

Document Overview

The purpose of this document is to provide information on how to use PearsonAccess^{next} to successfully manage registrations of students who transfer between districts in Colorado. The following sections provide step-by-step directions on how to move students from one district to another through the use of the PearsonAccess^{next} user interface or import/export process. These directions apply to both computer-based and paper-based testing formats.

Note: The transfer request feature does not need to be used for school-to-school transfers within a district. The District Assessment Coordinator (DAC), or other designated individual with the appropriate PearsonAccess^{next} user roles, can update the school on the student’s registration as long as the student moves to another school within the district.

Document Contents

Document Overview	1
How to Register Students through the User Interface	2
Steps to Add Students to your Organization through the User Interface.	2
Searching for a Student Record	3
Registering and Assigning a Test to a Student Record.....	5
How to Create a “Work Request” for Transfer Students through the PearsonAccess ^{next} User Interface	6
How to Register Students through the File Import/Export Process	10
How to Request Transfers through the File Import/Export Process.....	11
A Student Moved Away from the District - Directions for the Transfer-From District:	12
How to Approve/Reject Transfers through the PearsonAccessnext User Interface	12
How to Approve/Reject Transfers through the File Import/Export Process	14
Enrollment Transfer File Field Definitions	15
Resources	17



A New Student Moved into the District - Directions for the Transfer-To District:

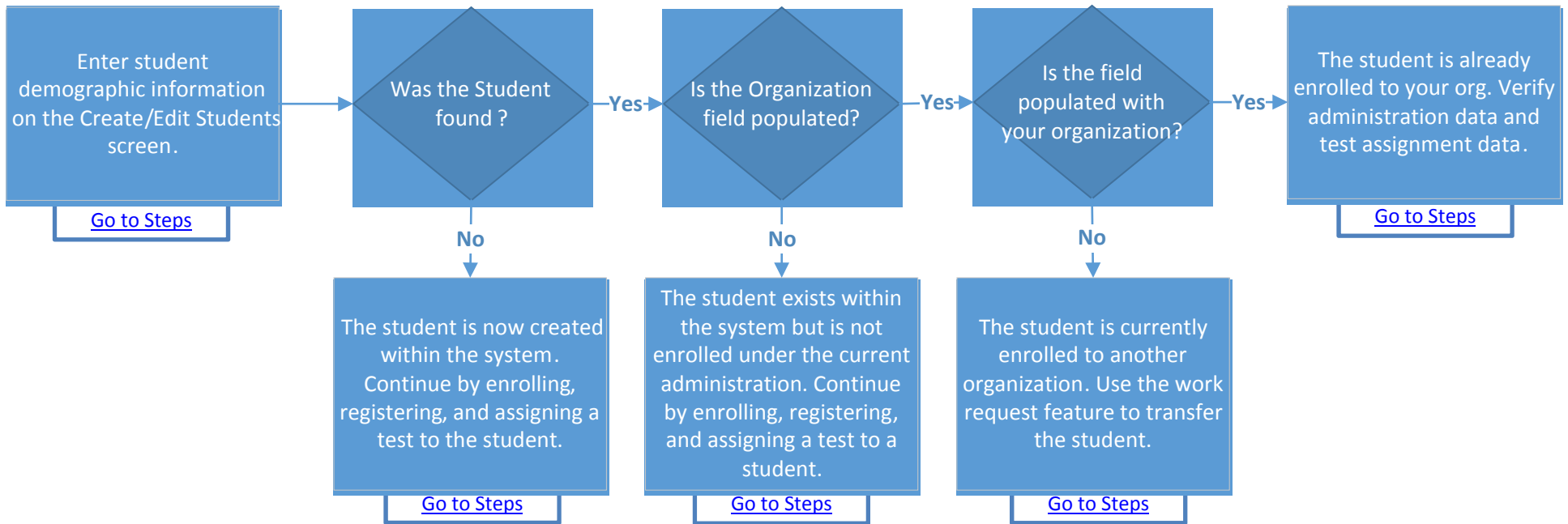
How to Register Students through the User Interface

The purpose of this section is to provide information on how to use PearsonAccess^{next} to successfully register students who move to your organization. Users assigned the **LEA/District Test Coordinator** or **School Test Coordinator** role can manually create/locate, enroll, register, and assign a test to a student record. Users assigned the **LEA/District Test Coordinator** or **Sensitive Data** role can request a student transfer through the “Work Request” screen.

For information about [Registering Students via SR/PNP](#) go to page 10.

For information about [Requesting Transfers through the File Import](#) go to page 11.

Steps to Add Students to your Organization through the User Interface.





Directions for the Transfer-To District:

Searching for a Student Record

Step	Directions
1. Enter student demographic information on the Create/Edit Students screen.	<ul style="list-style-type: none">• Choose the administration from the dropdown in the top banner in PearsonAccess^{next}.• Go to Setup > Students.• Select Create/Edit Students, Register Students, and Manage Student Tests under the Tasks dropdown menu and click Start.• On the Create/Edit Students screen, enter the student's demographic information. Make sure to correctly enter all information, especially the State Student ID.• Click Create.
2. Was the Student found?	<p>A. Yes - 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." Go to Step 3.</p> <p>B. No - If a student was not found, then a "Success" banner message will appear. Continue to the Registering and Assigning a Test to a Student Record steps.</p> <p>Note: PearsonAccess^{next} uses matching criteria to locate existing student records. You will receive an error stating value(s) entered did not match the value in the database if the State Student Identifier and at least <u>two</u> of the following fields did not match exactly what is currently recorded in PearsonAccess^{next}: First Name (full), Last Name (full), Birthdate (YYYY-MM-DD format), Local Student Identifier, and Sex.</p>



Step	Directions
<p>3. Is the Organization field populated?</p>	<p>A. Yes - Go to Step 4.</p> <p>B. No - The student exists within the system but is not enrolled under the current administration.</p> <ol style="list-style-type: none"> Select the student record from the left side of screen. Populate the organization field and click Save. Continue to the Registering and Assigning a Test to a Student Record steps.
<p>4. Is the Organization field populated with your organization?</p>	<p>A. Yes - Go to Step 5.</p> <p>B. No - The student is currently enrolled to another organization. Exit the task and continue to the requesting a Transfer “Work Request” steps.</p> <p>Note: If you are a district user, and a student is transferring between two schools within your district, you may update the school associated with the student record without using the transfer request process.</p>
<p>5. The Student Record is currently enrolled to your organization.</p>	<p>The student is already enrolled to your org. You should verify administration data and test assignment data. For more information, view the Registering and Assigning a Test to a Student Record steps. If all data is correct, no further action is required.</p>



Directions for the Transfer-To District:

Registering and Assigning a Test to a Student Record

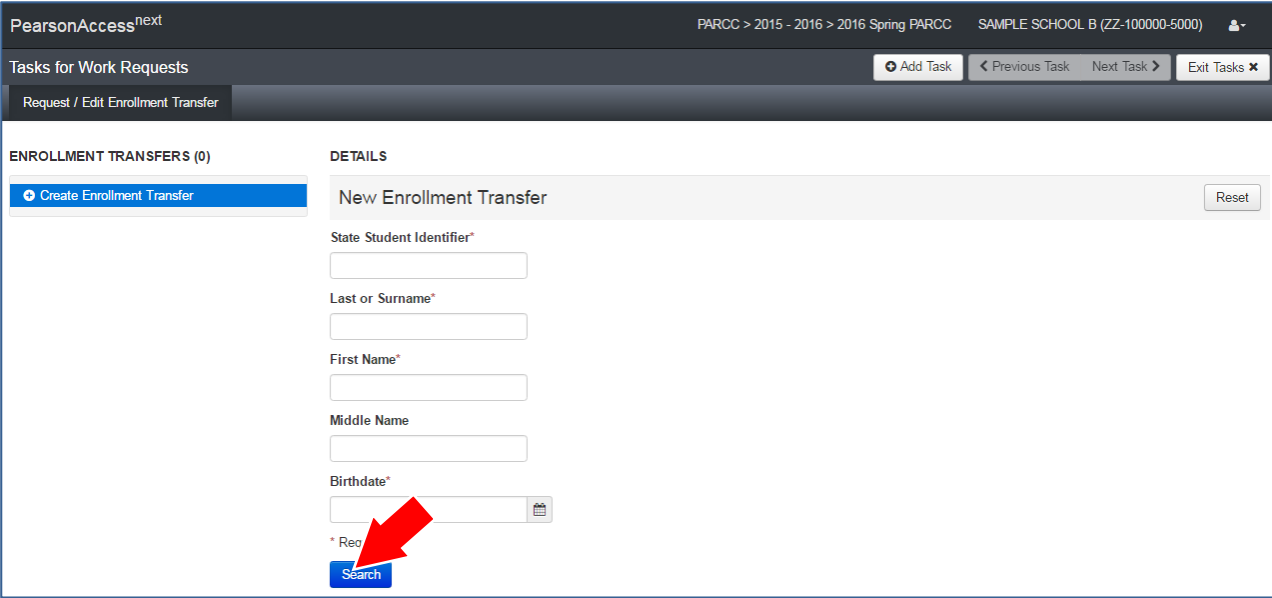
Step	Directions
<ul style="list-style-type: none">• Register Student	<ul style="list-style-type: none">• On the Register Students screen, select the student to register and check the Registered option. The student's Grade Level and Responsible School Code will also need to be entered.
<ul style="list-style-type: none">• Manage Student Tests	<ul style="list-style-type: none">• On the Manage Student Tests screen click Create Student Tests and enter the required information to create a new test. Click Save.<ul style="list-style-type: none">○ Note: Students testing online will still need to be placed into a test session once the test assignment is created.



Directions for the Transfer-To District:

How to Create a “Work Request” for Transfer Students through the PearsonAccess^{next} User Interface

Only users assigned the **LEA/District Test Coordinator** or **Sensitive Data** role can create a transfer “Work Request.”

Step	Directions
1. Search for the Student Record	<ul style="list-style-type: none">Choose the administration from the dropdown in the top banner in PearsonAccess^{next}.Go to Setup > Work Request and click the Select Tasks dropdown menu and select Request/Edit Enrollment Transfer. Click Start.To search for the student to be transferred, enter the student details and click Search. 
2. Was a record found?	<p>A. Yes - Go to Step 3.</p> <p>B. No – Double-check the demographic information that you entered is correct. PearsonAccess^{next} uses matching criteria to locate existing student records. You will receive an error stating the student wasn’t found if the values entered did not match the values in the database. The State Student Identifier, First Name (full), Last Name (full), and Birthdate (YYYY-MM-DD format) must all match for the record to be found. If you verified all information is correct, go to the Searching for a Student Record step to see if the student is enrolled under the current administration.</p> <p>Note: If you still experience difficulties, please contact Pearson Colorado Customer Support.</p>



Step

Directions

3. Request the Transfer

- If a match is located, under the **Change Enrollment To** dropdown menu, select the organization where the student is to be transferred.
- Click **Send Request**.

Tasks for Work Requests

Request / Edit Enrollment Transfer

ENROLLMENT TRANSFERS (0)

DETAILS

New Enrollment Transfer

State Student Identifier*
SAMPLE1000

Last or Surname*
Sample

First Name*
Student A

Middle Name

Birthdate*
2016-08-04

Student found. Enter the new organization below.

Change Enrollment From
SAMPLE SCHOOL A

Change Enrollment To*
SAMPLE SCHOOL B (ZZ-100000-5000)

* Required

Send Request Reset

Note: The student will be transferred after the request is approved by the transfer-from organization, as described in [Locating and Approving a Transfer “Work Request.”](#)

Note: If the Change Enrollment From field is blank, the student is not currently enrolled to the administration. Go to [Step 1 of Searching for a Student Record](#).

Check the status of your transfer “Work Request”

- Go to **Setup > Work Request** and use the Status filters found on the left side of the screen to view the status of your transfer “Work Request.” Once approved, go to [Step 4](#). Contact the DAC in the transfer-from district if the student transfer request is not approved or rejected within a reasonable amount of time. Contact information for all DACs across the state is found at <http://www.cde.state.co.us/assessment/dac>.

Status

x Waiting for Approval x Approved

x Rejected |



Step

4. Verify Registration and Test Assignment Information.

Directions

Once the student is transferred your organization, you should verify student registration data and test assignments.

- Go to **Setup > Students**.
- Search for and select the student record, select **Register Students** and **Manage Student Tests** under the **Tasks** dropdown menu and click **Start**.
- On the **Register Students** screen, verify the Responsible School Code and demographic fields. Make any updates and click **Save**.
 - **Important:** Make sure to update the Responsible School Code. The Responsible School Code is auto-populated with the Testing School Code when a student is initially registered and that value remains when the student transfer request is approved. Please review the Operational Report “Students where Responsible District/School is different from Testing District/School” to confirm all students’ Responsible School Codes are correct.

The screenshot shows the 'Tasks for Students' interface. At the top, there are navigation buttons: 'Add Task', '< Previous Task', 'Next Task >', and 'Exit Tasks x'. Below this, there are two tabs: 'Register Students' (selected) and 'Manage Student Tests'. The main content area is titled 'STUDENTS (1)' and '2016 FALL BLOCK PARCC'. It displays a student record for 'SAMPLE, STUDENT A (SAMPLE1000)'. The record includes a 'Save' button, a 'Reset' button, and a 'Registered' checkbox which is checked. There are also links for 'Show Student Details', 'Show Audit Trail', and a '8 Critical Warnings' indicator. Below the student name, there are three fields: 'Grade Level When Assessed*' (set to 'Sixth Grade'), 'Responsible School Code*' (set to 'SAMPLE SCHOOL B (Z...)' with a dropdown menu open showing 'SAMPLE SCHOOL (ZZ-100000-2000)'), and 'Ship Report District Code*'. There is also a 'Ship Report School Code*' field.

- Toggle to **Manage Student Tests** screen and verify all test assignment data is correct. Make any updates and click **Save**.



Step	Directions
5. Transfer student test assignment from Transferred session.	<p>If the student was assigned an online test and started testing in their previous organization, then a new test session will automatically be created in the Transfer-To School and transferred student test assignments will be automatically assigned to these sessions. The test sessions under the Transfer-To School will be named “Transfer” followed by the test subject and grade level (e.g., Transfer-Grade 3 Mathematics). Important: The transfer sessions cannot be prepared or started. Student tests will need to be moved from these sessions to other test sessions to test.</p> <ul style="list-style-type: none">• Go to Testing > Students in Sessions and add the transfer sessions you need to manage to the Session List.• Select the students to move from the list at the bottom of the screen.• Select the Move Students between Sessions under the Tasks dropdown menu and click Start.• On the Move Students between Sessions screen, select the Sessions search box to move the student to an existing session or click Create to move the student to a new session.<ul style="list-style-type: none">○ If creating a new session, complete the session details in the pop-up window and click Create.• Click the check box for the session to move the student(s) to and click Move. <p>Important: The transfer sessions cannot be prepared or started. Students will need to be moved from these sessions to other test sessions to test.</p>



Directions for the Transfer-To District:

How to Register Students through the File Import/Export Process

Note: Only students who are not enrolled to another organization will be registered without error.

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 Student Registration/Personal Needs Profile (SR/PNP) import. This can be completed by users assigned the **LEA/District Test Coordinator** or **School Test Coordinator** role. The user will also need the **Sensitive Data** add-on role or the **Student Test Update** add-on role.

Step	Directions
1. Create a new SR/PNP Import	<ul style="list-style-type: none"> Choose the administration from the dropdown in the top banner of PearsonAccess^{next}. Refer to the SR/PNP layout documents found on the Support Page of PearsonAccess^{next}.
2. Import SR/PNP File	<ul style="list-style-type: none"> Go to Setup > Import/Export Data. Select Import/Export Data under the Tasks dropdown and click Start. Under Type, select Student Registration Import. Click Choose File and select the new Student Registration/Personal Needs Profile Import file. Click Process. If completed without error, the student(s) will now be assigned a test in the new school.
3. Troubleshooting Errors	<ul style="list-style-type: none"> An error stating “The student can only be enrolled in 1 organization” is received when a student is already enrolled in a different district. If you receive this error, see the directions on submitting a Transfer “Work Request” through the user interface or importing an Enrollment Transfer File. An error stating “The student <attribute> did not match the value of the student <attribute> in the database” is received when a student SSID is matched to an existing student record in PearsonAccess^{next} but at least two fields used for matching did not. Matching fields include: First Name (full), Last Name (full), Birthdate (YYYY-MM-DD format), Local Student Identifier, and Sex. If you have verified all data is entered correctly and still receive this error, contact the DAC in the previous district of enrollment (contact information for all DACs in Colorado is found at http://www.cde.state.co.us/assessment/dac).



Directions for the Transfer-To District:

How to Request Transfers through the File Import/Export Process

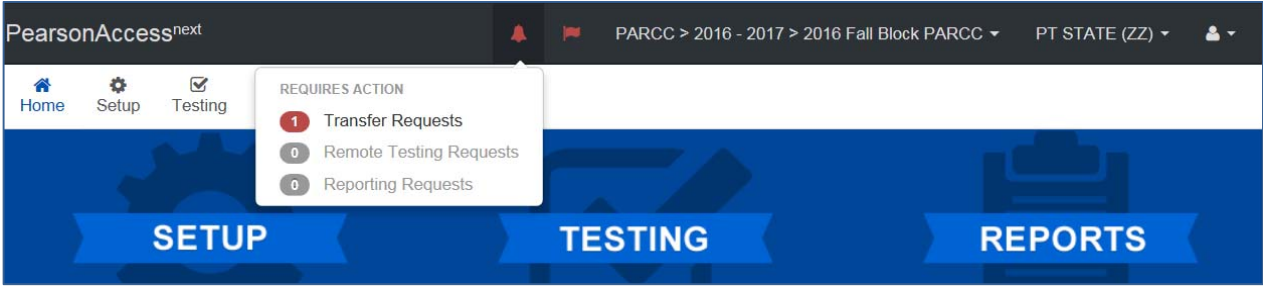
Step	Directions												
<p>1. Create a new Transfer Work Request Import File</p>	<ul style="list-style-type: none"> Choose the administration from the dropdown in the top banner of PearsonAccess^{next}. Download the Enrollment Transfer Template file found on the Support Page of PearsonAccess^{next}. Populate Enrollment Transfer File Template using the Enrollment Transfer File Field Definitions. <ul style="list-style-type: none"> Populate Column M – Action Field with “C” to create the enrollment transfer request. <p>Note: If a SR/PNP file was imported and “The student can only be enrolled in 1 organization” error message was received, download the Records in Error file from the View files Details task screen to help populate required fields in an Enrollment Transfer File. Use the following table as a field crosswalk.</p> <table border="1" data-bbox="464 670 1997 927"> <thead> <tr> <th>Enrollment Transfer File</th> <th>SR/PNP</th> </tr> </thead> <tbody> <tr> <td>Column A – State Student Identifier</td> <td>Column F – State Student Identifier</td> </tr> <tr> <td>Column C – Last or Surname</td> <td>Column I – Last or Surname</td> </tr> <tr> <td>Column D – First Name</td> <td>Column J – First Name</td> </tr> <tr> <td>Column F – Birthdate</td> <td>Column L – Birthdate</td> </tr> <tr> <td>Column J – Transfer To Organization Code</td> <td>Concatenate the values from Column A – State Abbreviation, Column B - Testing District Code, and Column C - Testing School Code with a hyphen separating the values.</td> </tr> </tbody> </table>	Enrollment Transfer File	SR/PNP	Column A – State Student Identifier	Column F – State Student Identifier	Column C – Last or Surname	Column I – Last or Surname	Column D – First Name	Column J – First Name	Column F – Birthdate	Column L – Birthdate	Column J – Transfer To Organization Code	Concatenate the values from Column A – State Abbreviation, Column B - Testing District Code, and Column C - Testing School Code with a hyphen separating the values.
Enrollment Transfer File	SR/PNP												
Column A – State Student Identifier	Column F – State Student Identifier												
Column C – Last or Surname	Column I – Last or Surname												
Column D – First Name	Column J – First Name												
Column F – Birthdate	Column L – Birthdate												
Column J – Transfer To Organization Code	Concatenate the values from Column A – State Abbreviation, Column B - Testing District Code, and Column C - Testing School Code with a hyphen separating the values.												
<p>2. Import Enrollment Transfer File</p>	<ul style="list-style-type: none"> Go to Setup > Import/Export Data. Select Import/Export Data under the Tasks dropdown and click Start. Under Type, select Enrollment Transfer Import. Click Choose File and select the locally saved Enrollment Transfer Import file. Click Process. <p>Note: The student will be transferred after the request is approved by the transfer-from organization. Fields are used for matching data only, no updates to student data field are made from the Enrollment Transfer Import file.</p> <p>Check the status of your transfer “Work Request”</p> <ul style="list-style-type: none"> Go to Setup > Work Request, and use the Status filters found on the left side of the screen to view the status of your transfer “Work Request.” Once approved, go to Step 4 under How to Create a “Work Request” for Transfer Students through the PearsonAccess^{next} User Interface. <p>Note: Contact the DAC in the transfer-from district if the student transfer request is not approved or rejected within a reasonable amount of time. Contact information for all DACs in Colorado is found at http://www.cde.state.co.us/assessment/dac.</p>												



A Student Moved Away from the District - Directions for the Transfer-From District:

How to Approve/Reject Transfers through the PearsonAccessnext User Interface

The purpose of this section is to provide information on how to use PearsonAccess^{next} to successfully transfer students who move from your organization. Users assigned the **LEA/District Test Coordinator** role or the **Sensitive Data** role can review, approve, and reject student transfers through the “Work Request” screen.

Step	Directions
<p>1. Look for a Transfer Request</p>	<ul style="list-style-type: none"> Choose the administration from the dropdown in the top banner in PearsonAccess^{next}. Select the Bell Icon, check to see if there is a Transfer Request. 
<p>2. Has another organization requested a student transfer?</p>	<p>If yes, click Transfer Requests (this will automatically take you to the Setup > Work Requests screen) and proceed to Step 3.</p>



Step

Directions

3. Approve/Reject the Transfer “Work Request”

- Selected the record, select **Approve/Reject Enrollment Transfer** from the **Tasks** dropdown menu and then click **Start**.

The screenshot shows the 'Work Requests' interface. At the top, there are two tabs: 'Tasks 1 Selected' and 'Work Requests 1 Selected Clear'. Below the tabs, there are two dropdown menus: 'Select Tasks' and 'Manage'. The 'Select Tasks' dropdown is open, showing two options: 'Request / Edit Enrollment Transfer' (unchecked) and 'Approve / Reject Enrollment Transfer' (checked). Below the dropdowns, there are filters for 'Status' (Waiting for Approval) and 'Work Type' (Enrollment Transfer). A table below shows one result with the following data:

Status	Work Type	Created by	Requesting Organization	Assigned Organization
<input checked="" type="checkbox"/> ! Waiting for Approval	Enrollment Transfer	biederman	SAMPLE SCHOOL B (ZZ-100000-1000)	SAMPLE SCHOOL A (ZZ-100000-1001)

- On the **Approve/Reject Enrollment Transfer** screen, if the student transfer “Work Request” is for a student who has:
 - moved away from your organization, click **Approve**.
 - not moved away from your organization, populate the **Reject Enrollment Transfer Reason** Field and click **Reject**.

The screenshot shows the 'Approve/Reject Enrollment Transfer' screen for 'SAMPLE, STUDENT A (SAMPLE1000)'. The screen displays the following information:

- State Student Identifier***: SAMPLE1000
- Last or Surname***: SAMPLE
- First Name***: STUDENT A
- Middle Name**: (empty)
- Birthdate***: 2016-09-05
- Change Enrollment From**: SAMPLE SCHOOL A (ZZ-100000-1001)
- Change Enrollment To**: SAMPLE SCHOOL B (ZZ-100000-1000)
- Reject Enrollment Transfer Reason**: (empty text box)

At the bottom of the screen, there are two buttons: 'Approve' and 'Reject'. A red arrow points to the 'Approve' button. On the right side of the screen, there is a 'Work Request Status' box showing 'Waiting for Approval' and 'Request Received' on '2016-09-27'.



Directions for the Transfer-From District:

How to Approve/Reject Transfers through the File Import/Export Process

The purpose of this section is to provide information on how to use PearsonAccess^{next} to successfully transfer students who move from your organization. Users assigned the **LEA/District Test Coordinator** or the **Sensitive Data** role can review, approve, and reject student transfers through the Enrollment Transfer process.

Step	Directions
1. Export Enrollment Transfer File	<ul style="list-style-type: none"> Choose the administration from the dropdown in the top banner in PearsonAccess^{next}. From Setup > Import/Export Data, open the task list and select Import Export Data. Click Start. Select Transfer Enrollment Export. Click Process. After the file is exported, it will be listed at Setup > Import / Export Data.
2. Create a new Transfer Work Request Import File	<ul style="list-style-type: none"> Download the Transfer Enrollment Export file. Populate Column M – Action Field with “A” to approve or “R” to reject the enrollment transfer request. <ul style="list-style-type: none"> If rejecting the request, populate Column L – Reject Reason. Ensure that the custom formatting is correct for the appropriate columns (e.g., birthdate, grade level). Save the file locally. <p>Note: For additional information, view the Enrollment Transfer File Field Definitions.</p>
3. Import Enrollment Transfer File	<ul style="list-style-type: none"> Go to Setup > Import/Export Data. Select Import/Export Data under the Tasks dropdown and click Start. Under Type, select Enrollment Transfer Import. Click Choose File and select the locally saved Enrollment Transfer Import file. Click Process. <p>Note: The student registration(s) with “A” indicated in Column L – Action Field will be transferred to the new district(s) once the file is processed.</p>

Tip: Use Microsoft Excel’s Text Import Wizard to retain source formatting when opening an exported csv file.

- Open a blank Excel spreadsheet and select cell A1.
- On the **Data** tab, in the **Get External Data** group, click **From Text**.
- Locate and double-click the text file that you want to import.
- On Step 1 of the Text Import Wizard, select **Delimited** and then click **Next**.
- On Step 2 of the Text Import Wizard, check **Comma** as delimiter and then click **Next**. On Step 3 of the Text Import Wizard, scroll horizontally in the Data preview until you see the last field. Hold down your control & shift keys and select the last column title. This will select all columns in the file. Select **Text** from the **Column Data Format** option list and then click **Finish**.



Enrollment Transfer File Field Definitions

Column Letter	Field Name	Required	Field Length	Field Definitions and Notes	Expected Values
A	State Student Identifier	Y	50	A unique number or alphanumeric code assigned to a student by a state or any other entity.	A-Z 0-9 No embedded spaces
B	Local Student Identifier		50	A unique number or alphanumeric code assigned to a student by a school system or any other entity.	A-Z 0-9 No embedded spaces Blank
C	Last or Surname	Y	100	The full legal last name borne in common by members of a family.	A-Z 0-9 . - ' (Standard Apostrophe) Embedded Spaces
D	First Name	Y	100	The full legal first name given to a person at birth, baptism, or through legal change.	A-Z 0-9 . - ' (Standard Apostrophe) Embedded Spaces
E	Middle Name		100	A full legal middle name given to a person at birth, baptism, or through legal change.	A-Z 0-9 . - ' (Standard Apostrophe) Embedded Spaces Blank
F	Birthdate	Y	50	The year, month and day on which a person was born.	YYYY-MM-DD
G	Sex		1	The concept describing the biological traits that distinguish the males and females of a species.	F = Female M = Male
H	Transfer From Organization Code		100	The testing organization code (CO-DDDD-SSSS) the student moved from .	
I	Transfer From Organization Name		200	The testing organization (school) name the moved from .	



Column Letter	Field Name	Required	Field Length	Field Definitions and Notes	Expected Values
J	Transfer To Organization Code	Y	100	<p>The testing organization code (CO-DDDD-SSSS) the student moved to that is responsible for administering the test for a student.</p> <p>Note: To obtain the correct format, concatenate the State Abbreviation, Testing District Code, and Testing School Code fields. If using Excel, use formula: =CONCATENATE(State Abbreviation Field,"-",TEXT(District Code Field,"0000"),"-",TEXT(School Code Field,"0000")).</p> <p>Example: State Abbreviation = CO, District Code = 1234, & School Code = 5678. Formula =CONCATENATE(A1,"-",TEXT(B1,"0000"),"-",TEXT(C1,"0000")) will result with CO-1234-5678.</p>	A-Z 0-9 -
K	Transfer To Organization Name		200	The testing organization (school) name the student moved to that is responsible for administering the test for a student.	A-Z 0-9 . - ' (Standard Apostrophe) Embedded Spaces Blank
L	Reject Reason	*Y	3000	*Required if Action = R	A-Z 0-9 . - ' (Standard Apostrophe) Embedded Spaces Blank
M	Action	Y	1		C = Create A = Approve R = Reject



Resources

Resource	Information
Pearson Colorado Customer Support	If assistance is needed, contact the Colorado Support Center at 888-687-4759 or visit co.pearsonaccessnext.com and select Contact COLORADO Support . Monday - Friday 7:00 am - 6:00 pm (MST)