



MT 4030 Student Locator

August 2009

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ADDING CENSUS INFORMATION



OVERVIEW

This lesson will introduce you to the process of adding new students to your Campus database. The Student Locator will be used to determine if this student has existing records in either the local database or the Infinite Campus State Edition your district is linked to. Once the new student is added, we will then add other people and create a household.

OBJECTIVES

At the conclusion of this lesson, you should be able to:

- Search for a student using the Student Locator.
- Add a new student if needed.
- Enroll a student in your school.
- Use the district transfer tool to request records from the student's previous district.
- Add related people using Census > Add Person.
- Add an address.
- Create a household using the Census Wizard.

A screenshot of the "Student Locator" web interface. The title bar says "Student Locator". Below it is a "Student Search" section with instructions: "Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. The user must enter the State ID, the SSN, or the full legal lastName, firstName and gender. Select a student from the list or click on Create New Student. When doing a SSN-only search, the user must still do a name based search before they are allowed to create a new person." Below the instructions are input fields for "Last Name", "First Name", "Gender" (a dropdown menu), "Birth Date" (with a calendar icon), "Middle Name", "SSN #" (with dashes), and "State ID". A "Search-->" button is at the bottom left. To the right of the input fields is a table with columns: "Name", "State ID", "Gender", "Birth Date", and "%". The table is currently empty.

Searching for a Student using Student Locator

1. In your Index outline, select Student Information > Student Locator.
2. Enter the student's first and last names and select the gender.
3. Click Search.
4. All students who match will display in the search results. The student locator uses a type of search technology to find students whose names are phonetically similar to the name entered.
5. Use the information on screen such as their birth date and state ID number to determine if one of the results is the student you are attempting to register.
6. **If no results are found, click Create New Student** and proceed with Adding a New Student
7. **If the student is found using the Student Locator**, proceed with the directions for Transferring a Student.



When adding new students to your site, it is critically important to use the Student Locator

to see if the student has been enrolled in the state already. A district-to-district records transfer may then be used to copy information from the previous database to your database, thus reducing the amount of data re-entry. Student Locator will also allow one point of entry for a student in the entire state, allowing that student's learning and development to be tracked over time from district to district.



Use additional information displayed on the Student Locator (such as birthdate, stateID, etc.)

To confirm that the student has or has not been previously enrolled in a school in your state.

Adding a New Student (First Enrollment in the State)

Primary Enrollment - the main enrollment for the student. Most students will have primary enrollment indicated by a Service Type of P: Primary.

Partial enrollment - a 10th grader taking one course at a vocational school would have a partial enrollment indicated by a Service Type of S: Partial and a P: Primary enrollment record at their home high school.

Special Ed Enrollment - a student enrolled in a school for special education services only. A private school student who receives speech therapy at a public school would have a Service Type of N: Special Education Services on their enrollment record at the public school.

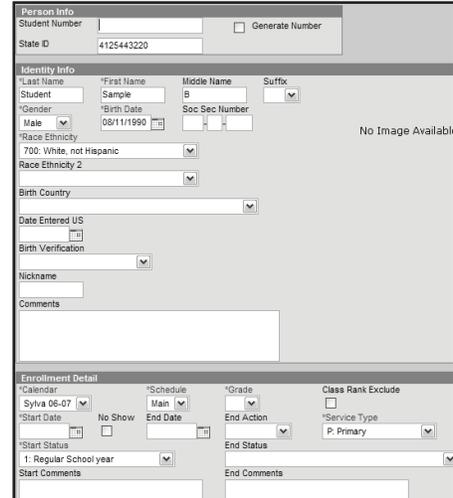
Records Transfer Status

Waiting- the message has not been acted on by the first district.

Rejected- the request for records has been turned down by the other district.

Released- the records are ready to be transferred to your district.

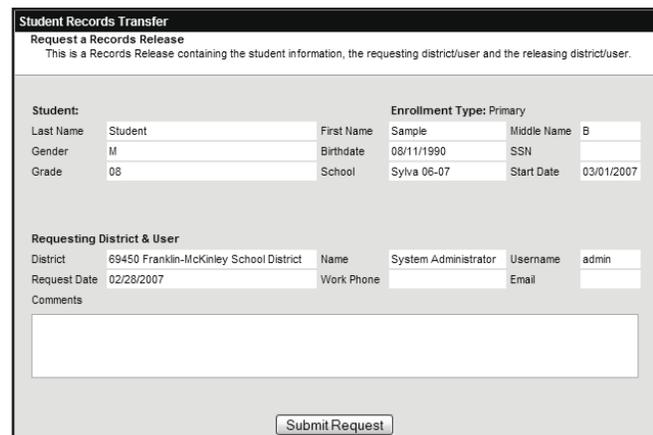
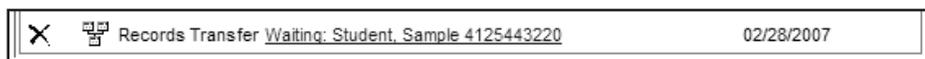
1. Create a local Student Number by either entering the number manually in the field or checking Generate Number.
2. A StateID for the student is created automatically when your system syncs with the State Edition. Leave this field blank.
3. Enter the student's demographic information. All fields in red and asterisked are required fields.
4. Enroll the student by selecting the correct elements for the calendar, schedule, grade, start date and status. Save when finished.
5. Enter all applicable state reporting data for this student.
6. Since the student is new to the state, there will not be records available to transfer. Proceed to Adding People.



Transferring a Student From Another District Using District-to-District Transfer

If the student has an enrollment in another school in the state, you may use tools to move their records into your district once the other district has released the student's records.

1. If the student is found in the Student Locator search results, click on their name.
2. Enter a local student number or check Generate number.
3. Enroll the student in your district by selecting the correct elements for the calendar, schedule, grade, start date, and start status.
4. Click Save.
5. The Records Transfer Request form will display.
6. Enter any comments and click Submit Request. A message will be sent to a designated person in the student's originating district requesting records. A notice will also be in your Process Inbox.

Census: New Student



Uploading Records After an Accepted Records Transfer

Once the sending district releases the student records, selected records may be copied into the receiving district's database using data import wizards; other information from the student's previous district will be contained in read-only PDF documents.

From the Process Inbox, click the link for the accepted records transfer OR navigate to the Records Transfer tab of Student Information > General and select the transfer in question.

1. To print a transfer document, select the link for that document. A PDF will then generate with the information to be printed or saved as needed.
2. To use the Data Imports, select the particular Wizard for the data that should be imported; directions are provided on screen.

Each Data import wizard is a one-time process.



When importing student records, records from the other district will need to be mapped (or matched) to data elements and categories in your district. Each wizard cannot be done in parts. **You cannot import items from the transcript separately.**

- Courses on the student's transcript will need to be assigned to a local credit group and the amount of credit awarded for each class can also be edited if needed.
- Assessments from the other district will also need to be matched to locally used assessments.
- Enrollment history may also be imported into the local history and may be changed to reflect different start and end statuses as needed.

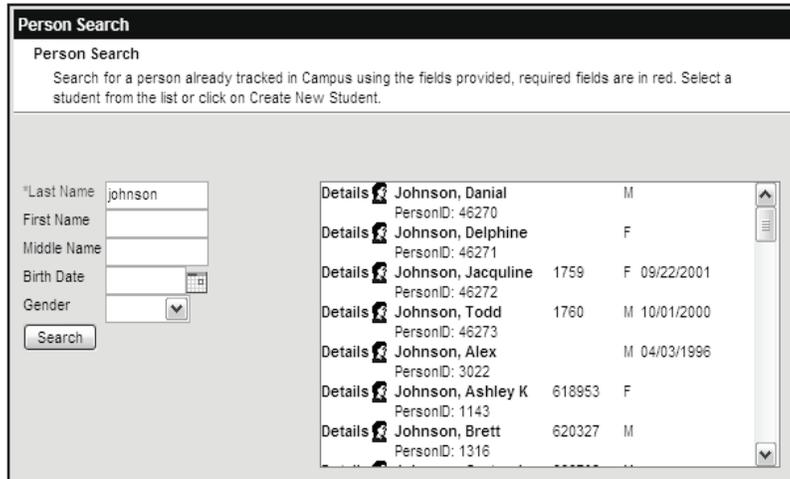
In all cases with Import Wizard, the user may opt to leave data out of the local district's records and not import the data from the approved records transfer.

Transfer documents in Adobe PDF format must be saved or printed locally and then added manually to your district's database if policy and procedure requires this information to be added. Consult your district's policy and procedure documents for further instructions.

Records Release					
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.					
Records Transfer Student, Sample #					
Student:			Enrollment Type: Primary		
Last Name	Student	First Name	Sample	Middle Name	B
Gender	M	Birthdate	08/11/1990	SSN	
Grade	08	School	Sylva 06-07	Start Date	03/01/2007
Requesting District & User					
District	69450 Franklin-McKinley School District		Name	System Administrator	Username admin
Request Date	02/28/2007	Work Phone		Email	
Comments None.					
Releasing District & User					
District	73908 McFarland Unified School		Name	System Administrator	Username admin
Release Date	02/28/2007	Work Phone	(543)543-5434x543	Email	eadmin@ca.org
Comments None.					
Status: Records released.					
Transfer Documents			Data imports		
Transcript	Progress	Report Card	Transcript Import Wizard	Enrollment History Import Wizard	Assessment Import Wizard
Census Contact Summary	IEP	Special Ed Evaluation	Immunization Import Wizard	EP Import Wizard	Special Ed Evaluation Import Wizard
Enrollment History					
Schedule					
Attendance Period Detail					
Assessment Summary					
Behavior Summary					
Health Condition Summary					
Health Screening Summary					
Health Immunization Summary					

 In Montana, it is only required to enter special education students and parent contacts in Census. It is highly recommended that special education, general education, counselors, principals, psychologists, service providers, and all other people who serve on student IEP teams be entered in Census. Doing this will reduce the number of times data will need to be entered for these individuals.

 Enter enough criteria to limit your results to a usable number, but not so much criteria that it filters down to no results. As an example, if the father's name is James Smith, searching for "James Smith" would exclude any record that may have been created as "Jim Smith." Searching by last name and first initial may yield better results.



Person Search

Person Search

Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Student.

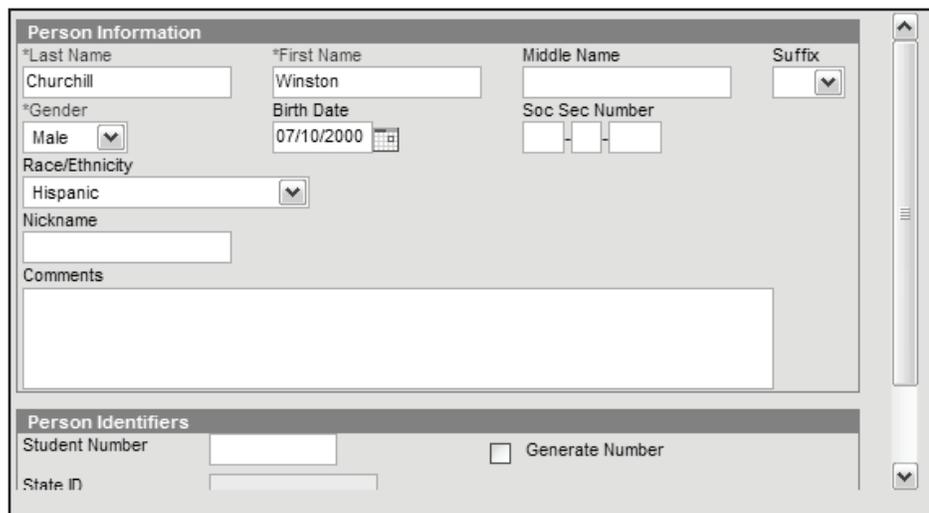
*Last Name: Johnson
 First Name:
 Middle Name:
 Birth Date:
 Gender:
 Search

Details	Name	Gender	PersonID
Details	Johnson, Danial	M	46270
Details	Johnson, Delphine	F	46271
Details	Johnson, Jacqueline	F	46272
Details	Johnson, Todd	M	46273
Details	Johnson, Alex	M	3022
Details	Johnson, Ashley K	F	1143
Details	Johnson, Brett	M	1316

Adding People (Census > Add People)

1. In your Index outline, select Census > Add Person.
2. Enter the search criteria to see if this person exists in Campus.
3. Click Search.
4. All people who match your search will display in the search results. Use the information in the window or click Details to find more demographic information to determine if you have found an exact match.
5. IF NO RESULTS ARE FOUND, click Create New Person.
6. Enter the information to complete the person's demographic information as required. DO NOT check "generate number" as the parents will not have student numbers.
7. Click Save.

Repeat steps for all adults associated with the new student entered.



Person Information

*Last Name: Churchill
 *First Name: Winston
 Middle Name:
 Suffix:
 *Gender: Male
 Birth Date: 07/10/2000
 Soc Sec Number:
 Race/Ethnicity: Hispanic
 Nickname:
 Comments:
 Person Identifiers
 Student Number:
 State ID:
 Generate Number

Census: New Student



Adding an Address (Census > Add Address)

1. In your Index outline, select Census > Add Address
2. Enter the search criteria to search for the family's address.
3. If an address is found and shows in the search results, click on the address and proceed with Checking an Existing Address
4. If the address is NOT found, click New Address.
5. Enter the elements for the address in the fields provided. Click save. Proceed to the Census Wizard.

A screenshot of the "Address Creation" form. The form has a title bar "Address Creation" and a subtitle "Address Creation". Below the subtitle is a instruction: "Fill in the fields below. This will create a new Address object in the database and then continue on to the next Process Step". The form is divided into several sections. The "Address Information" section contains fields for "P.O. Box" (with a checkbox), "Number", "Prefix", "Street" (with "Main" entered), "Tag", "Direction", and "Apt". Below this are fields for "City", "State", "Zip", "County", and "Location Code". There are also fields for "Latitude" and "Longitude" (with search icons), "Tract", and "Block". A "Comments" text area is located below these fields. At the bottom of the form is a "District" dropdown menu.

Prefix— a directional indication before the street name, such as 2000 East Maple.

Tag—the type of street, such as St., boulevard, Parkway, etc. Districts should consult with your local Post Office for preferred nomenclature.

Direction—directional indication after the street name and tag, such as 2000 Main Street South.



In Montana, it is important to enter the mailing address for

students as this information is needed for Special Education forms. If the mailing address is a P.O. box make sure to mark the P.O. Box checkbox, a Number, City, State, and Zip code. Do NOT mark the P.O. box checkbox if the mailing address is associated with a street name.

Checking an Existing Address

If the address is found when searching to create a new address, follow these steps. Otherwise, proceed to Census Wizard.

1. Check to be sure you selected that all elements match the address given by the family.
 - If all elements match, proceed to step two.
 - If any elements do not match, consult your district's established policy and procedure for the correct process to follow. **DO NOT CHANGE** address data at this point as you may be changing the address of another family!
2. Click the Households tab to determine if a household is currently at this address. If a household is currently at the address, consult your district's established policy and procedure for the correct process to follow.
3. If the address is not currently being used by a household, proceed with the steps for Census Wizard.

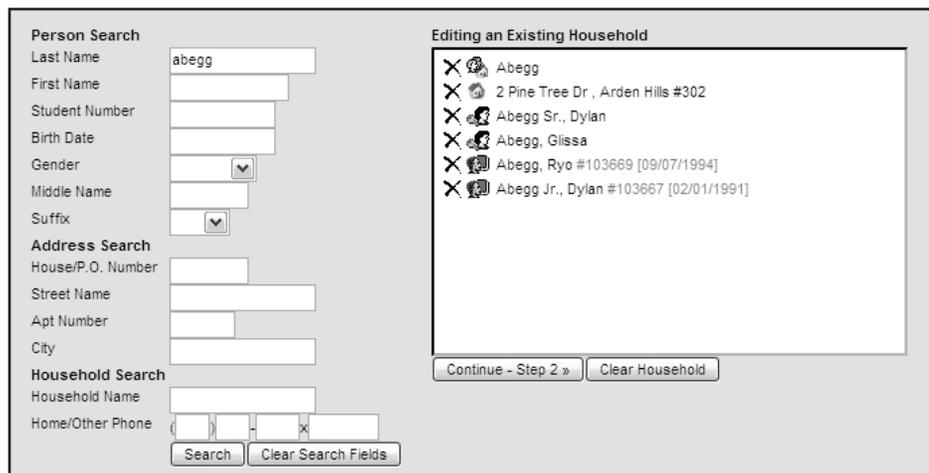
Census: New Student

Census Wizard

The Census Wizard tool allows a user to create a household (family unit) for a group of people, attach a mailing address, and define relationships between people in a three step process.

Step 1. Assembling Households and Addresses

1. Search for household members in the search box in the wizard.
2. Click on a person in the outline (left side of your screen) to place them into the new household assembly area.
3. If needed, people may be removed from the assembly area by clicking the “X” next to their name.
4. Repeat steps as needed until all people in the household are in the assembly area.
5. Search for household’s address(es) by number and street name.
6. Click on an address in the outline to place it into the new household assembly area.
7. Click Continue- Step 2.



The screenshot shows the 'Person Search' and 'Address Search' sections on the left, and the 'Editing an Existing Household' section on the right. The 'Person Search' section includes fields for Last Name (abegg), First Name, Student Number, Birth Date, Gender, Middle Name, and Suffix. The 'Address Search' section includes fields for House/P.O. Number, Street Name, Apt Number, and City. The 'Household Search' section includes fields for Household Name and Home/Other Phone. The 'Editing an Existing Household' section displays a list of household members with an 'X' icon next to each name, indicating they can be removed. The list includes: Abegg, 2 Pine Tree Dr , Arden Hills #302, Abegg Sr., Dylan, Abegg, Glissa, Abegg, Ryo #103669 [09/07/1994], and Abegg Jr., Dylan #103667 [02/01/1991]. At the bottom of the 'Editing an Existing Household' section are buttons for 'Continue - Step 2 »' and 'Clear Household'. At the bottom of the 'Person Search' section are buttons for 'Search' and 'Clear Search Fields'.

Step 2. Editing Membership and Mailing

1. Name the household according to district policy and procedure. Leaving the household name null will result in the name of the household defaulting to the guardian(s) names.
2. Enter the home phone number.
3. Mark the mailing address with the mailing checkbox.
4. Enter start dates as required by district policy and procedure.
5. Click necessary secondary flags on address and membership
6. Click Save & Continue- Step 3.

Census: New Student



Household	
Household Name (Override) Abegg	Household Phone Number (555) 844-6117 x
Private <input type="checkbox"/>	
Household Locations	
Address	Start End Private Secondary Mailing
2994 100TH St. E., Nampa MD 13749	03/31/2007 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2 Pine Tree Dr #302, Arden Hills MN 55112	04/01/2007 <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
Household Members	
Name Birthdate Gender Start End Private Secondary	
Abegg Jr., Dylan 02/01/1991 M	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Abegg, Glissa F	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Abegg, Ryo 09/07/1994 M	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Abegg Sr., Dylan M	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Save & Continue - Step 3 »	

Step 3. Defining Relationships

1. Choose the district-defined description that best describes the relationship between the pair. (Relationships work in both directions and will auto fill down.)
2. A comment may be made on a relationship if needed. Clicking on the will open a comments space.
3. Enter in start dates (if needed) and appropriate flags.
4. Click Save & Done when finished.

Private- The private check-box will not hide this data from a user of Campus. Rather it may be used when doing an AdHoc query for a data export. Data marked as private can be excluded from the export.

Secondary address- Some of the time this household can be found at this address (As in the case of a lake home, cabin in the mountains, or other second home.)

Secondary membership Some of the time this member can be contacted through this household (A student lives with a parent for part of the time).

Census Wizard - Edit Relationships											
Step 3 - Edit Relationships of Household Members											
Edit the relationships between the family members.											
Relationships to Abegg Jr., Dylan											
Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Abegg Sr., Dylan		M					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Abegg, Glissa		F					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Abegg, Ryo	09/07/1994	M					<input type="checkbox"/>				
Relationships to Abegg Sr., Dylan											
Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Abegg Jr., Dylan	02/01/1991	M					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Abegg, Glissa		F					<input type="checkbox"/>				
Abegg, Ryo	09/07/1994	M					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Relationships to Abegg, Glissa											
Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Abegg Jr., Dylan	02/01/1991	M					<input checked="" type="checkbox"/>				
Abegg Sr., Dylan		M					<input type="checkbox"/>				
Abegg, Ryo	09/07/1994	M					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Relationships to Abegg, Ryo											
Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Abegg Jr., Dylan	02/01/1991	M					<input type="checkbox"/>				
Abegg Sr., Dylan		M					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Abegg, Glissa		F					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Save & Done											

Guardian names the legal guardian of the child. Will show on the student summary information and will pull into the Campus IEP.

Mailing. The non-student will receive a copy of all mailings about the student, such as report cards, behavior or attendance letters, etc.

Portal will give one person access to the student's information in the Campus Portal.

Messenger is the phone dialer and e-mail component of Campus. A Messenger contact for a student is a person who can be designated to receive messages of a general or high priority nature, or due to a behavior or attendance event.

Census: New Student

Abegg, Dylan Hall Monitor Legal Medical
 Grade:10 #103667 DOB:02/01/1991 Gender:M

District Assignments | **POS Deposit** | **School Choice** | **Credentials**
Demographics | **Identities** | **Households** | **Relationships** | **Enrollments** | **District Employment**

Relationships within the Abegg										
Name	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Abegg, Glissa	F	Mother	12/04/2006			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Abegg, Ryo	M					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abegg, Harrison	M					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Non-Household Relationships										
Name	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
<input checked="" type="checkbox"/> Aas, Alexander	M	Emergency Contact				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 4. Define Relationships with People Outside the Household

1. Click on student's name in the search results (left side of screen) to add non-household relationships, such as emergency contacts.
2. Relationship tab > New non-household relationship
3. Search for and find the existing person.
4. Choose the district-defined description that best describes the relationship between the pair.
5. Enter in start dates and appropriate flags.
6. Click Save when finished.

Step 5. Add Parent Contact Information and Set Messenger Preferences

1. In the Results pane on the left side of the screen, click the parent/guardians name to access their demographics screen.
2. Enter the person's contact information that they have provided. The private checkbox will not hide information from Campus users, rather it can be used to restrict results of AdHoc filters.
3. If the person is a Messenger contact, select what telephone number or email address the Messenger system should contact for a particular message type.
4. Click Save when finished.

Person Information

PersonID: 3107
 *Last Name: Smith *First Name: Billy Middle Name: Joe Suffix:
 *Gender: Male *Birth Date: 12/26/1991 (Age: 9) Soc Sec Number: No Image Available
 *Race/Ethnicity: 01: White Birth Country:
 Date Entered US: Birth Certificate:
 Original Entry in KY:
 Nickname:
 Comments: Upload Picture:

Person Identifiers

Student Number: 3107
 State ID: 3107
 Staff Number:
 Person GUID: 954ED335-85F1-4A5C-B05D-E51E2B1BC4DE

Personal Contact Information

Other Phone: Private Work Phone: Private
 Cell Phone: Private Pager: Private
 Email: Private
 Preferred Language: en_US: US English
 Comments:

Messenger Preferences

Contact Reason: High Priority Attendance Behavior: General: Teacher:

District Defined Elements

Hot Lunch PIN #:

PROCESS INBOX MESSAGES

OVERVIEW

This lesson will cover the messages that may be encountered when submitting and releasing student record transfers.

OBJECTIVES

At the conclusion of this lesson, learners will understand the messages that may appear in the Process Inbox when managing student record transfers.

Process Inbox Messages



Process	Step	Posted Date	Due Date
Records Transfer	Waiting	04/13/2009	
Records Transfer	Request for you to release	02/24/2009	
Vertical Interoperability State Resync Requested		01/16/2009	
Vertical Interoperability State Resync Requested		01/15/2009	
Records Transfer	Transfer Released	01/12/2009	

Vertical Interoperability messages may be removed from the Process Inbox, as these messages are for the user's information only. Either the district or Campus performed a resync of the district's data to state edition on the date indicated on the message.

Records Transfer messages may be removed from the Process Inbox when the user has completed the task.

A **Transfer Complete** message is for the user's information only, used to indicate that a student's records have been successfully transferred to a requesting district. After the user has read the message, it may be removed.

A **Request for you to release** message requires the user to complete a task. It is recommended that the user completes requests for the current year promptly. After the task is done, the user may remove the message from the Process Inbox.

A **Waiting** message is a reminder that the user has requested a student's records to be released from another district. After the district releases the records for the student, the user may delete the message from the Process Inbox. It is recommended that the user does not delete the Process Inbox notice if the district has not released the student records, as it serves as a reminder to the user to contact the district to complete the task requested.

A **Transfer Released** message indicates that the student's records have been released to the user's district and may be uploaded, saved and/or printed.



User Security

Deleting Process Inbox Messages

1. Navigate to the first screen you see when logged into Campus. If already logged in, select your username from the top of the Index tab. This will return you to the main screen.
2. Click on the black X to the left of the message to remove it from the user's Process Inbox.