

Priority Student Entry Checklist

08/26/2024 9:47 am EDT

Use the abbreviated checklist below for quick student enrollment. Make sure to return and finish any additional steps as detailed in the [Student Enrollment Checklist](#).

Search/Enroll

	Task	<input checked="" type="checkbox"/> Completed
1.	Student UID Search (NC Student Identification System)	<input type="checkbox"/>
2.	Student Locator Wizard: Student Information >> Student Information General >> Student Locator Wizard Used to search for an existing student or create a new student & create their enrollment record. Always search for the student by their legal name. Required fields: Last Name, First Name, Sex. https://kb.infinitecampus.com/help/student-locator	<input type="checkbox"/>
3.	Verify Record if found to make sure that it is absolutely the correct student.	<input type="checkbox"/>
4.	Create New Student if the student is not found in Infinite Campus' State Edition. If a record is found in the Student UID system for the student, enter data exactly as it appears in Student UID.	<input type="checkbox"/>
5.	Complete enrollment following the steps applicable below. Enrolling a Student Within District Enrolling a Student Out of District Enrolling a New Student	<input type="checkbox"/>
6.	Assign NC Student UID: Steps to follow if a Student UID Number is needed. State Specific Information >> North Carolina >> North Carolina State Tools	<input type="checkbox"/>

Student Tools

	Task	<input checked="" type="checkbox"/> Completed
7.	Demographics: Census >> Census People >> Demographics <ul style="list-style-type: none"> • Update student contact information (Ex. Student email address). • Select appropriate Messenger Preference Contact Reasons. <ul style="list-style-type: none"> ◦ Emergency, General, and Priority https://kb.infinitecampus.com/help/demographics	<input type="checkbox"/>

	Task	<input checked="" type="checkbox"/> Completed
	<p>Enrollments: Student Information >> Student Information General >> Enrollments</p> <p>Update any state reported or other fields for Enrollments if not already completed.</p>	
8.	<p>Current Enrollment > Click on the Start Date - verify Start Date, Local Start Status, Grade Level, Admission Status, enter brief Start Comment if required to include type of school if it is not in the name of the school (i.e. full name of school, city, state: ABC Christian School Raeford NC).</p> <p>https://kb.infinitecampus.com/help/enrollments</p>	<input type="checkbox"/>
9.	<p>Transportation: Please follow your PSUs process for Transportation.</p>	<input type="checkbox"/>
10.	<p>Schedule: Student Information >> Student Information General >> Schedule</p> <p>https://kb.infinitecampus.com/help/schedule-student</p>	<input type="checkbox"/>

Create Additional Household Members

	Task	<input checked="" type="checkbox"/> Completed
	<p>Create Additional Household Members: Census >> Census People >> Add Person</p>	
11.	<ol style="list-style-type: none"> 1. Enter the Last Name of the person who needs to be entered into Campus. This is a required field. Additional search criteria may be entered – First Name, Middle Name, Birth Date and Gender. 2. Click the Search button. Matching search results, if any, display in the box to the right. It is recommended that the results be thoroughly reviewed before creating a new person. To review in more detail the search results of the persons, click the Details link next to the person's name. This displays a Person Summary Report of that person's demographic data, contact information and relational information. 3. If the search results do not match the information that needs to be entered, select the Create New Person button. The Person Creation and Person Identifiers editor screen displays. Enter as much of the information that is known at this time. 4. In the Person Creation fields, enter the Last Name, First Name and Gender of the person. These are required fields. 5. Enter additional person information where known and follow recommended district procedures for creating new persons. 6. Click the Save button at the bottom of the screen. <p>https://kb.infinitecampus.com/help/add-person</p>	<input type="checkbox"/>
12.	<p>Update Contact information in Census -> People -> Demographics</p> <ul style="list-style-type: none"> • Enter email and phone number information. • Select appropriate Messenger Preference Contact Reasons. <ul style="list-style-type: none"> ◦ Emergency, Attendance, Behavior Messenger, General, Priority, and Teacher <p><i>Note: It is recommended that Emergency, General, and Priority be selected for Parents/Guardians who have custody of a student.</i></p>	<input type="checkbox"/>

	Task	<input checked="" type="checkbox"/> Completed
13.	Add additional members of household (parents, guardians) as needed.	<input type="checkbox"/>

Add Household Address(es)

	Task	<input checked="" type="checkbox"/> Completed
14.	<p>Add Household Address: Census >> Census Addresses >> Add Address</p> <p>If there is a mailing address separate from the physical address, add this too.</p> <ol style="list-style-type: none"> 1. Enter the search criteria for finding the address. 2. Click the Search button. Matching results will appear to the right of the search fields. 3. If one of the results matches the desired address, select that address to view details about that address. 4. If results were not returned or the returned results are not the appropriate address, click the New Address button in the bottom right corner of the screen. 5. Enter the address fields in the appropriate areas. See the Address Fields definition for guidance. Include Number, Prefix (S, NW), Street (Name), Tag (Road, Street), Direction (N, S, SW), Apt, City, State, Zip Code, County. 6. Select the District for where students attend school when living at this address. 7. Click the Save icon when finished. 8. Upon saving, the interface will change to the Address Info tab where additional details about the address can be added. <p>https://kb.infinitecampus.com/help/add-address-376ce9d-add-address-video</p>	<input type="checkbox"/>

Create Household

	Task	<input checked="" type="checkbox"/> Completed
15.	Create household of Student, People, Address with Census Wizard .	<input type="checkbox"/>
16.	Search for and Add Students and other People, Search for and Add Address(es).	<input type="checkbox"/>
17.	Add start dates for household locations and members. If mailing and physical address, make sure to check box. If this is the student's secondary household, make sure to check "Secondary" for students.	<input type="checkbox"/>
18.	<p>Edit Relationships between Students and Parents/ Guardians. Infinite Campus is student-centered, so add relationships based off of the student.</p> <p>Add Start Date (today's date is fine) • Check relevant boxes for guardian, mailing, portal, and messenger if applicable.</p> <p>https://kb.infinitecampus.com/help/assemble-new-household-video Census Wizard Workflow</p>	<input type="checkbox"/>

