Transfer Student (CBT) Guidance for Colorado
Version 1.0
March 7, 2016

Document Overview

The purpose of this document is to provide information on how to use PearsonAccess^next to successfully manage students who transfer schools. The following sections provide step-by-step directions on how to move students through the use of the PearsonAccess^next user interface or import/export process. These directions apply to both computer and paper-based formats.

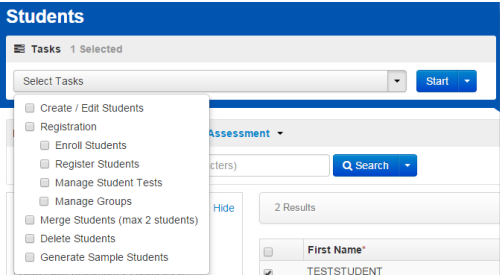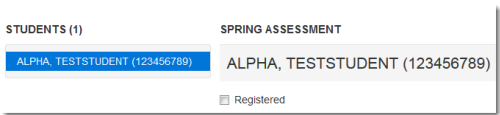|	Directions for the Transfer-From District/School	Directions for the Transfer-To District/School
BEFORE TESTING	How to **Unregister** Students through the User Interface	How To **Register** Students through the User Interface
BEFORE TESTING	How to **Unregister** Students through the File Import/Export Process	How To **Register** Students through the File Import/Export Process
DURING TESTING	How to Approve/Reject a Work Request Transfer for Students	How to Create a Work Request for Transfer Students
DURING TESTING	Transfer Session Creation for Students with a Started Online Test	

Directions for the Transfer-From District/School: How to Unregister Students through the User Interface

Note: These steps apply to students who have not started testing.

If a student leaves a district/school they will need to be unregistered for current/upcoming administration. The user who completes this task will need to have a base role of the **LEA/District Test Coordinator**, **Non-School Institution Test Coordinator** or **School Institution Test Coordinator**. The user will also need the **Sensitive Data** add-on role.

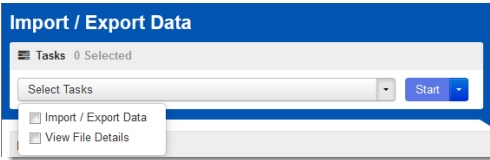| Step	Directions
Unregister Student	• Choose the administration from the drop down in the top banner in PearsonAccess^next. • Go to **Setup** > **Students**. • Select the appropriate student. • Select **Register Students** under the **Tasks** drop down menu and click **Start.** • On the **Register Students** page, uncheck the **Registered** box towards the top of the page and then click **Save.** • A green Success Changes Saved message will appear indicating that the student is no longer registered for the specific administration. This student may now be registered by a separate district/school.

Directions for the Transfer-From District/School: How to Unregister Students through the File Import/Export Process

Note: These steps apply to students who have not started testing.

If a student leaves a district/school they will need to be unregistered for current/upcoming administration. The user who completes this task will need to have a base role of the **LEA/District Test Coordinator**, **Non-School Institution Test Coordinator** or **School Institution Test Coordinator**. The user will also need the **Sensitive Data** and **Delete Student** add-on roles.

Step	Directions
Export SR/PNP File	• Choose the administration from the drop down in the top banner in PearsonAccess^next. • From **Setup > Import/Export Data**, open the task list and select **Import Export Data**. Click **Start**. • Select a **Student Registration Export.** Set the **File Layout Type** to **CSV** and clear the **Test Status Filters**. Click **Process.** • After the file is exported, it will be listed at **Setup > Import / Export Data**. To download the file, see the **View File Details** section.
Update the SR/PNP File to Unregister the Student	• Once the file is processed and downloaded, filter the file to include only the student registrations that are to be removed. • Ensure that the custom formatting is correct for the appropriate columns (e.g., birthdate, grade level). • Save the file locally.

Import the file as a Student Registration Delete File	- From **Setup > Import/Export Data**, open the task list and select **Import Export Data**. Click **Start**. - Select **Student Registration Delete.** Set the **File Layout Type** to **CSV**. Choose the file and click **Process**.

Directions for the Transfer-From District/School: How to Approve/Reject a Work Request Transfer for Students

Note: These steps apply to students who have not started testing as well as those who may have started testing.

Once an Enrollment Transfer Work Request has been sent from the Transfer-To District/School, an alert icon will appear on the Transfer-From District/School's PearsonAccess[next] page. The Transfer-From District/School user (with the appropriate roles) may click on the Transfer Request notification, to be taken directly to the **Setup > Work Request page.**
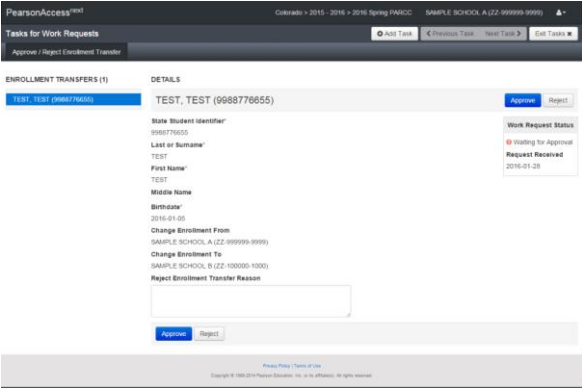
Note: Enrollment Transfer Work Requests only apply to students who are still registered at the Transfer-From District/School.
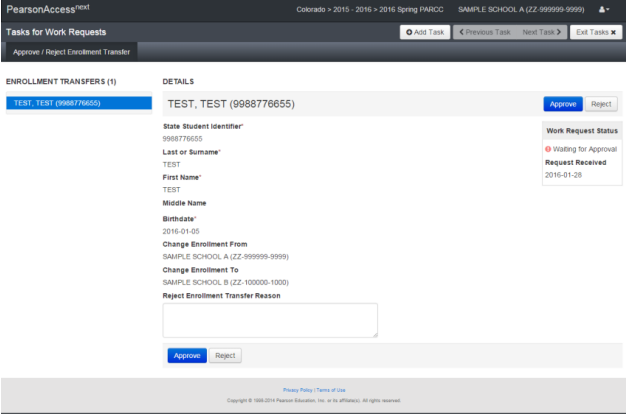
Step	Directions
Approving the Enrollment Request	• Choose the administration from the drop down in the top banner in PearsonAccess[next]. • Go to **Setup > Work Requests.** • Select the Work Request that is to be approved. Click the **Select Tasks** drop down menu and select **Approve/Reject Enrollment Transfer.** Click **Start.** • Select the **Enrollment Request** and select **Approve**. If an error is received when approving transfer requests, this is an indication that the student registration has already been removed from the district. See the note below this table for additional information.
Rejecting the Enrollment Request	• Choose the administration from the drop down in the top banner in PearsonAccess[next]. • Go to **Setup > Work Requests.** • Select the Work Request that is to be rejected. Click the **Select Tasks** drop down menu and select **Approve/Reject Enrollment Transfer.** Click **Start.** • Select the **Enrollment Request** and enter a **Reject Enrollment Transfer Reason.** o **Note**: If the Transfer-From District/School is rejecting the Enrollment Request a reason is required. Please use clear, concise language as to why the request is being rejected. "No" or "Rejected" is not descriptive enough.

	• Once a **Reject Enrollment Transfer Reason** is entered, click **Reject**.

Note: If an error is received upon approving the Transfer Enrollment Work Request, it is likely that the student has already been unregistered by the Transfer-From District/School. The Transfer-From District/School can verify this by searching for the student record under Setup > Students for the specific administration. If the student cannot be located because s/he has been unregistered, reject the Transfer Enrollment Work Request with a reason stating that the student has been unregistered from the Transfer-From School.

Directions for the Transfer-To District/School: How to Register Students through the User Interface

The purpose of this section is to provide information on how to use PearsonAccess[next] to successfully manage students who move prior to the start of the test administration but after the initial SR/PNP import. This can be completed by users assigned the **LEA/District Test Coordinator Role**, **Non-School/Institution Test Coordinator Role**, and **School/Institution Test Coordinator Role**.

Note: These steps apply to students who have not started testing.

Step	Directions

Create a Student	• Choose the administration from the drop down in the top banner in PearsonAccess[next].
	 • Go to **Setup > Students**.
	 • Select **Create/Edit Students**, **Register Students,** and **Manage Student Tests** under the **Tasks** drop down menu and click **Start**.
	 • On the **Create/Edit Students** page, enter the student's demographic information.
	 • Click **Create.**
	   ○ If a student record is matched, then the user will get the following banner message: "Success: Matching student has been located in the system and has been added to your selected students list. New student has not been created." **Note:** If the student was not created due to the student existing in a separate organization, see the steps on submitting **a Work Request**.
	   ○ If a student was not found, then a "Success" banner message will appear. Continue to the **Register Student** step.

Register Student	• On the **Register Students** page, select the student to register and check the **Registered** option. The student's **Grade Level** and **Responsible School Code** will also need to be entered. • Core demographic information is used to match student records within PearsonAccess[next].

	○ **Note**: See Student Matching Rules at the end of the document. ○ **Note**: If the student cannot be created due to the student existing in a separate organization, please see the steps on submitting a **Work Request**.
Manage Student Tests	● On the **Manage Student Tests** page click **Create Student Tests** and enter the required information to create a new test. Select **Create.** ○ **Note**: Students will still need to be placed in to a test session once the test assignment is created.

Directions for the Transfer-To District/School: How to Register Students through the File Import/Export Process

The purpose of this section is to provide information on how to use PearsonAccess^{next} to successfully manage students who move prior to the start of the test administration but after the initial SR/PNP import. This can be completed by users assigned the **LEA/District Test Coordinator Role**, **Non-School/Institution Test Coordinator Role**, and **School/Institution Test Coordinator Role**. The user will also need the **Sensitive Data** add-on role and the **Student Test Update** add-on role.

Note: These steps apply to students who have not started testing.

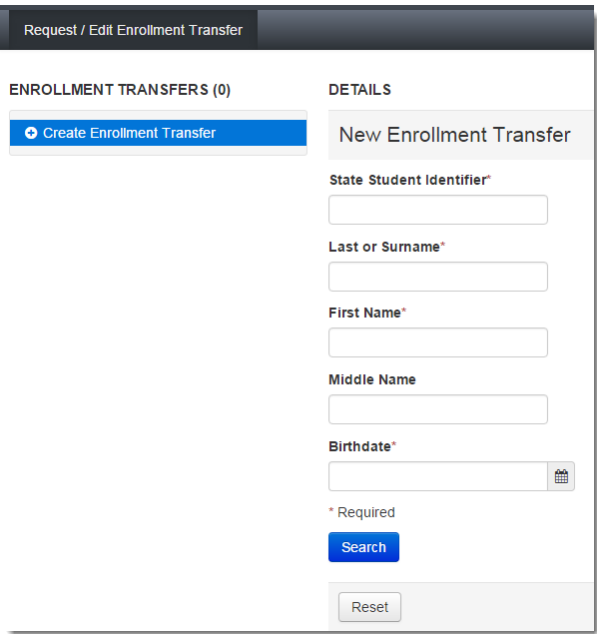| Step	Directions
Create a new Student Registration/Personal Needs Profile Import	• Choose the administration from the drop down in the top banner of PearsonAccess^{next}. • Refer to the Student Registration/Personal Needs Profile Training Module. • Refer to the Student Registration/Personal Needs Profile file layout documents found on http://www.cde.state.co.us/assessment/newassess-parcc under Administration Training Information. • Include PNP information, if necessary.
Import SR/PNP File	• Go to **Setup** > **Import/Export Data**. • Select **Import / Export Data** under the **Tasks** drop down and click **Start**. • Under **Type**, choose **Student Registration Import**. • Click **Choose File** and select the new Student Registration/Personal Needs Profile Import file. • Click **Process**. • If completed without error, student will now be assigned a test in the new school. o **Note:** If an error is received indicating that the student is already enrolled in a separate district/school, see the directions on submitting a **Work Request.**

Directions for the Transfer-To District/School: How to Create a Work Request for Transfer Students

The purpose of this section is to provide information on how to successfully submit a Work Request for an Enrollment Transfer. A student must be enrolled in (associated with) an organization in order to test. Students can be transferred from one organization to another, which means their association is changed. A transfer requires the current organization (Transfer-To District/School) to request the change. To request a transfer for a newly enrolled student, submit a Work Request for an Enrollment Transfer. When this request is approved, the student will be transferred to your organization.
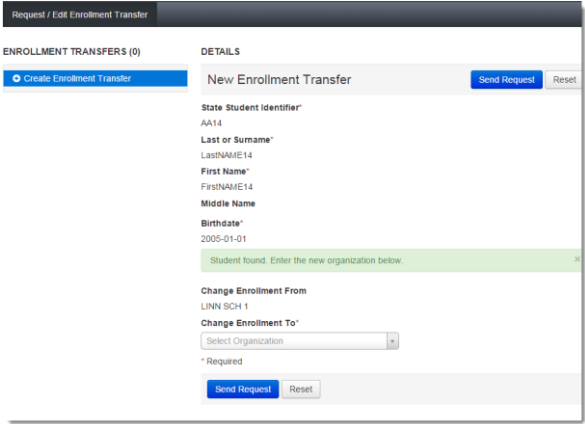
> **Note:** These steps apply to students who may have started testing. The following steps may need to be completed for both the PARCC and the Science and Social Studies administrations in PearsonAccess[next].

Step	Directions
Create a Work Request for Transfer Students	- Choose the administration from the drop down in the top banner in PearsonAccess[next]. - Go to **Setup > Work** Requests, click the **Select Tasks** drop down menu and select **Request/Edit Enrollment Transfer**. Click **Start.** - To search for the student to be transferred, enter the student details and click **Search**.

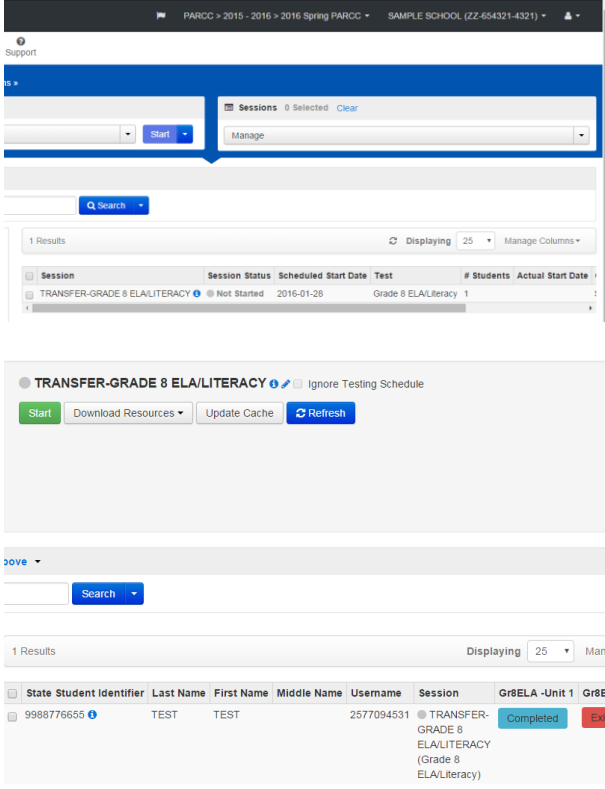|	
	- If a match is located, under the **Change Enrollment To** drop down menu, select the organization where the student is to be transferred. Click **Send Request**. **Note:** The required fields contain core demographic information used to match student records in PearsonAccess[next]. If a match cannot be located, verify that the information being entered matches the information in RITS. - The student will be transferred after the request is approved, as described in **How to Approve/Reject Enrollment Transfers.**
Update Student Record	- The **Responsible District/School** information is not updated in the transfer process. The Transfer-To District/School will need to ensure that the **Responsible District/School** information is accurate for the transferred student. - Check test assignments under **Manage Student Tests**; update as needed. - Add transfer students to a test session if they do not have a started online test. - For transfer students who have started testing online, the Transfer-To District/School should confirm that a test session has been created for the transfer student. See section for **Transfer Session Creation for Students with a Started Online Test**.

Transfer Session Creation for Students with a Started Online Test

The purpose of this section is to provide information on students transferring with a started student test.

Note: This section applies to transfer students who have started testing.

Step	Directions
Transfer Session	Once an Enrollment Transfer is approved, a new test session will automatically be created in the Transfer-To School for students who started testing before the enrollment transfer. The test session under the Transfer-To School will be named "Transfer" followed by the test subject and grade level (e.g., Transfer-Grade 3 Mathematics, Transfer-Grade 5 Science).

Student Matching Rules

When student data is entered into PearsonAccess[next] via the File Import Process or the User Interface, core demographic fields are used to identify unique students. When data is updated in PearsonAccess[next], matching rules are applied to these fields to identify if students currently exist within the system. The table below provides information on the fields used for matching. These fields can be updated through an SR/PNP Import.

> **Note**: The fields listed below will need to match on the **Work Request for Enrollment Transfer**

Core Demographic Fields	Match Hierarchy Level	How Matching Works	Can it be updated via Student Registration File Import?	Definitions and Notes
Pearson Student Identifier	1	Record will match if Pearson Student Identifier and at least two of the following Core Demographic Fields Match: ● State Student Identifier ● Last or Surname ● First Name ● Sex ● Birthdate	No. The Pearson Student Identifier is generated by PearsonAccess[next] and cannot be modified by end users.	Unique Pearson Student Identifier that will move intrastate if a student moves district to district or school to school. Assigned within PearsonAccess[next].

State Student Identifier	2	If Pearson Student Identifier is blank, record will match if State Student Identifier and at least two of the following Core Demographic Fields Match: • State Abbreviation • Last or Surname • First Name • Sex • Birthdate	No. The State Student Identifier cannot be updated by importing a Student Registration File. However, it can be updated through the PearsonAccess^{next} user interface.	A unique number or alphanumeric code assigned to a student by the state.
Last or Surname		This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels.	Yes. The Last Name value can be updated if the Pearson Student Identifier and/or State Student Identifier and at least two of the following Core Demographic Fields match: • First Name • Sex • Birthdate • State Abbreviation	Student's last name as it appears in CDE's Record Integration Tracking System (RITS).

First Name		This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels. (Note, only the first 8 characters are used to match on the First Name Field.)	Yes. The First Name value can be updated if the Pearson Student Identifier and/or State Student Identifier and at least two of the following Core Demographic Fields match: • Last or Surname • Sex • Birthdate • State Abbreviation	Student's first name as it appears in CDE's Record Integration Tracking System (RITS).
Sex		This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels.	Yes. The Sex value can be updated if the Pearson Student Identifier and/or State Student Identifier and at least two of the following Core Demographic Fields match: • Last or Surname • First Name • Birthdate • State Abbreviation	The concept describing the biological traits that distinguish the males and females of a species.
Birthdate		This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels.	Yes. The Birthdate value can be updated if the Pearson Student Identifier and/or State Student Identifier and at least two of the following Core	The year, month and day on which a person was born. Format: YYYY-MM-DD.

			Demographic Fields match: • Last or Surname • First Name • Sex • State Abbreviation	