

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.

Records Transfers

[AIM User Guide](#)

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FAQ:

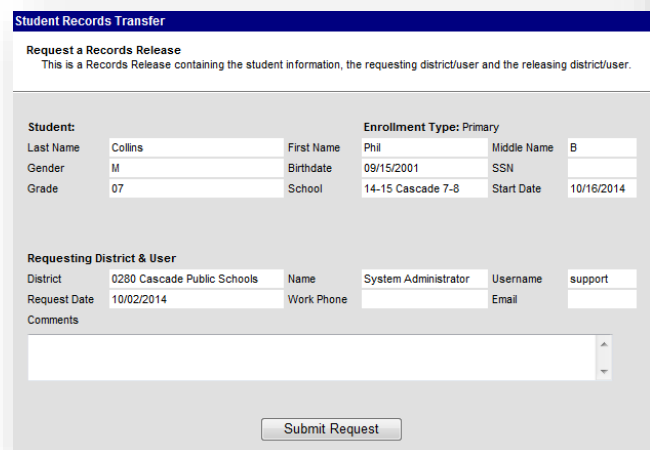
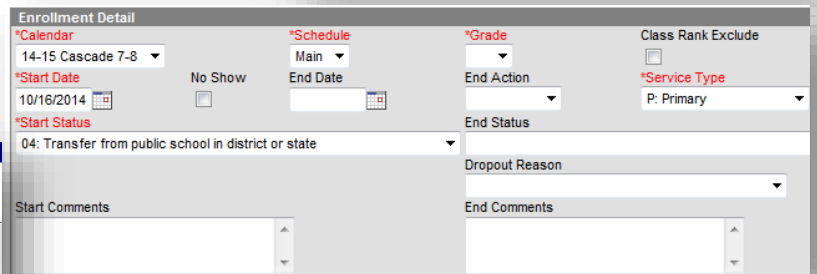
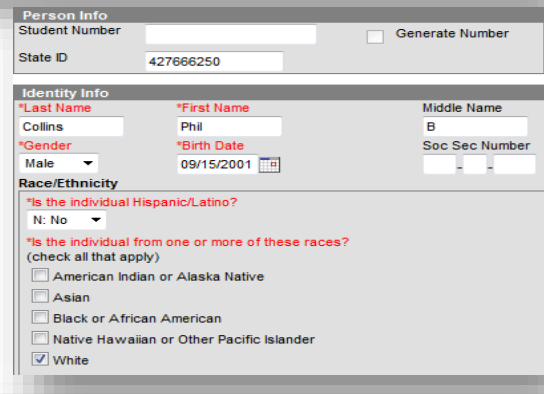
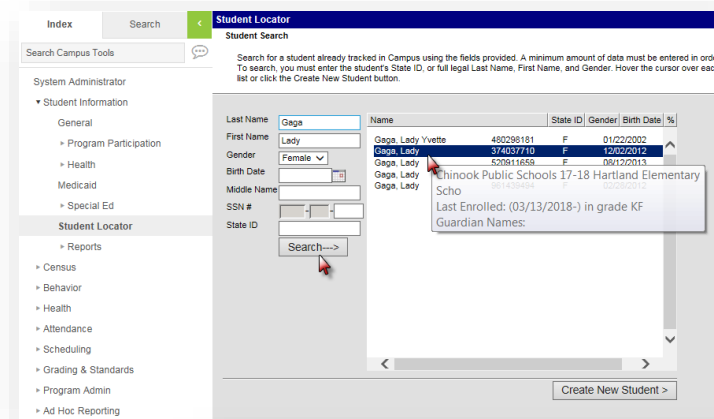
- 1. We have a new student from a neighboring district – how do I request a transfer of records in AIM?** Use the Student Locator to begin the records transfer process. See *page*
- 2. What is the Process Inbox and how do I use it?** The Process Inbox is a "message center" used to facilitate the movement 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**.

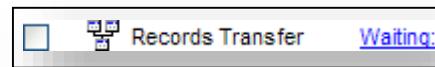
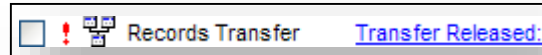
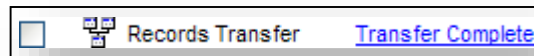
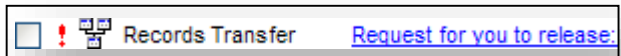


Process Inbox Messages

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	Find Messages
Delete Selected Messages				
<input type="checkbox"/>	Process	Name	Posted Date	Due Date
<input type="checkbox"/>	Records Transfer	Waiting: Baba, Ali 461714648	10/08/2014	
<input type="checkbox"/>	Records Transfer	Waiting: Collins, Phil 427668250	10/02/2014	
<input type="checkbox"/>	Records Transfer	Waiting: Rav, Rachel 187953224	10/01/2014	
<input type="checkbox"/>	Records Transfer	Transfer Released: Banks, Tyra 996037066	08/13/2014	
<input type="checkbox"/>	Records Transfer	Transfer Error: Huxtable, Vanessa 393911535	08/13/2014	
<input type="checkbox"/>	Records Transfer	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:
 Grade: 08, School: 14-15 Cascade 7-8, SSN:
 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.

Release 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
- IEP
- MT-Supplemental
- Special-Ed-Evaluation
- IEP-Documents
- PLP
- PLP-Documents
- LEP
- LEP-Services
- LEP-Accommodations

Data imports

- 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 01/18/2014 - 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:

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

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

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Import as PDF only

Special Ed Evaluation Import

MT Evaluation Report 05/16/2008
 MT Evaluation Report
 Date: 05/16/2008, Locked:

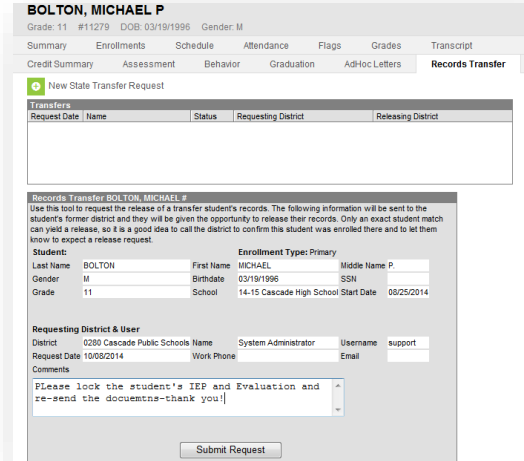
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Direct Entry

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**.



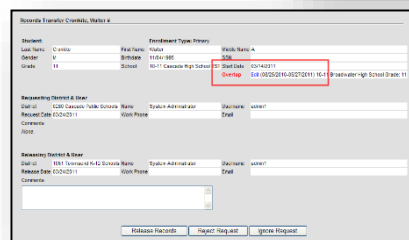
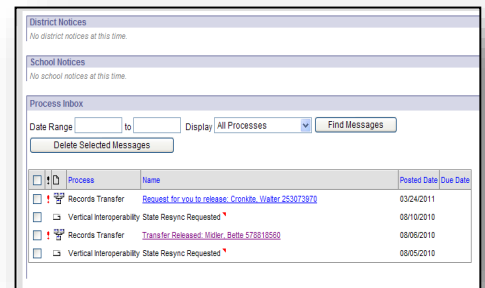
Deleted Process Inbox Messages

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 Exiting 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.



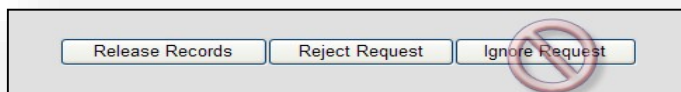
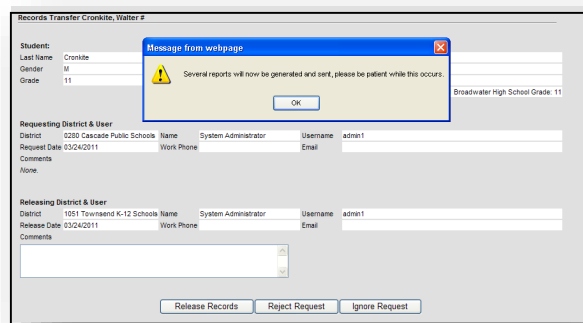
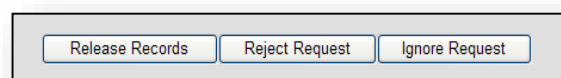
Student End Dates

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](#)