

AIM USER GUIDE:
RECORDS
TRANSFERS FOR AIM
ADMINISTRATORS

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.

Records Transfers for AIM Administrators

AIM User Guide

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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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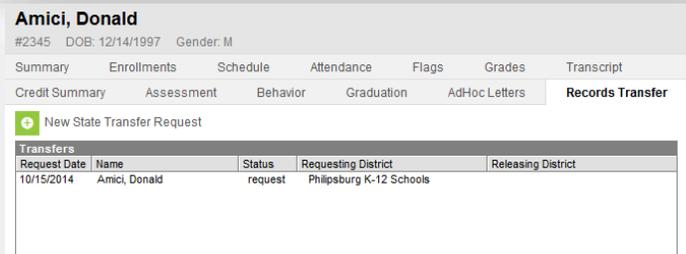
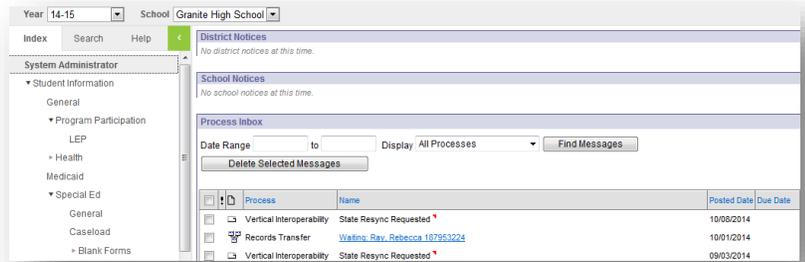
FAQ:

- 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:

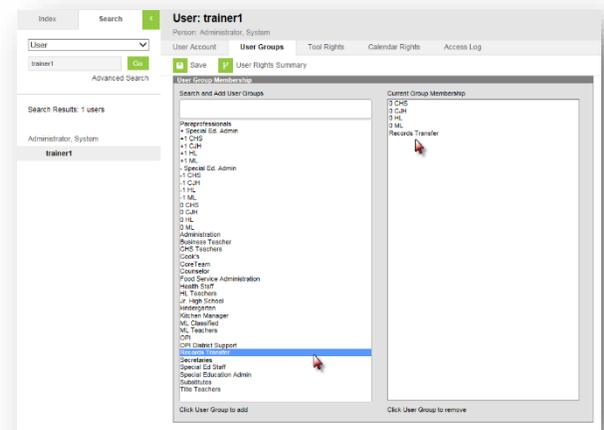
The **Records Transfer** user group gives a user access to the **Process Inbox** and the **Records Transfer** tab.

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.

Records Transfer Bourdain, Anthony #
 Use this tool to request the release of a transfer student's records. The following information will be sent to the student's former 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 release request.

Student:	Enrollment Type: Primary		
Last Name	Bourdain	First Name	Anthony
Gender	M	Birthdate	07/28/1999
Grade	08	School	13-14 Philipsburg 7-8
		Start Date	09/03/2013

Requesting District & User

District	0556 Philipsburg K-12 Schools	Name	System Administrator	Username	support
Request Date	10/15/2014	Work Phone	(406)444-2561x256	Email	sysadmin@school.org

Comments

Submit Request

Carey, Drew M
 DOB: 08/07/1977 Gender: M

Demographics Identifies Households Relationships Enrollments District

Save Delete Person Summary Report Demographics Data

Comments

Upload Picture

- Modified by: Administrator, System 10/15/2014 15:11

Person Identifiers

Local Student Number Generate Number

Student State ID

Local Staff Number

Staff State ID 002679

Person GUID E19C98C3-7E9C-41B6-9475-4C0E9DA56061

Personal Contact Information

Contact Information	Private	Emergency Attendance	Behavior	General Priority	Teacher
Email: dcarey@pburg.k12.mt.us	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secondary Email:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cell Phone: (509) 431-5555	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Phone: () - x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Phone: (406) 859-4444	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pager: () - x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

An Infernal district is requesting the release of your district's records of a student. The request has come in through the Infinite Records Exchange the student has identified themselves as coming from your district. The student has been enrolled in the new district, so please help to prevent info 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 for make the request using the user account listed below. You may accept or reject this request, but you are encouraged to call the requesting district to verify the user's identity.

Student:	Enrollment Type: Primary		
Last Name	Obama	First Name	Malik
Gender	F	Birthdate	07/04/1998
Grade	07	School	10-11 Philipsburg 7-8
		Start Date	04/15/2011
		Overlap	08/25/2010-06/03/2011 10-11 Cascade 7-8

Requesting District & User

District	0558 Philipsburg K-12 Schools	Name	Melen Kiefer	Username	mkiefer
Request Date	07/15/2011	Work Phone	(406)555-1234	Email	mkiefer@school.k12.mt.us

Comments

None

Releasing District & User

District	0280 Cascade Public Schools	Name	Laura Ingalls	Username	l Ingalls
Release Date	07/15/2011	Work Phone	(406)555-9876	Email	l Ingalls@school.k12.mt.us

Comments

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](#)