u>

AIM User Guide

This guide is designed to help new AIM users understand the basics of navigating Infinite Campus. It includes primary topics such as how to search within Infinite Campus, how to locate student enrollment and demographics information, creating enrollments, starting and end dating enrollments, records transfers, and how to run ad hoc reports.

The <u>OPI AIM website</u> contains numerous additional guides which are organized by data collection schedules and by topic. It also includes a helpful AIM data dictionary as well as commonly used importing templates for data collections. There is also an email subscription wizard which we recommend all AIM users subscribe to in order to receive important information on OPI AIM announcements and updates.

**NOTE:** Please be sure to update our <u>District AIM Contact Form</u> whenever there is a staff change which affects how the OPI AIM staff communicates with your school/district on AIM data and collections. It is important to keep this information as accurate and up to date as possible.

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## **OPI AIM Website**

All new users of the AIM/Infinite Campus student information system should spend some time becoming familiar with the various resources available on the OPI AIM Website. It is also recommended that this webpage is bookmarked and

revisited frequently. The homepage of the OPI AIM Website includes the AIM Support Staff contact information, the <u>AIM Annual Collection Schedule</u>, a subscription link to receive the AIM Unit emails, an <u>AIM Contacts Form</u> for districts to fill out, and additional pertinent information which may assist AIM users in navigating their AIM data reporting throughout the school year.

There are also a series of tabs which are links to important additional resources: (Click on the blue headings below to be directed to those webpages.)

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	AII	M- Achievem	ent In Monta	na	
Achieveme	nt In Montana (AIM) is the O	PI state-wide student	information system. Th	nis system allows sch	ool districts to submit
TM required st	udent information electroni	cally. AIM provides the	OPI, the state of Mont	ana, federal entities,	and the education

AIM USER GUIDES	AIM UPLOAD TEMPLATES	AIM GENERAL INFORMATION	AIM DATA DICTIONARY
INFINITE CAMPUS UPDATE SCHEDULE & REFERENCES	AIM WEBINARS	AIM POLICY REFERENCES	AIM ADDITIONAL RESOURCES

AIM User Guides: This tab will direct users to the collections of all of the AIM User Guides which are organized by User Guides By Collection Schedule and User Guides By Topic. There is also a link to the Definition Appendixes. Please check this webpage frequently to ensure you are using the most current version of an AIM User Guide.

**AIM Upload Templates:** This tab will direct users to the templates which are required for student data uploads. These are for users who have a third-party student information system and must upload their data into AIM/Infinite Campus.

**<u>AIM General Information:</u>** This tab provides a description for the flow of AIM Data from Districts to the State.

<u>AIM Data Dictionary:</u> This tab provides helpful information pertaining to AIM student reporting data definitions. Entering student data into AIM/Infinite Campus requires some understanding of unique



#### **AIM Upload Templates**

All imports, except the Student Demographic import, require Student State I Student Enrollment file upload. Once these two have been completed for eve

#### Required Templates:

- <u>Student Demographic Template</u>
   <u>Student Enrollment Template</u>
- Additional Templates By Collection:
- Fall Enrollment Count Template
- Program Participation Template
   Free Reduced Application Management (FRAM) Import Template
- English Learners (EL) Template
   Spring Enrollment Count Template
- <u>Career and Technical Education (CTE) Template</u>
- Test Window (TW) Enrollment Count Template
- End of Year (EOY) Attendance Totals Template

terms relative to specific data collections. This tool allows users to look up a term with which they are unfamiliar and locate definitions. It is organized alphabetically.

**Infinite Campus Update Schedule & References:** This tab provides information regarding updates that are done to the AIM/Infinite Campus system throughout the year. Viewing these dates allows users to plan accordingly when there are planned outages. There is also helpful link listed pertaining to notes on update packages.

AIM Webinars: This tab provides users with access to all the AIM Unit's recorded webinars. For each AIM data

collection there are typically two webinars hosted so districts can walk through the collection processes and ask any questions they may have. The webinar is then posted here for later viewing. There is also a Webinar Schedule provided so that districts can plan for upcoming webinars.

AIM Policy References: This tab provides links to many of the Administrative Rules of Montana (ARM) and Montana Code Annotated (MCA) definitions which pertain to the OPI AIM Unit's collection of student data.

#### **G** 🕑 🖻 PUTTING MONTANA STUDENTS FIRST Search... Re-opening **#** Families & Students Educator Leadership Contact Schools AIM Webinars s are tailored to help districts navigate the AIM user guides and various data coll r dates may be subject to change. Please be aware that these webinars are recorr oise and disruotions, we ask that district staff set all microphones to be muted u se be aware ed at a la AIM Recorded Webinars AIM Webinar Schedule 2020-2021 School Year 🖾 Manage District Webinars Wed. 8/5/20 & Th. 8/6/20 Wed. 8/5/20 & Th. 8/6/20 Wed. 9/9/20 & Th. 9/10/20

#### AIM Additional Resources: This tab provides

addition links to important sites such as the MAEFAIRS website and TEAMS website.

## What is Infinite Campus:

The state of Montana Office of Public Instruction (OPI) adopted the Infinite Campus software application as its statewide student information system (SIS). The OPI calls the state level SIS 'Achievement In Montana' (AIM). The name of the company who owns the Infinite Campus software is also called Infinite Campus.

**The 'State Edition'** of Infinite Campus is used by the OPI staff and contains the state-reported student data from all Montana districts. Access is strictly controlled and monitored.

**The 'District Edition'** of Infinite Campus is used by a majority of Montana districts as their complete local SIS. District Edition users have access to all Infinite Campus tools, functions, features, programs, community support and direct Infinite Campus support.

**The 'Montana Edition'** of Infinite Campus is provided to certain districts at no cost so that these schools who don't use Infinite Campus as their local SIS can submit their data up to the State Edition of Infinite Campus for state reporting. Users of Montana Edition have fewer tools available to them in Infinite Campus since it is provided to them at no cost. This also limits their access to customer support at Infinite Campus. Districts wishing to have access to all features and full customer support should contact the AIM Unit at the OPI for information on how to make Infinite Campus their complete SIS.

The 'Montana Edition – Valued Added' is typically used by small districts as their main local student information system. Districts use it to maintain their basic set of enrollment, demographic, programs and special education IEP data. The 'value added' feature of this edition also allows districts to maintain students' daily attendance and marks data. Campus Instruction, which is the teacher portal, is not available to Value Added users. These users also do not have access to customer support through Infinite Campus. Districts wishing to have access to all features and full customer support should contact the AIM Unit at the OPI for information on how to make Infinite Campus their complete SIS.

## Infinite Campus Community (for District Edition users)

Infinite Campus offers their own portal with helpful informational tools such Infinite Campus instructions, howto-videos, and forums for Infinite Campus users. Campus community is accessible by signing into your Infinite Campus site and navigating to the Community icon in the upper right-hand corner.

Once you are signed into Campus Community, you will land on the **News** homepage where additional links for the **Forums** and the **Knowledge Base** product tool can be found.



The **Knowledge Base** tool allows users to search for guides or videos on specific Campus tools or modules.

By clicking on **Knowledge Base**, you will be taken to the Knowledge Base search engine. Here, you can search for specific articles.



Infinite Campus Kr

You can select from topics on the left side of the screen as well, such as **Release Information**, which will bring you to another screen to search for specific release information.

Home			- 1
Release Informati	on 🛚 🖶		- 8
Overview   Release Details   General Ava	lability   Release Schedule		- 8
Overview 🖉			- 8
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## **INFINITE CAMPUS NAVIGATION BASICS**

Infinite Campus is a web-based Student Information System (SIS). District Edition users and MT Edition users of Infinite Campus store important student data such as student demographics, enrollments, program participation, assessment data, as well as special education and IEP data, which is synced to the State Edition of Infinite Campus. A secure **username** and **password** are required to log-in and use the system. The username and password are supplied and maintained by your District's System Administrator and should be assigned to you only; <u>do not share sign-in information between users</u>.

#### To access Infinite Campus:

- 1. Open a web browser (Internet Explorer has some compatibility issues. Chrome, Edge, and Firefox are friendly browsers.)
- 2. Enter your district's URL. (If this is bookmarked it will need to be updated periodically.)
- 3. Enter your username and password.

Once you are logged in, the screen area in the Infinite Campus application is divided into three parts: the **Campus Action Toolbar**, **Index/Search Outline**, and **Main Workspace**.

Infinite Campus	State Edition	Campus Action Toolbar
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Student Inform     Census	mation	Process Alerts         Date Range       to         Display       All Processes         Delete Selected Messages
<ul> <li>Benavior</li> <li>Attendance</li> </ul>		Image: Process     Name

#### **Campus Action Toolbar:**

The Campus Toolbar is within the Action Bar area, and it is where you will find the fields for the **Year** and **Calendar**. The tools on the far-right end of the toolbar provide quick access to hide or see **calendars**, to switch between applications or go to **Campus Community**, to get or search for **help** and to **log off**.



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### Index/Search Outline:

The Outline on the left side of the screen is composed of two tabs: Index and Search.

The Index tab is divided into modules. Modules are groups of similar tools. The **Student Information** module, pictured right, contains tools that help find information about students (General, Student Locator, Reports). To expand any module, click on the name of the module. To select a tool, click on the tool name. Also, by selecting **Student Information** and then **General**, you are able to view the Summary demographics for a student. If you look further down the **Index** tab you will come to **Census**. Select **Census**, then **People**, and you are able to access the **Demographics** tab for a student.

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► Reports			

The **Search** tab, which is next to the **Index** tab, allows the user to search for different types of information in Campus. The types of searches available to a user depend on the rights given by the System Administrator. To search, select a search type from the drop-down list and enter search criteria in the box.

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#### Main Workspace:

The Workspace contains the specific record or tool that is being used. Pictured here is an example of an Ad Hoc Filter. When no tools are being used, the Process Alerts screen will appear here.



## Searching in Infinite Campus

There are two options of searching within Infinite Campus: the **basic** and **advanced search**.

#### **Basic Search:**

The **basic search** is used to find a specific data type with limited or open criteria. To use a basic search, click on the **Search** tab in the **Outline**. To find a student, *the correct Year and Calendar must be selected*. (If you are unsure of the correct year or Calendar, a search by People will yield results of anyone that matches the name entered.) Select the specific data type from the drop-down menu and enter the criteria in the search box (last name, first name). Click **Go**. It will generate a list of matches to the name you searched.

Note: Wildcard searches can also be attempted with a basic search by entering part of the last name, and part of the first name if correct spelling is not known.

- The underscore (\_) can be used to replace one character in the name. For example, when searching for Anderson/Andersen, use the \_ to replace the o/e: Anders\_n. The search will return matches for both Anderson and Andersen.
- The percentage symbol (%) replaces multiple characters. It can be used for all
   - % alone, or for after: b% returns all names whose last name begins with b, or
   for between b%n returns all names that begin with b and end with n.
   Searching with just a % symbol (or no entry) will return <u>all</u> results.

#### **Advanced Search:**

The **advanced search** combines a variety of data pieces to yield a more specific search result. To use the advanced search, click on the **Search** tab in the **Outline**, then click **Advanced Search**.

Index

Student

b%, k%

Last Name First Name Student Nu SSN Grade Birth Date Gender StateID Person ID Locker Nun Special Ed Status Setting Disability

The **advanced search** allows the user to combine a variety of data elements or Ad Hoc Reports into one search.

For example, to search for all ninth-grade students who are male, select 09 from Grade and M from Gender. Click **Search**.

In addition to the **Student Search** filters there is a **Saved Filter** window which displays saved searches drawn from the AD Hoc Filter tool and "State Published" reports created by OPI. To use a saved filter, select the filter from the Saved Filter window. Click Search.

**Note:** Each AIM user can create their own Ad Hoc filters so the items displayed in the Saved Filter window will likely vary from one user to another.

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## **Student Information**

Student data is contained in three primary locations in Campus: the **Summary** tab, the **Enrollment** tab and the **Demographics** tab.

#### **Summary Tab:**

Path: Index/Student Information/General/Summary

The **Summary** tab contains data about a student and is available in two formats. The 'Classic Summary Tab' is pictured right and contains information such as the **Name, Gender, Race/Ethnicity, Birthdate, Student Number (local ID number), State ID, Household Information, and a visible photo** *if the photo has been uploaded.* 

There is also a *new summary* format which is available by clicking the **New Summary Tab** in the top right corner in the Classic Summary view. This new summary format is will include the same summary details as above.

**NOTE: Gender** refers to the **legal sex** of the student as it appears on their birth certificate or other legal documentation, which may not be the same as how they personally identify. For reporting purposes, enter the legal gender of the student. *A new identity should be created for those students where the gender value has been legally changed.* 

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#### **Enrollment Tab:**

Path: Index/Census/People/Enrollments

The **Enrollment** tab contains information about a student's current and historical enrollment into a school and/or district. The basic elements of an enrollment record are the student's Start/End Dates, Start/End Status, Grade Level, and Service Type. These elements will be outlined in more detail in the next section.

ockers	Gra	duation	Athletics	Ad Hoc Letters	Waiv	er	Records T	ransfer
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09 Start Status: End Status:	N 04 Trans	19-20 F fer from pu	ergus High Scho blic school in district of	ool or state	08/21/201	9		<b>^</b>
08 Start Status: End Status:	P 02 Contii 110 Pron	18-19 L nued enroli noted to an	.ewistown 7-8 ment same school, no other school in the sa	interruption me district	08/23/201	8	05/31/2019	
07 Start Status: End Status:	P 04 Trans 100 End	17-18 L fer from pu of year, ret	.ewistown 7-8 blic school in district o urning to same schoo	or state I next year	08/24/201	7	05/31/2018	
06 Start Status: End Status:	P 02 Contii 120 Tran	16-17 L nued enroli sfer to a pu	ewis & Clark Sch ment same school, no blic school in the sam	o interruption e district	08/25/201	6	05/31/2017	
05 Start Status: End Status:	P 04 Trans 100 End	15-16 L fer from pu of year, ret	ewis & Clark Sch blic school in district o urning to same schoo	001 or state I next year	12/07/201	5	05/27/2016	
05	Ρ	Shephei Element	rd Public Schools ary (History)	15-16 Shepherd	08/26/201	5	12/04/2015	
Start Status: End Status:	04 Trans 140 Tran	fer from pu sfer to pub	blic school in district o lic schl in another dist	or state rict in MT				
04	Ρ	Shephel Element	rd Public Schools ary (History)	13-14 Shepherd	08/21/2013	3	05/23/2014	
Start Status:	02 Conti	nued enroli	ment same school, n	interruption				*

#### **Demographics Tab:**

Path: Index/Census/People/Demographics

The **Demographics** tab allows a user to correct a misspelled name, incorrect birthdate, Race/Ethnicity code, or Student Number (local ID).

**NOTE:** If a student changes their legal name (or it is discovered that the student is enrolled with a name other than their legal name) use **the Identities tab** to make those changes (see page 12-14). <u>Do</u> <u>not delete a previous identity, add a new one instead, unless an</u> <u>error was made when entering the identity, in which case</u> <u>modifications can be done in the Demographics tab.</u>

## **Creating Enrollments**

# Student Locator Method: (Likely Used By District Edition or MT Value Added Users)

Path: Index/Student Information/Student Locator

The **Student Locator** is the <u>preferred method</u> for enrolling new students into Infinite Campus. The Student Locator searches the state database for students previously enrolled in a Montana school district. Using the Student Locator decreases the chances of creating a duplicate State Student ID.

#### The student's Last Name, First Name and Gender are required for

**a search.** A student should always be entered with their legal name. If a student has been previously enrolled in a Montana school district, but a match is not generated, try commonly used last names, nicknames, switch first and last names, or vary the gender.

#### **Tips for Success:**

- No periods on Jr and Sr suffixes.
- If the first name is two names (e.g., Mary Ann) try the combined name as well as the first name only under first name.

(Continue to the next page)

Demographics	Identities	House	holds	Relationshins	Enrollme	nts District	Employme
semegraphice				(	21101110	ite biotitiet	
Save Delete	🖶 Pers	son Summa	ary Report	🖶 Demograp	ohics Data		
Person Infor	rmation						
PersonID	10075						
*Last Name	*First Name	_	Middle	Name Suffi	x	Unload Dicture	.
Allen	Elizabeth		Rudi L	Lyn	*	opioud Ficture	
*Gender	*Birth Date (/	Age: 7)	Soc Se	ec Number			
F: Female *	10/02/2012			H			
Race/Ethnicity (Edit)						No Image Ava	ailable
Federal Designation:	: 6:Wł	nite				Missing Child Ph	oto
Race(s):	White	e				opt in status.	
Hispanic/Latino: Race/Ethnicity Deter	N:No mination: 01:P	arent Identifie	d				
Hispanic/Latino: Race/Ethnicity Deter Birth Country Date Entered US	N:No mination: 01:P Date Entered	arent Identifie	ed T				
Hispanic/Latino: Race/Ethnicity Deter Birth Country Date Entered US	Date Entered	arent Identifie	ed				
Hispanic/Latino: Race/Ethnicity Deter Birth Country Date Entered US	Date Entered	I US School	ed T				
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Hispanic/Latino: Race/Ethniotly Deter Birth Country Date Entered US Home Primary Lang Select a Value	N:No mination: 01:P Date Entered	US School	ed T				
Hispanic/Latino: Race/Ethniotly Deter Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact	N:No mination: 01:P Date Entered	US School	ed T				
Hispanic/Latino: Race/Ethnicity Deter Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact	N:Ne mination: 01:P Date Entered	I US School	b: •				
HispanicLatino: Race/Ethnicity Deter Birth Country Date Entered US Cale Entered US Select a Value Language of Impact Nickname	NNo mination: 01.P Date Entered	US School	b:				
Hispanic/Latino: Race/Ethnicity Deter Birth Country Date Entered US Mome Primary Lang Select a Value Language of Impact	NNC 01 P Date Entered Date Entered Uate Entered Uate State	US School US School State School	b: v				
HispanicLatino: Race/Ethnicity Deter Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact Nickname Comments	NNC MINING OF THE NEW YORK OF	US School US School State School V	b: v				
Hispanic/Latino: Racer/Ethnicity Deter Birth Country Date Entered US Mome Primary Langy Select a Value Language of Impact Nickname Comments	N No miniation: 01:P	US School	b. v				





- A) If a match is generated, verify the child's birthdate. Hovering over the child's name will show their last enrollment and grade level. If those match the enrolling child, click on the child's name. From the Student Information screen use the <u>Direct Entry Method</u> to create a **New Enrollment**. Proceed to the next page. (The <u>Enrolling a Student in AIM</u> user guide is also helpful with this process.)
- B) If the child has not been previously enrolled in a Montana school district, click Create New Student. A message will pop up, warning the user that this process will create a new State Student ID. Click OK. Proceed below:

After clicking **OK**, the following information will need to be entered in order to create a new student in the system:

- Person Info: Enter the Student Number (local ID) optional. If this is a new student, the State ID will populate when the record is saved.
- **2. Identity Info:** Enter the required information (marked with a red asterisk (\*)).
- **3. Enrollment Detail:** Enter the student's Start Date, Start Status and Grade.
- 4. Click Save at the top of the page to enroll the student.
- 5. The Student Records Transfer wizard will appear. Click Submit Request. Records from the sending district will be automatically requested (this feature does not replace an official records transfer request from the district only information contained in the sending district's database will be sent).

Student:			Enrollment Type: Primary		
Last Name	Lane	First Name	Sarah	Middle Name	Joanne
Gender	F	Birthdate	04/09/1999	SSN	
Grade	11	School	18-19 Columbia Falls High Schl	Start Date	12/18/2018
District	0467 Columbia Falls Pub Schls	Name	System Administrator	Username	OPlaimstaff
Request Date	12/18/2018	Work Phone		Email	
Comments					



## Direct Entry Method: (Likely Used By District Edition or MT Value Added Users)

Path: Index/Student Information/General

Students who already exist within Infinite Campus, can be enrolled in each year by creating a new enrollment.

1001

After pulling up a student's **General Information** screen (click on the **Search** tab, enter the last name and click **Go**):

- 1. Click on the Enrollments tab.
- 2. Select the Year and select a School in the Calendar bar.
- 3. Click New.
- Enter at least the required fields (Calendar, Schedule, Grade, Start Date, Service Type, Local Start Status) in the General Enrollment Information editor.
- **5.** If additional information can be added at this time, enter that information as well.
- Lockers Graduation Athletics Ad Hoc Letters Waiver Records Tr Flags Profile Enrollments Schedule Attendance New Print Enrollment History New Enrollment History Enrollment Editor Grade 💠 Type Calendar Start Date End Date 06 Ρ 19-20 Lewis & Clark School 08/21/2019 Start Status: 02 Continued enrollment same school, no interruptic End Status: P 18-19 Lewis & Clark School 05 08/23/2018 05/31/2019
- 6. Click the Save icon. The new enrollment will be listed in the Enrollment Editor.

Note: If the child is transferring in from another district in the state of Montana, a records request will have to be initiated.

#### **Race/Ethnicity:**

Path: Index/Census/People/Demographics

Districts should encourage parents of students new to the district to provide accurate information on students' race and ethnicity. Parents also need to be made aware they have the right to refuse to answer the race and ethnicity questions, but a third-party observer will then designate the student's race and ethnicity.

- To enter or edit race and ethnicity information, locate the student's demographic information. (Index/Census/People/Demographics).
- 2. Next to the Race/Ethnicity section, click Edit.
- **3.** Enter the appropriate **Ethnicity** and **Race** information. Both questions are required, and multiple Races may be selected.
- The Race/Ethnicity Determination field is optional. It may be used to track how a student's Race/Ethnicity was determined.

Demographics	Identities	House	holds	Relationships	Enrollme	nts Dist	rict Employme
Save	e 🖶 Pers	ion Summa	ry Report	🖶 Demograp	ohics Data		
Person Info	rmation						
PersonID	10075						_
*Last Name	*First Name		Middle	Name Suffi	x		
Allen	Elizabeth		Rudi L	yn 🗌	*	Upload Pie	sture
*Gender	*Birth Date (A	(ge: 7)	Soc Se	c Number			
F: Female T	10/02/2012	<b></b>					
Race/Eth city (Edit)	)					No Imago	Aupilable
Federal esignation	6:Wh	ite				Missing Child	d Photo
Race(s):	White	•				Opt In Sta	tus:
Hispanic/Latino:	N:No						*
Race/Ethnicity Deter	mination 01 D	went Identifie	4				
Birth Country		arent identilie	•				
Birth Country Date Entered US	Date Entered	US School	• •				
Birth Country Date Entered US	Date Entered	US School State Schoo	• •				
Birth Country Date Entered US Home Primary Lang	Date Entered	US School	• •				
Birth Country Date Entered US Home Primary Lang Select a Value	Date Entered	US School State School	• •				
Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact	Date Entered	US School State Schoo					
Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact	Date Entered	US School					
Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact Nickname	Date Entered	US School	• •				
Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact Nickname Comments	Date Entered	US School	u 				
Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact Nickname Comments	Date Entered	US School	u 	]			
Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact Nickname Comments	Date Entered	US School	u •				
Birth Country Date Entered US Home Primary Lang Select a Value Language of Impact Nickname Comments	Date Entered	US School	u 			- Modifie	d by: Unknown

## Enrollment Start & End Dates, Status Codes, Service Types, & Identities

Path: Index/Student Information/General/Enrollments

The student's **Start** and **End Dates** reflect the actual dates that a student attends a school. The **Start Date** is the student's *first day of attendance (not necessarily the enrollment date).* A student may enroll prior to the first day of enrollment. The **End Date** is the *student's last day of attendance (not the date the records request is received).* A student may leave a district for a period of time before a records request (or other notification that the students has exited) is received. Once the notification is received, the *Student's End Date should be changed to reflect the last day of attendance.* 

#### **Enrollment Start and End Status Codes:**

Path: Index/Student Information/General/Enrollments

The student's **Start and End Status codes** reflect where the student came from and where the student is going. For State reporting purposes, it is important that these codes be as accurate as possible.

**NOTE:** Occasionally, schools may have an overlap in End Dates and Start Dates, for example, when a student transfers from one school to another. This will create a flag in the system during enrollment counts which will require either one or both schools to make an adjustment to the end or start dates.

See <u>Appendix A</u> for definitions of **Enrollment Start Status codes**. See <u>Appendix B</u> for definitions of **Enrollment End Status codes**.

#### Service Type:

Path: Index/Student Information/General/Enrollments

The **Service Type** is a partial indicator of a student's enrollment status. There are **three choices** for Service Type:

- 1. P: Primary the Primary Service Type indicates that the student is primarily enrolled in this school or district for educational services and is considered full-time.
- 2. S: Partial the Partial Service Type indicates that the student is enrolled primarily at another school or district, but receives some educational services from this school or district. (e.g., a home school student who takes a math class at the local high school or an 8<sup>th</sup> grade student with a primary enrollment at the middle school but taking a math class at the high school). This is considered part-time enrollment.
- 3. N: Special Ed Services the Special Ed Services Service Type indicates that the only services a student receives from the school or district is Special Education services. This Service Type applies to students who receive their educational services from another type of school (e.g., home school or private school), but comes to the school or district for Special Education services. *This Service Type also applies most often to Pre-Kindergarten students who receive Special Education services (including speech).*



Calendar	Schedule (read only)
19-20 Gameid Schoo	Main 🔻
Start Date	End Date
08/21/2019 🛗	06/08/2020 🛗
Local Start Status	
02: Continued enroll	ment same school no internution
1	ment same school, no interruption
1 Of First first state	durational and an
02: Continued enrolln	educational services
03: Re-entry to the sa	me school after withdrawal
04: Transfer from pub	lic school in district or state
05. Transfer from pub	nut of state school
07: Transfer from a so	chool from out of the country
08: Transfer from a pr	rivate school within the state
09: Transfer from hon	ne school within the state
10: Transfer from a M 20: Transfer from Mor	I state-tunded school stana Vouth Challenge
40: Military Connected	d: Transfer from public school in district or sta
60: Military Connected	d: Transfer from an out of state school
20 Military Connector	d: Transfer from a school out of the country
ou, minitary connecter	

Households Relation	onships	Enrollments	District	Employment
🖶 Print Enrollment Histo	New	/ Enrollment Histo	ry	
nformation				
Schedule (read only)	*Grade	Class Ran	k Exclude	External LMS
Main 🔻	06 🔻			
End Date	End Actio	on *Service T	ype	
		P: Primar;	r	•
	Local En	d Status		
chool, no interruption ×	<ul> <li>Select a</li> </ul>	Value S: Partial	у	
chool, no interruption	State End	I Status N: Specia	I Ed Services	;
· ·	Dropout			

**NOTE:** A student may have a Primary enrollment at one school and a Secondary or Special Ed enrollment in another. However, a student can **never** have two primary enrollments with overlapping dates.

In the example to the right a student has a **Primary enrollment** in the eighth grade at the middle school and is also taking an advanced class at the high school. The enrollment at the high school has a **Service Type of S: Partial** and is listed as a ninth-grade enrollment (because this high school does not include the eighth-grade level).

Another example could be that a student is enrolled in a home school and is taking a speech class at the local high school. Because the student is receiving <u>only</u> Special Ed services from the public school his **Service Type is N**:

Summary	P	rofile	Enrollments	Schedule	Attenda	ance	Flags	Grade
New	🖶 Pr	int Enro	llment History	New Enrollmen	t History			
Enroll	ment	Edito	r					
Grad	Туре	alenda	r		Start Date	÷ ÷	End Date	÷
01 Start Status End Satus:	S : 02 Conti 100 End	19-20 nued enro o year, re	Garfield School Iment same school, n turning to same schoo	o interruption of next year	08/21/20	019	06/08/2020	
KF Start Status End Status:	P 01 First 100 End	18-19 tin e receiv of year, re	Garfield School ing educational servic turning to same schoo	es bi next year	08/23/20	018	05/31/2019	
PK	Р	Central	Montana Head St	art Inc 17-18	10/23/20	17		

Special Ed. A note should be added to the student's Start Comments explaining the situation.

#### Identities, Legal Names/Name Changes:

Path: Index/Census/People/Identities

Infinite Campus is designed so that each student has **only one State Student ID** that stays with a student from the first enrollment into public school through graduation from high school. To prevent duplication, it is highly recommended that legal names are used in Infinite Campus. <u>The system allows multiple identities to be</u> <u>attached to a single State Student ID</u>, to accommodate necessary legal name changes.

**Scenario A:** Student has a legal name change, or district realizes student was not enrolled with legal name. **Fix:** Create a new identity record for the student with new name. This allows there to be a history of the name change in the system and searching using either the old or new name will bring up the same student.

- 1. Click the Search Tab.
- 2. Select All People from the search criteria box.
- 3. Enter the student's last name, then click Go.
- 4. Click the Identities Tab.
- 5. Click New.
- 6. Enter the student's new legal name information under the Identity Information section. (NOTE: If the student has a preferred name or gender which is different than their legal name or gender, you may enter it under the Identity Information section and then enter the legal name or gender under the Protected Identity Information section. This is only necessary if their preferred name and gender do not match their legal name or gender.)
- 7. Click Save.
- 8. Refresh your search results by clicking **Go** under the **Search tab** again for the name to change under Search Results or at the top of the screen.

**NOTE:** The information recorded under the '**Identity Information**' section of the 'Identities tab', is what is recorded at the state level of the AIM system for state reporting and is the name that will show up on local reports and teacher rosters etc. If the student has a

D4	emographics	Identitie	s House	aholds R	elationships	Enrollments
	Save D	elete New			olalionompo	Linointoito
	Identities	Editor				
lo	lentity	🗘 Cun	rent Effectiv	ve Date 🕴 Birt	h Date 🕴 🕻	District
)emographic Save	s Identi New	ties Househ	nolds Rela	itionships E	Enrollments	District Employment
		_				
Identity	Informatio	n				
Last Name	*First Na	me	Middle Name	Suffix		
				•		
'Gender	*Birth Da	te (Age: 7)	Soc Sec Numb	er		0.12.22
		ity Informatio			No Ima	age Available
- Prote	cted Identi	uv mornanc				
	cted Ident	st warne	Legal Middle N	lame Legal Suffi	¢.	
			Legal Middle N	lame Legal Suffi	K.	
E Protect Legar Last Wa Legal Gende			Cegal Middle M	lame Legal Suffi	ĸ	
Egal Gende	r y (Edit)		Cegal Middle N	lame Legal Suffi	K.	
Egal Gende Race/Ethnicit Federal Design	y (Edit)	6:White	cegal Middle N	lame Legal Suffi	K	
e Protectory and the second se	r y (Edit) gnation:	6:White White	Cegal Middle M	lame Legal Suffi	K	
Egal Gende Egal Gende Race/Ethnicit Federal Desig Race(s): Hispanic/Lati Race/Ethnicit	y Determination:	6:White White N:No 01:Parent Identified	Cogal Middle M	lame Legal Suffi	K.	

preferred name or gender which is different than their legally documented name or gender, enter it under the **Identity Information** section and then enter the legal name or gender under the **Protected Identity Information** section. <u>This is</u> <u>only necessary if their preferred name or gender do not match their legally documented name or gender</u>.

**Scenario B:** Student has a preferred name or gender that is different from their name or gender on a legal document. I.e., student's birth certificate says female, but the student identifies as male.

**Fix:** Create a new identity record for the student with the preferred name or gender. This allows there to be a history of the name change in the system and searching using either the old or new name will bring up the same student.

- 1. Click the Search Tab.
- 2. Select All People from the search criteria box.
- 3. Enter the student's last name, then click Go.
- **4.** Click the **Identities** Tab.
- 5. Click New.
- 6. Enter the student's preferred name information under the **Identity Information** section and then enter the legal name or gender under the **Protected Identity Information** section. This is only necessary if their preferred name and gender do not match their legal name or gender.
- 7. Click Save.
- 8. Refresh your search results by clicking **Go** under the **Search tab** again for the name to change under Search Results or at the top of the screen.

**NOTE:** The information recorded under the '**Identity Information**' section of the 'Identities tab', is what is recorded at the state level of the AIM system for state reporting, and is the name that will show up on local reports and teacher rosters etc. If the student has a preferred name or gender which is different than their legally documented name or gender, enter it under the **Identity Information** section and then enter the legal name or gender under the **Protected Identity Information** section. This is only necessary if their preferred name or gender do not match their legally documented name or gender.

## **Records Transfer**

The **Records Transfer** tool in Infinite Campus is used mainly to facilitate the transfer of **Special Education records**. The Records Transfer tool can also be used to reconcile enrollment overlaps and provide student transfer information such as LEP data.

When a student that is new to the district is enrolled using the Student Locator, the Records Transfer Wizard opens automatically to generate a request immediately. *If a student is enrolled using the direct entry method,* the administrator must manually generate a Records Transfer request. The next sections explain how to enter a manual Records Transfer request and view the status of all requests.

#### View a Records Transfer Request:

The **Process Inbox** allows a user to view the status of each Records Transfer request made through Infinite Campus.

The **Process Inbox** is located on the user's Main Work page. To access the Process Inbox:

- 1. Click on the user's name on the Index tab.
- 2. Use the pull-down Display menu to select Records Transfer.
- 3. Click Find Messages.
- 4. The list shows the status of all records transfer requests. Click a message to open the record and view details. Details look like this:

v Display	All Processes Assessment Push Down Combine Person Merge Filter Designer Records Transfer User Security Vertical Interoperability	Find Messages	
ame		Posted Da	te
ransfer Error: Huxtable, Theodo	re 100966093	08/07/2014	
ransfer Released: Knievel, Evel	419339261	06/19/2014	1
ransfer Released: Zorro, Jim 39	9621145	05/19/2014	ł

This is a R	ase ecords Release containing the st.	ident Informati	on, the requesting distric	t/user and the r	eleasing district/u
Records Tran	sfer Zorro, Jim #				
Student:			Enrollment Type: Prin	nary	
Last Name	Zorro	First Name	Jim	Middle Name	
Gender	M	Birthdate	01/01/2000	SSN	
Grade	06	School	12-13 Cascade School	Start Date	01/24/2013
Requesting D	Nstrict & User				
District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	06/18/2014	Work Phone		Emall	
Commente					
Commenta					
None.	trict & User				
Releasing Dis	trict & User 0556 Philipsburg K-12 Schools	Name	System Administrator	Username	support
Releasing Dis District Release Date	trict & User 0556 Philipsburg K-12 Schools 06/19/2014	Name Work Phone	System Administrator	Username Email	support
Releasing Dis District Release Date Comments	trict & User 0556 Philipsburg K-12 Schools 06/19/2014	Name Work Phone	System Administrator	Username Email	support

## **Processing Records Transfer Requests**

#### A. Transferring into a District: Manually Request a Records Transfer

Path: Search/Student/(enter student name and click Go)/Records Transfer

**NOTE:** When a student who has never been enrolled in the district is entered using the Student Locator, this step <u>is not</u> necessary as a records request will be sent automatically. If the student was previously enrolled in the district at any time, the screen will not automatically produce a records request, so it must be manually entered.

- 1. Click the Search tab.
- 2. Select **Student** from the drop-down menu.
- **3.** Enter the student's last and first name. Click **Go**.
- The Records Transfer tab should appear at the top with various other tabs. It contains information about all pending and completed transfer requests.
- 5. To *manually request records* from a student's former district, click New State Transfer Request.
- 6. Click Submit Request to initiate a transfer request. The status of a request can be verified on the Process Inbox or in the Records Transfer tab of the student's record. Infinite Campus processes the request and gathers records from the previous school district. Once the record has been processed by the former district, a "Transfer Released" message will appear in the Process Inbox or on the student's Records Transfer tab. If the request is still pending, the status will read: Waiting for former district to release records.
- 7. Click on the Transfer Released link. A list of available Transfer Documents and Data Imports will be listed below the transfer information. \*Transfer Documents are PDF records that can be printed and added to a student's paper file. \*Data Imports are wizards that import data directly into the district's Infinite Campus database.

Summer Schoo	ol Prom	otional Status	Rep	port Comments	s AUP	LM Atter	idance Person D	)ocuments	Field
Cease and De	sist Pare	ent Contact	504 P	lan Thr	eat Assessment	Form	s Administrative	Correspondence	
Lockers	Graduation	Athletics	Ad	Hoc Letters	Waiver	Misc	Records Transfer	Inclement \	Weath
New State T	ransfer Reque	est 🔶	J						
Transfer	s								
Request Date	Name		Status	Requesting Dis	strict	Releasing D	listrict		
	Lockers	Graduation	Athletic	s Ad Hoc	Letters Wai	ver Mise	Records Transfer		
	EUCINCIS	Cidedation	, incuc	5 //01100	Editoro Mun	101			
	New State	Transfer Reques	а 						
	Transfe	rs							
	Request Date	Name		Status Requ	uesting District	Relea	sing District		
rd.									
								- 11	
	Records	s Transfer						- 10	
	Use this tool to and they will b the district to c	e given the opportu confirm this student	e of a transfe nity to releas was enrolled	er student's record: se their records. Or i there and to let th	s. The following inform nly an exact student n rem know to expect a	nation will be se natch can yield a release request	nt to the student's former distri i release, so it is a good idea t	o call	
h	Student:	onin and ordered		Fare	Ilmant Tunas Driman	release request			
	Last Name Gender	Smith M		First Name Birthdate					
I	Grade	12		School					
r	Requesting	District & User							
	District Request Date	0565 Havre Distri e 03/06/2020	ct 16 and A I	Name Supp Work Phone	ort OPI Username Email	OPIsupport			
	Comments								
:									
de									
, J.	$\langle \rangle$		Subr	nit Request	-				
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	1	$\mathbf{i}$							
		Proces		Name					
		Records Tr	ansfer	Transfer Rele	ased: Allen, Kylar 9	71274844			
=		Bata Certifi	cation	The State of I	MT published Data (	Certification Ty	pes		
		🚏 Data Certifi	cation	The State of I	MT published Data (	Certification Ty	pes		
ards									

- To open a Transfer Document or activate a wizard, click on the blue links listed. <u>Items</u> <u>that are not available for import or download</u> <u>will be listed in strikethrough text.</u>
- 9. To import a student's enrollment history, click the Data Import Wizard called the 'Enrollment History' import wizard. The wizard will display the student's enrollment history in the releasing district. Click Save to import the data. The enrollment history record will now display in the new district's database.

his is a Record	Is Release containing	the student inform	ation, the requesting district/user and the releasing district/user.
Student:			Enrollment Type: Primary
Last Name	Smith	First Name	
Gender	F	Birthdate	
Grade	12	School	
Requesting D	istrict & User		
District	0246 Joliet Public Scl	hools Name	Brice Tu
Request Date	08/22/2017	Work Phone	
Comments			
None.			
Releasing Dis	trict & User		
District	0565 Havre Public So	chools Name	
Release Date	08/23/2017	Work Phone	
Comments			
None.			
	Status: R	ecords released t	o requesting district. Process Complete.
Transfer Doc	uments		
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### B. Transferring Out of a District

- When a student transfers out of the district, a **transfer message** will be generated by the new district when they enroll the student. (If the new district used the **Student Locator**, the message was generated automatically; If they used the direct entry method, the district must have entered a **transfer request** manually.)
- The message **"Request for you to release**:" will appear in the **Process Inbox** on the Main Work page when you sign in. (Or search for a specific student and click on the student's **Records Transfer**). Click on the blue underlined link to open the request.
- There are three options on the Student Records Transfer.
  - 1. Release records an acknowledgement that this student has left the district and enrolled into the receiving district. The records in the database will transfer to the new school.
  - Reject Request this should only be used if the student has not actually left the district or if there is a legal reason to withhold the records. In the case of common names, the new district may have accidently.

district may have accidently enrolled the wrong student. *Please call the receiving district or the OPI AIM Staff to resolve the overlap.* 

 Ignore Request – this should never be used. If there is not time to process the request, click on another module or tool in the

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1	÷	Records Transfer	Request for you to release: Mouse, Minnie 567881540	08/05/2011
•	믛	Records Transfer	Request for you to release: Church, Eric 662880660	08/01/2011

application and come back to it later. The request may contain important information that the receiving district needs for the student.

#### End Dates & Overlaps:

The **Records Transfer tool** can aid in reconciling enrollment overlaps. When a student transfers to a new district, the transfer request shows the student's **Start Date** in the new district. If there is an overlap in enrollment, the **Records Transfer request will appear with a warning**.

#### To fix an Overlap:

- 1. Click Edit to return to the Enrollments tab, or go directly to the Enrollments tab and correct the error.
- Once the enrollment overlap has been fixed, click save and return to the Process Inbox or Records Transfer tab and complete the records transfer.

your distriction of the second	the student has been enrolle npus verifies that the requesting u may accept or reject this requ	d in the new district is w lest, but you	district, so please help to hom they say they are, a are encouraged to call th	ond that the us requesting o	er data of en offending in our internet receipe beining of the offending rect data of enrollment overlaps. er making the request has been authenticated and authorized to make the istrict to verify the user's identity.
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Request Date	08/01/2011	Work Phone		Email	
Comments None.					
Releasing Di	istrict & User				
District	0556 Philipsburg K-12 Schools	Name	System Administrator	Username	admin1
Release Date	08/17/2011	Work Phone		Email	
Comments				<u>^</u>	

Important: The End Date for a student should *always be the last date the student was in attendance at a school*, <u>not the date the records request is received</u>. If a student leaves without notice a school may carry the student according to district policy. Once the student has been located (either receives a Records Transfer request in AIM, a records request from the receiving district, notice from OPI, the parent or another reliable source), enter the End Date as of the last day of actual attendance (if the district has already ended the student's enrollment according to district policy, the End Date may need to be changed to reflect the student's last day of actual attendance).

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## Adding New Student Enrollments (Montana Edition Users)

Montana Edition users of Infinite Campus utilize a third-party student information system to record their student data. This data must be imported into AIM/Infinite Campus to be reported to the state. The <u>AIM File</u> <u>Imports Guide</u> provides instruction on how this is done. It is important to note that a Demographics Upload must first be completed before completing a Student Enrollment Upload. This will likely be used for larger ME districts. Smaller ME districts can also use the Direct Entry Method detailed above.

## **Data Verification**

Using the appropriate data verification tools ensures that the data entered is accurate. Inaccurate data can result in missed financial payments, missing assessment labels and/or incorrect AYP calculations. AIM/Infinite Campus data is used for public reporting of school information and in making policy decisions at the state and federal levels. The data is also posted on the OPI GEMS website.

## The Following are a few useful tools for running Student Information Reports

#### **Enrollment Status:**

Path: Index/Student Information/Reports/Enrollment Status

The **Student Enrollment Status** report is a student level report that can filter by **Year, Grade, Start/End Date and/or Start/End Status.** Select the criteria and click **Generate Report.** 

#### **Enrollment Summary:**

Path: Index/Student Information/Reports/Enrollment Summary

The **Enrollment Summary** report is an aggregate report that shows the number of students by **grade, gender and ethnicity** as of a specified date. The reporting options on this report are more limited.

#### **Enrollment Summary Details:**

Path: Index/Student Information/Reports/Enrollment Summary Details

The **Enrollment Summary Details** report is a detailed version of the Enrollment Summary Report that offers much more filtering options from which to choose.

#### Ad Hoc Reports:

Path: Index/Ad Hoc Reporting/Filter Designer

Ad Hoc reports are custom reports that are built by the user or the State and are used to verify/view/extract data. A variety of filter options can be added to narrow down the search criteria, and a variety of formats are available for printing or sorting.

Refer to the following guides for further instruction on Ad Hoc Reporting: <u>AD Hoc Reporting</u>

**NOTE:** To view a list of useful reports that were prepared

and saved for district use by the OPI, expand the +**State Published** list in the Saved Filters box. <u>State Published</u> Ad Hoc Reports

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#### **MT Extracts:**

Path: Index/MT State Reporting/MT Extracts

Use **MT Extracts** to verify a specific type of data that has been entered in Infinite Campus.

- 1. Select the **Index** tab.
- 2. Select MT State Reporting.
- 3. Select MT Extracts.
- 4. Choose the Extract Type, the Format and the Year(s)/School(s).
- 5. Click **Generate Extract**. The extract will open in a new window in the format selected.



# Additional AIM User Guides to Review for New AIM Primary or AIM Backup Staff

- Creating and Modifying Users
- Data Security
- Setup for Dropout, Graduate, and Cohort Data Validation and Certification
- Behavior- Setting Up Access to Validate and Certify Behavior Data

For further assistance, contact the AIM Help Desk at 1-877-424-6681 or <u>Submit an AIM Help Desk Ticket</u>