<u>AIM User Guide:</u> **Records Transfers**

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.

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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 accidently 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:

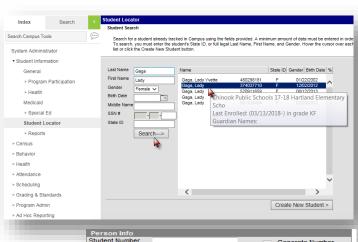
The **Records Transfer** tool is activated when the **Student Locator** is used to enroll a student. The student must have been previously enrolled in a Montana district for the records transfer tool to work.

NOTE: Always do an **All People** search for a student <u>before</u> 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:			Enrollment Type: Pri	mary		
ast Name	Collins	First Name	Phil	Middle Name	В	1
Gender	М	Birthdate	09/15/2001	SSN		
Grade	07	School	14-15 Cascade 7-8	Start Date	10/16/2014	
District						
	10/02/2014	Work Phone		Email		
Request Date Comments	10/02/2014	Work Phone		Email		
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Collins	Phil	В
'Gender	*Birth Date	Soc Sec Number
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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.

🚦 🚆 Records Transfer Request for you to release: Records Transfer Transfer Complete Records Transfer • Transfer Released Records Transfer Waiting to Records Transfer Transfer Ignored 물 Records Transfer Transfer Rejected 🚏 Records Transfer Transfer Error:

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

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



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.

	isfer Banks, Tyra #					
Student:				Enrollment Type: Pri	mary	
Last Name	Banks		First Name	Tyra	Middle Name	
Gender	F		Birthdate	05/13/1998	SSN	
Grade	08		School	14-15 Cascade 7-8	Start Date	08/25/2014
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District	0280 Cascade Public Sc	hools	Name	System Administrator	Username	support
Request Date	08/13/2014		Work Phone		Email	
Comments						
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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 dropdown 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*.

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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.

- 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.

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October 2020

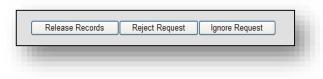
Student End Dates

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.



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Release Records	Reject Request Ignore Request

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

Submit an AIM Help Desk Ticket