

Records Transfers

AIM User Guide

This AIM User Guide provides guidance for the process of initiating and completing a records transfer for a student who is new to the district. The procedure for importing and/or printing transfer documents is also covered. AIM can transfer a student's Special Education, English Learners (EL), and enrollment history records to another district as live data – reducing the data entry burden on the receiving district.

This AIM User Guide provides guidance for the process of initiating and completing a records transfer for a student who is new to the district. The procedure for importing and/or printing transfer documents is also covered. AIM can transfer a student's Special Education, English Learners (EL), and enrollment history records to another district as live data – reducing the data entry burden on the receiving district.

Table of Contents

FAQ:	2
Records Transfer:.....	3
Process Inbox Messages	4
Direct Entry	6
Deleted Process Inbox Messages.....	6
Transfer for an Existing Student.....	6
Student End Dates	7
Request Options	7

FAQ:

1. **We have a new student from a neighboring district – how do I request a transfer of records in AIM?** Use the Student Locator to begin the records transfer process. See [page](#)
2. **What is the Process Inbox and how do I use it?** The Process Inbox is a "message center" used to facilitate the movement of students both in and out of a district. See [page](#)
3. **I accidentally deleted the request in my Process Inbox – can I get it back?** The records in the Process Inbox can be accessed through the Records Transfer tab on the student's record. See [page](#)
4. **A district requested records for a student that is still enrolled in my district – how do I handle this request?** The Records Transfer tool can be used to notify a district they have requested records for the wrong student. See [page](#)
5. **What are the options for responding to a transfer request?** There are three options: Release Records, Reject Request, Ignore Request. See [page](#)

Records Transfer:

The **Records Transfer** tool is activated when the **Student Locator** is used to enroll a student. The student must have been previously enrolled in a Montana district for the records transfer tool to work.

NOTE: Always do an **All People** search for a student before using the Student Locator. If the student has been previously enrolled in your district, **do not use the Student Locator**. Use direct entry instead. *See page*

1. Select the **Index** tab.
2. Select **Student Information**.
3. Select **Student Locator**.
4. Enter the student's *Last Name, First Name and Gender*.
5. Click **Search**.
6. Find the most appropriate match in the results box. Hovering on a name in the box will show you where that student is currently enrolled. Click the appropriate student's name to begin the enrollment process.
7. Enter the student's personal information, including *Last Name, First Name, Middle Name* (not required), *Gender, Birthdate*, and *Race/Ethnicity* (only the first two questions are required). *Student Number* (local ID number) is also not required.
8. Enter the student's enrollment information, including *Calendar, Schedule, Grade, Start Date, Start Status* and *Service Type*.
9. Click **Save**.
10. The **Student Records Transfer Wizard** will appear once the record is saved. This request is sent to the school the student is transferring from. Comments, including additional contact information, may be added before clicking **Submit Request**.

Student Records Transfer

Request a Records Release
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

Student:	Enrollment Type: Primary			
Last Name	Collins	First Name	Phil	Middle Name
Gender	M	Birthdate	09/15/2001	SSN
Grade	07	School	14-15 Cascade 7-8	Start Date
			10/16/2014	End Date

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	10/02/2014	Work Phone		Email	
Comments					

Submit Request

Student Locator

Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. You must enter the student's State ID, or full legal Last Name, First Name, and Gender. Hover over each list or click the Create New Student button.

Last Name	First Name	State ID	Gender	Birth Date	%
Gaga	Lady Yvette	480298181	F	01/22/2002	
Gaga, Lady		374037710	F	12/02/2012	
Gaga, Lady		520911659	F	08/12/2013	
Gaga, Lady		581458494	F	02/26/2012	
Gaga, Lady		Chinook Public Schools 17-18 Hartland Elementary Scho			
Last Enrolled: (03/13/2018-) in grade KF					
Guardian Names:					

Person Info

Student Number	Generate Number
State ID	427666250

Identity Info

*Last Name	*First Name	Middle Name
Collins	Phil	B
*Gender	*Birth Date	Soc Sec Number
Male	09/15/2001	
Race/Ethnicity		
*Is the individual Hispanic/Latino?		
N: No		
*Is the individual from one or more of these races?		
(check all that apply)		
<input type="checkbox"/>	American Indian or Alaska Native	
<input type="checkbox"/>	Asian	
<input type="checkbox"/>	Black or African American	
<input type="checkbox"/>	Native Hawaiian or Other Pacific Islander	
<input checked="" type="checkbox"/>	White	

Enrollment Detail

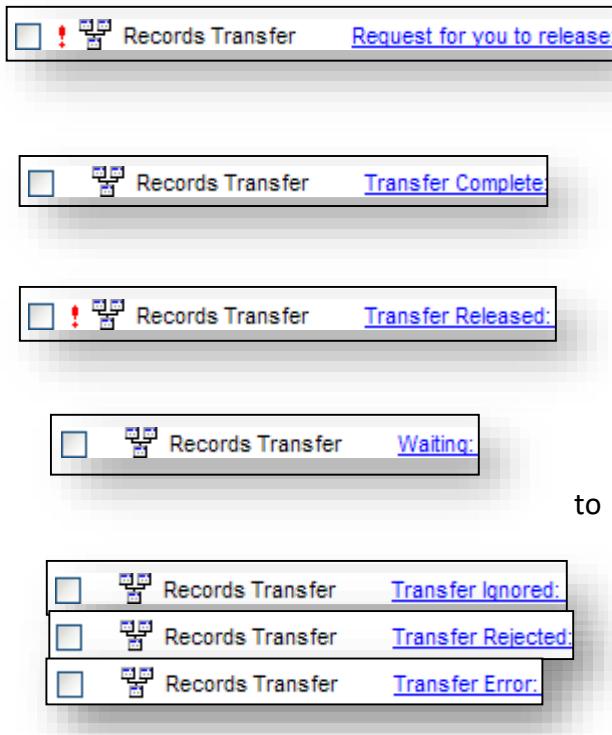
*Calendar	*Schedule	*Grade	Class Rank Exclude
14-15 Cascade 7-8	Main		
*Start Date	No Show	End Action	*Service Type
10/16/2014	<input type="checkbox"/>		P: Primary
*Start Status	End Date	End Status	
04: Transfer from public school in district or state			
Dropout Reason			
Start Comments			
End Comments			

Process Inbox Messages

The **Process Inbox** displays the status of submitted requests. To access the **Process Inbox**, click the *User Account Name* (should be your username listed at the top of the **Index** tab). Access to the **Process Inbox** is dependent upon user rights. Please contact your system administrator about access to the Process Inbox.

During the transfer process there are several types of messages that may appear in the **Process Inbox**. Below are some samples of messages that may appear:

- **Request for you to release:** a district has requested you to release records for a student.
- **Transfer Complete:** you have completed the steps to release records to a requesting district.
- **Transfer Released:** a district has released a transfer request initiated by your district.
- **Waiting:** waiting for a district to respond a transfer request initiated by your district.
- **Transfer Ignored/Rejected/Error:** a district has chosen not to take action on your request, or the student was not previously enrolled in a MT Edition/District Edition school.



to



After the sending district releases the records, the **Process Inbox** message will change to **Transfer Released**.

1. Click the blue hyper link to complete the records transfer and open the **Records Transfer Wizard**.

Process Inbox			
Date Range	to	Display	All Processes
<input type="button" value="Delete Selected Messages"/>			
Process	Name	Posted Date	Due Date
<input type="checkbox"/>	Waiting: Baba, Ali 461714648	10/08/2014	
<input type="checkbox"/>	Waiting: Collins, Phil 427666250	10/02/2014	
<input type="checkbox"/>	Waiting: Ray, Rachel 187953224	10/01/2014	
<input type="checkbox"/>	Transfer Released: Banks, Tyla 996037068	08/13/2014	
<input type="checkbox"/>	Transfer Error: Huxtable, Vanessa 393911535	08/13/2014	
<input type="checkbox"/>	Transfer Error: Fallon, James 862145321	08/13/2014	

The **Records Transfer Wizard** allows access to a variety of records. The most common data items to look for are IEP records and English Learner (EL) records.

- **Transfer Documents** are records that are imported as a PDF. To view the **Transfer Documents**, click a document name. The document will open as a PDF in a separate window.
- **Data Imports** are records that are imported as live data elements.

2. Click on a **Data Import** record you wish to import. Follow the on-screen guidance to complete the import.

NOTE: The *IEP Plan Import* and the *Special Ed Evaluation Import* require the "locked" box to be checked. See screenshots to the right.

Records Transfer Banks, Tyra #

Student:	Last Name: Banks	First Name: Tyra	Enrollment Type: Primary
Gender: F	Birthdate: 05/13/1998	Middle Name: SSN	
Grade: 08	School: 14-15 Cascade 7-8	Start Date: 08/25/2014	

Requesting District & User

District: 0280 Cascade Public Schools	Name: System Administrator	Username: support
Request Date: 08/13/2014	Work Phone:	Email:

Comments: None.

Releasing District & User

District: 0556 Philipsburg K-12 Schools	Name: System Administrator	Username: support
Release Date: 08/13/2014	Work Phone:	Email:

Comments: None.

Status: Records released.

Transfer Documents

- Transcript
- Census Contact Summary
- Extended-Census-Summary
- Enrollment History
- Schedule
- Attendance Period Detail
- Assessment Summary
- Behavior Summary
- Health Condition Summary
- Health Screening Summary
- Health Immunization Summary

Data imports

- IEP
- MT-Supplemental
- Special Ed Evaluation
- IEP-Documents
- PLP
- PLP-Documents
- LEP
- LEP-Services
- LEP-Accommodations
- Transcript Import Wizard
- Extended Census Import Wizard
- Enrollment History Import Wizard
- Assessment Import Wizard
- Immunization Import Wizard
- Health Condition Import Wizard
- Health Screening Import Wizard
- IEP Import Wizard
- MT-Supplemental Documents Import Wizard
- Special Ed Evaluation Import Wizard
- Special Ed Documents Import Wizard
- PLP Import Wizard
- PLP-Documents Import Wizard
- LEP Import Wizard

IEP Plan Import

Plan Type: MT Transition IEP 01/10/2014 - 01/17/2015
MT Transition IEP

Start Date: 01/18/2014 End Date: 01/17/2015 Locked

IEP Services Import

Do not import the following service.
Service: Self-Help/Independence
Self-Help/Independence
Service Provider:
Service Position: Special Education Teacher Display on Print
Special Education Teacher

Do not import the following service.
Service: Reading
Reading
Service Provider:
Service Position: Special Education Teacher Display on Print
Special Education Teacher

Do not import the following service.
Service: Written Expression
Written Expression
Service Provider:
Service Position: Special Education Teacher Display on Print
Special Education Teacher

Import as PDF only

Special Ed Evaluation Import

MT Evaluation Report 05/16/2008
MT Evaluation Report

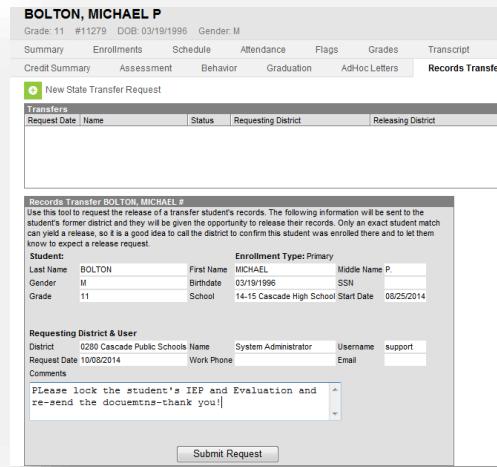
Date: 05/16/2008 Locked

Direct Entry

If the student has been previously enrolled in the district **DO NOT** use the Student Locator to create an enrollment. Enroll the student by Direct Entry. Then create a manual record request.

After entering the new enrollment:

1. Select the **Search** tab and select **Student** from the drop-down menu.
2. Enter the student's last name and click **Go**.
3. Click the **Records Transfer** tab and select **New State Transfer Request**.
4. Enter comments (if necessary) and click **Submit Request**.



BOLTON, MICHAEL P
Grade: 11 #11279 DOB: 03/19/1996 Gender: M

Summary Enrollments Schedule Attendance Flags Grades Transcript
Credit Summary Assessment Behavior Graduation Ad-Hoc Letters Records Transfer

Transfers
Request Date: Name: Status: Requesting District: Releasing District:

Records Transfer BOLTON, MICHAEL #
Use this tool to request the release of a transfer student's records. The following information will be sent to the student's new district and they will be given the opportunity to release their records. Only an exact student match can yield a release, so it is a good idea to call the district to confirm this student was enrolled there and to let them know to expect a records request.

Student:
Last Name: BOLTON First Name: MICHAEL Middle Name: P
Gender: M Birthdate: 03/19/1996 SSN:
Grade: 11 School: 14-15 Cascade High School Start Date: 08/25/2014

Enrollment Type: Primary

Requesting District & User:
District: C200 Cascade Public Schools Name: System Administrator Username: support
Request Date: 10/08/2014 Work Phone: Email: Comments:
Comments: Please lock the student's IEP and Evaluation and send the documents-thank you!

Submit Request

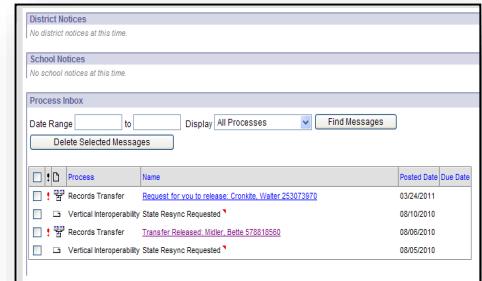
Deleted Process Inbox Messages

If a **Records Transfer** notice is deleted from the **Process Inbox** or a student has been previously enrolled in the district, navigate to the student's **Records Transfer** tab to view the status of a pending request.

Transfer for an Existing Student

If a student leaves the district and enrolls in another MT public school, the receiving district should initiate a records request through the MT Edition. The request will appear in the former district's **Process Inbox**. Action must be taken to release the student's records to the receiving school. Access to the **Process Inbox** depends upon user rights.

1. Click the **Request for you to release:** blue hyper link to open the **Records Transfer Wizard**. The wizard will show the student's personal information, including *Start Date* into the new school and the name of the *Requesting District*. If the student does not have an *End Date*, or the *End Date* overlaps with the new school, an overlap warning will appear. The student's *Start Date* at the receiving district is listed above that warning.
2. Click **Edit** to resolve the overlap.

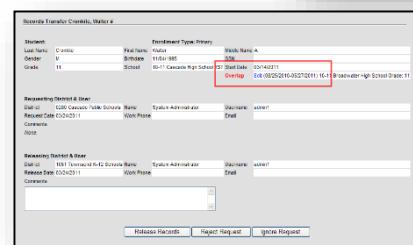


District Notices
No district notices at this time.

School Notices
No school notices at this time.

Process Inbox
Date Range: to: Display: All Processes Find Messages
Delete Selected Messages

Process	Name	Posted Date	Due Date
Records Transfer	Request for you to release_Cronkite_Water 253073879	03/24/2011	
Vertical Interoperability State Resync Requested		08/10/2010	
Records Transfer	Transfer Released_Miller_57581560	08/06/2010	
Vertical Interoperability State Resync Requested		08/05/2010	



Records Transfer Requests, Miller #

Request for you to release_Cronkite_Water 253073879
Status: Pending
Request Date: 03/24/2011
Release Date: 03/24/2011
Comments: Overlap: End (08/25/2014-09/27/2014) 16-14-Bethelviller-High School Start Date: 11

Vertical Interoperability State Resync Requested
Status: Pending
Request Date: 08/10/2010
Release Date: 08/10/2010
Comments:

Records Transfer Requests, Miller #

Request for you to release_Cronkite_Water 253073879
Status: Pending
Request Date: 03/24/2011
Release Date: 03/24/2011
Comments:

Vertical Interoperability State Resync Requested
Status: Pending
Request Date: 08/10/2010
Release Date: 08/10/2010
Comments:

Buttons: Release Records, Request Again, Ignore Request

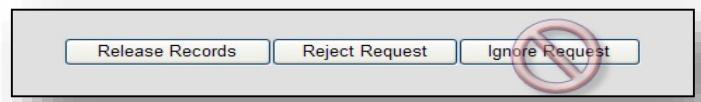
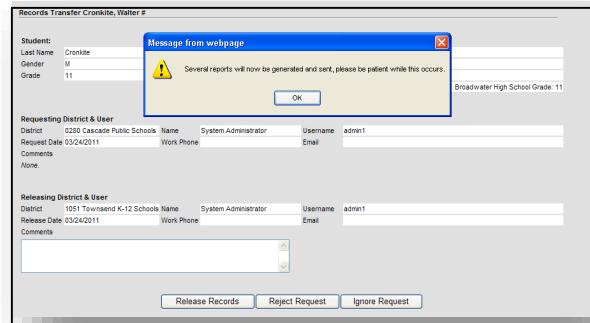
Student End Dates

The student's *End Date* in a district is the last day he/she was physically in attendance at your school. If the student's *Start Date* or *End Date* conflicts with those of the other district, please contact the other district to resolve the overlap. No student may hold a primary enrollment in two districts at the same time.

Request Options

Once any Start Date and End Date overlap is resolved, the student's former district has three options: **Release Records**, **Reject Request** or **Ignore Request**.

- The first option is to **Release Records**:
If the student appears to be the correct student and the overlaps are resolved, click **Release Records**. The records are then sent to the receiving district.
- The second option is to **Reject Request**:
If a district has attempted to enroll a student that has not transferred, this may occur in instances where a student has a common name that generated a large number of matches through **Student Locator**, rejecting the request is appropriate. It is recommended that a district enter comments about the transfer before clicking **Reject Request**. **Note:** There may also be legal reasons, e.g., protection order, witness protection, for rejecting a request. These determinations are made at the district level.
- The third option is to **Ignore Request**. It is not recommended that districts use this function.



For more information, contact the AIM Help Desk at 1- 877-464-6681 or

[Submit an AIM Help Desk Ticket](#)