

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

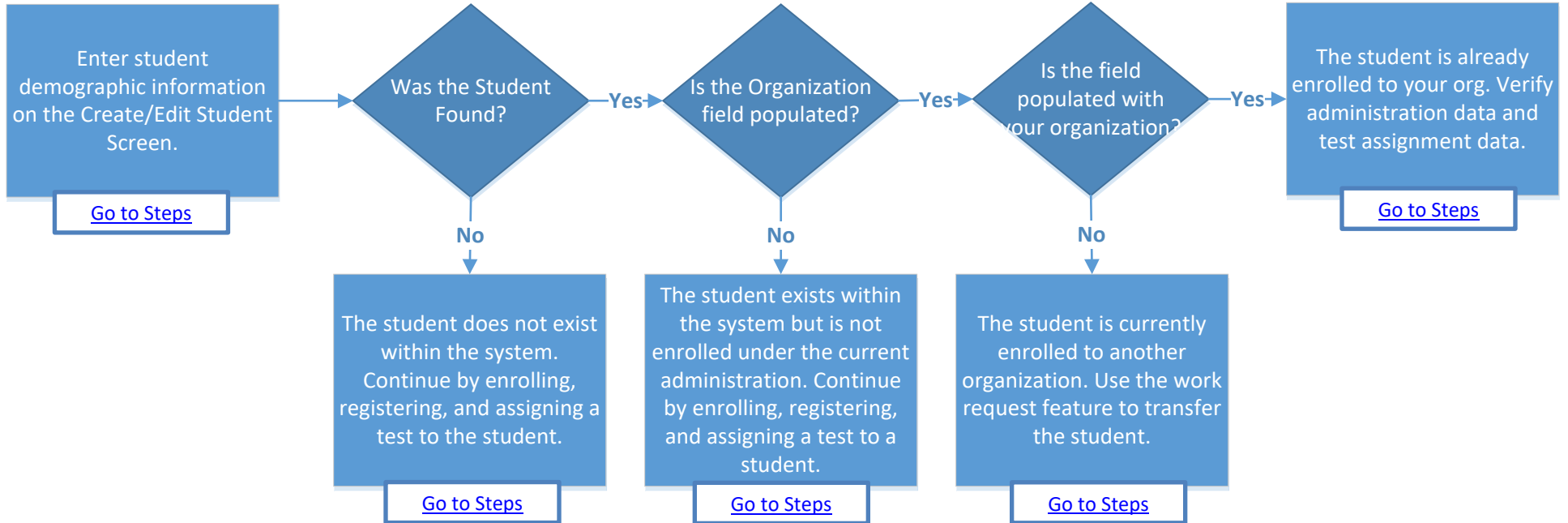
Directions for the Transfer-To District/School: How to Register Students through the User Interface

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

For information about [Registering Students via SR/PNP](#) go to page 20.

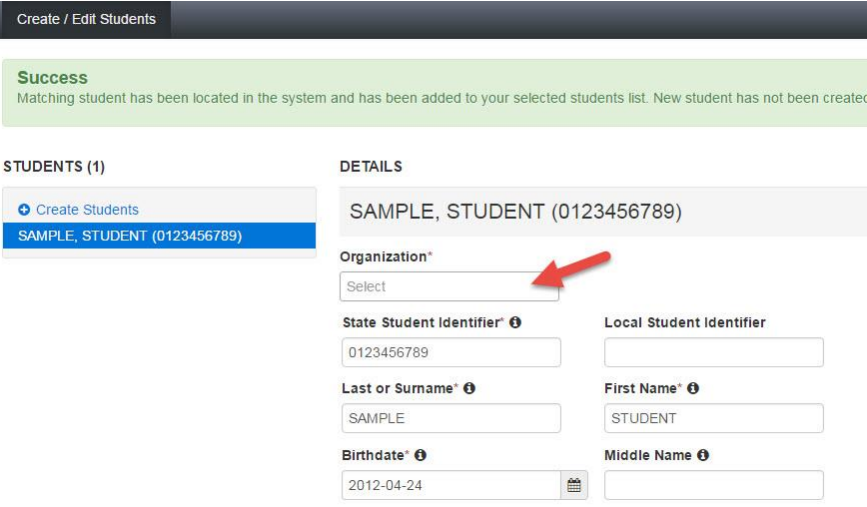
For information about [Requesting Transfers through the File Import](#) go to page 21.

Steps to add Students to your Organization through the PearsonAccess^{next} User Interface.



Searching for a Student Record

Step	Directions
<p>1. Enter student demographic information on the Create/Edit Student 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 Sex.</p>

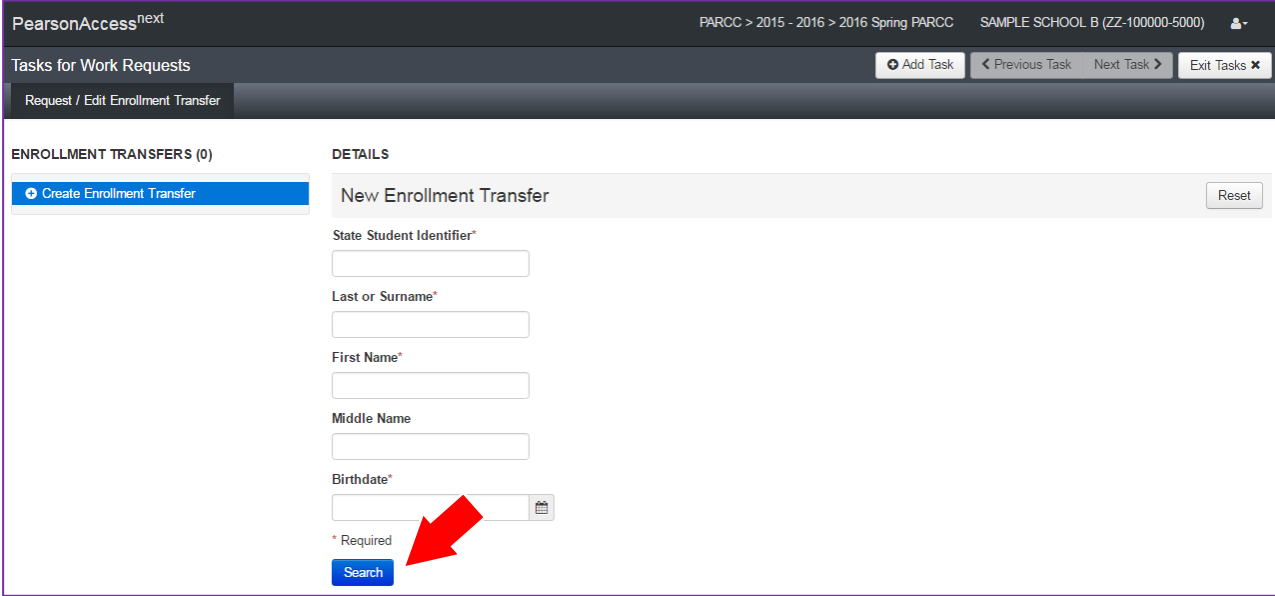
Step	Directions
<p>3. Is the Organization Field Populated?</p>	<p>A. Yes - Go to Step 4.</p> <p>B. No - The student exists within the system but is not enrolled under the current administration.</p> <ol style="list-style-type: none"> Select the student record from the left side of screen. Populate the organization field again and click Save. Continue to the Registering and Assigning a Test to a Student Record steps. 
<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, 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.</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>

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 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

Only users assigned the **State Role** or **LEA 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” 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. 
<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, 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 Customer Support.</p>

Step

3. Request the Transfer

Directions

- 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**.

The screenshot shows a web interface for creating a new enrollment transfer. The page title is 'Tasks for Work Requests' and the breadcrumb is 'Request / Edit Enrollment Transfer'. On the left, there is a section for 'ENROLLMENT TRANSFERS (0)' with a 'Create Enrollment Transfer' button. The main area is titled 'New Enrollment Transfer' and contains the following fields: 'State Student Identifier*' (SAMPLE1000), 'Last or Surname*' (Sample), 'First Name*' (Student A), 'Middle Name', 'Birthdate*' (2016-08-04), 'Change Enrollment From' (SAMPLE SCHOOL A), and 'Change Enrollment To*' (SAMPLE SCHOOL B (ZZ-100000-5000)). A green message box indicates 'Student found. Enter the new organization below.' A red arrow points to the 'Change Enrollment To' dropdown menu. At the bottom, there are 'Send Request' and 'Reset' buttons.

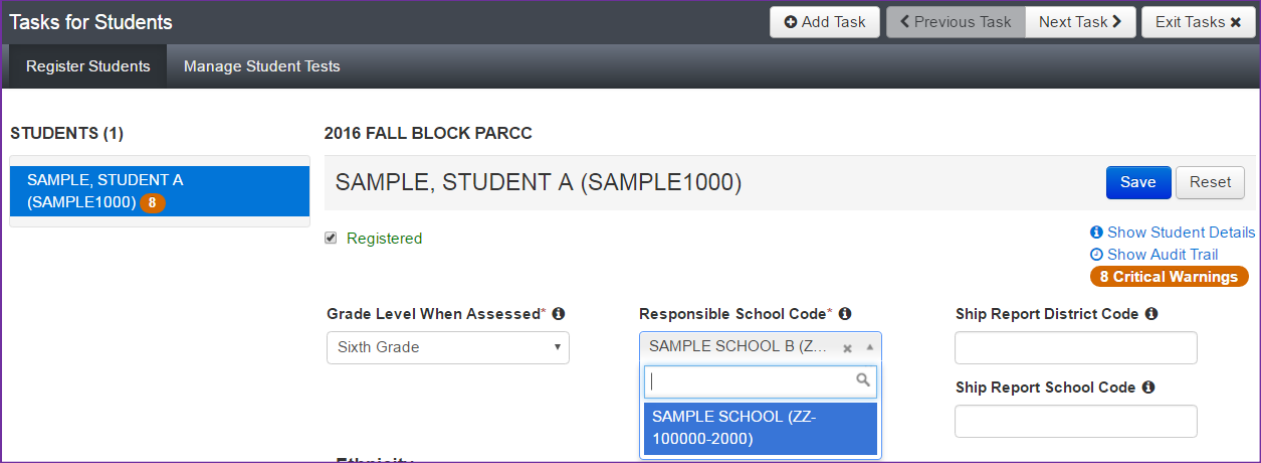
Note: The student will be transferred after the request is approved by the transfer-from organization, as described in [Locating and Approving a Transfer “Work Request.”](#)

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.

The screenshot shows a 'Status' filter section with three buttons: 'x Waiting for Approval', 'x Approved', and 'x Rejected'.

Step	Directions
<p>4. Verify Registration and Test Assignment Information.</p>	<p>Once the student is transferred your organization, you should verify student registration data and test assignments.</p> <ul style="list-style-type: none"> 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. On the Register Student screen, verify the responsible school code and demographic fields. Make any updates and click Save. <ul style="list-style-type: none"> 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 via a SR/PNP import 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.  <ul style="list-style-type: none"> Toggle to Manage Student Test Screen and verify all test assignment data is correct. Make any updates and click Save.

Step	Directions
<p>5. Transfer student test assignment from Transferred session.</p>	<p>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.</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>

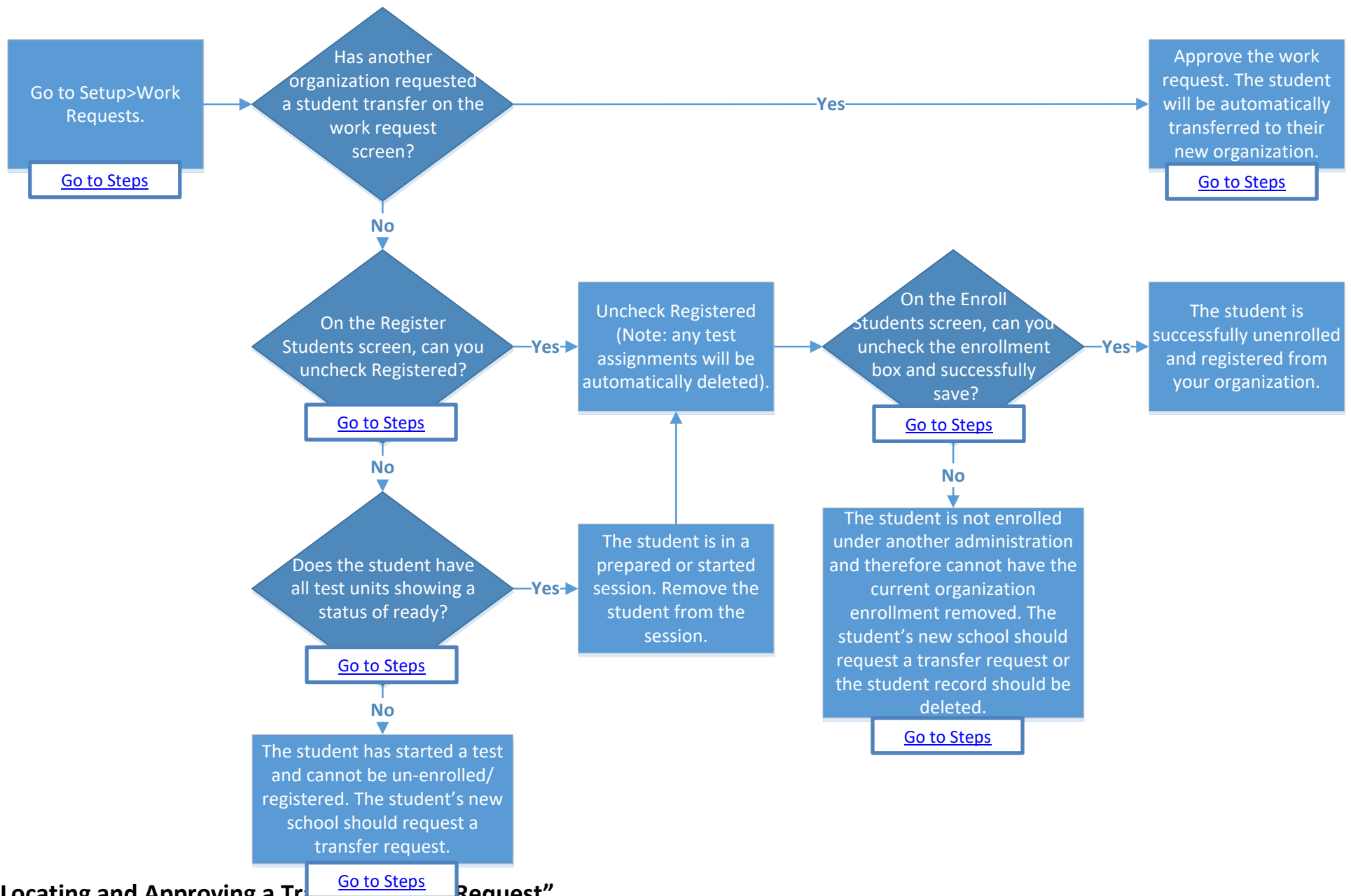
Directions for the Transfer-From District/School: How to Unregister Students through the User Interface

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

For information about [Unregistering Students via SR/PNP](#) go to page **18**.

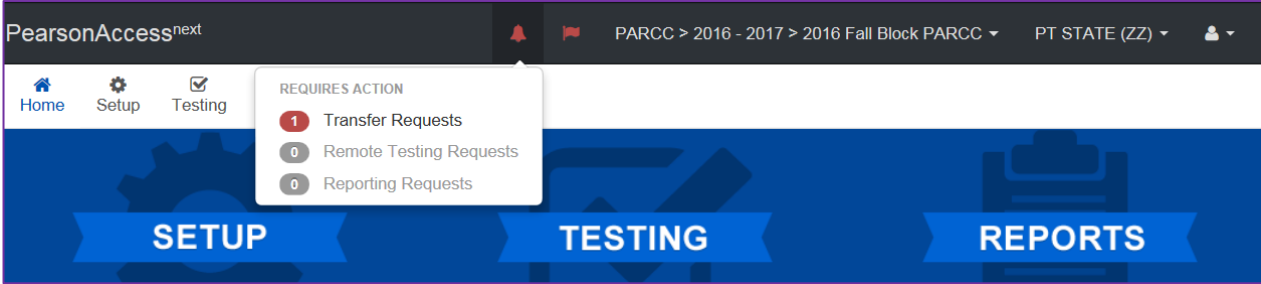
For information about [Approving/Rejecting Transfers through the File Import](#) go to page **19**.

Steps to remove Students from your Organization through the PearsonAccess^{next} User Interface.



Locating and Approving a Transfer Request

Only users assigned the **State Role** or **LEA Role** can create a transfer “Work Request.”

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. If so, click Transfer Requests. (This will automatically take you to the Setup > “Work Request” s screen).  <p>The screenshot shows the PearsonAccess^{next} user interface. At the top, there is a navigation bar with 'Home', 'Setup', and 'Testing' icons. A notification bell icon is active, showing a dropdown menu titled 'REQUIRES ACTION' with three items: 'Transfer Requests' (with a red circle containing the number 1), 'Remote Testing Requests' (with a grey circle containing 0), and 'Reporting Requests' (with a grey circle containing 0). Below the navigation bar, there are three large blue buttons labeled 'SETUP', 'TESTING', and 'REPORTS'.</p>
<p>2. Has another organization requested a student transfer?</p>	<p>A. Yes - Go to Step 3.</p> <p>B. No – Go Manually Removing Student Enrollment and Registration Steps.</p>

Step

3. Approve /Reject the Transfer “Work Request”

Directions

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

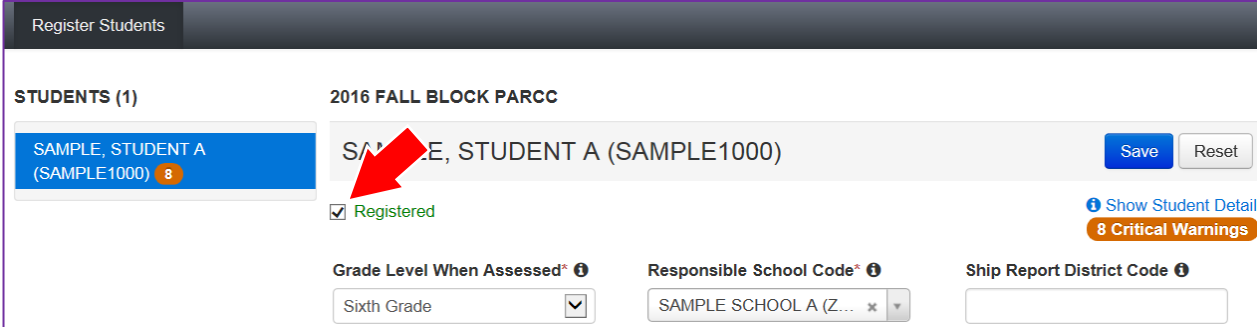
The screenshot shows the 'Work Requests' interface. At the top, there are two tabs: 'Tasks 1 Selected' and 'Work Requests 1 Selected Clear'. Below the tabs, there are two dropdown menus: 'Select Tasks' and 'Manage'. The 'Select Tasks' dropdown is open, showing two options: 'Request / Edit Enrollment 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 the filters shows 1 result with the following columns: Status, Work Type, Created by, Requesting Organization, and Assigned Organization. The table contains one row with the status 'Waiting for Approval', work type 'Enrollment Transfer', created by 'biederman', requesting organization 'SAMPLE SCHOOL B (ZZ-100000-1000)', and assigned organization 'SAMPLE SCHOOL A (ZZ-100000-1001)'. A blue arrow points from the 'Approve / Reject Enrollment Transfer' option in the dropdown menu to the 'Approve' button in the second screenshot.

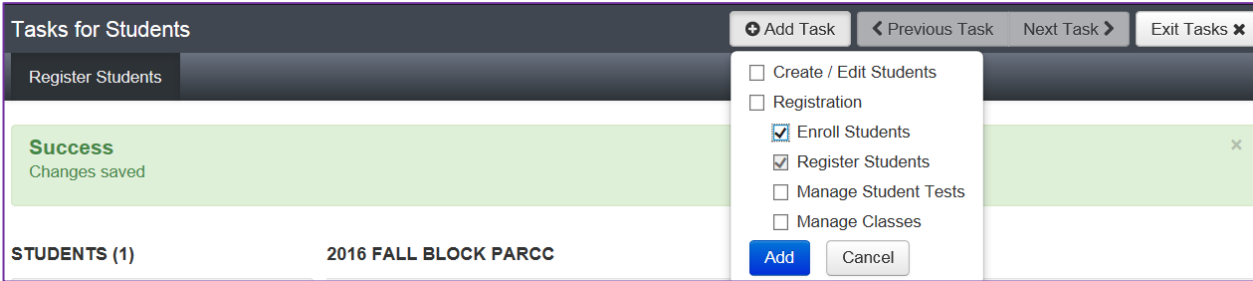
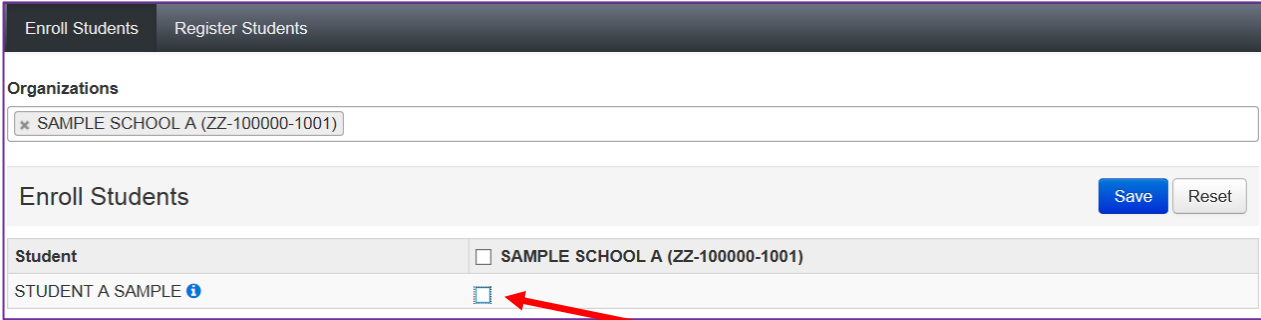
- On the **Approve/ Reject Enrollment Transfer** screen, click **Approve**.

The screenshot shows the 'Approve/ Reject Enrollment Transfer' screen for 'SAMPLE, STUDENT A (SAMPLE1000)'. The page has a header with the student's name and two buttons: 'Approve' and 'Reject'. Below the header, there are several fields: '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)), and 'Reject Enrollment Transfer Reason' (empty text box). On the right side, there is a 'Work Request Status' box showing 'Waiting for Approval' and 'Request Received' (2016-09-27). At the bottom, there are two buttons: 'Approve' and 'Reject'. A red arrow points to the 'Approve' button.

Step	Directions
Approve /Reject the Transfer “Work Request” (Continued)	<ul style="list-style-type: none"> 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

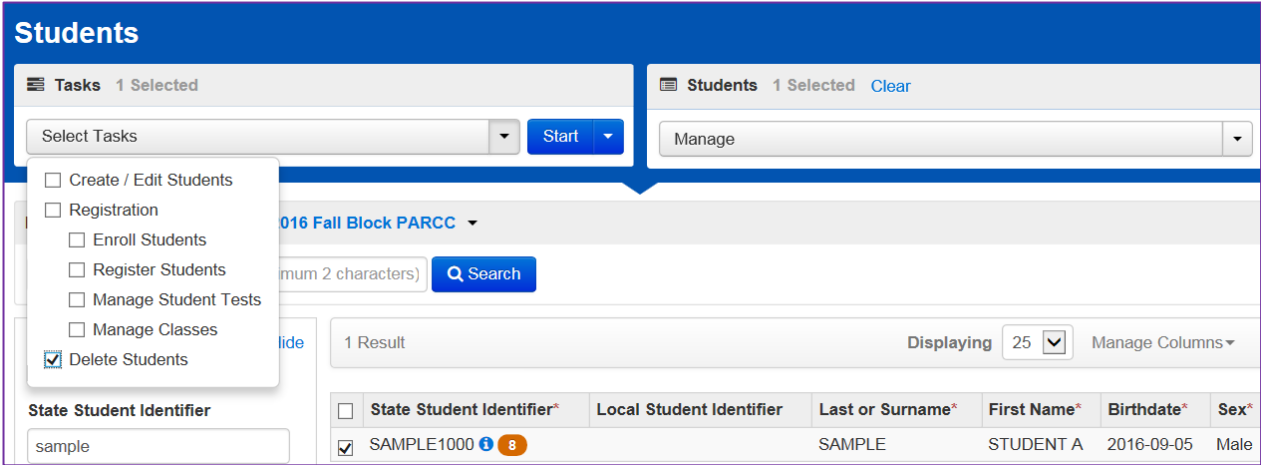
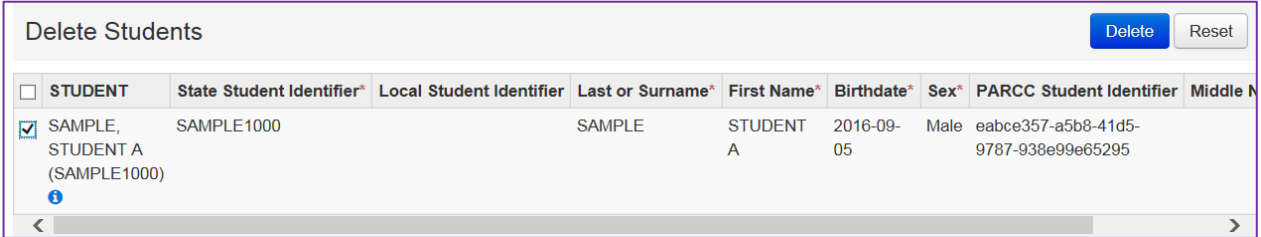
Step	Directions
1. Can you uncheck Registered?	<ul style="list-style-type: none"> Choose the administration from the dropdown in the top banner in PearsonAccess^{next}. Go to Setup > Students. Search and select the student record, select Register Students under the Tasks dropdown menu and click Start. Can you uncheck Registered? <ol style="list-style-type: none"> Yes – Uncheck Registered and go to Step 2. (If a test is assigned, it will automatically be removed) No – Go to Step 3.(Registered checkbox will be grayed out) 

Step	Directions
<p>2. Can you uncheck the Enrollment Box and Successfully Save?</p>	<p>C. Select Enroll Students under the Add Task dropdown menu and click Add.</p>  <ul style="list-style-type: none"> • 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.  <ul style="list-style-type: none"> • Were you able to successfully save? <ol style="list-style-type: none"> Yes – A success message appeared. The student enrollment and registration has been successfully removed from your organization. No further action is required. No – An error message appeared. Go to Manually Deleting a Student Record Steps.

Step	Directions
<p>3. Does the student have all test units showing a status of ready*?</p>	<p>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.</p> <p>Does the student have all test units showing a status of ready*?</p> <ul style="list-style-type: none"> 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. <p>* (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 Pearson Customer Support if you show all students in a ready status but are unable to uncheck Registered.</p>

Manually Deleting a Student Record

PearsonAccess^{next} requires a student record to have an organization association under at least one administration. You will be unable to remove the Organization Enrollment if the student has not be enrolled under another administration. Instead, the student record will need to be deleted.

Step	Directions
<p>1. Manually Deleting a Student Record (for users assigned the Delete Student add-on user role).</p>	<ul style="list-style-type: none"> 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.  <ul style="list-style-type: none"> On the Delete Students task screen, select the student record and click Delete. 

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 role of the **LEA Test Coordinator** or **School Test Coordinator**.

Step	Directions
1. Export SR/PNP 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 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<p>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”.</p>

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	<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. <ol 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 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.)

- 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**.

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. This can be completed by users assigned the **LEA Test Coordinator Role** or **School Test Coordinator Role**.

Step	Directions
1. Create a new Student Registration/Personal Needs Profile Import	<ul style="list-style-type: none"> 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	<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, student 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 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 SSID or PARCC 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												
<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. <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="562 639 1990 932"> <thead> <tr> <th data-bbox="562 639 1094 675">Enrollment Transfer File</th> <th data-bbox="1094 639 1990 675">SR/PNP</th> </tr> </thead> <tbody> <tr> <td data-bbox="562 675 1094 711">Column A – State Student Identifier</td> <td data-bbox="1094 675 1990 711">Column F – State Student Identifier</td> </tr> <tr> <td data-bbox="562 711 1094 747">Column C – Last or Surname</td> <td data-bbox="1094 711 1990 747">Column I – Last or Surname</td> </tr> <tr> <td data-bbox="562 747 1094 782">Column D – First Name</td> <td data-bbox="1094 747 1990 782">Column J – First Name</td> </tr> <tr> <td data-bbox="562 782 1094 818">Column F – Birthdate</td> <td data-bbox="1094 782 1990 818">Column L – Birthdate</td> </tr> <tr> <td data-bbox="562 818 1094 932">Column J – Transfer To Organization Code</td> <td data-bbox="1094 818 1990 932">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> </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	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.
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	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.												
<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 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. 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	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 10 min/max
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	Student Date Of Birth	Y	50	The year, month and day on which a person was born.	YYYY-MM-DD
G	Sex (Gender)		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 (school) code the student is moving from.	

Column Letter	Field Name	Required	Field Length	Field Definitions and Notes	Expected Values
I	Transfer From Organization Name		200	The testing organization (school) name the student is moving from.	
J	Transfer To Organization Code	Y	100	<p>The testing organization (school) code the student is moving to and 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")). The number of zeros for the district and school codes should match the state format.</p> <p>Example: State Abbreviation = DC, District Code = 0001, & School Code = 1111. Formula =CONCATENATE(A1,"-",TEXT(B1,"0000"),"-",TEXT(C1,"0000")) will result with NM-0001-1111.</p>	<p>A-Z 0-9 -</p> <p>Format: DC = DC-XXXX-XXXX</p>
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.	<p>A-Z 0-9 . - ' (Standard Apostrophe) Embedded Spaces Blank</p>
L	Reject Reason	*Y	3000	Required if Action = R	<p>A-Z 0-9 . - ' (Standard Apostrophe) Embedded Spaces Blank</p>
M	Action	Y	1		<p>C = Create A = Approve R = Reject</p>

Resources

Resource	Information
Pearson Customer Support	If assistance is needed, contact the Pearson Support Center at 866-688-9555 or visit dc.mypearsonsupport.com/support/ and select Contact Customer Support . Monday - Friday 6:00 am - 7:30 pm (EST)