

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 using 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.

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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.

Searching for a Student Record

Step	Directions
<p>1. Enter student demographic information on the Create/Edit Students screen.</p>	<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.
<p>2. Was the Student found?</p>	<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 Gender.</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 registered 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. <div data-bbox="1136 224 2011 730" style="border: 1px solid black; padding: 5px;"> <p style="background-color: #333; color: white; padding: 2px;">Create / Edit Students</p> <div style="background-color: #e0ffe0; padding: 5px; margin-bottom: 10px;"> <p>Success Matching student has been located in the system and has been added to your selected students list. New student has not been created.</p> </div> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>STUDENTS (1)</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">+ Create Students</div> <div style="background-color: #007bff; color: white; padding: 2px;">SAMPLE, STUDENT (0123456789)</div> </td> <td style="width: 50%; vertical-align: top;"> <p>DETAILS</p> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">SAMPLE, STUDENT (0123456789)</div> <p>Organization* <input type="text" value="Select"/> </p> <p>State Student Identifier* ⓘ <input type="text" value="0123456789"/> Local Student Identifier <input type="text"/></p> <p>Last or Surname* ⓘ <input type="text" value="SAMPLE"/> First Name* ⓘ <input type="text" value="STUDENT"/></p> <p>Birthdate* ⓘ <input type="text" value="2012-04-24"/> Middle Name ⓘ <input type="text"/></p> </td> </tr> </table> </div>	<p>STUDENTS (1)</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;">+ Create Students</div> <div style="background-color: #007bff; color: white; padding: 2px;">SAMPLE, STUDENT (0123456789)</div>	<p>DETAILS</p> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">SAMPLE, STUDENT (0123456789)</div> <p>Organization* <input type="text" value="Select"/> </p> <p>State Student Identifier* ⓘ <input type="text" value="0123456789"/> Local Student Identifier <input type="text"/></p> <p>Last or Surname* ⓘ <input type="text" value="SAMPLE"/> First Name* ⓘ <input type="text" value="STUDENT"/></p> <p>Birthdate* ⓘ <input type="text" value="2012-04-24"/> Middle Name ⓘ <input type="text"/></p>
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<p>4. Is the Organization field populated with <u>your</u> 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 registered in your organization.</p>	<p>The student is already registered in your organization. Verify registration and test assignment data. For more information, view the Registering and Assigning a Test to a Student Record steps. If all data are correct, no further action is required.</p>		



Directions for the Transfer-To District:

Registering and Assigning a Test to a Student Record

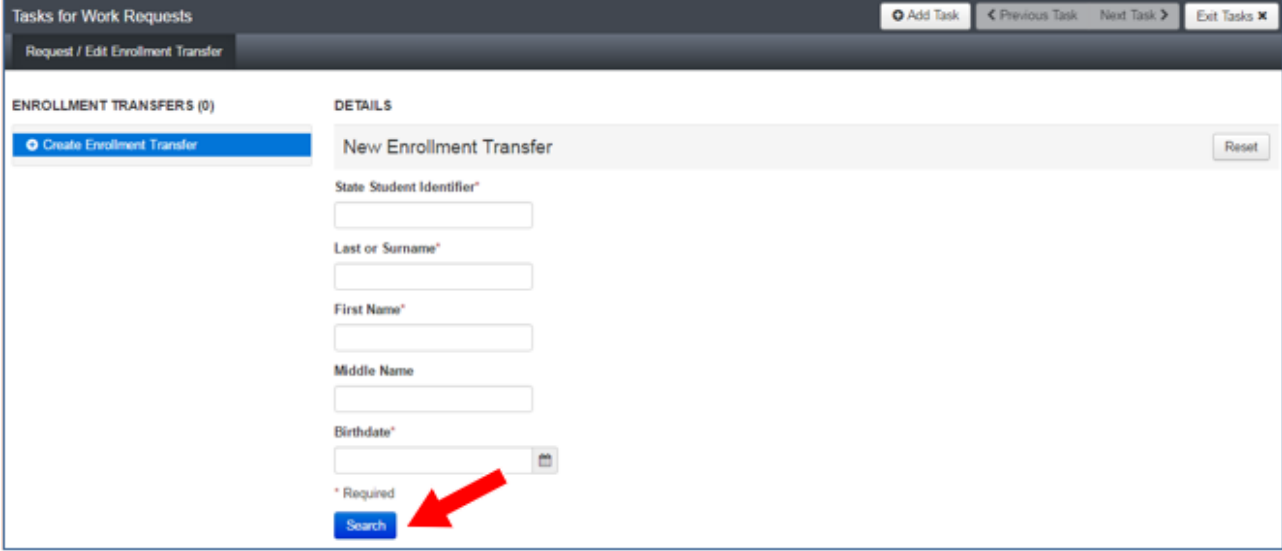
Step	Directions
<ul style="list-style-type: none">• Register Student	<ul style="list-style-type: none">• On the Register Students screen, select the student to register and check the Registered option. Complete all other required data fields.<ul style="list-style-type: none">○ Note: Required data fields are identified by a red asterisk.
<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 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
<p>1. Search for the Student Record</p>	<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 Enrollment Transfer. Click Start. To search for the student to be transferred, enter the student details and click Search. 
<p>2. Was a record found?</p>	<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, the student record may not exist and may need to be created.</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

Create Enrollment Transfer New Enrollment Transfer **Send Request** **Reset**

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

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”

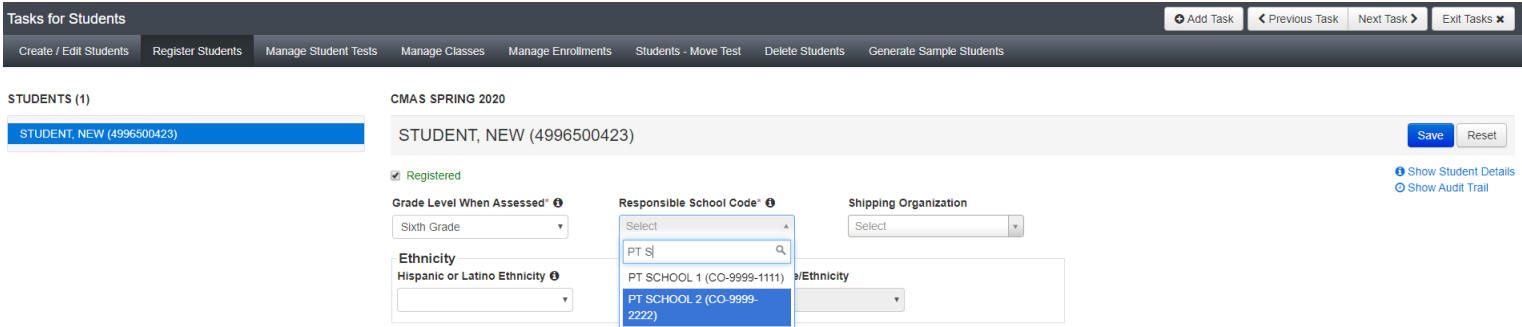
- Go to **Setup > Work Request** and use the Status filters on the left side of the screen to view the status of your transfer “Work Request.” Once approved, go to [Step 4](#). Contact the DAC in the transfer-from district if the student transfer request is not approved or rejected within a reasonable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

Status

Waiting for Approval Approved

Rejected |



Step	Directions
<p>4. Verify Registration and Test Assignment Information.</p>	<p>Once the student is transferred to your organization, verify student registration data and test assignments.</p> <ul style="list-style-type: none"> 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 are correct. <ul style="list-style-type: none"> Important: The Responsible School Code is auto-populated with the Testing School Code when a student is initially registered, and that value will change when the student transfer request is approved. Update the Responsible School Code if the student’s scores should be attributed to a different organization. Review the Operational Report “Students where Responsible Org is Different from Testing Org” to confirm accuracy of any students with differing Testing and Responsible School Codes.  <ul style="list-style-type: none"> Toggle to Manage Student Tests screen and verify all test assignment data are correct. Make any updates and click Save.
<p>5. Transfer student test assignment from Transferred session.</p>	<p>If the student was assigned an online test and started testing in their previous organization, 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 need to be moved from these sessions to other test sessions to allow the students to complete their tests.</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. Under the Tasks dropdown menu, select Move Students between Sessions 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.



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 **Sensitive Data** 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 <i>SR/PNP Field Definitions and File Layout</i> document found on the Data Resources > Data File Layouts section of the Colorado Assessments Portal (https://coassessments.com).
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 registered and assigned tests 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 SASID 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 Gender. If you have verified all data are 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												
1. Create a new Transfer Work Request Import File	<ul style="list-style-type: none"> ● Choose the administration from the dropdown in the top banner of PearsonAccess^{next}. ● Download the <i>Enrollment Transfer Field Definitions and File Layout</i> document found on the Data Resources > Data File Layouts section of the Colorado Assessments Portal (https://coassessments.com). ● 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 to compare the Enrollment Transfer File data against the SR/PNP file.</p> <table border="1" data-bbox="464 699 1997 963"> <thead> <tr> <th data-bbox="464 699 932 737">Enrollment Transfer File</th> <th data-bbox="932 699 1997 737">SR/PNP</th> </tr> </thead> <tbody> <tr> <td data-bbox="464 737 932 774">Column A – State Student Identifier</td> <td data-bbox="932 737 1997 774">Column F – State Student Identifier</td> </tr> <tr> <td data-bbox="464 774 932 812">Column C – Last or Surname</td> <td data-bbox="932 774 1997 812">Column I – Last or Surname</td> </tr> <tr> <td data-bbox="464 812 932 849">Column D – First Name</td> <td data-bbox="932 812 1997 849">Column J – First Name</td> </tr> <tr> <td data-bbox="464 849 932 886">Column F – Birthdate</td> <td data-bbox="932 849 1997 886">Column L – Birthdate</td> </tr> <tr> <td data-bbox="464 886 932 963">Column J – Transfer to Organization Code</td> <td data-bbox="932 886 1997 963">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.												



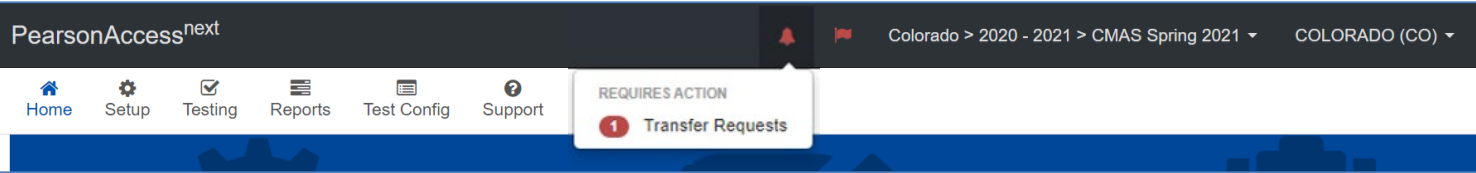
Step	Directions
2. Import Enrollment Transfer File	<ul style="list-style-type: none">• Go to Setup > Import/Export Data.• Select Import/Export Data under the Tasks dropdown and click Start.• Under Type, select Enrollment Transfer Import.• Click Choose File and select the locally saved Enrollment Transfer Import file.• Click Process. <p>Note: The student 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 PearsonAccess^{next} 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 current school year’s 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>The screenshot shows the PearsonAccess^{next} dashboard. At the top right, there is a navigation breadcrumb: "Colorado > 2020 - 2021 > CMAS Spring 2021" and a dropdown menu for "COLORADO (CO)". Below this is a navigation bar with icons for Home, Setup, Testing, Reports, Test Config, and Support. A notification bell icon is highlighted, and a dropdown menu shows "REQUIRES ACTION" with a red circle containing the number "1" next to "Transfer Requests".</p>
<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

3. Approve/Reject the Transfer “Work Request”

Directions

- Select 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'. Under the 'Tasks' tab, a dropdown menu is open, showing two options: 'Request / Edit Enrollment Transfer' (unchecked) and 'Approve / Reject Enrollment Transfer' (checked). Below the dropdown, 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 details for 'SAMPLE, STUDENT A (SAMPLE1000)'. The page includes fields for 'State Student Identifier*', 'Last or Surname*', 'First Name*', 'Middle Name', and 'Birthdate*'. It also shows 'Change Enrollment From' and 'Change Enrollment To' information. A 'Reject Enrollment Transfer Reason' field is present, with a red arrow pointing to it. At the bottom, there are 'Approve' and 'Reject' buttons. On the right side, 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 current school year’s 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 the 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 file to import into PearsonAccess^{next}. • Click Process. <p>Note: The student registration(s) with “A” indicated in Column M – Action Field will be transferred to the new district(s) once the file is processed.</p>



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 CDE. (SASID)	A-Z 0-9 No embedded spaces
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	Birthdate	Y	50	The year, month and day on which a person was born.	YYYY-MM-DD
G	Gender	N	1	The concept describing the biological traits that distinguish the males and females of a species.	F = Female M = Male N = Nonbinary
H	Transfer from Organization Code	N	100	The testing organization code (CO-DDDD-SSSS) the student moved from .	
I	Transfer from Organization Name	N	200	The testing organization (school) name the student 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	N	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)