

END OF YEAR (EOY) ENROLLMENT PROCESS

AIM User Guide:
*End of Year (EOY)
Enrollment Process*

THE END OF YEAR COLLECTION BEGINS THE PROCESS OF ENROLLING STUDENTS FOR THE NEW YEAR IN THE AIM STUDENT INFORMATION SYSTEM (SIS) BY CREATING NEXT YEAR'S CALENDARS, COMPLETING ENROLLMENTS FOR THE CLOSING YEAR, AND CREATING ENROLLMENTS FOR THE NEW SCHOOL YEAR.

ALL AIM GUIDES AND DOCUMENTS ARE AVAILABLE AT THE [OPI AIM WEBSITE](#)

HELPFUL AIM LINKS:

- [AIM COLLECTION SCHEDULE](#)
- [AIM New User Guide](#)

[AIM User Guide](#)

ALL DISTRICTS MUST CREATE CALENDARS FOR THE NEW SCHOOL YEAR IN INFINITE CAMPUS, AND HAVE THE OPTION OF PRE-ENROLLING STUDENTS FOR THE NEXT YEAR. CLOSING YEAR ENROLLMENTS MAY BE ENDED IN A BATCH (USING INFINITE CAMPUS TOOLS) OR MAY BE ENDED USING THE FILE UPLOAD PROCESS.

THIS COLLECTION IS DUE EACH YEAR IN MID-JUNE.

CONTACT YOUR STUDENT INFORMATION SYSTEM VENDOR FOR INSTRUCTIONS ON HOW TO RUN THE CALCULATION PROCESS FOR END OF YEAR ATTENDANCE TOTALS.

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FAQ:

HOW DO I CREATE NEW CALENDARS FOR THE NEW YEAR? All districts must use the Calendar Wizard tool to create calendars for the next school year. Also, the extra steps in the Calendar tool are needed to see your list of student names in black instead of red font.

MAY I AUTOMATICALLY ROLL FORWARD ENROLLMENTS FOR NEXT YEAR? Districts have the option to use the Enrollment Roll Forward tool to create enrollments for the new school year.

MAY WE END ALL STUDENT ENROLLMENTS AT THE END OF THE YEAR, OR DO WE HAVE TO DO THEM INDIVIDUALLY? Districts have the option to use the Enrollment End Batch tool to end all student enrollments at once.

MAY I USE THE ENROLLMENT END BATCH TOOL TO ENTER GRADUATION DATA? The Enrollment End Batch tool may be used to enter graduation data for students. Students who do not graduate (or graduate late) need their records changed manually.

WE ONLY HAVE GRADES K-8 IN OUR DISTRICT. WHAT DO WE DO WITH OUR 8TH GRADE STUDENTS? Students who have completed all the grades in a district should be exited using the Enrollment End Batch tool. K-8 students do not have graduation data entered.

MAY I USE OUR DISTRICT'S STUDENT INFORMATION SYSTEM TO COMPLETE THIS COLLECTION? Montana Edition districts may use the File Upload process to end enrollments and enter enrollments into the new calendar. (See the [AIM File Imports Guide](#)) However, the Calendar Wizard Tool must be used to create the new year's calendars first.

WHAT SHOULD I DO IF I ROLL A STUDENT FORWARD THEN LATER FIND OUT THEY ARE NOT RETURNING? Student enrollments will have to be adjusted manually if students do not return the following school year. Enrollment records in the new school year that the student was expected to attend should be deleted for grade levels K through 6. For grades, 7 through 12 if the student did not return due to dropping out they should have an enrollment record with a start and end date of the first day of school.

WHAT SHOULD I DO WITH PK STUDENTS? PK students should be rolled forward manually.

HOW DO I KNOW WHAT ENTRY OR EXIT STATUS CODES TO USE? REFER TO:

- [AIM Enrollment Start Status Codes](#)
- [AIM Enrollment End Status Codes](#)

Checklist

- Verify that all students have an enrollment and no overlaps:
 - INDEX > STUDENT INFORMATION > REPORTS: DUPLICATE IDs AND >ENROLLMENT STATUS AND >ENROLLMENT SUMMARY AND >STATE ENROLLMENT VERIFICATION AND STATE ENROLLMENT OVERLAP
- Enter End Date and End Status for withdrawn students. ([Enrollment End Status Codes.](#))
- Enter Special Education Exit Date and Exit Reason for exited Special Ed students. (Located in Special Ed Module under the Index.)
- Verify that all completed Special Education ERs and IEPs are locked.
- Verify status of MT Youth Challenge, Job Corps and Montana Digital Academy students and End Date enrollment as necessary.
- Notify the OPI School Finance Division at (406) 444-4401 if any grade levels offered at a school are changing for next year.
- Review user accounts and disable or expire accounts for users that are leaving or have left.
- Update the calendar rights for the previous, current and future year Calendar User Groups
- Create calendars for next year.
- Roll-over enrollments for next year (enrollments may be uploaded at beginning of next year as part of the Beginning of Year Collection.)
- End all current year enrollments.
- Verify Graduation data (Diploma type, Diploma date and Diploma period).
- Verify Data using State Published Ad Hoc Reports: INDEX>AD HOC REPORTING>FILTER DESIGNER>>+STATE PUBLISHED
- Resync enrollment data after uploading files (MT Edition users only)

State Published Ad Hoc Report List:

- **EOYEN End Date or Status Missing**

STEP 1: (ALL DISTRICTS) Creating New School Year Calendars

PATH: SYSTEM ADMINISTRATION > CALENDAR > CALENDAR WIZARD

1. Select the **Index** tab.
2. Select **System Administration > Calendar > Calendar Wizard**
3. Roll all the calendars in the district at once by using the multiple select feature. If there is more than one calendar at a school, then each calendar must be given a different name.
4. Select **Create new Calendars by rolling forward selected data**. Last-years data will be added to a newly created calendar.
5. Select **Next**.
6. Select the upcoming school year from the **Year** drop down box.
7. The **Name Template** should be [year] [schoolname].
8. Enter "1" in the **Number** field.
9. Enter the **Start Date** and **End Date**.

Note: The fiscal year is the start date of 7/1 and end date of 6/30. IEPs will not be allowed to be documented unless these dates are used.

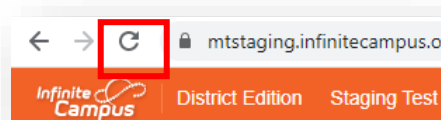
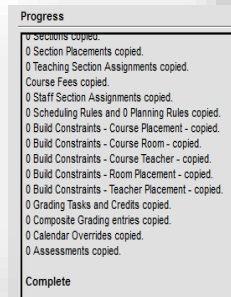
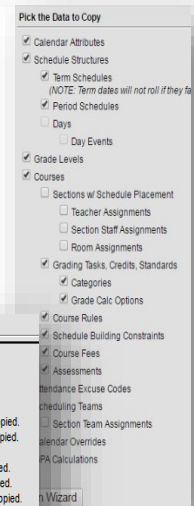
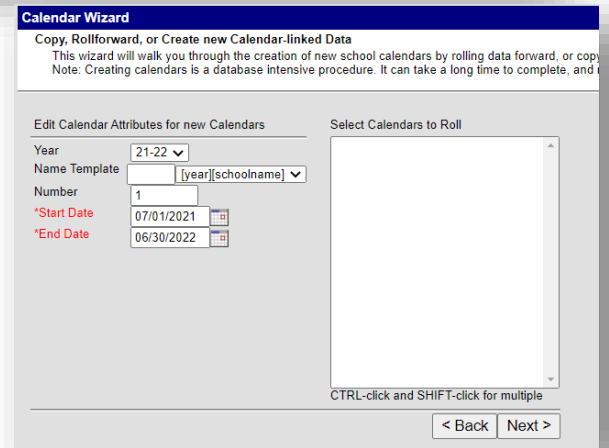
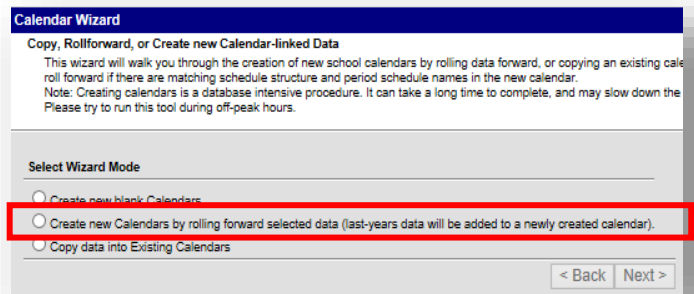
10. Select the **Calendar(s)** from the previous year to roll forward.
11. Click **Next**.

12. Check all the boxes that it allows you to check, to copy data from last year's calendar to this year's calendar. **Days and Day Events cannot** be checked

TIP: If new course numbers will be given in the upcoming school year, or changes to courses; it is best to modify the course numbers *after* rolling forward the previous school year's calendar instead of entering courses with new numbers.

13. Select **Run Wizard**.
14. Scroll to bottom of **Progress** box to verify the Wizard shows **Complete**.

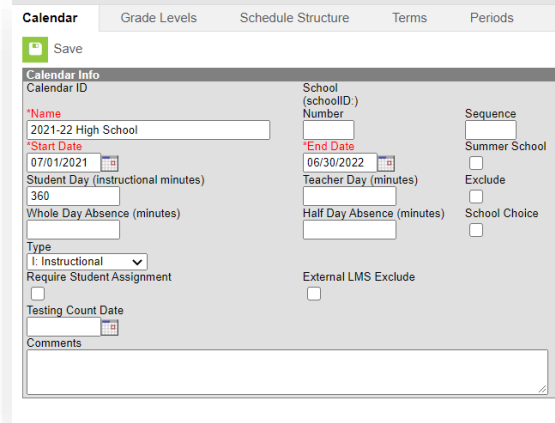
15. When the Wizard is **complete**, refresh your web browser by selecting the refresh button at the top of your web page. Proceed to the next steps to see the calendar change.



Verify Rolled Calendar Information:

PATH: INDEX > System Administration > Calendar > Calendar > Calendar Tab

- Action Bar** at the top of the screen:
 - Select the future school year from the **Year**.
 - Select the **School** and **Calendar** when applicable.
- Calendar Tab**
 - From the **Index** tab, select **System Administration**, then **Calendar**, and **Calendar**.
 - Select the **Calendar** tab at the top. Review the **Start Date** and **End Date** (they should auto-fill with 7/1 and 6/30) and enter the **Sequence**.
 - Note for the **Sequence** field:
 - When a school has multiple calendars, enter a sequence to display a specific calendar first in the Campus toolbar.
 - Calendars that have a sequence value are ordered numerically in the Calendar dropdown list, starting with 1.
 - The same sequence value can be assigned to multiple calendars. If this is done, the calendars are then ordered alphabetically.
 - Calendars *without* a sequence are sorted alphabetically.
 - Select **Save**.



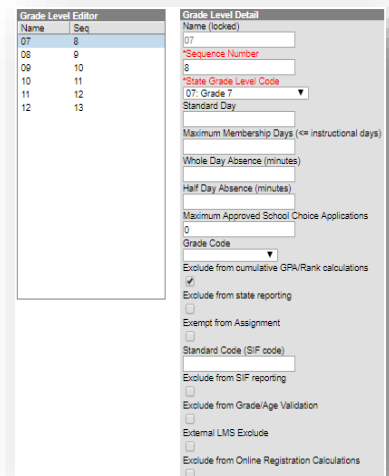
NOTE: FOR DISTRICT EDITION OR MT VALUE ADDED USERS THAT ENTER DAILY ATTENDANCE (ADA) IN INFINITE CAMPUS:

Student Day (instructional minutes) is used in the ADA calculations. If left blank, it will default to 360 and calculated ADA will be different between enrollment and the ADA report. **Example calculation:** There are 7 periods in a school day, each period has 50 minutes of instruction. $50 \times 7 = 385$ minutes of instruction per day. Do not include scheduled breaks or lunch breaks in this calculation.

Whole Day Absence minutes on a grade level will always override calendar Whole Day Absence minutes. If no value is entered for either field, the system will assume a value of 240.

Half Day Absence minutes on a grade level will always override calendar Half Day Absence minutes. If no value is entered for either field, the system will assume a value of 120.

- Grade Levels Tab**
 - Select the **Grade Levels** tab next to the **Calendars** tab and verify grades for the school. The **Name**, **Sequence Number** and **State Grade Level Code** fields should be populated.
 - Name** given to the grade level. This name appears on student enrollment records, in reports, and as part of the search results for students. This grade level should be entered as two (2) digits or as two (2) characters (e.g., KG or 09).
 - Seq. Numbers** between grades must be one higher than the grade and in order. This allows students to roll forward to the next grade in the sequence. Sequence numbers should also line up between schools, i.e.: if at the elementary school, the 6th grade sequence number is 7, then at the 7-8 school it should have an 8 for the sequence number for the 7th grade.
 - State Grade Level Code** is a State-defined grade level. This code is referenced in state reporting extracts.



NOTE: FOR GRADE LEVEL CALENDAR CHANGES FOR GRADES THAT ARE NOT CORRECT OR WILL BE CHANGING FOR THE SCHOOL (E.G., ADDING GRADE 6 TO YOUR 7-8 CALENDAR) CONTACT THE OPI SCHOOL FINANCE DIVISION AT (406) 444-4401.

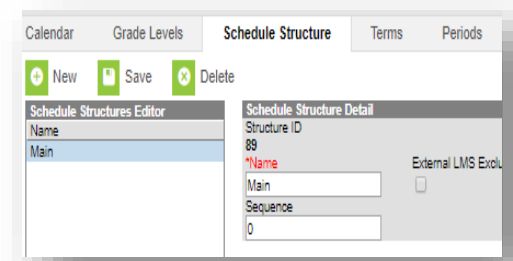
Schedule Structure, Terms, Periods and Days Tabs

(MT EDITION USERS: Information is required on the following tabs to show student lists in black font, rather than red.)

PATH: INDEX > System Administration > Calendar > Calendar > Calendar Tab

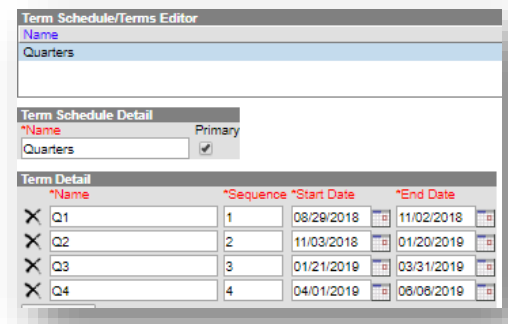
1. **(District and MT Edition)** Select the **Schedule Structure** tab next to the Grade Levels tab.

- a. Verify a schedule structure is listed.
 - If only one Schedule Structure exist, it should be named **Main**.
 - Multiple schedule structures are used when different groups of students meet at different times during the day.



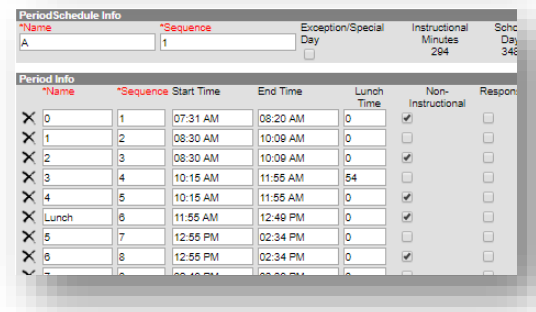
2. **(District and MT Edition)** Select the **Terms** tab.

- a. Verify the terms option listed.
 - The type of calendar structure the school has can be trimesters, quarters, or something else.
- b. Select the item(s) listed under the **Term Schedule/Terms Editor** and enter the instructional dates in the Start Date and End Date for the upcoming school year. (First and Last day of instruction.)
- c. If a Term Schedule does not exist, select **New Term Schedule/Terms**. Select the **Term** and click **Create Terms**.
- d. Select **Save Term Schedule/Terms**.



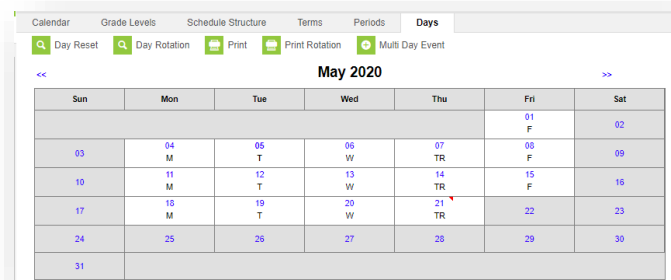
3. **(District Edition Only)** Select the **Periods** tab.

- a. Under **Period Schedule/Periods Editor**, select the name of the period schedule (e.g., Default) to open the screen.
- b. Verify the times for each period.
 - Lunch time is non-instructional and used for lunch or mid-morning break.
- c. To add a new period, click **Add Period**.
- d. To modify an existing period, change the **Name**, **Sequence**, **Start Time**, **End Time**, **Lunch Time** or check **Non-Instructional**.
- e. Select **Save Period Schedules**.



4. **(District Edition Only)** Select the **Days** tab.

- a. The school calendar is created on the **Days** tab.
- b. Select **Day Reset** to change the start date and end date for the new school year.
 - Enter the Instructional Start Date and End Dates for the school year. Not the fiscal year dates.
 - Select the days of the week that school is in session.
 - Select **Create Days**.
 - Once the Calendar of days is created, proceed with marking non-instructional days.



- The days that have a white background indicate days within the active school calendar for instruction. Click on the blue number of any calendar day to add an event.
- Select the Period Schedule, which is the day of the week the event occurs.
- Uncheck the boxes for **School Day**, **Instruction**, or **Attendance** if you would like those removed from that day.
- Enter a start and end time if the event is only for a few hours.
- If the field titled **Day Events**, select **Add Day Event** to choose from options such as Spring Break, or other holidays where school may be on break.

STEP 2: End-Dating Transfer Out Students & Students Not Advancing:

(This Step is Optional for MT Edition Districts but Required for District Edition Districts)

Before Using the Enrollment Roll Forward Tool:

Enrollments should only be ended after enrollments have been rolled forward into the next calendar. Before using the Enrollment Roll Forward tool, withdraw any students that are not continuing in the new school year, such as students transferring to another district, or students who will not need an enrollment for the following year. This must be done before using the Enrollment Roll Forward tool, so that the student is not advanced a grade in the process. Students who are being retained at their current grade level CAN be included when using the Enrollment Roll Forward Tool (see part B below). Remember to roll your transcript report and report card reports to the new school year as well.

A. Transfers Students Not Enrolling in the New School Year.

1. Use the previous school year.
2. Using the **Search** tab, locate the student by searching their *last name, first name*. Click **Go**. Select their name from the search results.
3. Click the **Enrollments** tab.
4. The End Status appears on the **Enrollments** tab.
 - a. If it does not display the correct End Status for a student who transferred, modify the record to add the transfer End Status.
5. Click the **Enrollment record** you need to modify to open the enrollment screen.
6. Transfers and Withdrawals -- Enter **End Date** and **End Status** to describe the transfer or other reason the student will not be enrolled the following year.
7. Select **Save**.

B. Students Not Advancing to the Next Grade Level.

Retained students will be rolled forward with their cohorts and then must have their grade manually adjusted back to the grade in which they are being retained.

1. Click on the new year's enrollment record to open the screen.
2. Change the Grade accordingly and enter the Start Comments: *Retained in ___ Grade*.
3. Click **Save**.

Step 3: Rolling Forward Students:

Same School in District – Non-PK Students

PATH: INDEX > SYSTEM ADMINISTRATION > STUDENT > ENROLLMENT ROLL FORWARD

1. Select the **Index** tab.
2. Select **System Administration**.
3. Select **Student**.
4. Select **Enrollment Roll Forward**.
5. Select **Source Calendar** - Choose one previous year calendar.
6. Select **Source Grades** - Choose the *Grade(s)* that will be continuing in that school.
 - a. For example: If a middle school is 7-8 school, choose grade 7 only. If a high school is 9, 10, 11, & 12 grades, then choose grades 9, 10, & 11 only. If elementary school is K-6, then choose grades K-5.
 - b. Follow these same steps for advancing students from **Elementary School to Middle School or Middle School to High School, however, only select the grade that will be advancing, ie: 8th grade for middle school, or 6th grade for elementary.**

7. **Service Source Type** – Select all three boxes.

8. Select **Main** from the **Select Source Structure**.

9. Select the **Local Start Status** –

- a. For students continuing to the next grade level in the same school: Use code *02: Continued enrollment same school, no interruption*. Skip the Destination Calendar, Destination Grade, and Destination Structure fields. Enter the first date of instruction in the Start Date Override field. Continue to number 9 below to Run Test.

- b. For students advancing to the next grade into a different school: Use code *04: Transfer from public school in district or state*. You will also need to Select Destination Calendar and choose the new year calendar and school from the options. You will also need to Select the Destination Grade, which would be the next grade level up. Enter the first date of instruction in the Start Date Override field.

10. Select **RUN TEST**.

- a. If **RUN TEST** returns acceptable enrollment counts, grade levels and schools, click **RUN**.
- b. If **RUN TEST** returns unacceptable counts, review Calendar End Dates, Grade Levels and Sequences and selections in the Enrollment Roll Forward screen. Or make sure the Destination Calendar and Grade were selected for those students advancing to a different school.

11. REPEAT FOR EACH SCHOOL. MAKE SURE TO ADVANCE

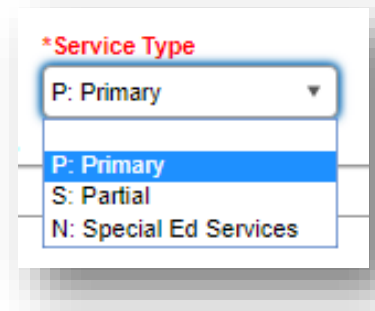
THOSE STUDENTS MOVING ONTO A NEW SCHOOL AFTER YOU'VE ADVANCED THOSE STUDENTS WHO ARE STAYING IN THE SAME SCHOOL.

- ❖ **NOTE-** IF STUDENT ENROLLMENTS WERE END-DATED BEFORE ROLLING FORWARD THEN CHECK THE 'SHOW WARNINGS' AND 'INCLUDE STUDENTS WHOSE ENROLLMENTS END ON THE LAST DAY OF THE LAST TERM'. THESE BOXES ARE LOCATED JUST BELOW 'TOTALS ONLY'.

Same School in District – PK Students

PK students should be rolled over manually.

- From the Action Bar at the top:
 - Select the current school year from the **Year**.
 - Select the **School** and **Calendar** when applicable.
- From the **Search** tab, select **Student** from the drop down.
- Select **Advanced Search**, located below 'Go'.
- Select **PK** from the grade drop down.
- Select **Search**.
- A list of the current year PK students appears to the left.
 - From the Action Bar at the top:
 - Select the upcoming school year from the **Year**.
- Select the name of a student.
- Locate the **Enrollment** tab.
- Select **New**.
- Enter the next year's **Start Date** and **Start Status** and the Kindergarten **Grade level**.
 - If the student is continuing in PK and receiving Special Education services only, confirm **Service Type** is set to **N: Special Ed Services**.
 - If the student is entering Kindergarten, be sure the **Service Type** is set to **P: Primary**.
- Click **Save**.
- Repeat for each PK Student.



STEP 4: Enrollment End Date & End Status Batch Process-

(This step is not to be done until the last day of instruction; previous steps can be done prior to last day of instruction)

Students Continuing in the same school:

PATH: INDEX > SYSTEM ADMINISTRATION > STUDENT > ENROLLMENT END BATCH

Once the school year ends, the **Enrollment End Batch Process** may be performed. This will end previous years enrollments by adding an **End Date** and **End Status** for each student that will continue in the same school next year.

PATH: INDEX > SYSTEM ADMINISTRATION > STUDENT > ENROLLMENT END BATCH

- Select the **Index** tab.
- Select **System Administration**.
- Select **Student**.
- Select **Enrollment End Batch**.
- Select **Calendars** - Choose one previous year from calendar list.
- Select **Grades** - Choose the *Grade(s)* that will be continuing in that school. (i.e.: K-5 graders for elementary, 7th graders for middle school, or 9, 10, 11th graders for high school).
- End Date** – Enter End Date for school year.
- Select the **Local End Status** - *100- End of Year, returning to same school next year.*
- Select **RUN**.
- REPEAT FOR EACH SCHOOL.**

Advancing Students into a different school:

Students who have completed all the grade levels in a school/district (school is K-6 or K-8 only) and will advance to another school/district:

PATH: INDEX > SYSTEM ADMINISTRATION > STUDENT > ENROLLMENT END BATCH

1. Select the **Index** tab.
2. Select **System Administration**.
3. Select **Student**.
4. Select **Enrollment End Batch**.
5. Select **Calendars** - Choose one previous calendar.
6. Select **Grades** - Choose the *Grade(s)* that will be continuing to another school.
 - If a K-6 school, choose grade 6 only. (to advance them to middle school)
 - If a 7-8 school, choose grade 8 only. (to advance them to high school)
7. **End Date** – Enter End Date for school year.
8. Select the **Local End Status** - 140: Transfer to another public school in district in Montana.
9. Select **RUN**.
10. **REPEAT FOR EACH SCHOOL.**

Note: Do not enter graduation data for these students – *graduate data is only entered for students in grade 12.*

Select Fields to fill

End Date

Local End Status 140: Transfer to public schl in another district in MT (Valid...)

End Action

Graduation

Graduates:

This step ends the closing year enrollment for all students in 12th grade by entering graduation information to the batch.

PATH: INDEX > SYSTEM ADMINISTRATION > STUDENT > ENROLLMENT END BATCH

1. Select the **Index** tab.
2. Select **System Administration**.
3. Select **Students**.
4. Select **Enrollment End Batch**.
5. Select **Calendars** - Choose one previous calendar.
6. Select **Grade** – 12.
7. **End Date** – Last day of school for senior.
8. Select the **Local End Status** - 400: Graduated.
9. **Diploma Date** – Date diploma issued.
10. **Diploma Type** – 01: Regular Diploma.
11. **Diploma Period** – 03: Four years or with IEP allowing longer.
12. Select **RUN**.
13. **REPEAT FOR EACH HIGH SCHOOL.**

Select Fields to fill

End Date

Local End Status 400: Graduated (Valid 93-94 thru current)

End Action

Graduation

Diploma Date

Diploma Type 01: Regular Diploma

Diploma Period 03: Four years or with IEP allowing for longer

Post Grad Location

Post Grad Plans

RUN

Note: The diploma period '04: Completed IEP Goals' should be selected when a student is graduating through completing their IEP goals, not by completing district graduation credit requirements. The diploma period is '03: Four years or with an IEP allowing for longer' if the student completes graduation requirements prior to the first day of school in the CURRENT YEAR.

Non-Graduates:

To modify a record for an individual senior who did not graduate.

PATH: SEARCH > STUDENT (FROM DROP DOWN) > SEARCH STUDENT

1. Choose active school year for the senior from the Action Bar at the top of the Infinite Campus screen.
2. Search for the student using the **Search** tab.
3. Select the senior student and locate the **Enrollment** tab.
4. Change the **End Status** from **400: Graduated** to **100: End of year, returning to same school**.
5. Select **Save**.
6. Locate the **Graduation** tab on the student's profile.
 - a. If the student did not graduate, remove the *Diploma Date*, *Diploma Type* and *Diploma Period*.
 - b. If the student did not graduate in four years, change just the *Diploma Period*.
7. Select **Save**. (Post Grad Location and Post Grad Plans are not required.)

Note: Federal Re-assigned Cohort Year: Use of this field is to comply with federal mandate (Ed Facts file specification 151) for calculating the cohort graduation rate. This field will contain a re-assigned cohort end year value *for students who have an identified disability under IDEA (special education students) with cognitive disabilities that:*

- take an alternate state assessment
- and have a diploma type of 'Met IEP Goals' (instead of getting a high school diploma)
- and take longer than 4 years to graduate.

The screenshot displays two overlapping windows from the Infinite Campus system. The top window shows a form with fields for *Grade (set to 12), Class Rank Exclude, External LMS Exclude, End Action, *Service Type (set to P: Primary), and Local End Status (set to 100: End of year, returning to same school next year). The bottom window, titled 'General Graduation Information', contains fields for Diploma Date, Diploma Type, Diploma Period, Date First Entered the 9th Grade (08/30/2017), Federal Re-assigned Cohort End Year (2021), NCLB Cohort End Year (2021), Post Grad Location, and Post Grad Plans.

Military Connected Student Data:

'Military Connected' student means a student enrolled in a school district who is a dependent of an active duty member of: The United States Military (Army, Navy, Air Force, Marines, or Coast Guard), Active Duty National Guard, Active Duty Reserve Force of the US Military or Transitioning out of Active Duty to National Guard or Reserve.

Military enrollment exit reasons:

1. Enrollment End Status 145: Military Connected: Transfer to public school in another district in MT
2. Enrollment End Status 155: Military Connected: Transfer to a school out of the country
3. Enrollment End Status 185: Military Connected: Transfer to a school out of state

NOTES:

- Military enrollment start and end status should only be used to record the enrollment status when a student initially enrolls at a school or exits a school.
- If the family military status changes during the year the enrollment status should not be updated.
- Military enrollment reasons do NOT need to be used during the 'end of year' enrollment roll over process (to record previous year exit or new year returning).
- When a military enrollment start and end status are selected, a Military program identifier should also be marked in the 'programs' area.

Military Status types inside the 'Programs' area:

1. The United States Military (Army, Navy, Air Force, Marines, or Coast Guard)
2. Active Duty National Guard
3. Active Duty Reserve Force of the US Military
4. Transitioning out of Active Duty to National Guard or Reserve

NOTES:

- The program does not automatically follow the student from school to school or from year to year and must be selected at the start of every school year.
- If the family military status changes during the year the program should not be updated.
- Districts that upload data into the OPI AIM system, the 'Program Participation' data upload template should be used.
- If the military status program type is selected, then a military enrollment entry and exit status should be used.

STEP 5: Verify Data & Rolling Forward Reports

VERIFYING DATA:

PATH: INDEX > AD HOC REPORTING > FILTER DESIGNER > STATE PUBLISHED

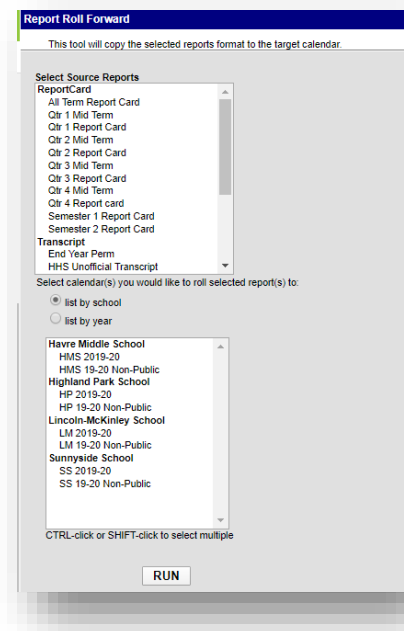
1. Select the **Index** tab.
2. Select **Ad Hoc Reporting**.
3. Select **Filter Designer**.
4. Select **State Published** from the saved filters.
5. Verify data with State Published Ad Hoc Report - **EOYEN End Date or Status Missing**.
6. Click **Test** to see a pop-up list of students that are missing their Enrollment End Date and Status.
7. Click **Search** to see the results in the outline under Search Results.
 - a. This allows you to click on each student and do the work to enter their end dates and statuses.
 - b. If the ad hoc does not yield results, then all data is entered. **No action is necessary.**



Reports Roll Forward (District Edition Users Only):

PATH: INDEX > SYSTEM ADMINISTRATION > PREFERENCES > REPORTS ROLL FORWARD

1. Select **Index**.
2. Select **System Administration**.
3. Select **Preferences**.
4. Select **Reports Roll Forward**.
5. Select the **Report Card(s)** from the list.
6. Select the **School(s)** from the list.
7. Click **Run**.
8. Repeat for **Transcripts**.



STEP 6: Resync State Data

A data resync is required for all file uploads and recommended before data collection due dates.

PATH: INDEX > SYSTEM ADMINISTRATION > DATA UTILITIES > RESYNC STATE DATA

1. Select the current **Year** and **All Schools** from the Action Bar at the top.
2. Select **Index**.
3. Select **System Administration**.
4. Select **Data Utilities**.
5. Select **Resync State Data** from the drop down.
 - a. Check the box for **Enrollment** and **Graduation**. (All associated boxes will automatically populate.)
6. Select **Send Resync**, located at the bottom of the page.

AIM HELP DESK AT 877-424-6681 OR [Submit an AIM Help Desk Ticket](#)