

# Montana Head Start

## AIM User Guide

The Montana Office of Public Instruction (OPI) will work with local Head Start organizations to integrate Head Start child enrollment and demographic data into the State’s Student Information System (Infinite Campus). The OPI and local Head Start organizations enter into an agreement to share data for the purpose of longitudinal analysis. Details of data to be shared are outlined in this agreement. Any data sharing under this agreement will comply with the OPI’s Information Security and Privacy Policies, Montana Statutes and Administrative Rules, and the Family Educational Rights and Privacy Act (FERPA). All requirements for data management, handling, and security listed herein shall apply equally to third party vendors performing services for named agencies.

Links:  
[MTHeadStart.org](http://MTHeadStart.org)

Head Start is a federally funded comprehensive child development program that has served low-income families since 1965. These child-focused programs serve children 3-5 years of age and their families with the goal of increasing school readiness. Head Start provides a range of individualized services in the areas of education and early childhood development, in addition to medical, dental, mental health, nutrition, and parent involvement which are responsive and appropriate to the development, cultural, and linguistic heritage and abilities of each enrolled child and family. Head Start programs provide learning environments which support children’s growth in the following areas: Language & literacy, cognition & general knowledge, physical development & health, social & emotional development, and approaches to learning.

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## Infinite Campus Navigation Basics

AIM MT Edition of Infinite Campus is a web-based application. A secure username and password are required to log-in and use the system. *Your school is responsible for creating and maintaining usernames and passwords.* ***Please do not share sign-in information between users.***

### To access the MT Edition of Infinite Campus:

1. Open a web browser (Internet Explorer has compatibility issues; we recommend using a different browser other than Internet Explorer.)
2. Enter your Infinite Campus URL. (If this is bookmarked it will need to be updated periodically.)
3. Enter your **username** and **password**.

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

The screenshot displays the Infinite Campus application interface. At the top, the 'Infinite Campus State Edition' logo is on the left, and the 'Campus Action Toolbar' is highlighted with a red box. Below the logo, there are filters for 'Year' (18-19), 'District' (All Districts), and 'School' (All Schools). The main content area is divided into three sections: 'Index/Search' (highlighted with a red box), 'Statewide Announcements' (dated 10/13/2018 with a link to AIM help), and 'Process Alerts' (with date range and display options). The 'Index/Search' section lists navigation options: Student Information, Census, Behavior, and Attendance. The 'Main Workspace' (highlighted with a red box) contains the 'Process Alerts' section, which includes a 'Date Range' field, a 'Display' dropdown set to 'All Processes', and a 'Find Messages' button. Below this is a 'Delete Selected Messages' button and a table header with columns for 'Process' and 'Name'.

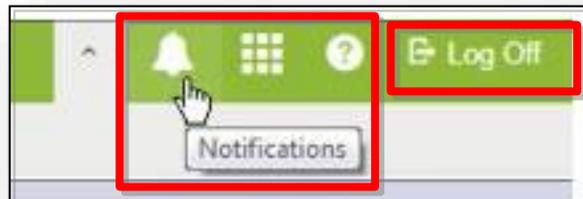
## Campus Action Toolbar

The action toolbar along the top of the screen allows the user to show or hide the campus toolbar where the drop-down menus are for Year, District and School.



**Notifications, app switch, log off, and help** are located in the toolbar.

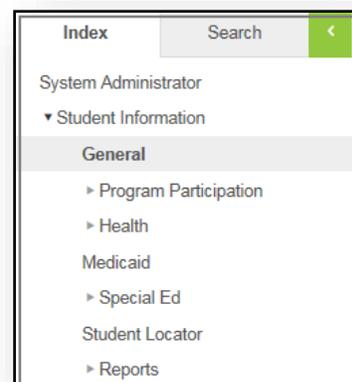
The Campus Action Toolbar is the area that defines the Year and Calendar. To find a child, the (School) Year and Calendar must be selected. The tools on the far-right end of the toolbar provide quick access to hide or see calendars, to switch between applications or go to Campus Community, to get or search for help and to log off.



## Index/Search Outline

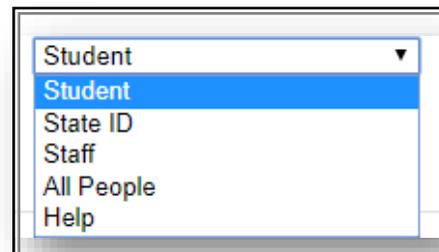
The Index/Search Outline is composed of two tabs: **Index and Search**. The **Index tab** is divided into modules. Modules are groups of similar tools. The Student Information module, for example, contains tools that help find information about children (General, Student Locator, Reports).

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



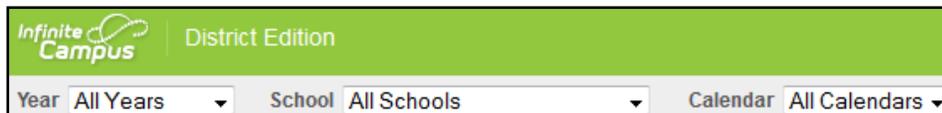
**Index Tab** - Index tab contains all your tools in campus. Tools are organized into groups called modules. Modules can be expanded by clicking on them, revealing various tools.

**Search Tab** - When you click the search tab a drop down will appear. Items available will depend on user rights. Most frequently include are **Student, State ID, Staff, All People** and **Help**. An advanced search tool is also available.



Under the **Index Tab**, click your name and it will bring you back to your Main Workspace.

## Parts of the banner tool bar:



It is important to remember to **Log Off** your computer when you finish each session instead of simply closing your browser. This practice ensures that the next person will not have access to the student's personally identifiable information. To further ensure confidentiality of student information, Log Off when you leave the computer.

Apply to this digital record the same practices that ensure confidentiality that you apply to paper records.



Help is context sensitive and when available will provide you with access to related materials. You can also Search Help.



The Apps Switcher icon allows you to access Campus Community. Campus Community is a great resource to find news, forums, answers to commonly asked questions, as well as How To videos. We recommend that you create an account in Campus Community.



Notifications are short, informational messages that likely do not require additional action. Currently, the only teachers who will receive notifications are those in districts using Campus Learning notifications announcing updates made to Campus Learning plans.

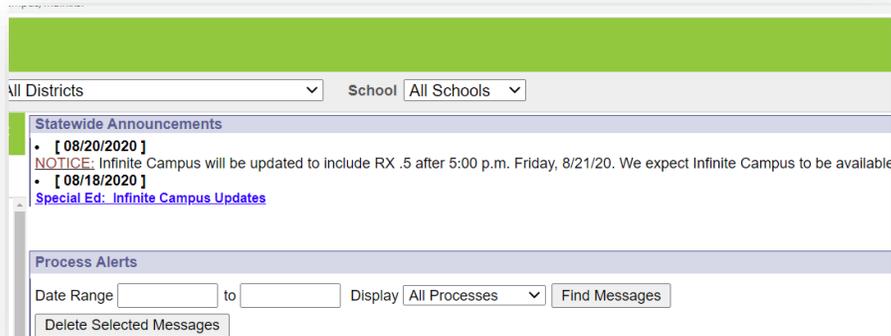


When you select the Caret, a drop-down menu appears that allows you to select the Year, School, and Calendar (if your district created personal calendars) for your district. Selecting the Caret again will hide the information:

## Main Workspace

The Workspace contains the specific record or tool that is being used.

Pictured here is the Summary Tab. If no tools are being used, the Process Alerts screen will appear here.



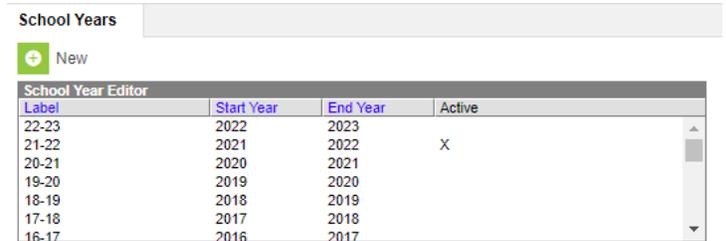
## Creating a new School Year

PATH: SYSTEM ADMINISTRATION > CALENDAR > SCHOOL YEARS

A school year must be created, if it has not been already, before you can create a new calendar for the upcoming school year.

1. From **Index**
2. Select **System Administration > Calendar > School Years**

- a. Select the **New** icon. A **School Year Detail** box displays below the **School Year Editor**.
- b. Enter the **Label** of the new school year. This is the years of which the school calendar spans (21-22, 22-23 etc.).
- c. Enter the **Start Year** and **End Year** in four-digit format (yyyy).
- d. Mark the **Active** box to indicate the new calendar is for the current school year. **This should be done after the existing school year is complete. If a school has a summer school calendar, change the active year AFTER the end of the summer school session.**
- e. Click the **Save** icon when finished. The new school year is listed in the School Year Editor.

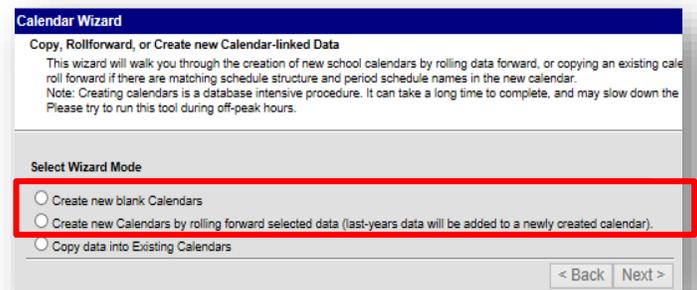


Label	Start Year	End Year	Active
22-23	2022	2023	
21-22	2021	2022	X
20-21	2020	2021	
19-20	2019	2020	
18-19	2018	2019	
17-18	2017	2018	
16-17	2016	2017	

## Creating New School Year Calendars

PATH: SYSTEM ADMINISTRATION > CALENDAR > CALENDAR WIZARD

1. From **Index**
2. Select **System Administration > Calendar > Calendar Wizard**
  - Roll all the calendars in the district at once by using the multiple select feature.
  - If there is more than one calendar, then each calendar must be given a different name.
  - Select **Create new Calendars by rolling forward selected data**. Last years data will automatically roll forward. (Select **Create New Blank Calendars** instead if there is no data from the previous year you wish to roll forward. Follow steps 3-9 below to complete this process and proceed to the next section to verify calendar has been created.)
3. Select **Next**.
4. Select the upcoming school year from the **Year** drop down box.
5. The **Name Template** should be [year] [schoolname].
6. Enter "1" in the Number field.
7. Enter the Start Date and End Date.
  - The fiscal year is always the start date of 7/1/yyyy and end date of 6/30/yyyy.



**Calendar Wizard**

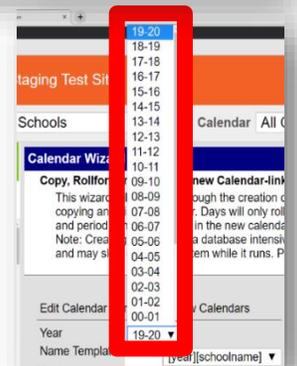
Copy, Rollforward, or Create new Calendar-linked Data

This wizard will walk you through the creation of new school calendars by rolling data forward, or copying an existing calendar forward if there are matching schedule structure 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 database. 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 >



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 forward if there are matching schedule structure 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 database. Please try to run this tool during off-peak hours.

Edit Calendar

Year: 19-20

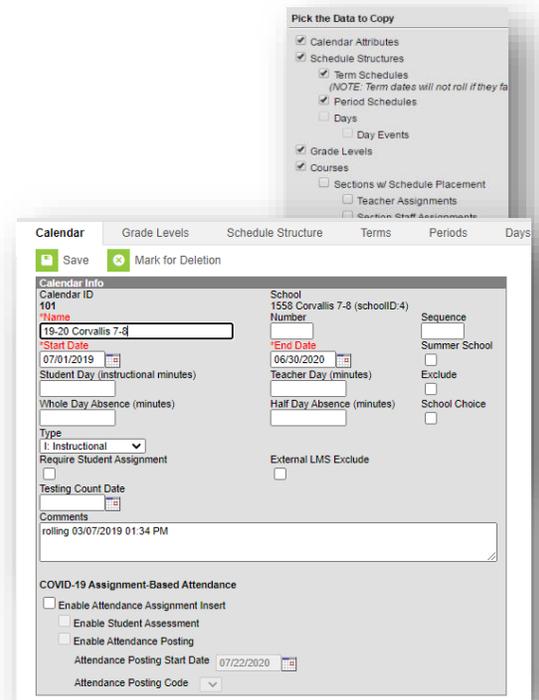
Name Template: [year][schoolname]

8. Select the Calendar(s) from the previous year to roll forward. (Or select the schools if you selected Create New Blank Calendars).
9. Click **Next**. (Or select **Run Wizard** if you selected Create New Blank Calendars).
10. Check all the boxes 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 make the adjustments after rolling forward the previous school year's calendar instead of entering all new courses.

11. Select **Run Wizard**.
12. Scroll to bottom of **Progress** box to verify the Wizard shows **Complete**.
13. When the Wizard is complete, refresh the web browser by selecting the refresh button in to see the new calendar(s).



## Verify Rolled Calendar Information

PATH: INDEX > SYSTEM ADMINISTRATION > CALENDAR > CALENDAR > CALENDAR TAB

Year  District  School

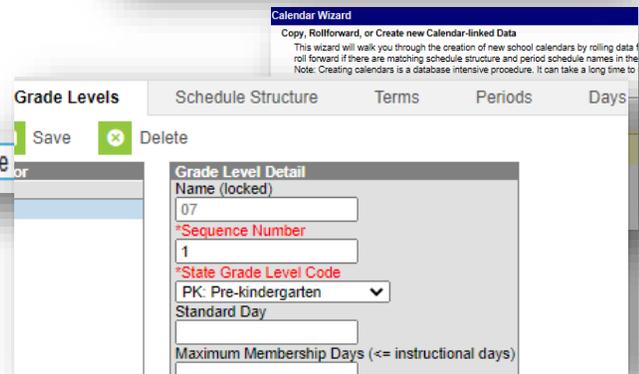
1. From the Action Bar at the top:
  - a. Select the future school year from the Year.
  - b. Select the District.
  - c. Select the School and Calendar when applicable.

### Calendar Tab

1. From Index, select **System Administration** then **Calendar** and **Calendar**.
2. From the **Calendar** tab, review the **Start Date, End Date**. These dates are always the fiscal year dates (7/1 and 6/30), not the dates of instruction.
3. Select **Save**.

### Grade Levels Tab

1. Select the **Grade Levels** tab and verify the PK grade for the school. The Name, Sequence Number and State Grade Level Code fields should be populated.
  - a. **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 appear as two (2) digits or as two (2) characters (e.g., PK).



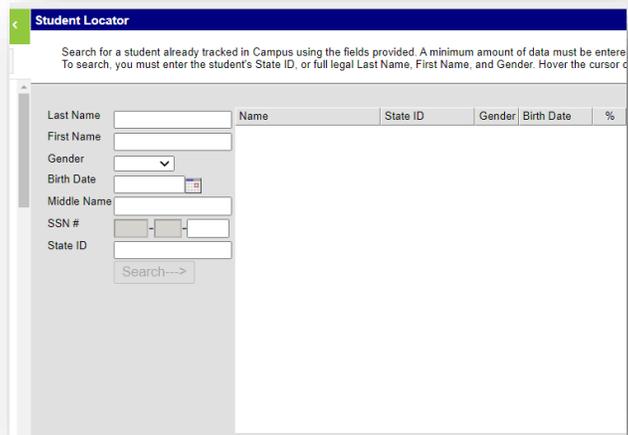
- b. **Seq. numbers** between grades must be one higher than the grade and in order. This allows students to roll forward to the next grade in the sequence. (e.g., 1)
- c. **State Grade Level Code** is a State-defined grade level. This code is referenced in state reporting extracts. (e.g., PK: Pre-kindergarten)

# Creating Enrollments

## Student Locator

PATH: INDEX/STUDENT INFORMATION/STUDENT LOCATOR

The Student Locator is the method for enrolling new children into AIM MT Edition. The Student Locator searches the entire state database for children previously enrolled in a Montana school district. Using the Student Locator decreases the chances of creating a duplicate State Student ID. The child's Last Name, First Name and Gender are *required* for a search. A child should always be entered with their legal name. If a child has been previously enrolled in a Montana school district, but a match is not generated, try to enter a variation in the spelling of the first or last name.

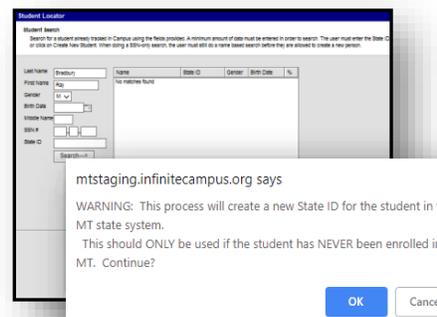


### Tips for Success:

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

If a match is generated, verify the child's birthdate to ensure it is not another child with the same name. Hovering over the child's name will show their last enrollment and grade level. If those match the enrolling child, click on the child's name. From the Student Information screen use the [Direct Entry Method](#) to create a new enrollment.

If the child has not been previously enrolled in a Montana school district, click **Create New Student**. A message will pop up, warning the user that this process will create a new State Student ID. Click **OK**.



1. Person Info: If this is a new student, the State ID will populate when the record is saved.
2. Identity Info: Enter the required information in **red font, marked with a red asterisk (\*)**, this includes all race/ethnicity info.
3. Enrollment Detail. Enter the child's:

**Start Date:** First day in attendance.

**Start Status:** 01 or 04 (usually)

**Grade:** PK

**Service Type:** P: Primary

4. Optional Program Details: **If a student is EL or Immigrant:** enter the Home Primary Language AND Language of Impact fields. **If a student is Immigrant:** also check the corresponding program box under the Other Program Participation section. **If a student is Homeless:** enter the Homeless Nighttime Residence and check the Homeless box under the Other Program Participation section. **If a student is EL:** please see the [EL User Guide](#).

5. Click **Save**.

NOTE: It is not necessary to click on the **Submit Request** button if a student is enrolling for the first time.

## Direct Entry Method for Previously Enrolled Children

PATH: INDEX/STUDENT INFORMATION/GENERAL

Students that already exist within Infinite Campus, can be enrolled in each year by creating a new enrollment. After pulling up a student's General Information screen (click on the Search tab, enter the last name, and click Go):

1. Click on the students **Enrollments** tab.
2. Select the **Year** and select a **School** in the toolbar
3. Click the blue **New** button. (Not *New Enrollment History*.)
4. Enter the **Start Date, Start Status, Grade Level, Service Type and Comments** (if applicable).
5. Optional Program Details: **If a student is EL or Immigrant:** enter the Home Primary Language AND Language of Impact fields under the Demographics tab. **If a student is Immigrant:** also check the corresponding program box under the Enrollment Tab under the Other Program Participation section. **If a student is Homeless:** enter the Homeless Nighttime Residence and check the Homeless box under the Enrollment Tab under the Other Program Participation section. **If a student is EL:** please see the [EL User Guide](#).
6. Click **Save**.

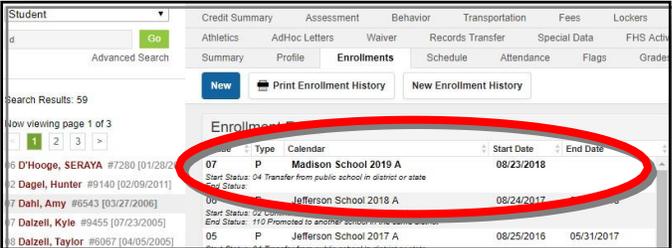
NOTE: If the child is transferring in from another district in the state of Montana, a records request will have to be initiated.

## Required Enrollment Information

PATH: INDEX/STUDENT INFORMATION/GENERAL/ENROLLMENTS

After pulling up a child's General Information screen (Search tab, enter last name, click Go), click the **Enrollments** tab.

1. Click on the first line of the current year's enrollment.
2. From the General Enrollment Information screen. The **Start Date, Local Start Status, Grade and Service Type** are required to be entered on each enrollment. All other data elements on the enrollment should be left blank.



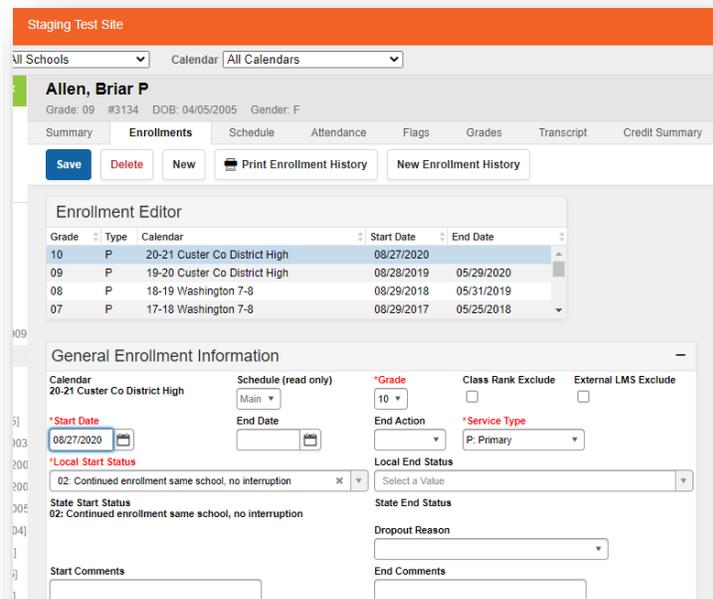
Student	Credit Summary	Assessment	Behavior	Transportation	Fees	Lockers	
id	Go	Athletics	AdHoc Letters	Waiver	Records Transfer	Special Data	FHS Acti
Advanced Search	Summary	Profile	Enrollments	Schedule	Attendance	Flags	Grade
Search Results: 59	New	Print Enrollment History	New Enrollment History				
Now viewing page 1 of 3							
06 D'Hooge, SERAYA #7280 [01/28/2018]	07	P	Madison School 2019 A	08/23/2018			
			Start Status: 04 Transfer from public school in district or state				
02 Dagel, Hunter #9140 [02/09/2011]	00		Jefferson School 2018 A	09/24/2017			
			Start Status: 02 Completed				
07 Dalzell, Kyle #9455 [07/23/2005]	05	P	Jefferson School 2017 A	08/25/2016	05/31/2017		
			End Status: 110 Promoted to another school in the same district				
08 Dalzell, Taylor #6067 [04/05/2005]							

# Enrollment Start, End Dates and Status Codes

PATH: INDEX/STUDENT INFORMATION/GENERAL/ENROLLMENTS

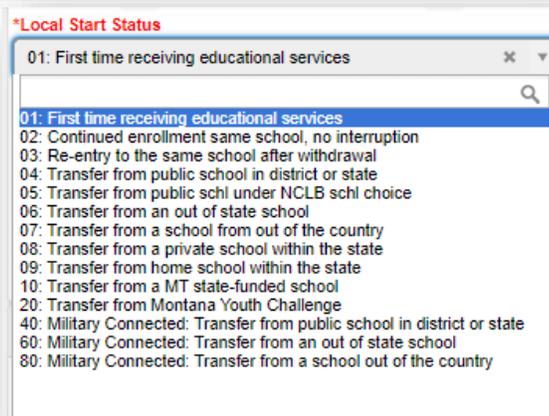
The child's Start, and End Dates and Status codes reflect when and where the child came from and when/where the child is going. For State reporting purposes, it is important that these dates and codes be as accurate as possible.

The Enrollment Start Date and End Date should reflect the first and last day the child attended the Head Start program.



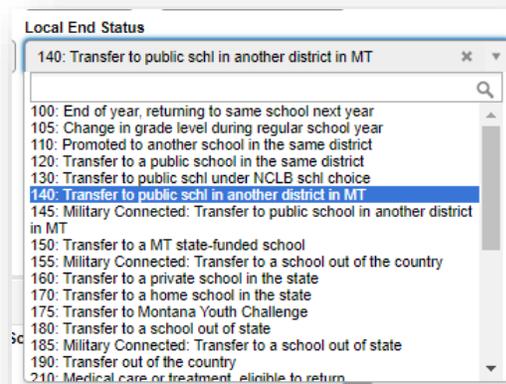
## Start Status Codes:

- If it is the first time enrolling in PK, then use status code: **01: First time receiving education services**
- If the student is returning as a PK student again, then use status code: **02: Continued enrollment same school, no interruption**
- If the student is transferring to your Head Start school from another Head Start school, then use status code: **08: Transfer from a private school within the state.**



## End Status Codes:

- If the PK student is advancing to Kindergarten, then use status code: **140: Transfer to public schl in another district in MT**
- If the PK student is returning next year as a PK student again, then use status code: **100: End of year, returning to same school next year**
- If the PK student advances or leaves to a home school, then use status code: **170: Transfer to a home school in the state**



# Service Type

PATH: INDEX/STUDENT INFORMATION/GENERAL/ENROLLMENTS

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

**P: Primary** – the Primary Service Type indicates that the child is primarily enrolled in this school or district for educational services.

A child may have a Primary enrollment at one school and a Partial or Special Ed enrollment in another. However, a child can never have two primary enrollments with overlapping dates. Head Start schools must communicate with local district schools if the child has dual enrollments in Head Start and another school regarding which is primary and which is secondary.

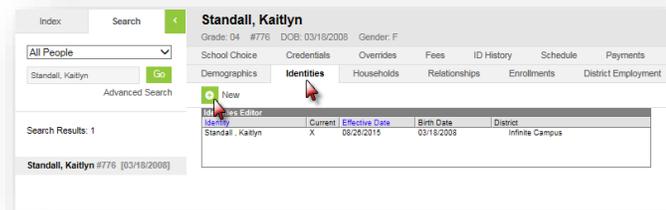
**N: Special Ed Services** – should be selected if the student is in PK and not receiving educational service but is receiving special education services (i.e. speech services).

**S: Partial**- should not be used for Head Start kids.

# Legal Names/Name Changes

PATH: INDEX/CENSUS/PEOPLE/IDENTITIES

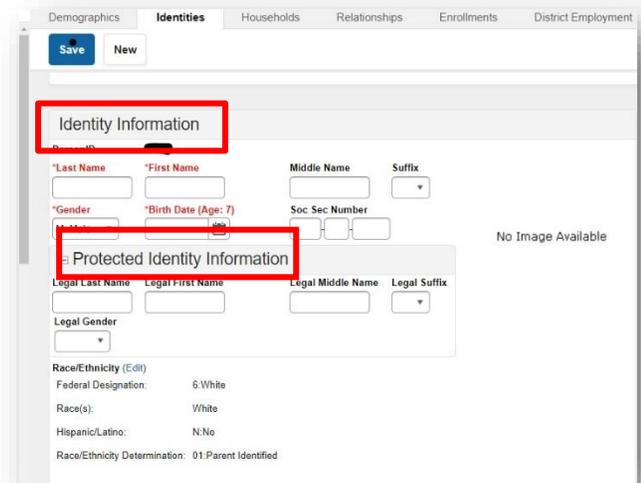
The AIM/Infinite Campus system is designed so that each child has only one State Student ID that stays with a child from the first enrollment into public school through graduation from high school. To prevent duplication, it is highly recommended that legal names are used in AIM/Infinite Campus regardless of the school being public or private (PK). The AIM system allows multiple *identities* to be attached to a single State Student ID, to accommodate necessary legal name changes.



**Scenario A:** Student has a legal name change, or district realizes student was not enrolled with legal name.

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

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



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

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

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

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

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

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

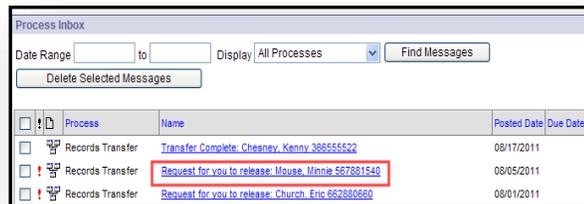
## Processing Transfer Requests

The Records Transfer tool is used mainly to facilitate the transfer of Special Education records. Therefore, the Head Start agencies should not be generating a records transfer request to school districts when enrolling an incoming student.

## Transfer out of District

When a child leaves the Head Start to transfer to a school district or another Head Start, a transfer message will be generated by the new district or Head Start when they enroll the child. The message "Request for you to release:" will appear in the **Process Alerts Inbox** (or click on the child's **Records Transfer** tab). Click on the underlined link to open the request.

There are three options on the Student Records Transfer. The only response should be to "Release Records."



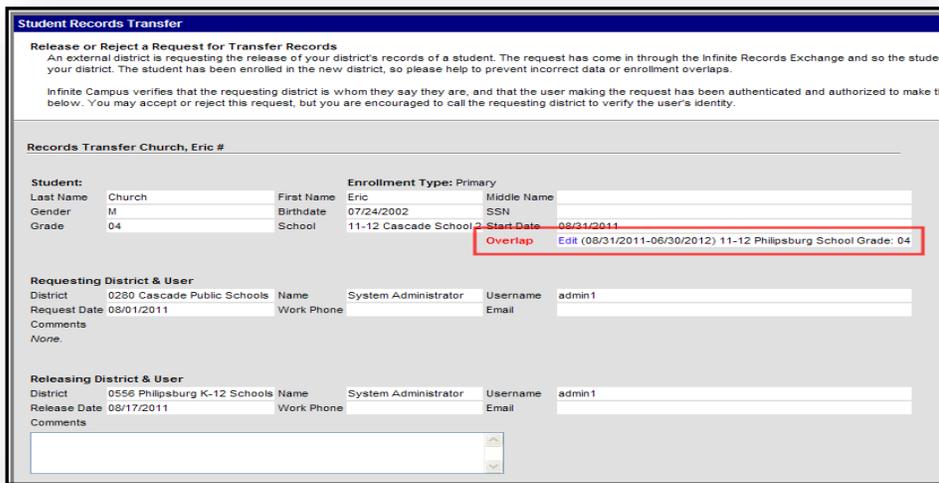
Process	Name	Posted Date	Due Date
Records Transfer	<a href="#">Transfer Complete: Chesney, Kenny 368555522</a>	08/17/2011	
Records Transfer	<a href="#">Request for you to release: Minnie 567881549</a>	08/05/2011	
Records Transfer	<a href="#">Request for you to release: Church, Eric 862880860</a>	08/01/2011	

## End Dates and Overlaps

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

Click **Edit** to return to the **Enrollments** tab and correct the error. Once the enrollment

overlap has been fixed, return to the **Process Inbox** or **Records Transfer** tab, and complete the records transfer.



**Student Records Transfer**

**Release or Reject a Request for Transfer Records**  
An external district is requesting the release of your district's records of a student. The request has come in through the Infinite Records Exchange and so the student has been enrolled in the new district, so please help to prevent incorrect data or enrollment overlaps.

Infinite Campus verifies that the requesting district is whom they say they are, and that the user making the request has been authenticated and authorized to make the request below. You may accept or reject this request, but you are encouraged to call the requesting district to verify the user's identity.

**Records Transfer Church, Eric #**

**Student:** Enrollment Type: Primary

Last Name	Church	First Name	Eric	Middle Name	
Gender	M	Birthdate	07/24/2002	SSN	
Grade	04	School	11-12 Cascade School	Start Date	08/31/2011

**Overlap** Edit (08/31/2011-08/30/2012) 11-12 Philipsburg School Grade: 04

**Requesting District & User**

District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	08/01/2011	Work Phone		Email	
Comments	None.				

**Releasing District & User**

District	0556 Philipsburg K-12 Schools	Name	System Administrator	Username	admin1
Release Date	08/17/2011	Work Phone		Email	
Comments					

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

## Searching in Campus

There are two levels of search in Infinite Campus, the basic and advanced search.

### Basic Search

The basic search is used for finding data that already exists in your district/school with limited or open criteria. **It does not search the entire state database.** To use a basic search, click on the Search tab in the Outline. Select the specific data type and enter the criteria in the search box (last name, first name). Click **Go**.

Wildcard searches can also be combined with a basic search.

The underscore (\_) replaces one character. For example, when searching for Anderson/Andersen, use the \_ to replace the o/e: Anders\_n. The search will return matches for both Anderson and Andersen.

The percentage symbol (%) replaces multiple characters. It can be used for all - % alone, for after – b% returns all names whose last name begins with b, or for between b%n returns all names that begin with b and end with n. Searching with just a % symbol (or no entry) will return all results.

### Advanced Search

The advanced search combines a variety of data pieces to yield a more specific search result. **This search will also only search your district, it will not search the entire state database.** To use the advanced search, click on the Search tab in the Outline, then click **Advanced Search**.

In addition to the Student Search filters there is a *Saved Filter* window which displays saved searches drawn from the AD Hoc Filter tool and “State Published” reports created by OPI.

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

## Reports

There are several reports within Infinite Campus that can be used to verify enrollment data.

1. Navigate to the **Index**, click on **Student Information**.
2. Select **Reports**.
3. Click on **Enrollment Summary** or **Enrollment Summary Details**. The Enrollment Summary report will generate a list of total enrollments. The Enrollment Summary Details report will provide a list of enrollments including names.

**For assistance, contact the AIM Help Desk  
at 1-877-424-6681 or  
[Submit an AIM Help Desk Ticket](#)**