



## Document Overview

The purpose of this document is to provide guidance on managing students who move during a PARCC or DC Science administration from:

1) [a paper-based testing \(PBT\) school to another PBT school](#), 2) [a computer-based testing \(CBT\) school to a PBT school](#), or 3) [a PBT school to a CBT school](#). (Refer to the Transfer Student (CBT) Guidance document for students who move from a CBT school to another CBT school.)

This guidance is for situations when students have completed some—but not all—units of a test (ELA/L, mathematics, or DC Science). Wherever possible, it is recommended that students complete testing at the original school before transferring. Students newly enrolling in a school who have not participated in any PARCC or DC Science testing should be scheduled for make-up testing within the test administration window whenever possible. Contact your state department of education to determine if your state has a cut-off date for testing newly enrolled students.

### Responsible Organizations

The Responsible District and School fields (also referred to as the Reporting District and School) are the organizations that the student tests will roll up to for reporting purposes. The Responsible District and School listed for the administration is what will be used for summative reporting.

Notes:

- Pearson cannot merge student responses from different test booklets (grade 3) or answer documents (grades 4–high school) during processing and scoring. Therefore, it is important to follow instructions below, and to not assign more than one test per student.
- Students who partially completed a PARCC (ELA/L or mathematics) or DC Science test in one state and then **moved to another PARCC state** during an assessment window will need to participate in those testing units again following the instructions below. Pearson cannot merge student test results across PARCC states.
- Reports will be sent to the last school where the student tested unless otherwise determined by the state.

### Students Who Transfer from a PBT School to Another PBT School

Below are the options when the original school and the new school are both doing paper-based testing.

If “School B” (the new school) can contact “School A” (the original school):

- **Option 1:** The student’s test booklet is transferred from School A to School B, and the student continues testing (if allowed by your state policy on page 2). Consult the decision tree on page 3 to determine next steps regarding student registration in PearsonAccess<sup>next</sup>.
  - **Option 1a: Original Test Material Arrives Prior to Testing:** The student’s test materials are transferred from School A to School B before the student needs to test in School B, and the student continues testing using the original test materials.

OR

- **Option 1b: Original Test Material Does Not Arrive Prior to Testing:** The student’s test materials are transferred from School A to School B, but not before the student begins testing at School B. The student continues testing in School B using new test materials provided by

School B with **the same form number**<sup>1</sup> as the original test materials. After School A sends the original test materials, School B will transcribe the answers from the School A test booklet (grade 3) or answer document (grades 4–high school) into the School B test booklet or answer document. The test booklet or answer document from School A is marked “Do Not Score” or with an “X.”

**OR**

- **Option 2:** School A marks the test booklet or answer document “Do Not Score” or with an “X,” and the student retests at School B using test materials with a **different form number**. For grades 4 through high school, make sure the student has a matching form number for their test booklet **and** answer document. See Section 3.10.2 in the *Test Coordinator Manual* on where to locate the form numbers on the test booklets and answer documents. Consult the decision tree below to determine next steps regarding student registration in PearsonAccess<sup>next</sup>.

If School B cannot contact School A:

- **Option 3:** The student takes one or more test units at School A before moving, and then completes the remainder of the test units at School B. Depending on your state policy (refer to the following table), School A will either return the booklet with scorable materials or mark it “Do Not Score” or with an “X” and return it with the nonscorable materials. The state assessment office will determine which test attempt will be reported. **Student responses from different test materials cannot be merged during processing and scoring, therefore the student will not receive a complete score.** Consult the decision tree on the next page to determine next steps regarding student registration in PearsonAccess<sup>next</sup>.

**Note:** If School B cannot contact School A, please contact your state education agency assessment office for assistance.

#### State Guidance on Allowable Options for Students Who Transfer from a PBT School to Another PBT School

State	Allows Option 1 (Transfer booklet to new school)	Allows Option 2 (Mark original booklet “Do Not Score,” and retest student in new school)	Allows Option 3 (All partially completed booklets sent to Pearson for scoring and processing)
District of Columbia	Yes (contact OSSE.Assessment@DC.gov for secure booklet transfer and documentation requirements)	No	No

<sup>1</sup> The new test materials **must** be the same form number or the original units will not be able to be transcribed into the new booklet. Results from partially completed test materials will not be merged together. The student must have one complete test booklet or answer document to receive full credit.

## 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 9

### State Policies for Transferring Students

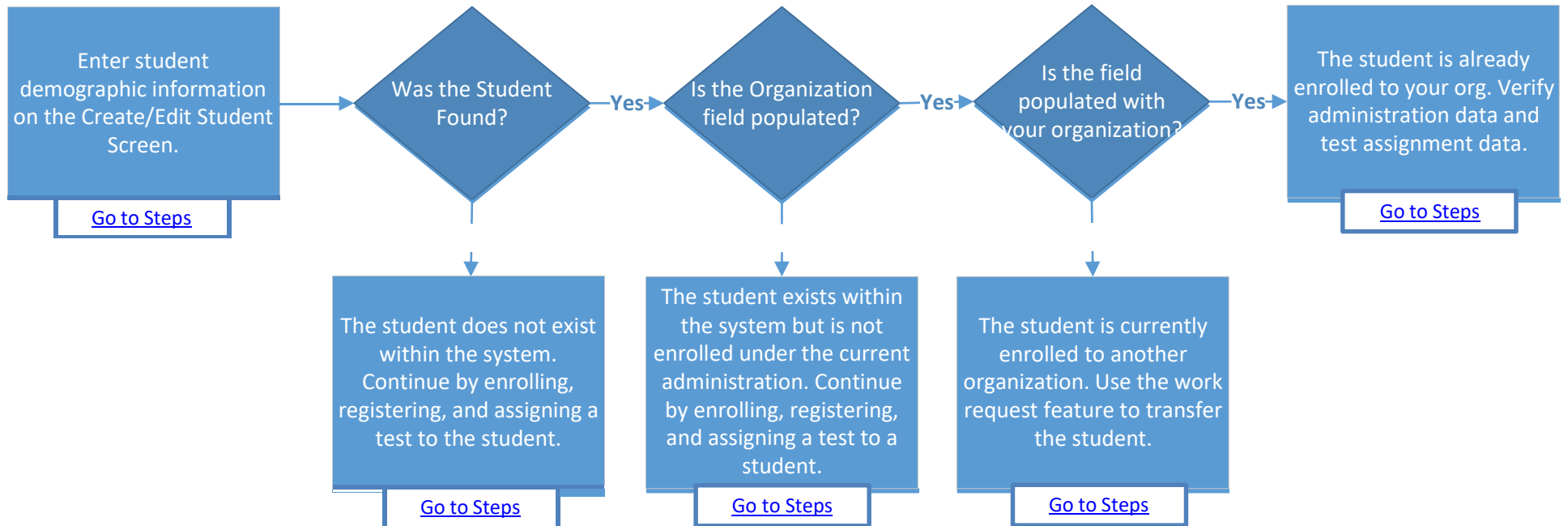
State	State Policy for Spring
District of Columbia	After state does additional upload.

## 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<sup>next</sup> 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 **18**.

## Steps to add Students to your Organization through the PearsonAccess<sup>next</sup> 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"> <li>Choose the administration from the dropdown in the top banner in PearsonAccess<sup>next</sup>.</li> <li>Go to <b>Setup &gt; Students</b>.</li> <li>Select <b>Create/Edit Students</b>, <b>Register Students</b>, and <b>Manage Student Tests</b> under the <b>Tasks</b> dropdown menu and click <b>Start</b>.</li> <li>On the <b>Create/Edit Students</b> screen, enter the student's demographic information. Make sure to correctly enter all information, especially the State Student ID.</li> <li>Click <b>Create</b>.</li> </ul>

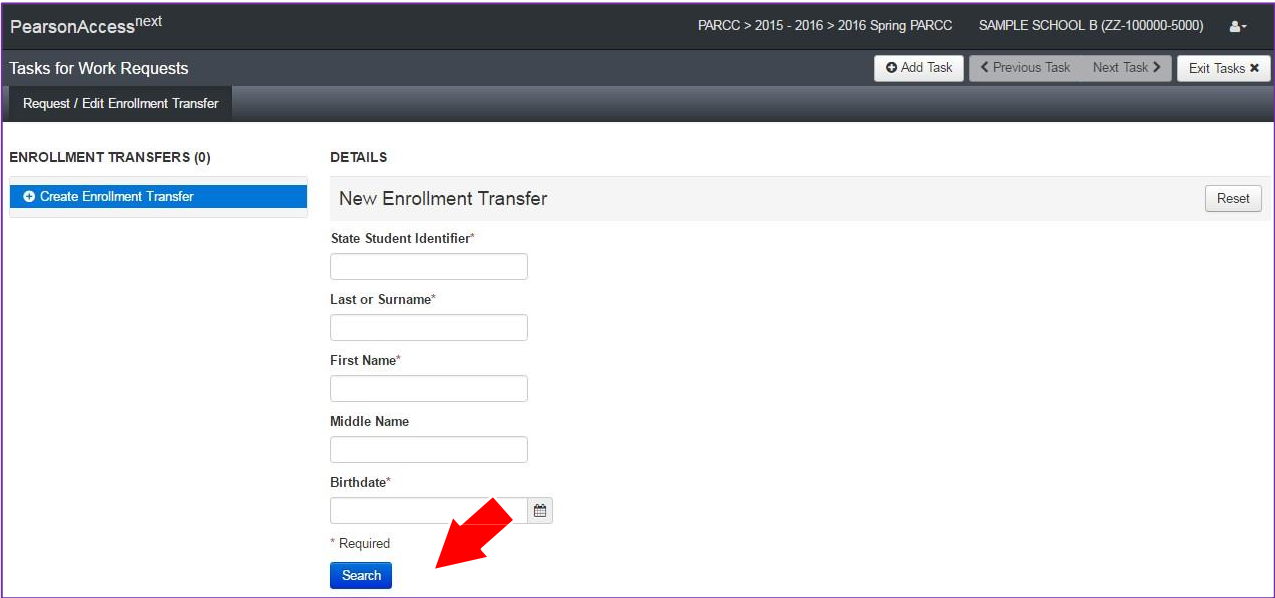
Step	Directions
<p><b>2. Was the Student Found?</b></p>	<p>A. <b>Yes</b> - If a student record is matched, then the user will get the following banner message: "Success: Matching student has been located in the system and has been added to your selected students list. New student has not been created." Go to <a href="#">Step 3</a>.</p> <p>B. <b>No</b> - If a student was not found, then a "Success" banner message will appear. Continue to the <a href="#">Registering and Assigning a Test to a Student Record steps</a>.</p> <p><b>Note:</b> PearsonAccess<sup>next</sup> 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<sup>next</sup>: First Name (full), Last Name (full), Birthdate (YYYY-MM-DD format), Local Student Identifier, and Sex.</p>
<p><b>3. Is the Organization Field Populated?</b></p>	<p>A. <b>Yes</b> - Go to <a href="#">Step 4</a>.</p> <p>B. <b>No</b> - The student exists within the system but is not enrolled under the current administration. Continue to the <a href="#">Registering and Assigning a Test to a Student Record steps</a>.</p>
<p><b>4. Is the Organization Field Populated with <u>your</u> Organization?</b></p>	<p>A. <b>Yes</b> - Go to <a href="#">Step 5</a>.</p> <p>B. <b>No</b> - The student is currently enrolled to another organization. Exit the task and continue to the requesting a <a href="#">Transfer "Work Request" steps</a>.</p> <p><b>Note:</b> 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><b>5. The Student Record is currently enrolled to your Organization.</b></p>	<p>The student is already enrolled to your org. You should verify administration data and test assignment data. For more information, view the <a href="#">Registering and Assigning a Test to a Student Record steps</a>. 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"><li>• <b>Register Student</b></li></ul>	<ul style="list-style-type: none"><li>• On the <b>Register Students</b> screen, select the student to register and check the <b>Registered</b> option. The student's <b>Grade Level</b> and <b>Responsible School Code</b> will also need to be entered.</li></ul>
<ul style="list-style-type: none"><li>• <b>Manage Student Tests</b></li></ul>	<ul style="list-style-type: none"><li>• On the <b>Manage Student Tests</b> screen click <b>Create Student Tests</b> and enter the required information to create a new test. Click <b>Save</b>.<ul style="list-style-type: none"><li>○ <b>Note:</b> Students will still need to be placed into a test session once the test assignment is created.</li></ul></li></ul>

## How to Create a “Work Request” for Transfer Students

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

Step	Directions
<b>1. Search for the Student Record</b>	<ul style="list-style-type: none"><li>Choose the administration from the dropdown in the top banner in PearsonAccess<sup>next</sup>.</li><li>Go to <b>Setup &gt; Work Requests</b>, click the <b>Select Tasks</b> dropdown menu and select <b>Request/Edit Enrollment Transfer</b>. Click <b>Start</b>.</li><li>To search for the student to be transferred, enter the student details and click <b>Search</b>.</li></ul>  <p>The screenshot shows the PearsonAccess<sup>next</sup> interface for creating a new enrollment transfer. The breadcrumb trail is 'PARCC &gt; 2015 - 2016 &gt; 2016 Spring PARCC &gt; SAMPLE SCHOOL B (ZZ-100000-5000)'. The page title is 'Tasks for Work Requests' with a sub-tab for 'Request / Edit Enrollment Transfer'. On the left, there is a 'Create Enrollment Transfer' button. The main area is titled 'New Enrollment Transfer' and contains several required fields: 'State Student Identifier*', 'Last or Surname*', 'First Name*', 'Middle Name', and 'Birthdate*'. A red arrow points to the 'Search' button at the bottom of the form.</p>
<b>2. Was a record found?</b>	<p>A. <b>Yes</b> - Go to <a href="#">Step 3</a>.</p> <p>B. <b>No</b> – Double-check the demographic information that you entered is correct. PearsonAccess<sup>next</sup> 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 <a href="#">Searching for a Student Record</a> step to see if the student is enrolled under the current administration.</p> <p><b>Note:</b> If you still experience difficulties, please contact <a href="#">Pearson Customer Support</a>.</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**.

Tasks for Work Requests

Request / Edit Enrollment Transfer

ENROLLMENT TRANSFERS (0)

DETAILS

New Enrollment Transfer

State Student Identifier\*  
SAMPLE1000

Last or Surname\*  
Sample

First Name\*  
Student A

Middle Name

Birthdate\*  
2016-08-04

Student found. Enter the new organization below.

Change Enrollment From  
SAMPLE SCHOOL A

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

\* Required

Send Request Reset

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

### Check the status of your transfer work request

- Go to **Setup > Work Requests** 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.

Status

Waiting for Approval Approved

Rejected



## Step

### 4. Verify Registration and Test Assignment Information.

## Directions

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

- Go to Setup > Students.
- Search 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**.
  - **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.

The screenshot displays the 'Tasks for Students' interface. At the top, there are navigation buttons: 'Add Task', 'Previous Task', 'Next Task', and 'Exit Tasks'. Below this is a tabbed interface with 'Register Students' and 'Manage Student Tests'. The main content area shows 'STUDENTS (1)' and '2016 FALL BLOCK PARCC'. A student record for 'SAMPLE, STUDENT A (SAMPLE1000)' is highlighted in blue. To the right of the student name is a 'Save' button and a 'Reset' button. Below the student name, there is a 'Registered' checkbox which is checked. On the right side, there are links for 'Show Student Details', 'Show Audit Trail', and a '8 Critical Warnings' badge. Below these are three input fields: 'Grade Level When Assessed\*' (set to 'Sixth Grade'), 'Responsible School Code\*' (set to 'SAMPLE SCHOOL B (Z-100000-2000)'), and 'Ship Report District Code\*'. There is also a 'Ship Report School Code\*' field which is currently empty.

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

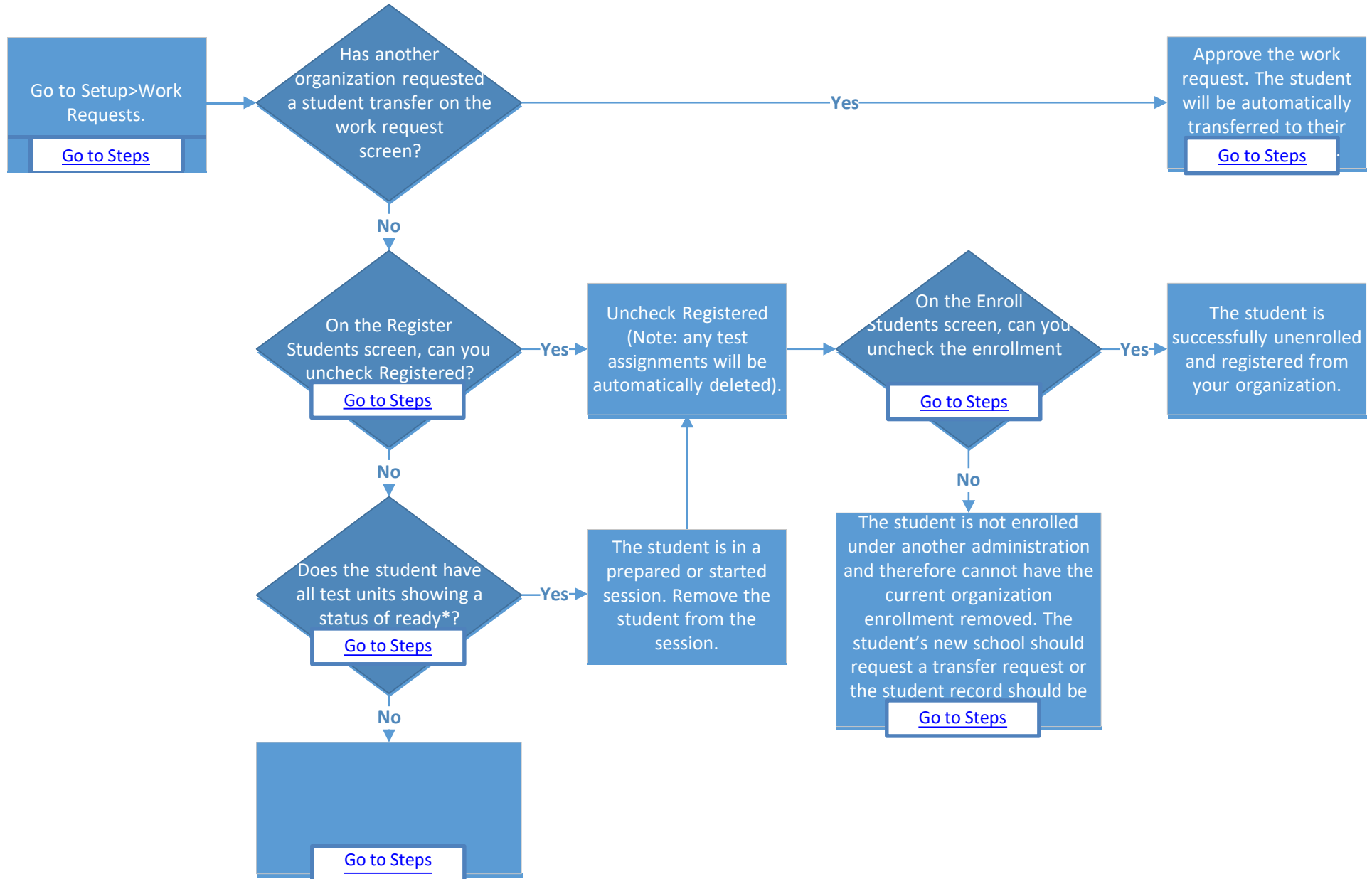
Step	Directions
<p><b>5. Transfer student test assignment from Transferred session.</b></p>	<p>If the student was assigned to a test session under their previous organization, then a new test session will automatically be created in the Transfer-To School and transferred student test assignments will 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). 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"> <li>• Go to <b>Testing &gt; Students in Sessions</b> and add the transfer sessions you need to manage to the Session List.</li> <li>• Select the students to move from the list at the bottom of the screen.</li> <li>• Select the <b>Move Students between Sessions</b> under the Tasks dropdown menu and click <b>Start</b>.</li> <li>• On the <b>Move Students between Sessions</b> screen, select the <b>Sessions</b> search box to move the student to an existing session or click <b>Create</b> to move the student to a new session. <ul style="list-style-type: none"> <li>○ If creating a new session, complete the session details in the pop-up window and click <b>Create</b>.</li> </ul> </li> <li>• Click the check box for the session to move the student(s) to and click <b>Move</b>.</li> </ul>

## 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<sup>next</sup> 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.

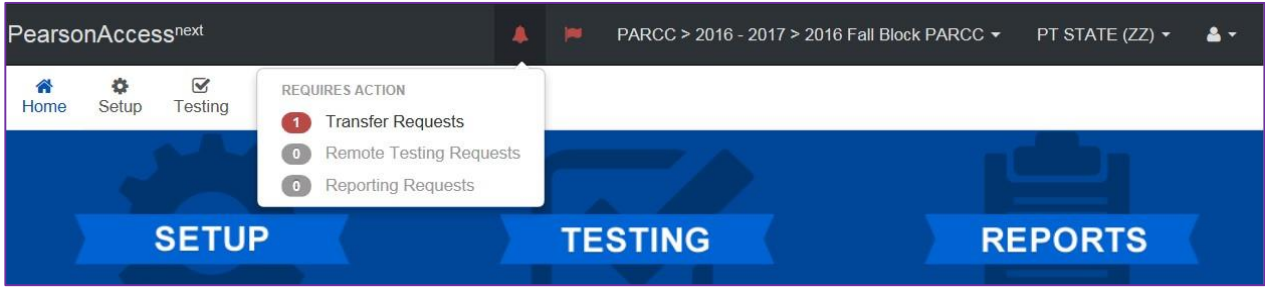
For information about [Unregistering Students via SR/PNP](#) go to page 15.

**Steps to remove Students from your Organization through the PearsonAccess<sup>next</sup> User Interface.**



## Locating and Approving a Transfer “Work Request”

Only users assigned the **State Role** or **LEA Test Coordinator Role** can create a transfer “work request.”

Step	Directions
<b>1. Look for a Transfer Request</b>	<ul style="list-style-type: none"><li>Choose the administration from the dropdown in the top banner in PearsonAccess<sup>next</sup>.</li><li>Select the Bell Icon, check to see if there is a Transfer Request. If so, click <b>Transfer Requests</b>. (This will automatically take you to the <b>Setup &gt; Work Requests</b> screen).</li></ul>  <p>The screenshot shows the PearsonAccess<sup>next</sup> 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>
<b>2. Has another organization requested a student transfer?</b>	<p>A. <b>Yes</b> - Go to <a href="#">Step 3</a>.</p> <p>B. <b>No</b> – Go <a href="#">Manually Removing Student Enrollment and Registration</a> 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'. The 'Tasks' 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 details:

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, click **Approve**.

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

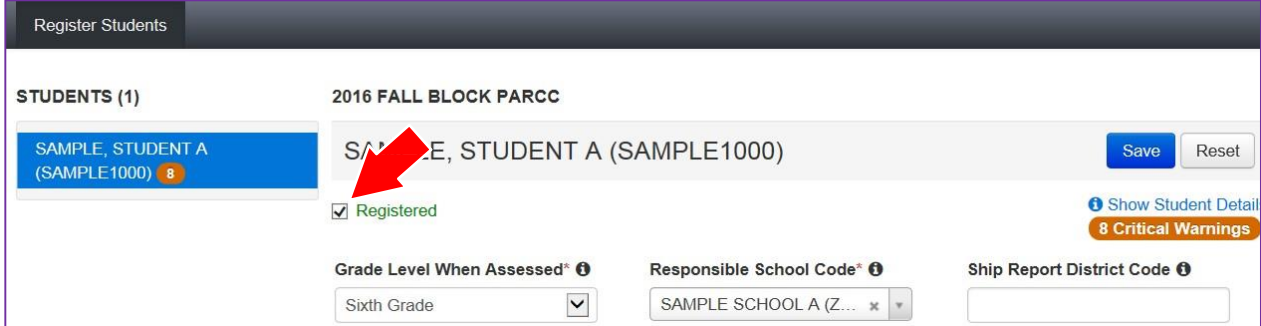
- State Student Identifier\***: SAMPLE1000
- Last or Surname\***: SAMPLE
- First Name\***: STUDENT A
- Middle Name**: (empty)
- Birthdate\***: 2016-09-05
- Change Enrollment From**: SAMPLE SCHOOL A (ZZ-100000-1001)
- Change Enrollment To**: SAMPLE SCHOOL B (ZZ-100000-1000)
- Reject Enrollment Transfer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

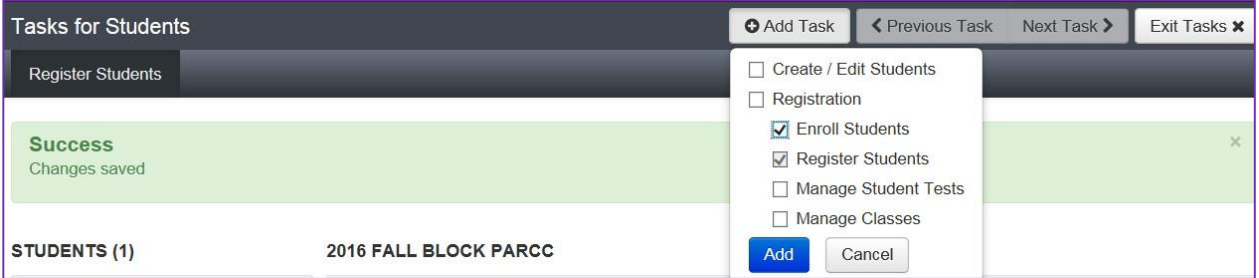
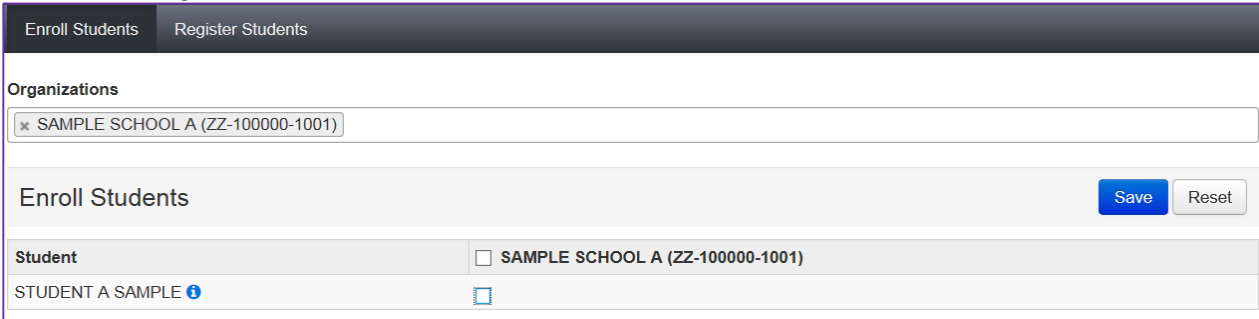
At the bottom of the page, there are two buttons: 'Approve' and 'Reject'. A red arrow points to the 'Approve' button. On the right side, there is a 'Work Request Status' box showing 'Waiting for Approval' and 'Request Received' on 2016-09-27.

**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

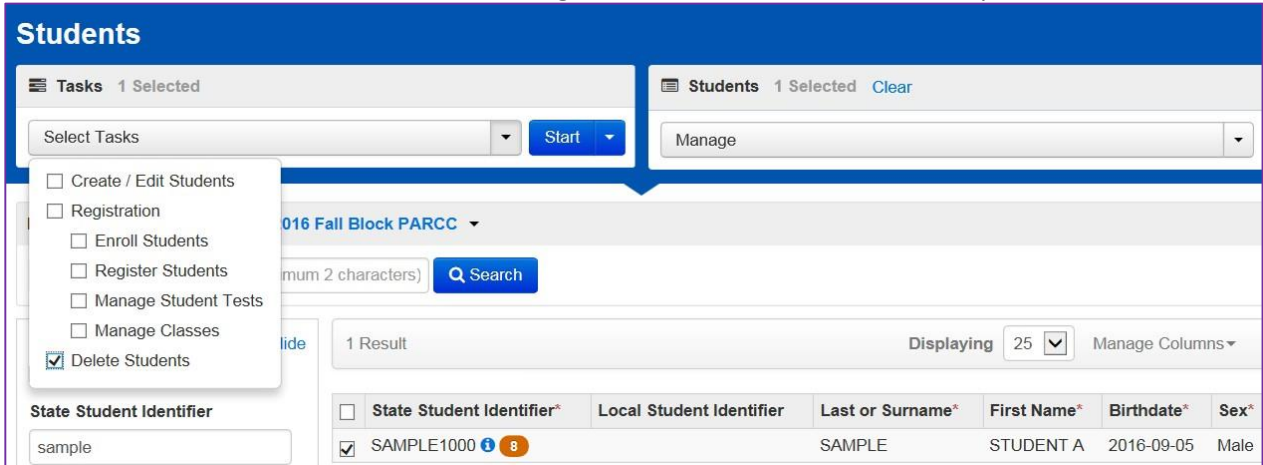
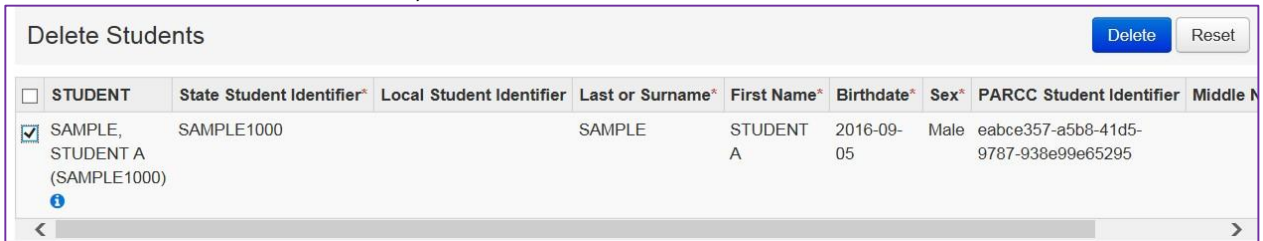
Step	Directions
1. Can you uncheck Registered?	<ul style="list-style-type: none"><li>• Choose the administration from the dropdown in the top banner in PearsonAccess<sup>next</sup>.</li><li>• Go to <b>Setup &gt; Students</b>.</li><li>• Search and select the student record, select <b>Register Students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

Step	Directions
<p>2. Can you uncheck the Enrollment Box and Successfully Save?</p>	<p>C. Select <b>Enroll Students</b> under the <b>Add Task</b> dropdown menu and click <b>Add</b>.</p>  <ul style="list-style-type: none"> <li>• Uncheck the organization enrollment and click <b>Save</b>.</li> </ul>  <ul style="list-style-type: none"> <li>• Were you able to successfully save? <ul style="list-style-type: none"> <li>A. <b>Yes</b> – A success message appeared. The student enrollment and registration has been successfully removed from your organization. <b>No further action is required.</b></li> <li>B. <b>No</b> – An error message appeared. Go to <a href="#">Manually Deleting a Student Record</a> Steps.</li> </ul> </li> </ul>
<p>3. Does the student have all test units showing a status of ready*?</p>	<p>You will not be able to uncheck <b>Registered</b> on the <b>Register Students</b> 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><b>Does the student have all test units showing a status of ready*?</b></p> <ul style="list-style-type: none"> <li>A. <b>Yes</b> – Remove the student from the session(s) and go to <b>Step 1</b>.</li> <li>B. <b>No</b> – The student has a test unit in a status of resumed, resumed upload, active, exited, completed, or marked complete. PearsonAccess<sup>next</sup> 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.</li> </ul> <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 <a href="#">Pearson Customer Support</a> if you show all student in a ready status but are unable to uncheck <b>Registered</b>.</p>



## Manually Deleting a Student Record

PearsonAccess<sup>next</sup> 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. If you have been assigned the **Delete Student Role** you will be able to manually delete the student record. If you are not assigned this role, please contact your Test Coordinator or State.

Step	Directions
<p>1. <b>Manually Deleting a Student Record (for users assigned the Delete Student add-on user role).</b></p>	<ul style="list-style-type: none"> <li>Choose the administration from the dropdown in the top banner in PearsonAccess<sup>next</sup>.</li> <li>Go to <b>Setup &gt; Students</b>.</li> <li>Search and select the student record, select <b>Register Students</b> under the Tasks dropdown menu and click <b>Start</b>.</li> </ul>  <ul style="list-style-type: none"> <li>On the Delete Students task screen, select the student record and click <b>Delete</b>.</li> </ul> 

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

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

If a student leaves a district/school they will need to be unregistered for current/upcoming administration. The user who completes this task will need to have a base role of the **LEA Test Coordinator** or **School Test Coordinator**.

Step	Directions
<p><b>Export SR/PNP File</b></p>	<ul style="list-style-type: none"> <li>• Choose the administration from the dropdown in the top banner in PearsonAccess<sup>next</sup>.</li> <li>• From <b>Setup &gt; Import/Export Data</b>, open the task list and select <b>Import Export Data</b>. Click <b>Start</b>.</li> <li>• Select a <b>Student Registration Export</b>. Set the <b>File Layout Type</b> to <b>CSV</b> and clear the <b>Test Status Filters</b>. Click <b>Process</b>.</li> <li>• After the file is exported, it will be listed at <b>Setup &gt; Import / Export Data</b>.</li> </ul>
<p><b>Update the SR/PNP File to Unregister the Student</b></p>	<ul style="list-style-type: none"> <li>• Once the file is processed and downloaded, filter the file to include only the student registrations that are to be removed.</li> <li>• Ensure that the custom formatting is correct for the appropriate columns (e.g., birthdate, grade level).</li> <li>• Save the file locally.</li> </ul>
<p><b>Import the file as a Student Registration Delete File</b></p>	<ul style="list-style-type: none"> <li>• From <b>Setup &gt; Import/Export Data</b>, open the task list and select <b>Import Export Data</b>. Click <b>Start</b>.</li> <li>• Select <b>Student Registration Delete</b>. Set the <b>File Layout Type</b> to <b>CSV</b>. Choose the file and click <b>Process</b>.</li> </ul>
<p><b>Troubleshooting Errors</b></p>	<p>An error stating “The test: &lt;Test Name&gt; for student &lt;Student Name&gt; 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 <b>Work Request</b>.</p>

## 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<sup>next</sup> 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
<p><b>Create a new Student Registration/Personal Needs Profile Import</b></p>	<ul style="list-style-type: none"> <li>• Choose the administration from the dropdown in the top banner of PearsonAccess<sup>next</sup>.</li> <li>• Refer to the Student Registration/Personal Needs Profile Training Module.</li> <li>• Refer to the Student Registration/Personal Needs Profile layout documents found on the Support Page of PearsonAccess<sup>next</sup>.</li> </ul>
<p><b>Import SR/PNP File</b></p>	<ul style="list-style-type: none"> <li>• Go to <b>Setup &gt; Import/Export Data</b>.</li> <li>• Select <b>Import / Export Data</b> under the <b>Tasks</b> dropdown and click <b>Start</b>.</li> <li>• Under <b>Type</b>, choose <b>Student Registration Import</b>.</li> <li>• Click <b>Choose File</b> and select the new Student Registration/Personal Needs Profile Import file.</li> <li>• Click <b>Process</b>.</li> <li>• If completed without error, student will now be assigned a test in the new school.</li> </ul>
<p><b>Troubleshooting Errors</b></p>	<ul style="list-style-type: none"> <li>• 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 <a href="#">“Work Request.”</a></li> <li>• An error stating “The student &lt;attribute&gt; did not match the value of the student &lt;attribute&gt; in the database” is received when a student SSID or PARCC ID is matched to an existing student record in PearsonAccess<sup>next</sup> 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.</li> </ul>

## Option 1: Transfer Test Booklet for Paper-based Testing

See page 1 to check if this option is available for your state.

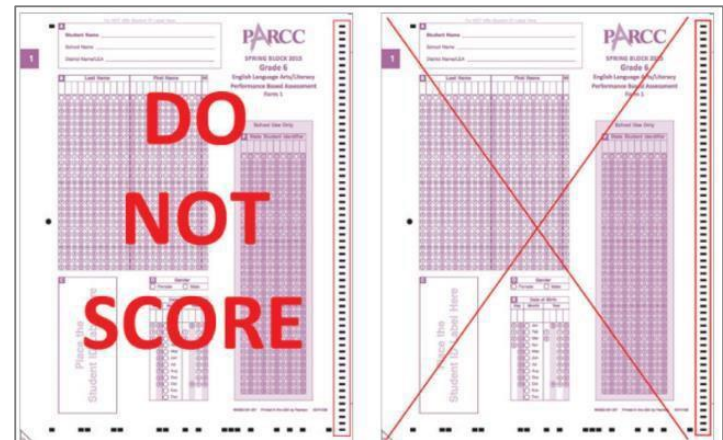
Step	Directions
<p><b>Options 1a and 1b:</b> School A contacts School B to inform the School Test Coordinator (STC) that their student is transferring there, and to request that they securely receive the student’s partially used test materials (and provide other student information—e.g., any accommodations the student uses).</p> <p>School A transfers the test materials either by delivering it to School B’s STC in person or shipping it via certified mail with signature required.</p>	<p>School A and School B must document the transfer of the test materials using a chain-of-custody form (<a href="#">see attached recommended form</a>).</p>
<p><b>Option 1a:</b> Test student after test materials arrive at School B.</p>	<p><b>Recommended:</b> The student can wait until the original test material has arrived to begin testing in School B. This is recommended so that the student can complete testing in one test booklet or answer document. After testing, the test booklet or answer document is returned with School B’s scorable materials. Refer to Section 5.2.4 of the <i>Test Coordinator Manual (TCM)</i> for instructions on returning scorable materials.</p> <p>During materials resolution after the administration, School A will receive a security resolution list via email from Pearson, which will include the test booklet and answer document barcode that was transferred to School B. School A should respond to this correspondence to inform Pearson that the booklet was shipped to School B due to a student move. Pearson will then enter this information into their system.</p>

Step	Directions
<p><b>Option 1b:</b> Test student before booklet arrives at School B.</p>	<p>If School B wishes to test the student before the original test booklet arrives, School B must contact School A to determine which form number the student used and which test units were completed.</p> <ol style="list-style-type: none"> <li>When the original test material arrives, School B will need to transcribe the student’s responses from the original test booklet or answer document to the new test booklet or answer document. Refer to Section 5.2.2 of the <i>TCM</i> for guidelines for transcribing.</li> <li>School B will mark the original test booklet or answer document “Do Not Score” (refer to the instructions in the first step of option 2) and return it with nonscorable materials.</li> <li>School B will return the new, transcribed test booklet or answer document with scorable materials (refer to Section 5.2.4 of the <i>TCM</i> for instructions on returning scorable materials).</li> </ol>

### Option 2: Mark “Do Not Score” and Retest for Paper-based Testing

Refer to the State Guidance table on pages 2–3 to check if this option is available for your state.

Step	Directions
<p>School A marks the student’s test booklet or answer document “Do Not Score” or with an “X,” and returns it with <b>nonscorable</b> materials.</p>	<p>Refer to Section 5.2.2 and 5.2.4 of the <i>Test Coordinator Manual</i> for marking test materials “Do Not Score” or marking materials with an “X” and returning the test materials.</p>



Step	Directions
<p>School B contacts School A to find out any accommodations the student uses. School B tests the student, using test materials with a different form number from the form number used at School A.</p>	<p>School B should check the school's or district's coverage for available test materials. If needed, School B will need to submit an additional order for test materials.</p> <p>Refer to Figures 3.0 and 3.1 in the <i>Test Coordinator Manual</i> to see how to find a form number.</p>
<p>Student completes testing, and School B returns the test booklet or answer document with scorable materials.</p>	<p>Refer to Section 5.2.4 of the <i>Test Coordinator Manual</i> for return instructions.</p>
<p>Student must be moved from School A to School B in PearsonAccess<sup>next</sup>.</p>	<ul style="list-style-type: none"> <li>• Choose the administration from the drop down in the top banner in PearsonAccess<sup>next</sup>.</li> <li>• Go to <b>Setup &gt; Students</b>.</li> <li>• <b>Select</b> Create / Edit Students, Register Students, and Manage Student Tests <b>under the</b> Tasks drop down menu and click <b>Start</b>.</li> <li>• On the <b>Create / Edit Students</b> tab, enter the student's core demographic information. Core demographic information is used to match student records within PearsonAccess<sup>next</sup> <ul style="list-style-type: none"> <li>○ Note: See Student Matching Rules at end of the document.</li> </ul> </li> <li>• Click <b>Save</b>. <ul style="list-style-type: none"> <li>○ Note: If the student exists and you successfully match student core data, you will</li> </ul> </li> </ul> <div data-bbox="961 833 1724 1166" data-label="Image"> </div>
<p><b>Register students.</b></p>	<ul style="list-style-type: none"> <li>• On the <b>Register Students</b> tab, verify data populated in all data fields is correct.</li> <li>• Important: Make sure to update the Responsible School Code. <ul style="list-style-type: none"> <li>○ Note: Only users assigned the Sensitive Data Add-on Role or Student Test Update Add-on Role will be able to view and edit Sensitive Data fields.</li> </ul> </li> <li>• Click <b>Save</b>.</li> </ul>

**Manage student tests.**

- Click the **Manage Student Tests** tab.
- On the right side of the screen, select **Create Student Tests**.
- Populate the appropriate data fields.
- Click **Save**.

**Add student to a test session.**

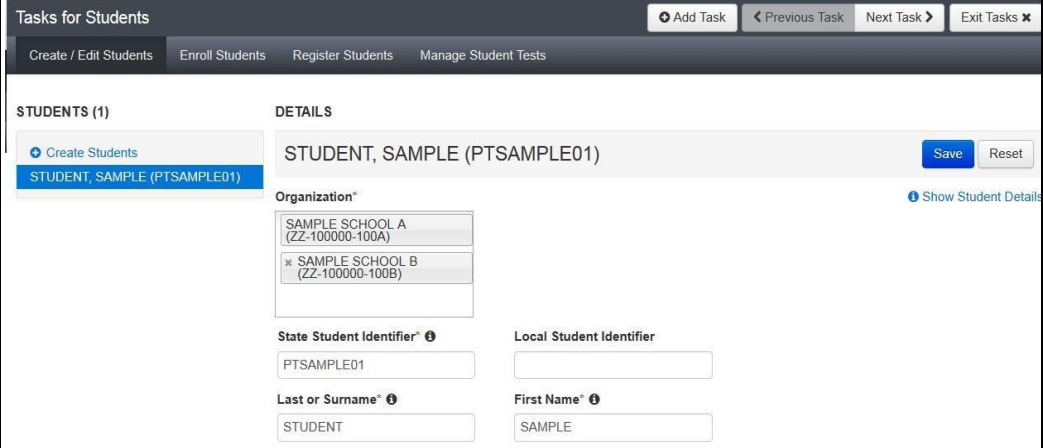
- Go to **Testing > Students in Sessions** and add the session under the Session List.
- Select **Add Students to Sessions** under the **Tasks** drop down and click **Start**.
- On the **Add Students to Sessions** screen, click the **Session** drop down to choose the session.
- Search for the student in the **Find available students** search bar or click the arrow to choose **Show all results** and see all students assigned to the test.
- Click the check box for the student and click the **Add** button.

**Note:** The student will still be enrolled and assigned tests in School A unless a district or state user deletes the original assignment.



### Option 3: School A and School B Send Test Booklets or Answer Documents for Scoring

Use this option only if School B cannot contact School A. See page 2 to check if this option is available for your state.

Step	Directions
<p>School B tests the student, using test materials from their existing inventory, or by ordering additional materials.</p>	<p>School B should check the school’s or district’s coverage for available test materials. If needed, School B needs to submit an additional order for test materials.</p>
<p>Both School A and School B return each partially completed test booklet or answer document with their scorable materials. The state assessment office will resolve the duplicate test attempts based on decision rules.</p>	<p>Refer to Section 5.2.4 of the <i>Test Coordinator Manual</i> for return instructions.</p> <p><b>Student responses from different test booklets and answer documents cannot be merged during processing and scoring, therefore the student will not receive a complete score.</b></p>
<p>Student must be moved from School A to School B in PearsonAccess<sup>next</sup>.</p>	<ul style="list-style-type: none"> <li>Choose the administration from the drop down in the top banner in PearsonAccess<sup>next</sup>.</li> <li>Go to Setup &gt; Students.</li> <li>Select <a href="#">Create / Edit Students, Register Students, and Manage Student Tests</a> <b>under the Tasks</b> drop down menu and click <b>Start</b>.</li> <li>On the <b>Create / Edit Students</b> tab, enter the student’s core demographic information. Core Demographic information is used to match student records within PearsonAccess<sup>next</sup> <ul style="list-style-type: none"> <li>Note: See Student Matching Rules at end of the document.</li> </ul> </li> <li>Click <b>Save</b>.</li> </ul>
	 <p>The screenshot shows the 'Tasks for Students' interface in PearsonAccess Next. The 'Organization' dropdown menu is open, showing 'SAMPLE SCHOOL A (ZZ-100000-100A)' and 'SAMPLE SCHOOL B (ZZ-100000-100B)'. The 'State Student Identifier' field contains 'PTSAMPLE01' and the 'First Name' field contains 'SAMPLE'. The 'Local Student Identifier' field is empty. The 'Save' button is highlighted in blue.</p>

Step	Directions
<b>Register students.</b>	<ul style="list-style-type: none"> <li>• On the <b>Register Students</b> tab, verify data populated in all data fields is correct.</li> <li>• Important: Make sure to update the Responsible School Code. <ul style="list-style-type: none"> <li>○ Note: Only users assigned the Sensitive Data Add-on Role or Student Test Update Add-on Role will be able to view and edit Sensitive Data fields.</li> </ul> </li> <li>• Click <b>Save</b>.</li> </ul>
<b>Manage student tests.</b>	<ul style="list-style-type: none"> <li>• Click the <b>Manage Student Tests</b> tab.</li> <li>• On the right side of the screen, select <b>Create Student Tests</b>.</li> <li>• Populate appropriate data fields.</li> <li>• Click <b>Save</b>.</li> </ul>
<b>Add student to a test session.</b>	<ul style="list-style-type: none"> <li>• Go to <b>Testing &gt; Students in Sessions</b> and add the session under the Session List.</li> <li>• Select <b>Add Students to Sessions</b> under the <b>Tasks</b> drop down and click <b>Start</b>.</li> <li>• On the <b>Add Students to Sessions</b> screen, click the <b>Session</b> drop down to choose the session.</li> <li>• Search for the student in the <b>Find available students</b> search bar or click the arrow to choose <b>Show all results</b> and see all students assigned to the test.</li> <li>• Click the check box for the student and click the <b>Add</b> button.</li> </ul>

**Note:** The student will still be enrolled and assigned tests in School A unless a district or state user deletes the original assignment.

## Students Who Transfer from a CBT School to a PBT School

There are two options for schools:

- **Option 1:** A student will need to complete the entire test in School A (CBT).

OR

- **Option 2:** School B (PBT) will follow instructions in the *Test Coordinator Manual*, including hand gridding a test booklet or answer document for a student without a Student ID Label. The student then needs to complete the entire test in School B, even if this means retesting certain units.

### Steps for option 2:

Step	Directions
School B registers student via import process.	Create a new Student Registration: <ul style="list-style-type: none"><li>• Choose the administration from the drop down in the top banner in PearsonAccess<sup>next</sup>.</li><li>• Refer to the Student Registration/Personal Needs Profile (SR/PNP) File Field Definitions document and follow the <a href="#">guidance for setting up and importing the file</a>.</li></ul>
School B orders test materials through additional orders (if needed).	School B should check the school's or district's overage for available test materials. If needed, School B needs to submit an additional order for test materials.
Student's partially completed CBT test from School A is voided.	School A refer to their state policy for marking a test Void in the Not Tested and Void Score Guidance.
Student completes the full test at School B, and School B returns the student's test booklet or answer document with their scorable materials.	Refer to Section 5.2.4 of the <i>Test Coordinator Manual</i> for return instructions.

## Students Who Transfer from a PBT School to a CBT School

There are two options for schools:

- **Option 1:** A student will need to complete the entire test in School A (PBT).

OR

- **Option 2:** School B (CBT) will follow instructions in the *Test Coordinator Manual* and other documentation for assigning a student a new test session.

### Steps for Option 2

Step	Directions
School B registers the student via the import process.	Create a new Student Registration Import: <ul style="list-style-type: none"><li>• Choose the administration from the drop down in the top banner in PearsonAccess<sup>next</sup>.</li><li>• Refer to the Student Registration/Personal Needs Profile (SR/PNP) File Field Definitions document and follow the <a href="#">guidance for setting up and importing the file</a>.</li></ul>
Follow the directions for beginning a test session and administering the CBT assessments.	Refer to Section 4.1 of the <i>Test Coordinator Manual</i> for instructions on administering the CBT assessments.
School A returns the partially completed booklet.	School A will return the partially completed paper-based test. School A should follow what is allowable for their state based on the <a href="#">table on page 2</a> . If School A has contacted School B, and School B will be fully testing the student: <ol style="list-style-type: none"><li>1. Mark the test booklet or answer document “Do Not Score” and return it with nonscorable materials (Option 2 in the table on page 2).</li></ol> If School A cannot contact School B: <ol style="list-style-type: none"><li>2. Return the test booklet or answer document with scorable materials (Option 3 in the table on page 2).</li></ol>



## 2021-2022 PARCC or DC Science Assessment Chain-of-Custody Form for Test Materials Being Transferred for Students Who Move to a New School

**Instructions:**

Both School A and School B should maintain a copy of this form. This form should be faxed from School A to School B if the test material is being transferred via certified mail. **Do not return this form with your test materials.** Check your state policy for specific requirements for how long to retain this document. You will need it if an investigation of missing materials takes place (and, School A may need this if School B does not return the test material correctly). The school and LEA will be held responsible for any secure materials that were received at the school but not accounted for. Once School B accepts receipt of test material, school B will be held responsible for that material.

**School A**

Contact Name \_\_\_\_\_

Contact Name and Ext \_\_\_\_\_

Fax \_\_\_\_\_

Contact Person's Role \_\_\_\_\_

School Name \_\_\_\_\_

School Code \_\_\_\_\_

LEA Name \_\_\_\_\_

LEA Code \_\_\_\_\_

**School B**

Contact Name \_\_\_\_\_

Contact Name and Ext \_\_\_\_\_

Fax \_\_\_\_\_

Contact Person's Role \_\_\_\_\_

School Name \_\_\_\_\_

School Code \_\_\_\_\_

LEA Name \_\_\_\_\_

LEA Code \_\_\_\_\_

Test material (Grade and subject)	Security barcode number	Method of transfer (e.g., car, certified mail)	Date and time that material was removed from School A (initialed by School A contact)	Date and time that material was received at School B (initialed by School A contact)
<b>Example</b>				
High School ELA Test Booklet	123456789-0	Car	12/2/21, 10 a.m. JZ	12/2/21, 12:15 p.m. MS

## Student Matching Rules

When student data is entered into PearsonAccess<sup>next</sup>, demographic fields are used to identify unique students. When data is updated in PearsonAccess<sup>next</sup>, matching rules are applied to these fields to identify if students currently exist within the system. The table below provides information on the fields used for matching and can be updated through an SR/PNP Import.

Core Demographic Fields	Match Hierarchy Level	How Matching Works	Can it be updated via Student Registration File Import?	PARCC Definitions and Notes
State Student Identifier	1	Record will match if PARCC Student Identifier and at least two of the following Core Demographic Fields Match: <ul style="list-style-type: none"> <li>• State Student Identifier</li> <li>• Local Student Identifier</li> <li>• Last or Surname</li> <li>• First Name</li> <li>• Sex</li> <li>• Birthdate</li> </ul>	No. The PARCC Student Identifier is generated by PearsonAccess <sup>next</sup> and cannot be modified by end users.	Unique PARCC Student Identifier that will move intrastate if a student moves district to district or school to school. Assigned within PearsonAccess <sup>next</sup> .
State Student Identifier	2	If PARCC Student Identifier is blank, record will match if State Student Identifier and at least two of the following Core Demographic Fields Match: <ul style="list-style-type: none"> <li>• State Abbreviation</li> <li>• Local Student Identifier</li> <li>• Last or Surname</li> <li>• First Name</li> <li>• Sex</li> <li>• Birthdate</li> </ul>	No. The State Student Identifier cannot be updated by importing a Student Registration File. However, it can be updated through the PearsonAccess <sup>next</sup> user interface.	A unique number or alphanumeric code assigned to a student by a state or any other entity.
Local Student Identifier		This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels.  *Note this is not a required field.	Yes. The Local Student Identifier value can be updated if the PARCC Student Identifier and/or State Student Identifier and at least two of the following Core Demographic Fields match: <ul style="list-style-type: none"> <li>• Last or Surname</li> <li>• First Name</li> <li>• Sex</li> <li>• Birthdate</li> <li>• State Abbreviation</li> </ul>	A unique number or alphanumeric code assigned to a student by a school system or any other entity.

Core Demographic Fields	Match Hierarchy Level	How Matching Works	Can it be updated via Student Registration File Import?	PARCC Definitions and Notes
Last or Surname		<p>This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels.</p> <p>(Note, only the first 10 characters are used to match on the Last or Surname Field.)</p>	<p>Yes. The Last or Surname value can be updated if the PARCC Student Identifier and/or State Student Identifier and at least two of the following Core Demographic Fields match:</p> <ul style="list-style-type: none"> <li>• Local Student Identifier</li> <li>• First Name</li> <li>• Sex</li> <li>• Birthdate</li> <li>• State Abbreviation</li> </ul>	<p>The full legal last name borne in common by members of a family.</p>
First Name		<p>This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels.</p> <p>(Note, only the first 8 characters are used to match on the First Name Field.)</p>	<p>Yes. The First Name value can be updated if the PARCC Student Identifier and/or State Student Identifier and at least two of the following Core Demographic Fields match:</p> <ul style="list-style-type: none"> <li>• Local Student Identifier</li> <li>• Last or Surname</li> <li>• Sex</li> <li>• Birthdate</li> <li>• State Abbreviation</li> </ul>	<p>The full legal first name given to a person at birth, baptism, or through legal change.</p>
Sex		<p>This is a Core Demographic field used for matching in Hierarchy 1 and 2 Levels.</p>	<p>Yes. The Sex value can be updated if the PARCC Student Identifier and/or State Student Identifier and at least two of the following Core Demographic Fields match:</p> <ul style="list-style-type: none"> <li>• Local Student Identifier</li> <li>• Last or Surname</li> <li>• First Name</li> <li>• Birthdate</li> <li>• State Abbreviation</li> </ul>	<p>The concept describing the biological traits that distinguish the males and females of a species.</p>

# Resources

Resource	Information
Pearson Customer Support	(866) 688-9555 Monday - Friday 6:00 am - 7:30 pm (EST)