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.

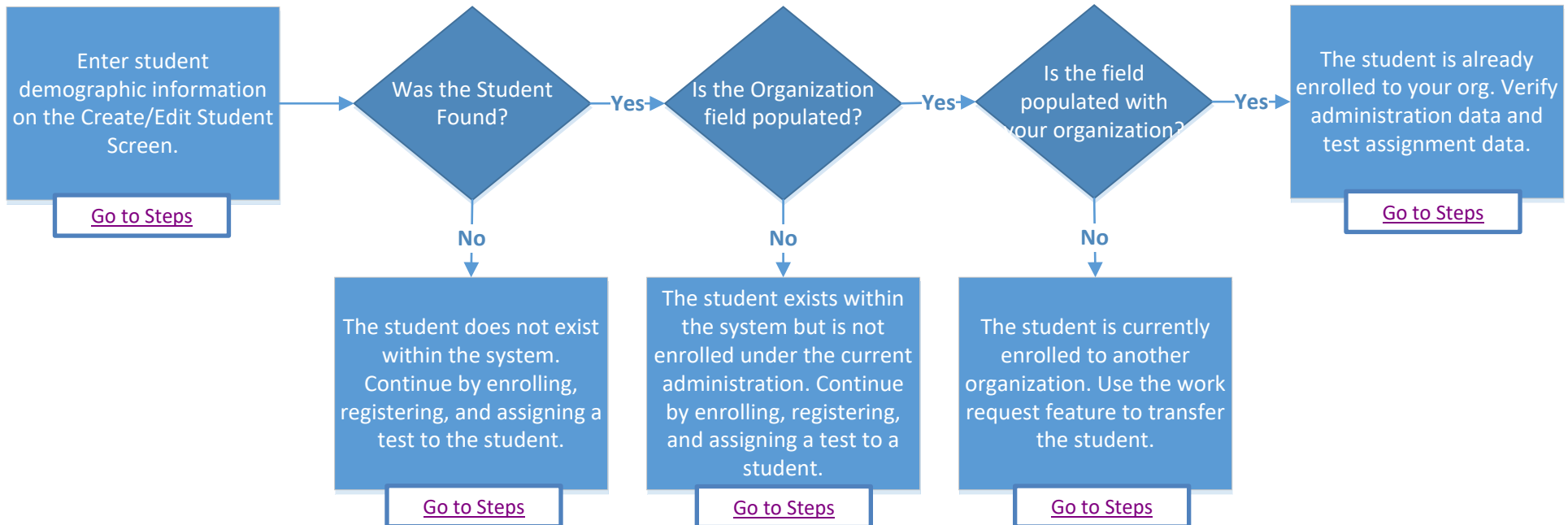| What is taking place?	
[A new student has moved to my district/school.](#) Go to page 2	[A student has moved away from my district school.](#) Go to page 10

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 register students who move to your organization. Review the User Role Matrix to learn which roles can perform these activities.

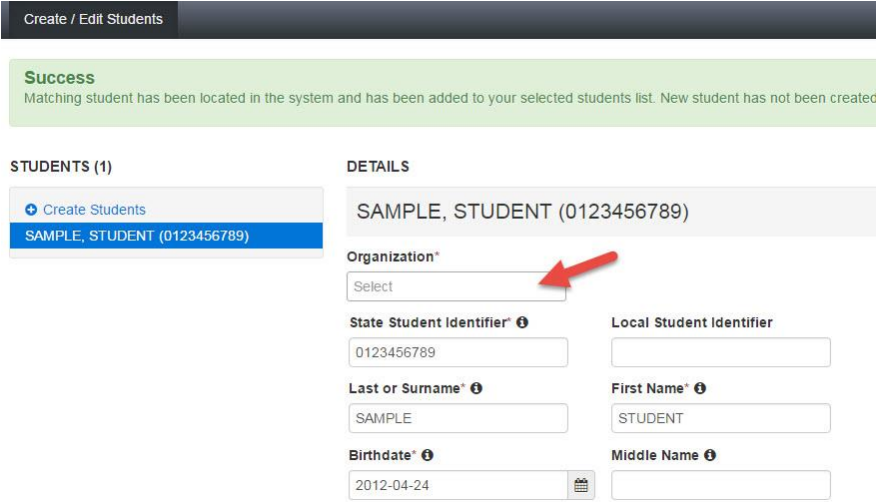For information about Registering Students via SR/PNP go to page **19**.
For information about Requesting Transfers through the File Import go to page **20.**

Steps to add Students to your Organization through the PearsonAccess[next] User Interface.

Enter student demographic information on the Create/Edit Student Screen.

Go to Steps

Was the Student Found?

Yes→

No

The student does not exist within the system. Continue by enrolling, registering, and assigning a test to the student.

Go to Steps

Is the Organization field populated?

Yes→

No

The student exists within the system but is not enrolled under the current administration. Continue by enrolling, registering, and assigning a test to a student.

Go to Steps

Is the field populated with your organization?

Yes→

No

The student is currently enrolled to another organization. Use the work request feature to transfer the student.

Go to Steps

The student is already enrolled to your org. Verify administration data and test assignment data.

Go to Steps

Searching for a Student Record

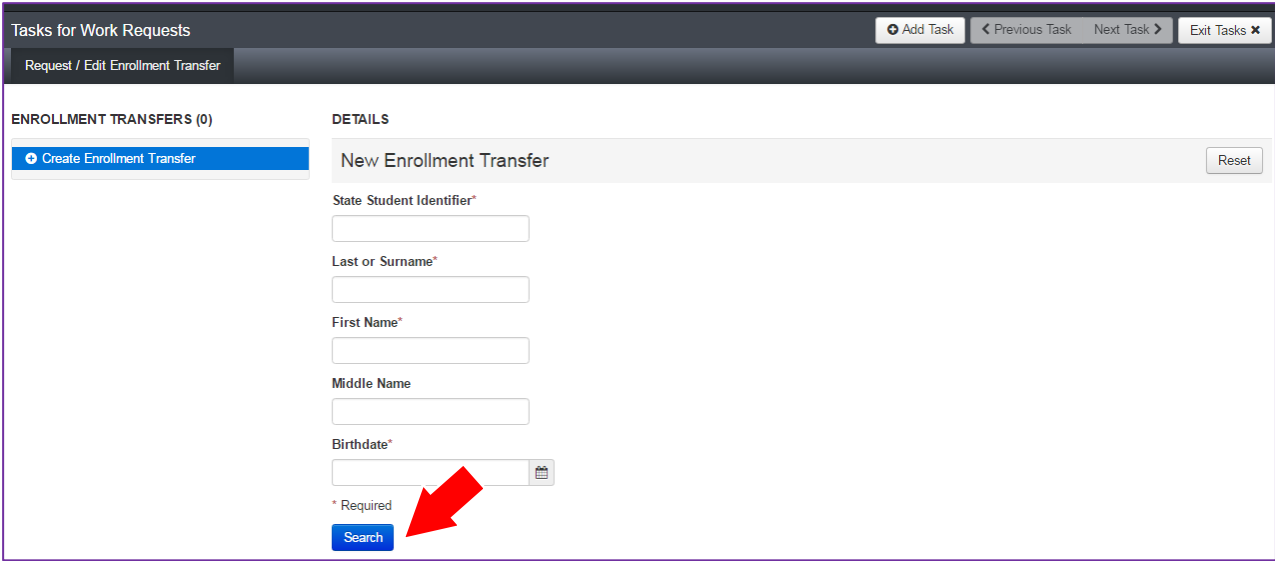| Step	Directions
1. **Enter student demographic information on the Create/Edit Student Screen.**	• Choose the administration from the dropdown in the top banner in PearsonAccess[next]. • Go to **Setup > Students**. • Select **Create/Edit Students**, **Register Students,** and **Manage Student Tests** 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?**	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**. 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**. **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.

Step	Directions

3. **Is the Organization Field Populated?**	A. **Yes** - Go to **Step 4**.
	B. **No** - The student exists within the system but is not enrolled under the current administration.
	  a. Select the student record from the left side of screen.
	  b. Populate the organization field again and click Save.
	  c. Continue to the **Registering and Assigning a Test to a Student Record steps**.

4. **Is the Organization Field Populated with <u>your</u> Organization?**	A. **Yes** - Go to **Step 5**. B. **No** - The student is currently enrolled to another organization. Exit the task and continue to the requesting a **Transfer "Work Request" steps**. **Note:** If you are a district user, and a student is transferring between two schools within your district, there are additional options to update the student record. This would involve removing the student's test assignments, replacing the organization enrollment, then reassigning the test assignments. If you are comfortable with the system and know how to do this, please proceed. However, due to different variables that and timing, it is recommended to use the Transfer "Work Request" step to ensure students are registered and enrolled correctly.
5. **The Student Record is currently enrolled to your Organization.**	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.

Registering and Assigning a Test to a Student Record

Step	Directions
• **Register Student**	• On the **Register Students** screen, select the student to register and check the **Registered** option. The student's **Grade Level** and **Accountable School Code** will also need to be entered.
• **Manage Student Tests**	• On the **Manage Student Tests** screen click **Create Student Tests** and enter the required information to create a new test. Click **Save**. o **Note:** Students will still need to be placed in to a test session once the test assignment is created.

How to Create a "Work Request" for Transfer Students

Step	Directions
1. **Search for the Student Record**	- Choose the administration from the dropdown in the top banner in PearsonAccess^{next}. - Go to **Setup >** "Work Request" **s**, 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?**	A. **Yes** - Go to **Step 3**. 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. **Note:** If you still experience difficulties, please contact customer support.

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**. 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 the Searching for a Student Record. **Check the status of your transfer "Work Request"** • Go to **Setup >** "Work Request" **s**, 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 transfer-from district or your state if the student transfer request is not approved or rejected within a reasonable amount of time.

4. **Verify Registration and Test Assignment Information.**	Once the student is transferred your organization, you should verify student registration data and test assignments.
	• Go to Setup > Students.
	• Search and select the student record, select **Register Students** and **Manage Student Tests** under the Tasks dropdown menu and click **Start**.
	○ **Note:** If you are unable to locate the student, switch to the "by Ignoring <Admin> Remigrations parameter. The transfer from organization may have removed test assignments and registration but left the student enrolled under the administration. In this situation, the transfer was still needed but you will need to register and the assign test(s) to the student record.

	• On the Register Student screen, verify the accountable school code and demographic fields. Make any updates and click **Save**.
	○ **Important:** Make sure to update the accountable school code. The accountable school code is auto-populated with the testing school code when a student is initially registered via a SR/PNP import and that value is remains when the student transfer request is approved. Please review the Operational Report "Students where Accountable District/School is different from Testing District/School" to confirm all students' accountable school codes are correct.

	• Toggle to Manage Student Test Screen and verify all test assignment data is correct. Make any updates and click **Save**.

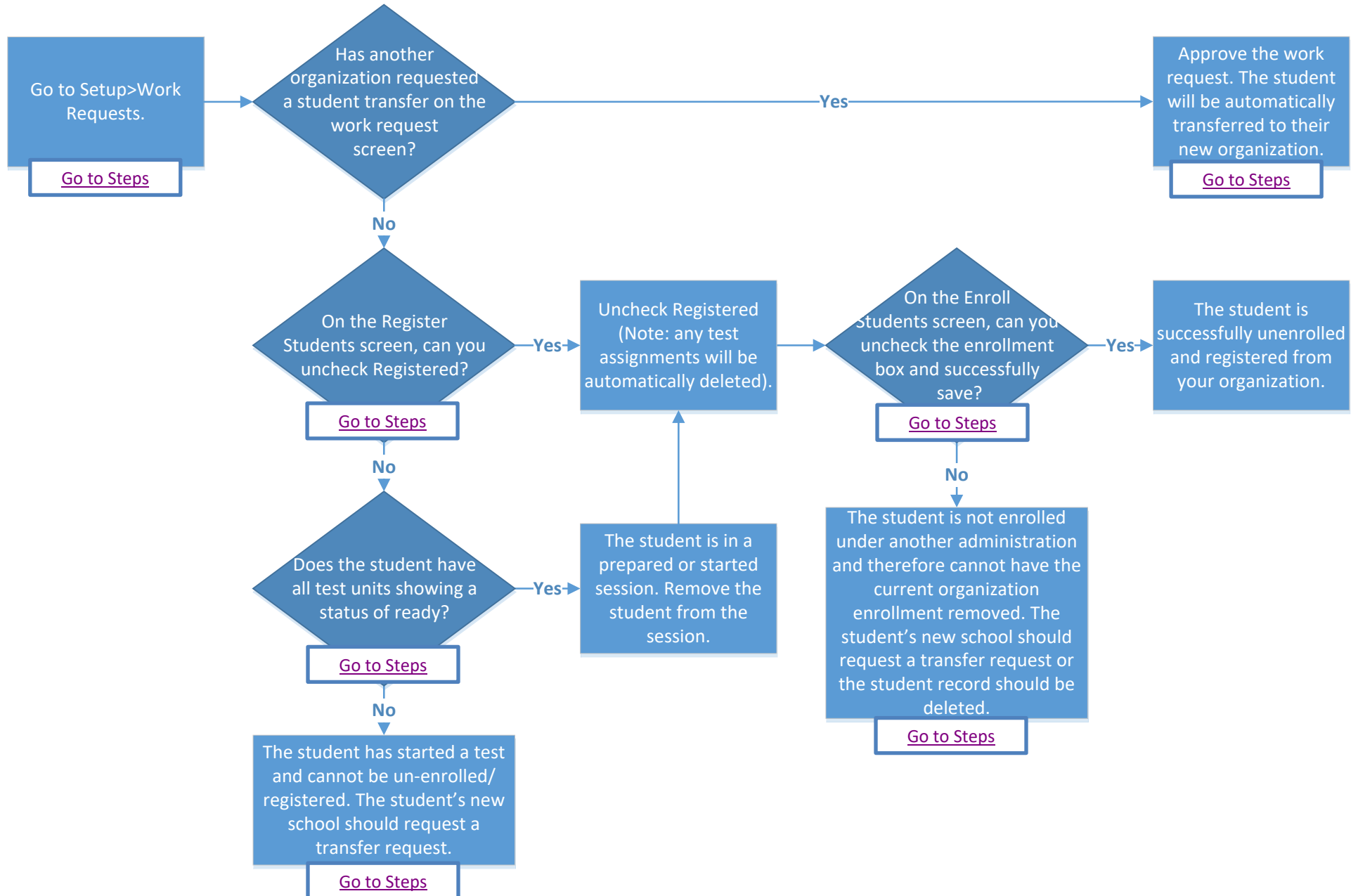| Step	Directions
5. **Transfer student test assignment from Transferred session.**	If the student was assigned to a test session under their previous organization, then a new test session will automatically be created in the Transfer-To School and transferred student test assignments will be automatically 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. Students will need to be moved from these sessions to other test sessions to test.** • 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. o 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.** **Important: The transfer sessions cannot be prepared or started. Students will need to be moved from these sessions to other test sessions to test.**

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

The purpose of this section is to provide information on how to use PearsonAccess^{next} to successfully unregister students who move from your organization. Review the User Role Matrix to learn which roles can perform these activities.
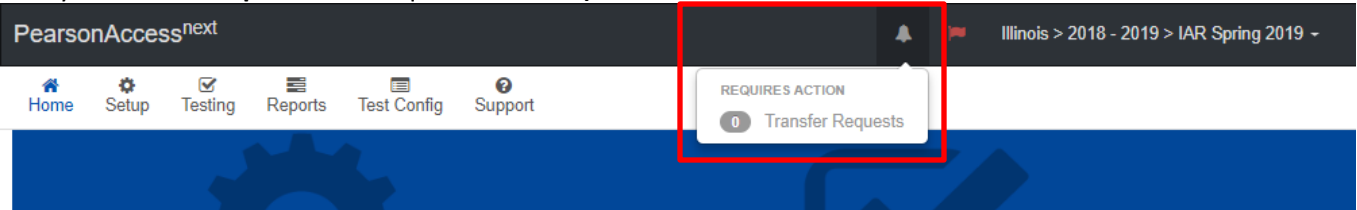
For information about Unregistering Students via SR/PNP go to page **17**.
For information about Approving/Rejecting Transfers through the File Import go to page **18.**

Steps to remove Students from your Organization through the PearsonAccess^next User Interface.
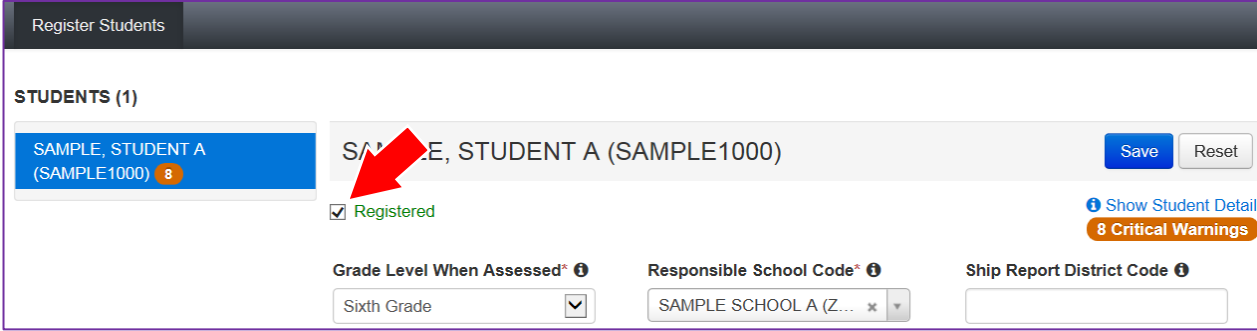
Go to Setup>Work Requests.

Go to Steps

Has another organization requested a student transfer on the work request screen?

Yes → Approve the work request. The student will be automatically transferred to their new organization.

Go to Steps

No

On the Register Students screen, can you uncheck Registered?

Go to Steps

Yes → Uncheck Registered (Note: any test assignments will be automatically deleted).

On the Enroll Students screen, can you uncheck the enrollment box and successfully save?

Go to Steps

Yes → The student is successfully unenrolled and registered from your organization.

No

Does the student have all test units showing a status of ready?

Go to Steps

Yes → The student is in a prepared or started session. Remove the student from the session.

No → The student is not enrolled under another administration and therefore cannot have the current organization enrollment removed. The student's new school should request a transfer request or the student record should be deleted.

Go to Steps

No

The student has started a test and cannot be un-enrolled/registered. The student's new school should request a transfer request.

Go to Steps

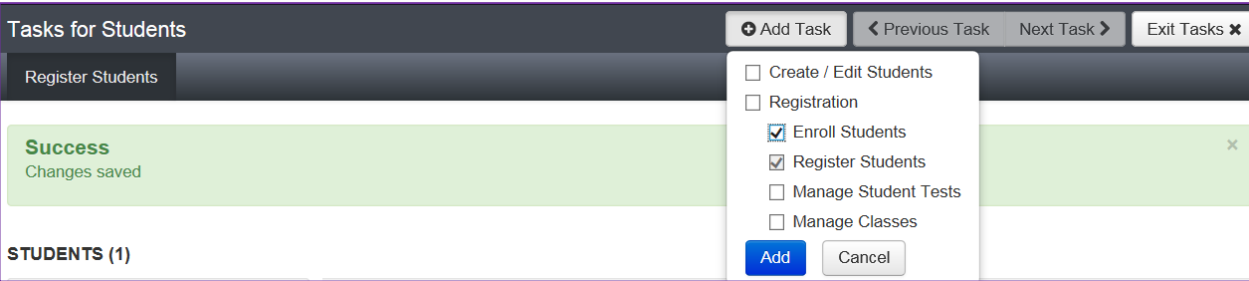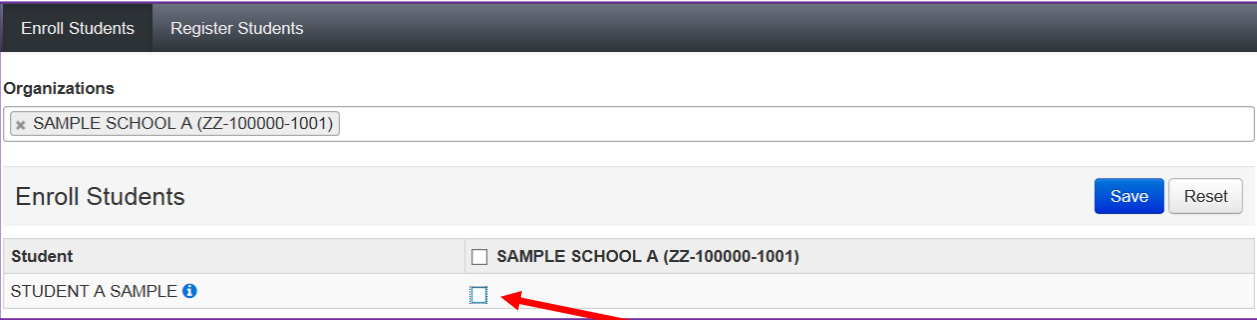## Locating and Approving a Transfer "Work Request"

Step	Directions
1. **Look for a Transfer Request**	• 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. If so, click **Transfer Requests**. (This will automatically take you to the **Setup >** "Work Request" **s**creen**)**.
2. **Has another organization requested a student transfer?**	A. **Yes** - Go to **Step 3**. B. **No** – Go **Manually Removing Student Enrollment and Registration** Steps.

Step	Directions
3. Approve /Reject the Transfer "Work Request"	• Selected the record, select **Approve/Rejected Enrollment Transfer** from the **Tasks** dropdown menu and then click **Start**.

Work Requests

Tasks 1 Selected

Select Tasks ▼ | Start ▼

☐ Request / Edit Enrollment Transfer
☑ Approve / Reject Enrollment Transfer

Work Requests 1 Selected Clear

Manage ▼

Filters Clear Hide
Status
× Waiting for Approval
Work Type
× Enrollment Transfer

1 Results   Displaying 25 ▼ Manage Columns▼

☐	Status	Work Type	Created by	Requesting Organization	Assigned Organization
☑	⚠ 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, click **Approve**.

SAMPLE, STUDENT A (SAMPLE1000)

SAMPLE, STUDENT A (SAMPLE1000)   Approve | Reject

State Student Identifier*
SAMPLE1000

Last or Surname*
SAMPLE

First Name*
STUDENT A

Middle Name

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

Work Request Status

⚠ Waiting for Approval

Request Received
2016-09-27

Approve | Reject

Step	Directions
Approve /Reject the Transfer "Work Request" (Continued)	• Alternatively, if there is a student transfer "Work Request" for a student not moving away from your organization, you can populated the **Reject Enrollment Transfer Reason** Field and click **Reject**.

Manually Removing Student Enrollment and Registration

Step	Directions
1. **Can you uncheck Registered?**	• Choose the administration from the dropdown in the top banner in PearsonAccess^next.
	• Go to **Setup > Students**.
	• Search and select the student record, select **Register Students** under the Tasks dropdown menu and click **Start**.
	• **Can you uncheck Registered?**
	A. **Yes** – Uncheck Registered and go to **Step 2**. (If a test is assigned, it will automatically be removed)
	B. **No** – Go to **Step 3**.(Registered checkbox will be grayed out)

Step	Directions
2. Can you uncheck the Enrollment Box and Successfully Save?	C. Select **Enroll Students** under the **Add Task** dropdown menu and click **Add**. **Tasks for Students** — Add Task · Previous Task · Next Task · Exit Tasks Register Students ☐ Create / Edit Students ☐ Registration ☑ Enroll Students ☑ Register Students ☐ Manage Student Tests ☐ Manage Classes Add · Cancel **Success** Changes saved **STUDENTS (1)** • Uncheck the organization enrollment and click **Save**. Note: Make sure to uncheck the organization check box to the right of the student record, not the organization name in the Organizations field. Enroll Students · Register Students **Organizations** × SAMPLE SCHOOL A (ZZ-100000-1001) **Enroll Students** — Save · Reset **Student** — ☐ SAMPLE SCHOOL A (ZZ-100000-1001) STUDENT A SAMPLE ⓘ — ☐ • **Were you able to successfully save?** A. **Yes** – A success message appeared. The student enrollment and registration has been successfully removed from your organization. **No further action is required.** B. **No** – An error message appeared. The student will remain enrolled to the organization under the administration but won't be registered or assigned tests. No further action is required. If the student moves to another district a transfer work request will still need to be approved.

Step	Directions
3. **Does the student have all test units showing a status of ready*?**	You will not be able to uncheck **Registered** on the **Register Students** screen if the student currently has a test assignment in a prepared or started session. Go to Testing/Students in Session and verify the status of the student's test units. **Does the student have all test units showing a status of ready*?** A. **Yes** – Remove the student from the session(s) and go to **Step 1**. B. **No** – The student has a test unit in a status of resumed, resumed upload, active, exited, completed, or marked complete. PearsonAccess[next] prevents the deletion of started tests. If the student transferred to another organization within your state, the new organization will need to request a "Work Request" transfer. Contact your state for further direction. * (Rare) Students that have a unit of the test voided automatically get reassigned the same unit of the test. The original unit that was voided is not deleted but instead is saved as a completed test. Contact customer support if you show all students in a ready status but are unable to uncheck **Registered.**

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. Review the User Role Matrix to learn which roles can perform these activities.

Step	Directions
1. **Export SR/PNP File**	- 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 **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**.
2. **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.
3. **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**.
4. **Troubleshooting Errors**	An error stating "The test: <Test Name> for student <Student Name> is complete. It cannot be deleted." is received when a student is already started at least one unit of the test. If you receive this error, see the directions on submitting a "Work Request"**.**

Tip: Use Microsoft Excel's Text Import Wizard to retain source formatting when opening an exported csv file. (Directions apply to: Excel 2016, Excel 2013, Excel 2010, and Excel 2007.

1. Open a blank Excel spreadsheet and select cell A1.
2. On the **Data** tab, in the **Get External Data** group, click **From Text**.
3. Locate and double-click the text file that you want to import.
4. On Step 1 of the Text Import Wizard, select **Delimited** and then click **Next**.
5. On Step 2 of the Text Import Wizard, check **Comma** as delimiter and then click **Next**.
6. 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**.

Directions for the Transfer-From District/School: How to Approve/Reject Transfers through the File Import/Export Process

Step	Directions
1. **Export Enrollment Transfer File**	• 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**	• Download the Transfer Enrollment Export File. • Populate Column M – Action Field with "A" to approve or "R" to reject the enrollment transfer request. a. 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. Note: For additional information, view the **Enrollment Transfer File Field Definitions**.
3. **Import Enrollment Transfer File**	• 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 Enrollment Transfer Import file. • Click **Process**.

Tip: Use Microsoft Excel's Text Import Wizard to retain source formatting when opening an exported csv file. (Directions apply to: Excel 2016, Excel 2013, Excel 2010, and Excel 2007.

7. Open a blank Excel spreadsheet and select cell A1.
8. On the **Data** tab, in the **Get External Data** group, click **From Text**.
9. Locate and double-click the text file that you want to import.
10. On Step 1 of the Text Import Wizard, select **Delimited** and then click **Next**.
11. On Step 2 of the Text Import Wizard, check **Comma** as delimiter and then click **Next**.
12. 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**.

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

Note: These steps apply to students who have not started testing and are not enrolled to another organization.

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. Review the User Role Matrix to learn which roles can perform these activities.

Step	Directions
1. **Create a new Student Registration/Personal Needs Profile Import**	- Choose the administration from the dropdown 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 layout documents found on the Support Page of PearsonAccess^next.
2. **Import SR/PNP File**	- 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, student will now be assigned a test in the new school.
3. **Troubleshooting Errors**	- An error stating "The student can only be enrolled in 1 organization" is received when a student is already enrolled in a separate district/school. 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 state ID 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, please contact your state.

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

Step	Directions
1. **Create a new Transfer Work Request Import File**	• 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**. 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. <table><tr><td>**Enrollment Transfer File**</td><td>**SR/PNP**</td></tr><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>Concatenated 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></table>
2. **Import Enrollment Transfer File**	• 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 Enrollment Transfer Import File. • Click **Process**. 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. **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 transfer-from district or your state if the student transfer request is not approved or rejected within a reasonable amount of time.

Enrollment Transfer File Field Definitions

Column Letter	Field Name	Required	Field Length	Field Definitions and Notes	Expected Values
A	Filler	N	50		
B	Local Student Identifier	N	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	N	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	Student Date Of Birth	Y	50	The year, month and day on which a person was born.	YYYY-MM-DD
G	Sex (Gender)	N	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	N	100	The testing organization (school) code the student is moving from.	
I	Transfer From Organization Name	N	200	The testing organization (school) name the student is moving from.	

Column Letter	Field Name	Required	Field Length	Field Definitions and Notes	Expected Values
J	Transfer To Organization Code	Y	100	The testing organization (school) code the student is moving to and responsible for administering the test for a student. Note: To obtain the correct format, concatenate the State Abbreviation, Testing District Code, and Testing School Code fields. If using Excel, use formula: *=CONCATENATE(TEXT(District Code Field ,"000"),"-",TEXT(School Code Field,"000")).* *The number of zeros for the district and school codes should match the state format.* Example: State = NM, District Code = 001, & School Code = 111. Formula *=CONCATENATE(TEXT(B1,"000"),"-",TEXT(C1,"000"))* will result with "001-111".	A-Z 0-9 - State Formats: BIE = XXXXXXXXXXX-XXXXXXXXXXX DC = XXXX-XXXX DD = XXXX-XXXXXX IL = XXXXXXXXXXXXXXX-XXXXXXXXXXXXXXX MD = XX-XXXX NJ = XXXXXX-XXX NM = XXX-XXX
K	Transfer To Organization Name		200	The testing organization (school) name the student is moving to and 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