



AIM Data Collections User Guide 2024-2025

Instructions for reporting student and staff data in Infinite Campus MT Edition or State Edition applications.

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*New sections will be added – check the version numbers for updates.

References:

Please refer to the following resources for additional information about requirements contained in this document:

AIM Webpage:

[AIM Collection Calendar](#)

[AIM Data Dictionary](#)

[Appendices](#)

[Montana Course Codes](#)

[Montana Employment Assignment Codes](#)

[Montana Code Annotated](#)

[Administrative Rules of Montana](#)

[Department of Labor and Industry - Records Search](#)

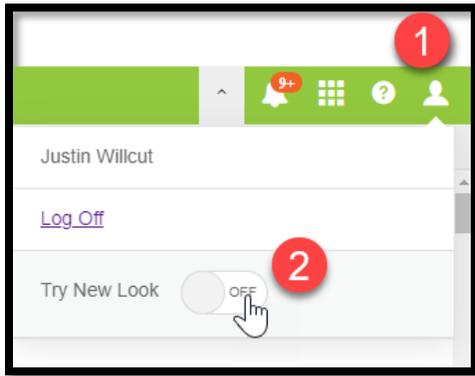
[Montana Board of Public Education](#)

General Navigation

On July 1, 2025, the “Old Look” for Infinite Campus (IC) no longer be available. All IC users are encouraged to begin using the “New Look” as often as possible to assist with ensuring it functions as needed and to ease the transition when the “Old Look” goes away. All AIM documentation will be presented in the “New Look” from July 1, 2024 forward.

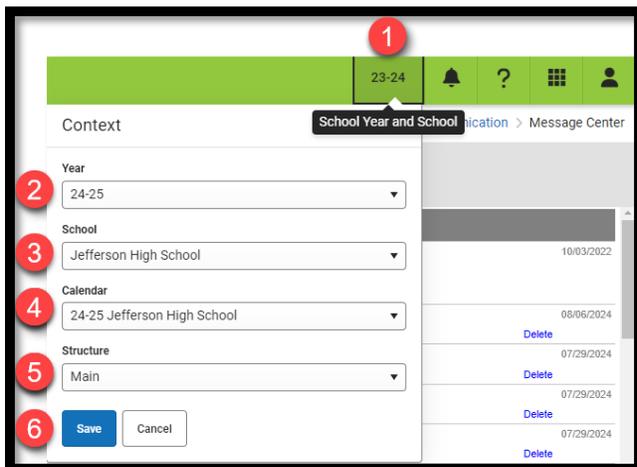
Turning On the New Look

1. Click on the profile picture in the upper right corner.
2. Click on the slider to turn on the New Look.



Selecting the Calendar

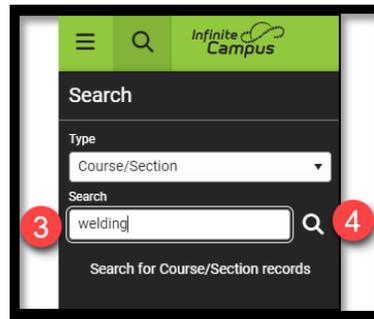
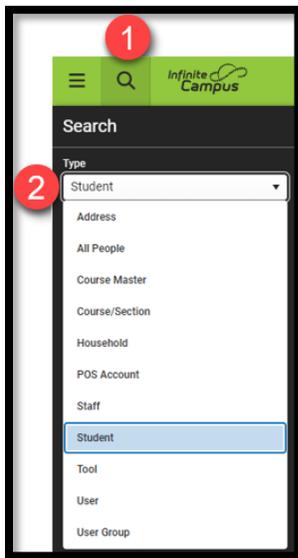
1. Click on the Calendar in the upper right corner of Infinite Campus.
2. Select the Year.
3. Select the School.
4. Select the Calendar.
5. Select the Structure.
6. Click Save (added requirement for New Look).



Search

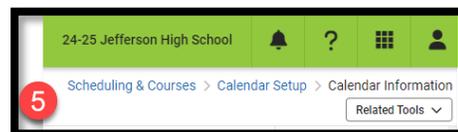
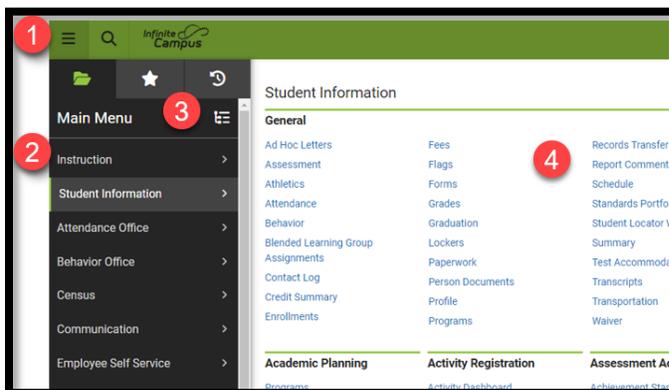
1. Click on the magnifying glass in the upper left corner.
2. Select the Type to search for.
3. Enter the Search criteria.
4. Click the small magnifying glass to search.

For more information and search tips, please visit the [Campus Community Knowledge Base article on Searching in Infinite Campus](#).



Navigation

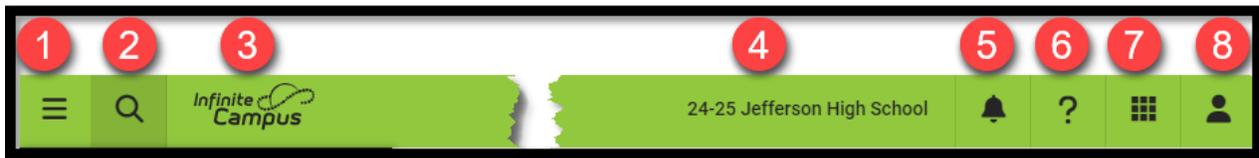
1. Click the 3 horizontal lines in the upper left corner.
2. Select the main heading to browse.
3. The 3 bars beside Main Menu will change the view between Flyouts and Lists.
4. Select the subheadings from the right.
5. The path will show in the upper right corner and can also be used for navigation.



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(406) 444-3800
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Tool Bar

1. Menu – Structured navigation for Infinite Campus.
2. Search – Search options for Infinite Campus.
3. Message Center (Infinite Campus logo) - The Message Center contains notifications from the State and District as well as records transfer notifications and data validation/certification notifications.
4. Calendar – Shows the currently selected calendar.
5. Notifications – Links to Message Center and System Notifications.
6. Help – Displays Infinite Campus Help information for what is currently on the screen.
7. Campus Products (App Switcher) – Links to Campus Learning Home and Community.
8. User Menu – Allows access to Password and Security Settings, changing view, and logging off.



Data Validation and Certification

Data Validation

A key component to any data collection is ensuring that the data is accurate. It's also important to understand why the data is collected and what the implications are when the data is either incomplete, inaccurate, or not submitted at all. The State Legislature has directed the OPI to not collect any data from school districts that is not directly related to a State or Federal reporting requirement. As you work through this guide each header will identify as many reasons as possible that data is collected.

The state is working to create as many reports as possible to assist with this process.

Data Validation Groups

PATH: *Reporting>Data Validation>Validation Groups*

The state has created Validation Groups for the district to use for data verification. Validation Groups are set up by collection and published to districts. These Validation Groups are collections of Ad Hoc or SQL reports that can be run simultaneously. Some of these Validation Groups are precursors to Data Certification (such as Behavior and Graduate, Dropout, Cohort) and some are set up to allow data validation throughout the year.

Before Validation Groups may be viewed as Data Validation Reports they must be assigned to a user group. The OPI has created a Data Validation User Group, or the district may choose to assign the report to a specific user group (e.g., Program Participation Validation Group assigned to State Reporting).

Validation Groups may be assigned to multiple User Groups.

- Select a Data Validation Group (shortcut: type all or part of the validation group name in the empty box at the top of the list).
- From the User Group Dropdown, select Data Validation (or another User Group).
- Click Save & Stay.

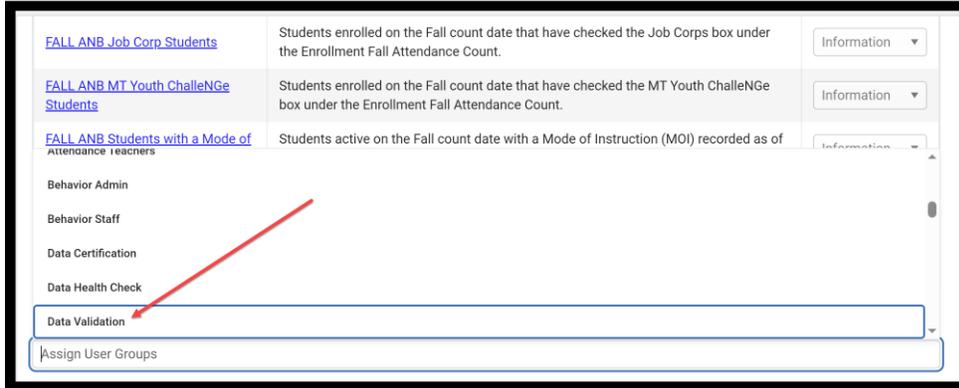
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Note: Reports may be run from Validation Groups, however, those results are limited to 100 records and only results from the local database. Use Data Validation Reports to ensure full results are displayed.

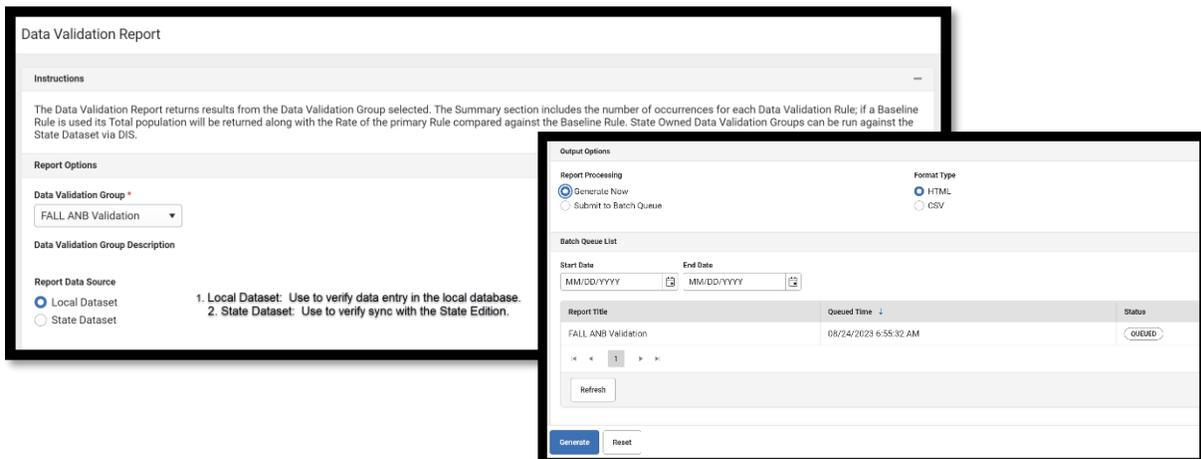


Data Validation Reports

PATH: *Reporting>Data Validation>Data Validation Report*

Once Validation Groups are assigned to a user account, they can be run as Validation Reports on either the local database or at the state. Running Validation Reports at the state level allows the district to verify that data has been properly synced before certifying a collection.

- Select a Data Validation Group.
- Select Report Data Source – Local or State Dataset.
- Select Output Options.
 - Report Processing: Generate Now or Submit to Batch Queue (the only option for State Dataset).
 - Format Type: HTML or CSV (CSV results will be produced on one Excel tab with no summary of results).
- Click Generate. Check the Batch Queue List or Process Inbox for notification of completion.



Data Certification

The OPI sets up Data Certification events to allow districts to create their own certified snapshots for data collections. Districts should follow the steps for Data Validation prior to certifying any data collection.

Data Certification Setup

PATH: *Reporting>Data Certification>Type Membership Setup*

Once a Certification Event is published, districts assign one or more staff members as Primary or Secondary certifiers. Primary certifiers are responsible for actual certification of the event. Secondary certifiers only have the rights to review the certification and associated validation reports. Districts may have different certifiers for each type of event.

- Select a Type (Certification Event).
- Click New Member.
- Enter a Name or click the magnifying glass to view all eligible certifiers (certifiers must be active staff members).
- Select a Type (Primary or Secondary).
- Click Save.

To modify a member:

- Select a Type (Certification Event).
- Click the member's name.
- Change Type or check/un-check Active.
- Click Save.

Data Certification

PATH: *Reporting>Data Certification>Type Membership Setup*

It is important to carefully read the Event Description for an event prior to certification. The Event Description outlines the requirements for each certification, the importance of the certification (what the data will be used for), and instructions for validating the event prior to certification. It is also important to run ALL Validation Reports at both the district and state prior to certification, to ensure that all data is fully synced prior to certification.

Follow these steps to complete a data certification event:

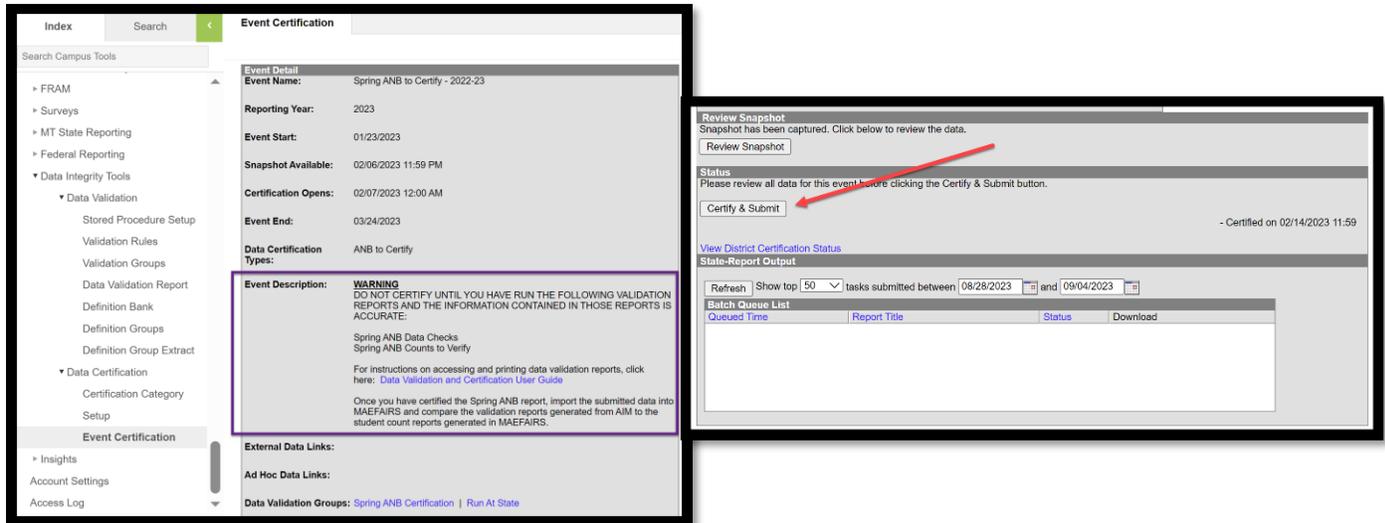
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- Select a certification event (must be assigned as a member (primary or secondary)).
- Read the Event Detail carefully for Certification Date and Event Description.
- Click Certify & Submit to finalize certification.



Note: Districts may Recertify & Submit at any time during the collection window if an error in data reporting is discovered. If an error is discovered after the collection window closes, contact the AIM Unit for assistance.

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.

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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.

The screenshot shows the 'Calendar Wizard' window with the title 'Calendar Wizard'. Below the title is a section titled 'Copy, Rollforward, or Create new Calendar-linked Data' with a note: '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.' Below this is the 'Select Wizard Mode' section with three radio buttons: 'Create new blank Calendars', 'Create new Calendars by rolling forward selected data (last-years data will be added to a newly created calendar)', and 'Copy data into Existing Calendars'. The second option is selected. At the bottom are '< Back' and 'Next >' buttons.

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.

The screenshot shows the 'Calendar Wizard' window with the title 'Calendar Wizard'. Below the title is a section titled 'Copy, Rollforward, or Create new Calendar-linked Data' with a note: '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.' Below this is the 'Edit Calendar Attributes for new Calendars' section with fields for 'Year' (23-24), 'Name Template' ([year][schoolname]), 'Number' (1), '*Start Date' (07/01/2023), and '*End Date' (06/30/2024). To the right is the 'Select Calendars to Roll' section with a list of school names and years, including '22-23 Cornelius Hedges School', '22-23 Edgerton School', '22-23 Elrod School', '22-23 Flathead High School', '22-23 Glacier High School', '22-23 Jeannette Rankin School', '22-23 Katspell Middle School', '22-23 Lillian Peterson School', '22-23 Russell School', '21-22 Cornelius Hedges School', '21-22 Edgerton School', '21-22 Elrod School', '21-22 Flathead High School', '21-22 Glacier High School', '21-22 Jeannette Rankin Element', and '21-22 Katspell Middle School'. A purple callout bubble points to the list with the text 'Select the prior year calendar to copy into the new year.' A green callout bubble points to the 'Start Date' field with the text 'Enter the new year's information. Start and End Date are Fiscal Year.' At the bottom are '< Back' and 'Next >' buttons.

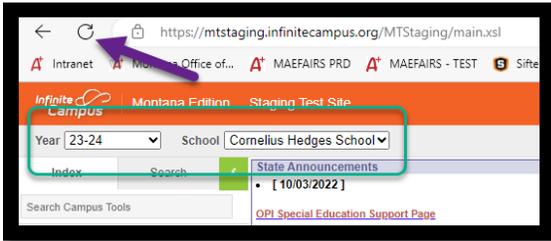
3. To ensure that data is properly copied from one year to the next, check all the boxes under Pick the Data to Copy. Click Run Wizard.

The screenshot shows the 'Calendar Wizard' window with the title 'Calendar Wizard'. Below the title is a section titled 'Copy, Rollforward, or Create new Calendar-linked Data' with a note: '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.' Below this is the 'Pick the Data to Copy' section with a list of checkboxes: 'Calendar Attributes', 'Schedule Structures', 'Term Schedules', 'Period Schedules', 'Days', 'Day Events', 'Section Templates', 'Postal Calendar and Term Settings', 'Grade Levels', 'Courses', 'Sections w/ Schedule Placement', 'Teacher Assignments', 'Section Staff Assignments', 'Room Assignments', 'Grading Tasks, Credits, Standards', 'Grade Calc Options', 'Categories', 'Course Rules', 'Schedule Building Constraints', 'Course Fees', 'Assessments', 'Attendance Excuse Codes', 'Scheduling Terms', 'Section Team Assignments', 'Calendar Overrides', and 'GPA Calculators'. A red callout bubble points to the list with the text 'Check all the boxes to ensure a complete data copy.' A red arrow points to the 'Run Wizard' button at the bottom. At the bottom are '< Back' and 'Next >' buttons.

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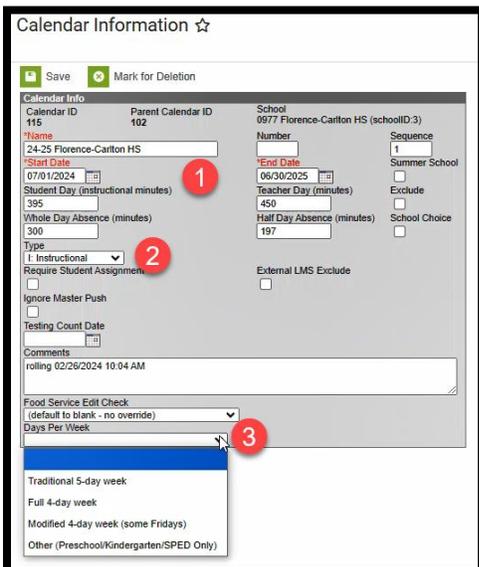
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4. Refresh the screen and navigate to the next year's calendar.



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.



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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.

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]

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:

Terms

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

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	*Sequence	Exception/Special Day	Instructional Minutes	School Day		
Main	1	<input type="checkbox"/>	630	630		

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).

The screenshot shows the '23-24 Whittier School' calendar interface. The 'Days' tab is active, displaying a calendar for August 2023. A red arrow points to the 'Day Reset' button. An inset window titled 'Auto Create Calendar Days' is open, showing the 'Day Reset' configuration form. The form includes fields for 'Start Date' (08/30/2023), 'End Date' (09/08/2024), and 'Duration' (0). There are checkboxes for 'Fill Missing Days Only' and checkboxes for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun). A 'Create Days' button is at the bottom.

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

The screenshot shows the '23-24 Ridge View Elementary' calendar interface. The 'Days' tab is active, displaying a calendar for August 2023. A purple arrow points to the 'Main' dropdown menu in the day detail view, which is open showing options like 'Main', 'M', 'T', 'W', 'R', 'F', 'MWF', 'TRF', and 'Early Release'. The day detail view also includes fields for 'Day #', 'Instruction', 'Attendance', 'Start Time', 'End Time', and 'Duration'.

- 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.

- 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.

Calendar Wizard ☆ Scheduling & Courses > Calendar Setup > Calendar Wizard
Related Tools ^

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 >

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

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 Copy Mode

Overwrite Terms/Days (this mode will update Term dates, Day Attributes (School Day, Instruction, Attendance), Day Events and the Period Schedules assigned to individual days so long as the Period Schedule names and Schedule Structure names are the same in the source and destination calendar)

Copy/Append other data elements

Copy School Month data

< Back Next >

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)

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.

Source Calendar
23-24 Morningside School

Destination Calendars
23-24 C M Russell High School
23-24 Great Falls High School
23-24 Chief Joseph School TK
23-24 East Middle School
23-24 Giant Springs Elem TK
23-24 Giant Springs Elementary
23-24 Great Falls High School
23-24 Lewis & Clark School
23-24 Lewis & Clark School TK
23-24 Lincoln School
23-24 Lincoln School TK
23-24 Longfellow School
23-24 Longfellow School TK
23-24 Loy School
23-24 Loy School TK
23-24 Meadow Lark School
CTRL-click and SHIFT-click for multiple

Source: Complete Calendar to be copied to other Calendars

Destination: Select the Calendar(s) to copy information into.

< Back Next >

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

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. Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow down other system functions.

Pick the Data to Copy

- Calendar Attributes
- Schedule Structures
- Term Schedules
- Period Schedules
- Days
- Day Events
- Section Templates
- Portal Calendar and Term Settings
- Grade Levels
- Courses
 - Sections w/ Schedule Placement
 - Teacher Assignments
 - Section Staff Assignments
 - Room Assignments
 - Grading Tasks, Credits, Standards ⓘ
 - Grade Calc Options

- Assessments
- Attendance Excuse Codes
- Scheduling Teams
 - Section Team Assignments
- Calendar Overrides
- GPA Calculations

Run Wizard

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).

The student's Start Date should be the first day of instruction and the End Date should be the last day of instruction, once a student is confirmed as enrolled in another school. If a student's whereabouts are unknown or unconfirmed, follow district policy.

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 3rd 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.

AIM Unit Contact Information

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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.

The screenshot shows the Enrollment Roll Forward Wizard interface. It is divided into two main columns. The left column contains several sections: 'Select Source Calendars' with a list of school years and grades (e.g., '23-24 Winifred 6-8'); 'Select Source Grades' with checkboxes for grades 01 through 12 and other codes (EK, KF, KH, P1, PK, UE, UH, UM); 'Source Ad Hoc Student Filter' with a dropdown menu; 'Source Service Type' with checkboxes for Primary, Partial, and Special Ed Services; and 'Select Source Structure' with a dropdown menu set to '6-8'. The right column contains: 'Select Local Start Status' with a dropdown menu set to '02: Continued enrollment same school, no interruption (Val)'; '(OPTIONAL) Select Destination Calendar' with a dropdown menu set to '24-25 Winifred 6-8'; 'Select Destination Grade' with a dropdown menu; 'Select Destination Structure' with a dropdown menu set to '6-8'; 'Start Date Override' with a text input field and a help icon; 'Allow Duplicate Primary Enrollments' with an unchecked checkbox; 'Totals Only' with a checked checkbox; 'Show Warnings' with an unchecked checkbox; 'Include students whose enrollments end on the last day of the last term' with a checked checkbox; and two buttons at the bottom: 'RUN TEST' and 'RUN'.

Student Locator and Records Transfer

PATH: *Student Information>Student Locator Wizard*

It is recommended that all new students be added using the *Student Locator* tool. The Records Transfer process is required for the transfer of Special Education records and is recommended for all students as a means of notifying the previous district that the student has enrolled elsewhere.

- 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).
- Click Save

The image shows two overlapping screenshots of a web application. The top-left screenshot is titled "Student Locator Wizard" and shows a "Save" button and a "Person Info" section with fields for Student Number (Automatically Generated) and State ID (Pending). Below this is an "Identity Info" section with fields for Last Name, First Name, Middle Name, Suffix, Gender, ID Type, and Birth Date. There is also a "Race/Ethnicity" section with checkboxes for American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White. The bottom-right screenshot is titled "Enrollment Detail" and shows an "Enrollment ID" section with fields for Calendar (Adams Elem School 2024 A), Schedule (1), Grade, Class Rank Exclude, and External LMS Exclude. It also has fields for Start Date, End Date, End Action, Local End Status, State Start Status, State End Status, Dropout Reason, Start Comments, and End Comments. A note at the bottom right of this screenshot says "Rolled From Enrollment ID: N/A".

PATH: *Student Information>General>Records Transfer*

If the student has not been enrolled in the district previously and is added using the Student Locator, the records transfer will be started automatically when the student is saved.

If the student has been enrolled in the district previously, the records transfer must be initiated manually.

- Search for the student in the district.
- Open the Records Transfer window through Student Information>General.
- Click New State Transfer Request.
- Enter in any Comments necessary.
- Click Submit Request.

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Modifying Student Enrollments

PATH: *Student Information>Student Locator Wizard*

Students who have been enrolled for 2024-25 and are no longer going to be attending that school have different requirements based on their grade.

- K-6 Students
 - If there is an enrollment for the 2024-2025 school year and the student will not be attending, the 2024-2025 enrollment should be deleted.
 - Modify the end status of the 2023-2024 enrollment to show where the student is currently enrolled (e.g. 180 – Transfer to a school out of state).
- 7-12 Students
 - The 2024-2025 enrollment can ONLY be deleted with official written documentation showing the student transferred out, emigrated to another country, transferred to a prison or juvenile facility, or is deceased (see Appendix below for more information).
 - Modify the end status of the 2023-2024 enrollment to show where the student is currently enrolled (e.g. 180 – Transfer to a school out of state).
 - If there is an enrollment for 2024-2025 school year, the student will not be attending, and the status of the student is not documented in writing, change the enrollment to a 1 day enrollment with the start and end date being the same and enter a Local End Status and Dropout Reason, following district guidelines and policies.

File Upload Process

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

Districts that use a 3rd 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.

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

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

Import Data

*Import Type: Student Enrollments

*Work to Perform: Validate and Test File

*File: Choose File EN_0466_08172023.tsv

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.

THIS PROCESS IS NOT COMPLETE UNTIL a Batch Resync is triggered.
New Look: *System Settings > Data Interchange Administration > Resync State Data - Batch*
Old Look: *System Administration > Data Utilities > Resync State Data*

Retrieve New Student State ID File

Refresh State ID File Generate

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.

Refresh Show top 50 tasks submitted between 08/10/2023 and 08/17/2023

Queued Time	Report Title	Status	Download
08/17/2023 06:46:16 AM	MT Data Upload	Completed	Get the report

Records Transfer Process

PATH: *Student Information>General>Records Transfer*

If the student is added using the file upload process, the records transfer must be initiated manually. The Records Transfer process is required for the transfer of Special Education records and is recommended for all students as a means of notifying the previous district that the student has enrolled elsewhere.

- Search for the student in the district.
- Open the Records Transfer window through Student Information>General.
- Click New State Transfer Request.
- Enter in any Comments necessary.
- Click Submit Request.

Student Identities

PATH: *Census > People > Identities*

A student's identity record holds important information about a student's name, birthdate, gender, and race/ethnicity. This information should not be changed once created unless an error is discovered with the initial entry. If a parent (or student, in some instances) make changes to a student's identity information, those changes should be completed by creating a new identity record. If a student has a preferred name, that should be reflected by creating one identity record with the student's legal name and a second with the student's preferred name. However, no identity record should have the same effective date (create the new record with a newer effective date than the original record).

The screenshot shows the 'Speech-Language, Pathologist' identity editor. It features a table of identities and a form for identity information. Annotations include:

- A red arrow pointing to the 'Effective Date' column in the 'Identities Editor' table, with the text: "The second effective date should be later than the first".
- A purple arrow pointing to the 'First Name' field in the 'Identity Information' form, with the text: "Change the preferred name using a second identity record".
- A green arrow pointing to the 'Race/Ethnicity' section in the 'Identity Information' form, with the text: "Race/Ethnicity changes should only be made by creating a new identity record".

Identity	Current	Effective Date	Birth Date	District
Speech-Language, Pathologist	X	08/17/2023		Kalispell Public Schools
Speech, Pathologist		01/08/2009		Kalispell Public Schools

Identity Information

PersonID: 8127

*Last Name: Speech-Language, *First Name: Pathologist, Middle Name: , Suffix:

*Gender: F: Female

Birth Date: , Soc Sec Number:

Protected Identity Information

Race/Ethnicity: Is the individual Hispanic/Latino? (N: No)

Is the individual from one or more of these races? (check all that apply)

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

Race/Ethnicity Determination: 01: Parent Identified

Exiting Students

Students who leave the district should be ended as of the last day of attendance. If a student's whereabouts are unknown, it's permissible to keep the student enrolled in accordance with district policy. Students who remain enrolled should be counted as absent for purposes of Days Present, Days Enrolled and ESSA Days Absent. A student who is absent 11 or more consecutive days as of a Count Date (1st Monday in October or 1st Monday in February) should be marked Exclude ANB.

Enter the student's End Date and Local End Status. Students in grades 7 through 12 who have a Local End Status of 300* should also have a corresponding Dropout Reason entered. Start and End Comments are helpful for tracking students who do not have a continuing enrollment but are not required.

Students in grades 9-12 have a higher standard of scrutiny for purposes of removal from a cohort. Refer to the Montana High School Completer and Dropout Data Collection Handbook for more information.

The screenshot displays the 'General Enrollment Information' form for Enrollment ID 115142. The form includes the following fields and options:

- Calendar:** 22-23 Cornelius Hedges School
- Schedule (read only):** Main
- *Grade:** KF
- Class Rank Exclude:**
- External LMS Exclude:**
- *Start Date:** 08/31/2022
- End Date:** 02/24/2023
- End Action:** [Dropdown]
- *Service Type:** P: Primary
- *Local Start Status:** 01: First time receiving educational services
- Local End Status:** 140: Transfer to public schi in another district in M
- State End Status:** 340: Dropout, unknown
- Dropout Reason:** [Dropdown menu with 19 options: 01: Academic Difficulty, 02: Attendance Difficulty, 03: Economic Reasons, 04: Employment, 05: Expelled, 06: Illness, 07: Job Corps or Similar Program, 08: Language Difficulty, 09: Marriage, 10: Military, 11: Needed at Home, 12: Over Compulsory Age, 13: Pregnancy, 14: Poor Personal Relationships, 15: Reached Maximum Age Set by District Policy, 16: Other Known Reason, 17: Unknown Reason, 18: HISET Pursuing, 19: Suspended, Did Not Return]
- State Start Status:** 01: First time receiving educational services
- Dropout Reason:** [Dropdown menu with 19 options]
- Start Comments:** [Text area]
- End Comments:** [Text area]

Staff Records

Districts must enter all staff members employed by the district and certain contracted employees in Infinite Campus. This includes teachers and some professional staff that are then associated with courses.

The requirements for entering staff are dependent upon the staff member's role in the districts. Refer to the [AIM webpage](#) for specific requirements for the staff member's State assignment code.

Using Staff Locator

PATH: *Census>Staff>Staff Locator Wizard*

Add Staff Using Staff Locator

PATH: *Census>Staff>Staff Locator Wizard*

The Staff Locator must be used to enter any adult in Infinite Campus – including parents, household contacts, and staff.

- Enter the person's Last Name, First Name and Gender.
- Click Search.
- Review the list of results to see if there's a match. The best indicator is a match on State Staff ID (SEID), but birthdate, name, or previous district of employment or enrollment (for former students) may also be used. To view association with another district, hover over the search result.
 - If there's a clear match, click the staff member's name.
 - If there's not a clear match, Create New District Staff. If a match is expected, but not found or uncertain, contact the AIM Unit for assistance.
 - Last Name, First Name, Gender, Staff State ID, and Employment Information Start Date (District Employment Start Date) are required. *Birth Date is recommended, but not required.*
- Click Save.

The screenshot shows the 'Staff Locator' web application. At the top, there is a search instruction: 'Search for a staff already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. To search, you must enter the staff member's Staff State ID, or full legal Last Name, First Name, and Gender. Hover the cursor over the search button.' Below this, there are input fields for 'Last Name', 'First Name', 'Gender' (a dropdown menu), 'Birth Date' (with a calendar icon), 'Middle Name', 'SSN #' (with a mask), and 'Staff State ID'. A 'Search -->' button is located below these fields. To the right of the input fields is a large empty table area with a header row containing the following columns: 'Name', 'Staff State ID', 'Gender', 'Birth Date', and '%'. At the bottom right of the form, there is a 'Create New District Staff -->' button.

Add District Assignment(s)

PATH: *Census>People>Demographics and Census>Staff>District Assignments*

- District Assignments – record of a specific role within the district.
 - Add a District Assignment for each role the staff member has within the school or district.
 - Fields that must be completed with a new District Assignment include:
 - School – Some State Assignment Codes require assignment to a specific school, and some are at the District Level. Districts with more than one school within their LE may see District Level EL, District Level HS, or District Level K-12 in the dropdown list.
 - Start Date
 - FTE – between 0.001 and 1 (Sum of all assignments must not be greater than 1.0 in most instances.) Some state assignment codes do not require FTE be entered.
 - State Assignment Code
 - Teacher – Required for staff to be assigned to courses.
 - Special Ed – Required for staff to be assigned to an IEP and for contractors.
 - Supervisor – Required for staff to be assigned as a supervisor for paraprofessionals and Special Ed staff.
 - MT SPED Level – Required only for Special Ed staff.
 - MT Titles – Used to indicate coordinators, contractors, cooperative staff, and individuals excluded from State reporting (e.g. school board members).
 - Supervisors – Required for paraprofessionals and Special Ed staff (visible after initially saving the record).

The screenshot shows a web form titled "Employment Assignment Information". The form contains several fields and checkboxes:

- *School**: A dropdown menu.
- Department**: A dropdown menu.
- *Start Date**: A date field with a calendar icon.
- End Date**: A date field with a calendar icon.
- Title**: A dropdown menu.
- Type**: A dropdown menu.
- FTE of Assignment**: A text input field.
- State Assignment Code**: A dropdown menu.
- Teacher**:
- Special Ed**:
- Program**:
- Behavior Admin**:
- Health**:
- Behavior Response Approver**:
- Response to Intervention**:
- Advisor**:
- Supervisor**:
- Counselor**:
- Foodservice**:
- Exclude Behavior Referral**:
- Self Service Approver**:
- FRAM Processor**:
- Activity Staff**:
- Activity Preapproval**:
- MT SPED Level**: A dropdown menu.
- MT Titles**: A text input field with "Select Values" as a placeholder.
- External LMS Exclude**:
- Exclude**:

File Upload

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

Districts that use a 3rd party Student Information System (SIS) may use the file upload process to enter staff. The Terms of Employment file outlines the requirements for the upload.

Extract the upload file from the district's SIS or create a text, tab delimited file from the Terms of Employment file upload template. 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.

The screenshot shows a web interface for file uploads. It has two main sections. The first section, 'Import Data', is selected with a radio button. It contains three dropdown menus: '*Import Type' (empty), '*Work to Perform' (set to 'Validate and Test File'), and '*File' (set to 'No file chosen'). Below these are 'Choose File' and 'Submit to Batch' buttons. A paragraph of instructions follows, stating that users should review validate and test results and use 'Refresh' and 'Get the report' buttons. A red warning states: 'THIS PROCESS IS NOT COMPLETE UNTIL a Batch Resync is triggered.' Below this, it provides navigation paths: 'New Look: System Settings > Data Interchange Administration > Resync State Data - Batch' and 'Old Look: System Administration > Data Utilities > Resync State Data'. The second section, 'Retrieve New Student State ID File', is unselected. It has a dropdown menu and 'Refresh State ID File' and 'Generate' buttons. Below this is another instruction paragraph: '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.' At the bottom, there is a 'Refresh' button, a 'Show top 50' dropdown, and a date range filter for tasks submitted between '07/30/2024' and '08/06/2024'. Below this is a table titled 'Batch Queue List' with columns for 'Queued Time', 'Report Title', 'Status', and 'Download'.

- Credentials and Contractors must be entered manually following the steps below.

AIM Unit Contact Information

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Credentials

PATH: *Census>Staff>Credentials*

District staff requiring professional licensure, Special Education staff, and paraprofessionals require additional data entry on the Credentials tab. Follow these steps to enter Credentials:

- Click New Credential.
- Select Credential Type (Highly Qualified for Special Education and paraprofessionals, Licensure/Certification for professional licensure).
 - Highly Qualified – Enter Start Date, Subject Type (only required for SPED), and Certification Status or Paraprofessional Qualification.
 - Only update Highly Qualified if there is a change, then end and create a new record.
 - Licensure/Certification – Enter Start Date (license issue date), End Date (license expiration date), SPED Related Services Credential or Health License, License Number, and License/Certification Type.
 - Click Save.

Note: Professional license data may be found on the [Montana Department of Labor](#) website.

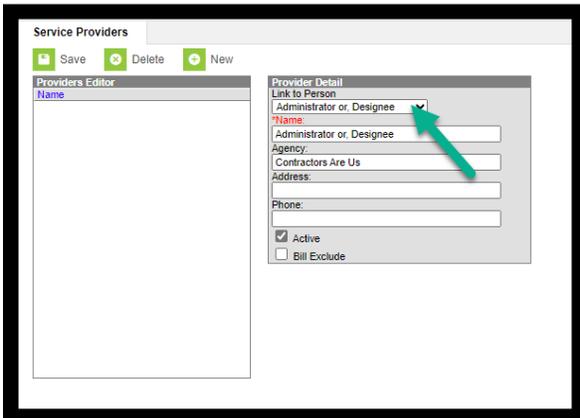
Contractors

PATH: *Student Information>Special Ed Administration>Special Ed Service Provider Setup*

Contractors identified on the District Assignment tab (must have MT Title designation as Contractor and have Special Ed box checked) require additional information entered about their employer. The additional information is entered on the Special Ed Service Provider tab.

- Click New.
- Use Link to Person to select the Contractor.
- Enter Agency (employer).
 - If the person is self-employed, enter the person's first and last name in the Agency field.
- Click Save.

Note: A person will not show up in the dropdown list unless Special Ed is checked on the District Assignments tab.



The screenshot shows a web application interface for 'Service Providers'. At the top, there are buttons for 'Save', 'Delete', and 'New'. Below this is a 'Providers Editor' section with a table containing a 'Name' column. To the right is a 'Provider Detail' form. The form includes a 'Link to Person' dropdown menu, which is highlighted by a red arrow. Below this are fields for 'Administrator or Designee', 'Agency', 'Contractors Are Us', and 'Address'. There is also a 'Phone' field and two checkboxes: 'Active' (checked) and 'Bill Exclude' (unchecked).

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December 2024

Modifying Staff

PATH: *Census>People>Demographics and Census>Staff>District Employment & District Assignments*

Existing staff members should have essential data elements entered. The key identifier for staff is the SEID number – assigned to the individual by the OPI in the Teach Montana (TMT) system. The SEID number is entered into the State Staff ID field. This is the key identifier for staff coming from other districts. Please review all existing staff members and verify that the SEID number is entered and accurate.

- District Employment – record of continuous employment with the district.
 - Must be entered for each staff member.
 - For existing staff it's not necessary to have a historical start date, but staff members employed on or after 7/1/2023 should have an accurate employment start date.
 - When a staff member's employment ends, enter an End Date in the District Employment record and click OK to end all open District Assignments.
- District Assignments – record of a specific role within the district.
 - When a staff member's assignment or role within the district changes, and the staff member is still employed in a different role, enter an End Date for the current assignment and create a new District Assignment.
 - Changes that must be documented with a new District Assignment include:
 - Start Date
 - FTE – between 0.001 and 1 (Sum of all assignments must not be greater than 1.0 in most instances.) Some state assignment codes do not require FTE be entered.
 - State Assignment Code
 - Teacher – Required for staff to be assigned to courses.
 - Special Ed – Required for staff to be assigned to an IEP and for contractors.
 - Supervisor – Required for staff to be assigned as a supervisor for paraprofessionals and Special Ed staff.
 - MT SPED Level – Required only for Special Ed staff.
 - MT Titles – Used to indicate coordinators, contractors, cooperative staff, and individuals excluded from State reporting (e.g. school board members).
 - Supervisors – Required for paraprofessionals and Special Ed staff (visible after initially saving the record).
- Credentials and Contractors – modify using the steps above.

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December 2024

Fall Data Collections

PATH: *Reporting>Data Validation>Validation Groups or Data Validation Report*

Fall data collections include Graduates, Cohort, and Dropouts (grades 7-12), Fall Enrollment, Fall ANB, and Fall Program Participation. The requirements and instructions for each collection are outlined below.

Dropout, Graduate, and Cohort Collection

The Dropout, Graduate, and Cohort Collection finalizes dropouts, graduates, and cohorts for the prior year. A student is counted as a prior year graduate if they finish their graduation requirements prior to the first day of school in the current year. A student who left during 2023-2024 school year has until September 30, 2024 to re-enroll in school, including students who dropped out in the summer of 2023. Students who fail to re-enroll by September 30th are counted as dropouts. Students who completed the prior school year, but fail to re-enroll, are not counted as a dropout until the following year.

Dropout, Graduate, and Cohort Data must be certified.

Dropout Validation

Run the Data Validation groups/reports **7-8 Dropout Data Validations** and **9-12 Dropout Data Validations** to identify potential errors to correct.

7-8 Dropout Data Validations - This report shows students in grade levels 7-8, with enrollment records that have a dropout end status but have since re-enrolled into another district in MT. These students may need to have their end status changed to a non-dropout reason.

The validation group includes:

- 7-8 DROPOUT Re-Enrolled - List students in grades 7-8 with a dropout end status and have a newer subsequent enrollment in the previous or current year.
- 7-8 DROPOUT Count - Count of students dropped out in grade levels 7-8
- 7-8 DROPOUT List - List of students in grade levels 7-8 that have dropped out.

9-12 Dropout Data Validations - This report provides a list of students in grade levels 9-12 that have a dropout enrollment end status but have since re-enrolled in another school. These students must have their enrollment end status changed to be a non-dropout.

- 9-12 DROPOUT Re-Enrolled - List students in grades 9-12 with a dropout end status and have a newer subsequent enrollment in the previous or current year.
- 9-12 DROPOUT Count - Count of students dropped out in grade levels 9-12.
- 9-12 DROPOUT List - List of students in grade levels 9-12 that have dropped out.

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Graduate Validation:

Run the Data Validation group/report **Graduate Data Validations** to identify potential errors to correct. This report includes:

- Graduate Not Grade 12 - Students who have a 400 end status but are not grade 12.
- Graduate Excluded as Foreign Exchange - Students with a graduate end status who will be excluded due to being marked as foreign exchange.
- Graduate Missing Diploma Information - Students who are missing Diploma date, diploma type or diploma period.
- Graduate Count – Count of students that are graduates, excluding foreign exchange students.
- Graduate List – All district students with a 400 end status, diploma information, start 9th grade, excluding foreign exchange students.

Cohort Validation

Run the Data Validation groups/reports **Cohort Data Validations** to identify potential errors to correct.

Cohort Data Validations - This report lists students whose cohort data needs to be checked and/or corrected before the data is certified for the OPI.

- These are students in grade levels 9-12 who are missing their 'Date First Time Entered 9th Grade'.
- This data is located in the students Graduation tab.
- Please fix those students who are on this list by going to their Graduation tab and completing or correcting their 'Date First Entered the 9th Grade' (anywhere in the world).
- When the fixed data is saved, it will automatically populate the students' 'NCLB Cohort End Year'.

Cohort reporting is the relationship between students who start 9th grade in a certain year and those that graduate at the end of 4 years. Between the first day of 9th grade and the last day of 12th grade students both enter and exit the cohort. There are specific Federal requirements regarding the removal of a student from the cohort. Please refer to the [Montana High School Completer & Dropout Data Collection Handbook](#) for more information.

NOTE: To remove a student from the cohort, a school or LEA must confirm, in writing, that the student transferred out, emigrated to another county, transferred to a prison or juvenile 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 GED program, 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))).

Fall Enrollment

PATH: *Student Information>Reports>State Enrollment Overlap Report*

The Fall Enrollment collection is used for Federal membership reporting, as of the first Monday in October. Student enrollments are unduplicated (using only P: Primary Service Types) and includes both Gender and Race/Ethnicity by School. Grade levels collected include PK through 12.

Use the Fall Enrollment Certification Data Validation Report to verify Fall Enrollment and the State Enrollment Overlap Report to ensure that no Primary enrollments overlap as of the Count Date before certifying Fall Enrollment.

Fall ANB

Fall ANB is the first of two data collections that determine funding for school district budgets in the ensuing year. The data elements collected include enrollment (both P: Primary and S: Partial), Aggregate Hours, American Indian Race, Indian Language Immersion Program (ILIP), 19/20 Eligible for ANB, MT Youth Challenge, Job Corps, and MT Digital Academy (MTDA). Students who are marked Exclude ANB or Extracurricular Activities Only are not included in the report. Specific instructions for this report are posted on the School Finance Webpage: [Student Count for ANB Instructions](#).

Districts that maintain attendance data in Infinite Campus may use the MT Count Date Attendance tool to calculate Aggregate Hours. Districts that use a separate SIS or maintain paper attendance records must populate the Aggregate Hours manually.

Use the **Fall ANB Data Checks** and **Fall ANB Counts** to Verify Data Validation Groups/Reports to ensure the accuracy of data before certifying the Fall ANB Count.

Verifying Enrollment

PATH: *Student Information>Reports>State Enrollment Overlap Report*

The State Enrollment Overlap Report will show any instances where a student is enrolled in more than one school at the same time. After running the report, work with the other schools to determine the correct enrollment dates for the students.

1. Select All Students to be included.
2. Select the current school year.
3. Check ALL enrollment service types.
4. Check to Include no show enrollments.
5. Check to Include same day overlaps.
6. Choose sort option and Report Format.
7. Click Generate Report.

The screenshot shows the 'State Enrollment Overlap Report' form. It includes a title bar, a description, and several sections for configuration. Red circles with numbers 1 through 7 are placed over the form to indicate the steps from the adjacent list. Step 1 points to the 'All Students' dropdown. Step 2 points to the 'Choose a School Year' dropdown. Step 3 points to the 'All' checkbox under 'Enrollment service type'. Step 4 points to the 'Include no show enrollments' checkbox. Step 5 points to the 'Include same day overlaps' checkbox. Step 6 points to the 'Alpha' radio button and the 'Report Format' dropdown. Step 7 points to the 'Generate Report' button.

State Enrollment Overlap Report

This report outputs enrollment information for students in the district who have overlapped enrollments. This is a very complex report. Please try to limit the number of students run per batch or consider running the report in smaller batches.

Which students would you like to include in the report?

Grade Ad Hoc Filter

All Students
J1
J2
J3
KF

Which type of enrollments would you like to evaluate?

School Year: Choose a School Year

Enrollment Date: [] To []

Enrollment service type:

All
 Primary
 Partial
 Special Ed Services

Include no show enrollments
 Include same day overlaps

How would you like the report sorted?

Alpha Grade Student Number

Report Format: PDF

Generate Report Submit to Batch

Calculate Attendance

MT Count Date Attendance Tool:

PATH: *Reporting>MT State Reporting>MT Count Date Attendance*

To use the MT Count Date Attendance Tool,

1. Select Count Period.
2. Select MT OPI Designated Count Date.
3. Calculation Type (Aggregate Hours of Instruction, Absent and Exclude ANB) populate automatically.
4. Click Run Test to check for and correct any reporting errors.
5. Select Generate to update enrollments. It may take up to 30 minutes for the process to complete.

Note: This process is not final until a batch resync is requested.

The screenshot shows the 'Count Date Attendance' web application interface. It features several input fields and checkboxes. Red circles with numbers 1 through 5 are overlaid on the interface to highlight specific elements: 1 points to the 'Count Period' dropdown menu; 2 points to the 'MT OPI Designated Count Date' date picker; 3 points to the 'Calculation Type' checkboxes for 'Aggregate Hours of Instruction', 'Absent', and 'Exclude ANB'; 4 points to the 'Ad Hoc' dropdown menu; and 5 points to the 'Generate' button. Below the form are buttons for 'Run Test', 'Generate', and 'Submit to Batch'. At the bottom, there is a 'Batch Queue List' table with columns for 'Queued Time', 'Report Title', 'Status', and 'Download'. The table is currently empty.

Entering Special Program Data

PATH: *Student Information>General>Enrollments*

Manually check the enrollment boxes as they pertain to each student.

1. MT Job Corps - Eligible districts enrolling qualifying students participating in MT Job Corps.
2. MT Youth Challenge – Eligible districts enrolling qualifying students participating in MT Youth Challenge.
3. 19/20 Eligible for ANB – Students ages 19-20 who meet the requirements for ANB inclusion.
4. Indian Language Immersion Program (ILIP) – Students in an approved Immersion Program.
5. Early Literacy – Eligible students who are at least 4 and enrolled in a PK Early Literacy program.
6. Exclude Fall ANB for reasons other than attendance (e.g., under 5 without board approval, day treatment, youth detention) in the student’s enrollment record.

The screenshot shows the 'ENROLLMENT COUNTS' form. It is divided into two sections: 'Fall Enrollment Count' and 'Spring Enrollment Count'. Each section contains a dropdown for 'Aggregate Hours of Inst.', a text input for 'Absent' (pre-filled with 0.000), and three checkboxes: 'Job Corps', 'Indian Lang. Immersion Prg.', and 'Age 19 or 20 Eligible for ANB'. Red circles with numbers 1 through 6 highlight the following elements: 1. Job Corps checkbox (Fall), 2. MT Youth Challenge checkbox (Fall), 3. Age 19 or 20 Eligible for ANB checkbox (Fall), 4. Job Corps checkbox (Spring), 5. Age 19 or 20 Eligible for ANB checkbox (Spring), and 6. Exclude Fall ANB checkbox.

PATH: *Student Information>General>Flags*

The Educational Savings Account program is new for the 2024-2025 school year. Students who have an approved application will need to be recorded for ANB purposes. Create a Flag to track student participation.

1. Click New.
2. Select **ESA: Education Savings Account (ESA)** from the dropdown.
3. Enter Start Date and End Date.

The screenshot shows the 'Student Flag Detail' form. It includes a dropdown menu for 'Flags' (with a red circle 2 highlighting it), and four date pickers for 'Start Date', 'End Date', 'Eligibility Start Date', and 'Eligibility End Date' (with a red circle 3 highlighting the Start Date). Below these are three text input fields: 'User Warning', 'Participation Details', and 'Description'.

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Identifying American Indian Students

PATH: *Census > People > Identities*

The American Indian achievement gap payment is calculated using the number of American Indian students enrolled in the district on the October count date. At least one of the student's races must be indicated as **American Indian or Alaska Native** to be included.

A student's identity record holds important information about a student's name, birthdate, gender, and race/ethnicity. This information should not be changed once created unless an error is discovered with the initial entry. If a parent (or student, in some instances) makes changes to a student's identity information, those changes should be completed by creating a new identity record. If a student has a preferred name, that should be reflected by creating one identity record with the student's legal name and a second with the student's preferred name. However, no identity record should have the same effective date (create the new record with a newer effective date than the original record).

Speech-Language, Pathologist
Gender: F

Demographics | **Identities** | Households | Relationships | Enrollments | District Employment | District Assignments

Save | Delete | New

Identities Editor

Identity	Current	Effective Date	Birth Date	District
Speech-Language, Pathologist	X	08/17/2023		Kalispell Public Schools
Speech, Pathologist		01/09/2009		Kalispell Public Schools

The second effective date should be later than the first

Identity Information

PersonID: 8137

*Last Name: Speech-Language | *First Name: Pathologist | Middle Name: | Suffix: |

*Gender: F: Female | No Image Available

Birth Date: | Soc. Sec Number: |

Protected Identity Information

Race/Ethnicity

Is the individual Hispanic/Latino? N: No

Is the individual from one or more of these races? (check all that apply)

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

Race/Ethnicity Determination: 01: Parent Identified

Change the preferred name using a second identity record

Race/Ethnicity changes should only be made by creating a new identity record

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File Upload:

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

This process is only to be used by districts that do not use Infinite Campus as their primary Student Information System (SIS).

Use the **Fall Enrollment Count** template to upload aggregate hours, attendance, and special programs to Infinite Campus (ESA students must be entered manually).

Extract the upload file from the district's SIS or create a text, tab delimited file from the AIM template. 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.

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.

THIS PROCESS IS NOT COMPLETE UNTIL a Batch Resync is triggered.
New Look: *System Settings > Data Interchange Administration > Resync State Data - Batch*
Old Look: *System Administration > Data Utilities > Resync State Data*

Resync Data

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

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

Check dependencies	Data Resync	Last Resync
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04/30/2024 17:00:20 Processed: 1
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04/30/2024 17:00:20 Processed: 49
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04/30/2024 17:00:20 Processed: 3
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	04/25/2024 08:59:52 Processed: 39

Item	Created	Processed	Errors
<input checked="" type="checkbox"/> TestAccommodations	04/28/2024 09:20:44	Processed: 0	Errors: 0
<input checked="" type="checkbox"/> TranscriptCourseSE	04/28/2024 09:20:44	Processed: 0	Errors: 0
<input checked="" type="checkbox"/> VaccineShot	04/28/2024 09:20:44	Processed: 0	Errors: 0
<input checked="" type="checkbox"/> IPersonIdentityNoCStateIDOnly	04/28/2024 09:20:44	Processed: 0	Errors: 0
<input checked="" type="checkbox"/> SchoolInstructionMode	04/28/2024 09:20:44	Processed: 31	Errors: 0

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Validate Data

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

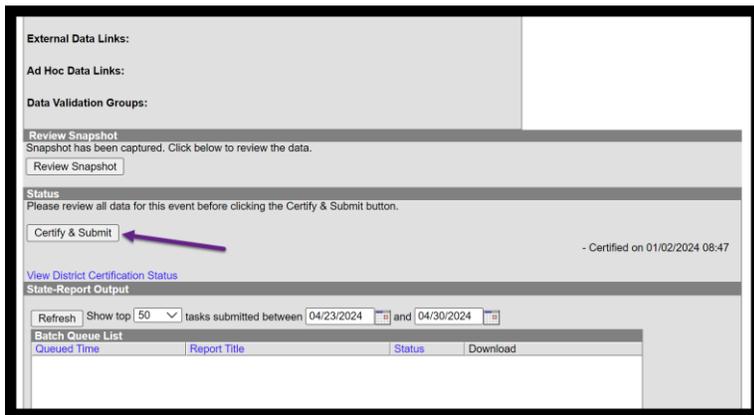
1. The validation groups/reports to run are:
 - a. **Fall ANB Validations – Student Counts**
 - b. **Fall ANB Validations – Student Lists**
2. Once all errors and warnings have been checked, run the above Validation Group as a Validation Report with the Run at State option selected. Running the report at both the district and state ensures that data has fully synced prior to certification. If there are mismatches between the state and district, repeat the process above to resync data and re-run the Validation Report at the state.

Certify Data

PATH: *Reporting> Data Certification>Event Certification*

It is recommended that you wait at least 60 minutes after a complete resync before certifying data.

1. From the Event Dashboard, select **Fall ANB Certification 2024-25**.
2. Select **Certify & Submit**.
3. Certification in Infinite Campus is required to be complete before a district imports data into MAEFAIRS.



If the district discovers a reporting error, please contact the AIM Unit to request recertification. If the AIM Unit discovers an error the certifier(s) may receive a message requesting correction and recertification.

Fall Program Participation

PATH: *Student Information>General>Enrollments*

Fall Program Participation is used to report State and Federal program information for students enrolled on the first Monday in October and includes the following (bold indicates the location within Infinite Campus):

- Title I Participation (Targeted Title I, Title I Part A Neglected, Title I Part D Delinquent) – **Enrollment**
- Military Connected – **Enrollment**
- Immigrant – **Enrollment**
- 21st Century Participants – **Enrollment**
- Foreign Exchange – **Enrollment**
- Gifted and Talented (Evaluated and Identified) – **Enrollment**
- Homeless – **Enrollment**
- Free/Reduced Meal Status (FRAM) – **FRAM Module**
- English Learner (EL) – **English Learners**
- Section 504 – **Program Participation**
- Foster Care (maintained by the OPI) – Program Participation
- Migrant (maintained by the OPI) – **Program Participation**; and
- Special Education (based on locked documents and SPED state reported data) – **Special Ed.**

Some of the Program Participation data elements are located inside the enrollment record and some are maintained outside of the enrollment. Both sets must be accurate as of the 1st Monday in October.

File Upload:

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

Districts that use a 3rd party Student Information System (SIS) may use the file upload process to populate Aggregate Hours. Use the Fall Program Participation Template, Section 504 Template, Free Reduced Application Management (FRAM) Import Template, and English Learners (EL) Template.

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

FRAM data is imported using the FRAM Eligibility Import Wizard. Instructions for using the Eligibility Import Wizard are embedded in the template.

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Manual Entry (Enrollments):

Student records are entered in the locations noted above.

Title I (A), Military Connected (B), Immigrant (C), 21st Century (D), Foreign Exchange (E), Gifted and Talented (F), and Homeless (G) are updated in the enrollment record active on the 1st Monday in October

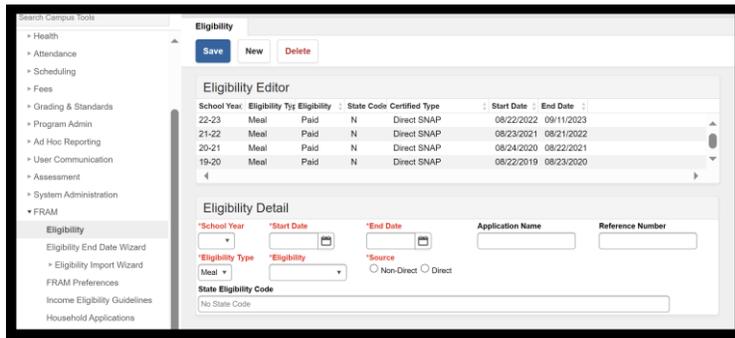
TITLE 1 A
Title I Targeted Assistance Program
Title I

Title I Instructional Services
 Reading Lang Arts Social Sciences
 Math Vocational/Career
 Science Other
Title I Support Services
 Health, Dental and Eye Care
 Guidance/Advocacy
 Other
Title I - Other
Title I Part A Neglected Title I Part D Delinquent and served by:

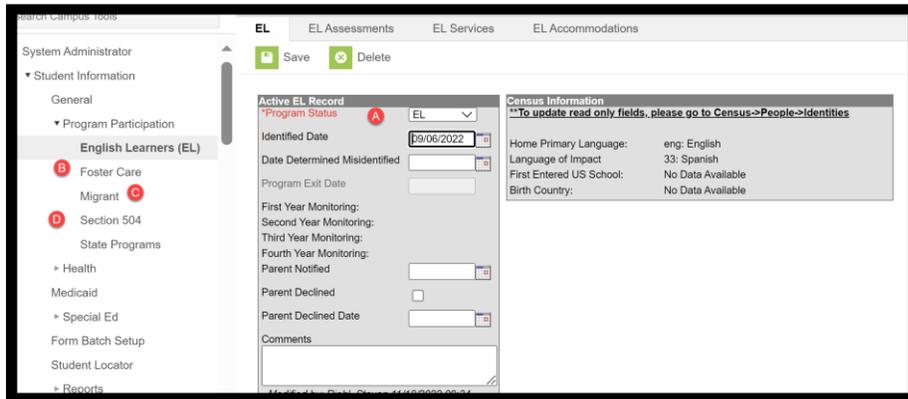
OTHER PROGRAM PARTICIPATION
Immigrant C Date Immigrant Entered US School
21st Century Participant D Foreign Exchange E Gifted and Talented Evaluated F Gifted and Talented Identified
Homeless G Homeless Night Time Residence Unaccompanied Youth

Serving and Resident Instruction Identification
Serving District Resident District
Serving School Resident School
Military Connected Status B
Student is a dependent of a member of:

Enter FRAM data in the FRAM Module



Enter EL – English Learners (A), Foster Care (B), Migrant (C), and Section 504 (D) under Program Participation. Records should be accurate as of the 1st Monday in October.



Teacher-Class Data Entry

Teacher Class Data entry includes Courses, Sections, Staff History, and Rosters. The Teacher Class collections are used for accreditation and Career and Technical Education (CTE) reporting.

Courses

PATH: *Scheduling & Courses>Courses>Add Course/Course Information*

Courses are entered for all enrolled students in grades PK-12. Courses contain information about Subject (NCES Codes), Grades (Low and High), Course Level, Credit (HS courses only), as well as indicators for Distance Class, Alternative Education, and Dual Enrollment Credit.

All courses must include an NCES Subject Area and an SCED Course Identifier. The SCED Course Identifier must be prefaced with an “MT” (e.g., MT – English/Language Arts I (9th grade)).

Grade PK-6, Unaccredited 7-8 Courses:

For grades PK-6 and grades 7 and 8 that do not have separate accreditation, only reporting of classroom assignment and specials taught by an educator other than the classroom teacher are required. PK reporting is only required if the students are assigned to a classroom.

Special education classes are not reported separately, unless the student is not otherwise assigned to a general education course (e.g., student is assigned to a 1st grade classroom, but is in the special education classroom for reading – reporting of a separate reading class for special education is not required).

Library is not reported as a class, as Library, for accreditation purposes is determined by a ratio of enrolled students to the FTE of the staff member with the State Assignment Code for Library/Media Specialist. [ARM 10.55.709](#)

1 Homeroom

Course Sections Grading Tasks Standards Grade Calc Options Assessments Copy Course

Save Delete Push To Sections

Course Information

CourseID 6

*Number 1 *Name Homeroom

Standards-based Active External LMS Exclude

Course-Only Curriculum

Subject Type Department

State Code 23012

Schedule Load Priority Max Students

GPA Weight 0 Bonus Points Advisory

Type Responsive Activity

Homeroom Allow student requests Allow teacher requests/recommendations Hide Standards On Portal Repeatable Attendance Positive Attendance High School Credit

Distance Class N: No Dual Enrollment Credit

NCES Data

NCES Code 23012GEKF0511

SCED Subject Area 23: Non-Subject Specific

SCED Lowest Grade KF: Kindergarten Full Time

Available Carnegie Unit Credit 0

SCED Course Level GE: General Education

SCED Course Identifier 012: MI-Prior-to-Secondary Education

SCED Highest Grade 05: Grade 5

SCED Sequence: (part n of m parts) 1 of 1

7th and 8th Grade Courses:

Separately accredited 7th and 8th grade classes must report individual courses, as accreditation depends on meeting a minimum number of classroom minutes in core instruction and specific electives. No credit is required at this level. [ARM 10.55.902](#)

Grade 7 ELA

Course Sections Grading Tasks Standards Grade Calc Options Assessments Copy Course

Save Delete Push To Sections

Course Information

CourseID 7

*Number 51000 *Name Grade 7 ELA

Standards-based Active External LMS Exclude

Course-Only Curriculum

Subject Type Department

State Code 51035

Schedule Load Priority Max Students

GPA Weight 0 Bonus Points Advisory

Type Responsive Activity

Homeroom Allow student requests Allow teacher requests/recommendations Hide Standards On Portal Repeatable Attendance Positive Attendance High School Credit

Distance Class Dual Enrollment Credit

NCES Data

NCES Code 51035GE07011

SCED Subject Area 51: English Language and Literature (prior-to-secondary)

SCED Lowest Grade 07: Grade 7

SCED Course Level GE: General Education

SCED Course Identifier 035: MT-Language Arts (grade 7)

SCED Highest Grade 07: Grade 7

SCED Sequence: (part n of m parts) 1 of 1

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High School Courses:

High schools must report all courses individually with the credit earned for completion of the course.

[ARM 10.55.906](#)

This screenshot shows the 'Course Information' form for a high school course. The course number is 'E01001' and the name is 'English 9A'. The 'NCS Data' section is highlighted, showing the following values: NCS Code '01001GE02.0011', SCED Subject Area '01: English Language and Literature (Secondary)', SCED Lowest Grade '09: Grade 9', SCED Highest Grade '09: Grade 9', Available Carnegie Unit Credit '0.5', SCED Course Level 'GE: General Education', and SCED Course Identifier '001: MT-English/Language Arts I (9th grade)'. The 'High School Credit' checkbox is checked.

Online courses (e.g., MT Digital Academy) must be reported in the same manner as other district courses. They should be marked Distance Class and Dual Credit, where appropriate.

This screenshot shows the 'Course Information' form for an online course. The course number is 'M02000' and the name is 'MTDA Calculus'. The 'NCS Data' section is highlighted, showing the following values: NCS Code '02124H00.0011', SCED Subject Area '02: Mathematics', SCED Lowest Grade '11: Grade 11', SCED Highest Grade '12: Grade 12', Available Carnegie Unit Credit '5', SCED Course Level 'HC: Honors', and SCED Course Identifier '124: MT-AP Calculus AB'. The 'Distance Class' checkbox is checked and 'Dual Enrollment Credit' is also checked.

For CTE Courses in approved pathways for your district:

1. Click in the CTE Pathway box to select applicable pathways. More than one pathway may be selected.
2. Check the Work Based Learning box if the course is considered Work Based Learning.
 - a. Course codes for Work Based Learning can be found [here](#).
3. Type the name of the Work Based Learning partner in the WBL Partner box.
4. Check the Dual Enrollment Credit box if applicable.
5. Click Save.

The screenshot shows the 'Course Information' form for '10001QX Intro to Drafting/Workplace Sa'. The form includes fields for Course ID, Number, Name, State Code, Department, Subject Type, Schedule Load Priority, Max Students, GPA Weight, Bonus Points, Advisory, Transcript, Required, Type, Responsive, Activity, Vocational Code, Homeroom, Allow student requests, Allow teacher requests/recommendations, Hide Standards On Portal, Repeatable, Attendance, Positive Attendance, High School Credit, Distance Class, CTE Pathway, Work Based Learning, WBL Partner, and Comments. Red circles with numbers 1 through 5 highlight the CTE Pathway dropdown, Work Based Learning checkbox, WBL Partner text field, Dual Enrollment Credit checkbox, and Save button respectively.

File Upload:

The Course upload is the first of 4 in a series of Teacher Class uploads. Courses must be uploaded and/or entered before proceeding with any of the other other upload files.

Districts that use a 3rd party Student Information System (SIS) may use the file upload process to populate Course information. Use the Course template from the Teacher Class Upload Files.

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

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Sections

PATH: *Scheduling & Courses>Courses>Section Information*

Sections are created to define courses by term and period schedule. The information from Sections is used to calculate course minutes required by Administrative Rule. If Calendar Information has not been properly entered, course minutes may not calculate correctly.

Manual Entry:

Click Add a Section. Enter Section Number (up to 4 digits). Select Session Type and Session Number. Session Type and Session Number define the period of time in which the course is offered. For example, if Semester is selected, choose "01" for a first semester class and "02" for a second semester class.

Section Editor

*Section Number: 1

Teacher Display Name: _____

Max Students: (0)

Lunch Count: Milk Count: Adult Count:

Custom Count 1: Custom Count 2: Custom Count 3:

Room: Skinny Seq: Homeroom:

Hide Standards On Portal: Advisory: External LMS Exclude:

Distance Class (Override): (N)

Primary Teacher

There is no active primary teacher for this section.

*Session Type: SM: Semester

*Session Number: 01: 01

Under Section Placement, choose the Term and Period Schedule that applies to the course.

Section Schedule Placement						
Trimesters						
	T1		T2		T3	
	Regular Day	Early Release	Regular Day	Early Release	Regular Day	Early Release
Period Day	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

File Upload

The Section upload is the second of 4 in a series of Teacher Class uploads. Courses must be uploaded and/or entered before proceeding with the Section upload.

Districts that use a 3rd party Student Information System (SIS) may use the file upload process to populate Section information. Use the Section template from the Teacher Class Upload Files.

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

**Before proceeding with the next step, manually add Section Placements to all courses. While this is not explicitly required, student rosters and teachers may not appear on some tabs until this step is completed.*

Staff History

PATH: *Scheduling & Courses>Courses>Section Staff History*

Staff History is used to staff to a course. All state reported courses must have a Primary Teacher with the role of Teacher of Record or Facilitator (for online courses). Start and/or End Date are only required if a staff member leaves during the year or starts after the first day of classes. Otherwise, dates are determined by the time period to which the course is assigned in Sections.

Other staff assigned to courses for state reporting purposes are co-teachers or paraprofessionals that are assigned to a course to cover a classroom overload. [ARM 10.55.712](#)

Manual Entry:

- Click staff type (Primary Teacher, Teacher, Section Staff).
- Select Name from the list (if name does not appear for Primary Teacher or Teacher, return to the District Assignment and verify that the Teacher checkbox has been checked).
- Select Role (for courses not state reported – e.g., elementary math – select Role “Not Applicable/Not State Reported”).
- If adding an additional Teacher or Section Staff for classroom overload, add Minutes (time in the classroom to meet overload requirements). Click Save.

The image displays two screenshots of the Staff History Detail form. The left screenshot shows the 'Primary Teacher' tab with the 'Name' dropdown set to 'Regular Education, Teacher' and the 'Role' dropdown set to '00: Teacher of Record'. The right screenshot shows the 'Section Staff' tab with the 'Name' dropdown set to 'Other, Specialist' and the 'Role' dropdown set to '07: Instructional Para General Ed'. A purple box highlights the 'Minutes' field with the value '90' in the right screenshot.

File Upload:

The Staff History upload is the third of 4 in a series of Teacher Class uploads. Courses and Sections must be uploaded and/or entered before proceeding with the Staff History upload. Teachers must also be entered either manually or via the Terms of Employment file upload before uploading Staff History.

Districts that use a 3rd party Student Information System (SIS) may use the file upload process to populate Staff History information. Use the Staff History template from the Teacher Class Upload Files.

Extract the upload file from the district's SIS or create a text, tab delimited file from the AIM template. Instructions for using the templates are embedded in the template file. In Infinite Campus, select the Import Type, the Work to Perform and choose the file to be uploaded. Click Submit to Batch.

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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.

APPENDIX

Removal of a Student from a Cohort

Cohort List and Counts to Certify for the 2024-25 School Year to certify for state reporting.

Districts may not remove a student from the cohort 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 to a prison or juvenile 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 GED program, 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 actually 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.

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