This AIM User Guide helps AIM/Infinite Campus Administrators set up accounts for District staff, including SPED Staff, to access the Records Transfer tools. The main purpose of the records transfer tool is to transfer certain Special Education records to transfer as live data – reducing the data entry burden on SPED staff as students move from one district to another within the state.

**NOTE:** The Records Transfer process in AIM does not replace a district's responsibility to transfer records. The only records that transfer (with the exception of a school using the District Edition of Infinite Campus) are Special Education records, Limited English Proficiency status information and limited Enrollment History. Sharing the responsibility for the Records Transfer process allows those involved with the transfer to communicate directly when there are questions and/or concerns regarding the information transferred.

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FAQ:

1. **I want the Special Education teacher to transfer records. How do I add this functionality?** User Groups have been established for Records Transfer. Add the Special Education teacher to that group.

2. **How does the receiving district know who initiated the transfer?** Adding the email and phone number of the person using the Records Transfer functionality will facilitate the process if questions arise.

3. **What is the advantage of allowing other users access to the Records Transfer tools?** Records Transfers in AIM are only required for the transfer of Special Education documents between districts. Assigning that functionality to users involved with Special Education services will expedite the transfer of records.
Adding Users to a Group:

The Records Transfer user group gives a user access to the Process Inbox and the Records Transfer tab.

**NOTE:** The Process Inbox cannot be limited by calendar. If a user has access to the Process Inbox, they will see all transfers in the district, not just those for the calendars to which they have been assigned.

To add the Records Transfer tools to a user's account:

1. Select the Search tab.
2. Select User from the drop-down menu.
3. Type the user’s last name then click Go.
4. In the Search Results box, click the user's username in bold.
5. Click the User Groups tab to see their current group membership.
6. Click a Group name in the left-hand column to move it under the Current Group Membership list on the right (and vice-versa). Click Save.

**NOTE:** The Process Inbox will only show transfers generated after this tool is added to the user's account.

To view previous transfer requests the user must navigate to the student's Records Transfer tab.
Adding Contact Information for Users:

Adding a user's email and phone contact information to the Demographics tab will allow the sending or receiving district access to that information when using the Records Transfer tools.

To enter the user's contact information to the Demographics tab:

1. Select the Index tab.
2. Select Census.
3. Select the Search tab.
4. Select All People from the drop-down menu.
5. Enter the person's last name and click Go.
6. Click the person's name from the results generated.
7. Select the Demographics tab.
8. Scroll down to the Personal Contact Information section. Enter the person's email and phone.
9. Click Save.
10. Records Transfer will now show both the Requesting and Releasing District, complete with contact information.

NOTE: If either district has questions regarding the transfer, the Special Education staff members may contact each other directly, taking the System Administrator out of the process.

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