

**DYNAMIC<sup>®</sup>**  
LEARNING MAPS

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# DATA MANAGEMENT MANUAL 2021–2022

ELA, MATH, AND SCIENCE

**Publication Date: 08/25/2021**

All screenshots, data dictionaries, and templates shown or referred to in this manual are accurate on the publication date noted above.

When this manual is updated, the Revision Date will also be updated. A summary of changes is included in the Appendix under Document History.

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## FINDING HELP

When the information in this manual and resources from your state Dynamic Learning Maps® (DLM®) webpage do not lead to solutions, these contacts can provide additional support.

HINT: Print this page and keep it handy!

Table 1

### *Where to Find Help*

Local Technology Representative	State Education Agency	The DLM Service Desk* 1-855-277-9751 (toll-free) or <a href="mailto:DLM-support@ku.edu">DLM-support@ku.edu</a>
Kite® Student Portal installation General computer support Internet availability Display resolution Issues with sound, headphones, speakers, etc.	How to use Student Portal and Educator Portal Training requirements Assessment questions Assessment scheduling Test invalidation requirements Student Individualized Education Program (IEP) requirements Test window dates, extensions, requirements, etc. Testlet resets (may take up to 72 hours)	Data issues (rosters, enrollment, etc.)

#### *\*When contacting the DLM Service Desk:*

- **Do not send any Personally Identifiable Information (PII) for a student via email or using Educator Portal Live Chat.** This is a federal violation of the Family Education Rights and Privacy Act (FERPA). PII includes information such as a student's name or Student State Identifier. Each state has unique PII requirements. Please check with your assessment coordinator to find out what student information can be legally emailed or sent via Live Chat in your state.
- Do send:
  - your contact information (email address and name)
  - the state and district in which your school is located
  - error messages, including the testlet number if applicable to the problem
  - the Service Desk ticket number when following up on a previously submitted issue

# DATA MANAGEMENT MANUAL 2021–2022

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## AUDIENCE AND PURPOSE

The DATA MANAGEMENT MANUAL for the Dynamic Learning Maps® (DLM®) alternate assessment provides data managers with information about gathering, editing, and uploading user, enrollment, and roster data in Educator Portal. Data managers primarily maintain educator, student, and roster data.

## WHAT'S NEW IN THIS VERSION

Information about these topics has been added or enhanced in this version.

Table 2

### *What's New*

Topic	Starting Page
Security agreement updates	8
New tables added for Roles and Permissions in Educator Portal	17
Update to Roles—added Regional Test Coordinator and Regional User roles	18
Updates throughout due to website changes	Throughout
General edits throughout	Throughout

To learn about updates to test administration resources such as this manual, subscribe to [Test Updates](#) on the DLM website.

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## INTRODUCTION

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### ABOUT THE DYNAMIC LEARNING MAPS® ALTERNATE ASSESSMENT SYSTEM

The Dynamic Learning Maps® (DLM®) Alternate Assessment System assesses what students with the most significant cognitive disabilities know and can do in DLM assessed subjects in grades 3–8 and high school. The department of education in each state determines the subjects and grades that are assessed. The DLM system provides accessibility by design and is guided by the core beliefs that all students are to have access to challenging, grade-level content, and test administrators must adhere to the highest levels of integrity in providing instruction and in administering assessments based on this challenging content.

### ABOUT KITE STUDENT PORTAL AND EDUCATOR PORTAL

The Kite® system was designed to deliver the next generation of large-scale assessments and was tailored to meet the needs of students with the most significant cognitive disabilities, who often have multiple disabilities. Educators and students use different parts of the Kite Suite.



Students have accounts in **Kite Student Portal**.

Students are delivered testlets using Student Portal, which is a customized, secure interface. Once Student Portal is launched, students are prevented from accessing websites or other applications during the assessment. Practice activities and released testlets are also available using demo student accounts through Student Portal. **Educators and staff do not have accounts in Student Portal.**



Staff and educators have accounts in **Kite Educator Portal**.

Kite Educator Portal is the administrative application where student data is managed, and reports and extracts are retrieved. Users will access [Educator Portal](#) online using a supported browser. For information on working within Educator Portal, go to the EDUCATOR PORTAL USER GUIDE on the DLM website.

## ACCESS ADDITIONAL RESOURCES

Additional resources for managing data and administering testlets are available on the DLM website. Resources are provided by the DLM Alternate Assessment Consortium, and state-specific resources may also be available.

To access resources for your state and role, follow these steps.

1. Go to the [DLM website](#).
2. Hover over **For States** in the blue banner to reveal a list of states. Select your state.

HINT: Bookmark the page or save it to your favorites for quick access later.

Table 3

### *Standard Resources Available Across All States that Support Data Management*

Resource	Description
<b>DATA MANAGEMENT MANUAL</b> (PDF)	Supports data managers in uploading or editing user accounts, enrolling students, and rostering students to test administrators in Educator Portal
<b>EDUCATOR PORTAL USER GUIDE</b> (PDF)	Supports test administrators and other users in navigating Educator Portal to access assessment information, including student data and reports
<b>Educator Portal Help Feature</b>	The Help button has frequently asked questions and answers for various Educator Portal tasks.

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## CHECKLIST TO MANAGE DATA

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HINT: Print these pages and keep them handy!

The key duties of the local data manager are to gather, verify, and upload educator (teacher, test administrator, examiner), student, and roster data into Educator Portal and to update records as needed. A summary of key responsibilities and steps is in Table 4. A more detailed description of roles in Educator Portal can be found in User Roles beginning on page 17 of this manual.

Data managers are to work with the assessment coordinator to align any state-provided calendar and to determine due dates to meet their district assessment schedule.

Table 4

### *Steps for Data Managers*

<input checked="" type="checkbox"/>	Steps
	1. Read this Data Management Manual.
	2. Use the resources on the state's page to become familiar with the DLM alternate assessments and the procedures to prepare the district's data. Go to the Access Additional Resources section on page 6 of this manual.
	3. Log in to Educator Portal and agree to the annual security agreement.
	4. Review the district's information inside the State Organizational Table.xls located on the state's DLM webpage. Alert the state assessment administrator about new or changed schools in the district or any other corrections needed. Include new or closed charter schools, a new or closed building in the district, name changes of existing schools, and any edits to the name of a district or building that are needed.
	5. Collect educator, student, and roster data. Use the instructions in this manual and the templates to prepare user, enrollment, and roster upload templates. Templates are available on the state's DLM webpage for states that allow district uploads. Templates must always be saved as a CSV (comma-delimited) file. Some state assessment administrators upload all files. Check with the district assessment coordinator before completing any uploads.
	6. Verify data for accuracy.



## CHECKLIST TO MANAGE DATA

☑	Steps
	7. Review and confirm user data from the previous year. Deactivate accounts for users who are no longer active in the district for the DLM alternate assessment. Users should not have multiple email addresses in Educator Portal. Typically, one user account can manage multiple tasks in a district. A teacher may serve multiple schools or districts but still have only one account in Educator Portal with only one email address as their user login in Educator Portal. Multiple accounts can be consolidated by a DLM Service Desk agent.
	8. Send a test email message to users to verify the accuracy of email addresses.
	9. Confirm that students and educators are linked to correct schools in the User Upload and Enrollment Upload Templates.
	10. Confirm students are linked to the correct test administrator in the Roster Upload Template.
	<p>11. Manually update existing users. All fields of a user's account may be edited to ensure the account is current. Always make corrections to email addresses using the user interface and <b>never</b> with a template upload. Editing in the user interface allows the user account to continue with the same password. Do not send a reactivation email. Instead, the user can log into Educator Portal using their new email address and continue with their same password.</p> <hr/> <p>NOTE: Contact the Service Desk to update the email address for a user with the teacher role in Educator Portal. The Service Desk agent can ensure that their account in Educator Portal reconciles with their <a href="#">Training Courses</a> account for the Required Test Administrator Training.</p> <hr/>
	12. Upload new users to Educator Portal, using either the User Upload Template file or the user interface. Do not include existing users on a new User Upload Template file because the new upload will override the existing user's account. The user's account will then have to be reactivated and will have a new password.
	13. Assign a role or roles to each user as needed. Go to page 54 of this manual to Edit a User's Account.
	14. Upload Enrollment Upload Template file or enroll students using the user interface.
	15. Upload Roster Upload Template file or add rosters using the user interface.
	16. Notify the assessment coordinator and educators when data uploads are complete.
	17. Manage student moves as needed. Go to page 116 of this manual to Management of Student Moves and Transfers.

## CHECKLIST TO MANAGE DATA

<input checked="" type="checkbox"/>	Steps
	18. Manage data verification and revisions (changes to user, enrollment, and roster data) promptly.
	19. Access the EDUCATOR PORTAL USER GUIDE for information about reports and data extracts.

## CHECKLIST TO MANAGE DATA

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### STATE ORGANIZATIONS AND AUTHORITY

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NOTE: The organizational file setup must be completed before any other data work can begin in preparation for the assessment window.

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#### THE STATE ORGANIZATIONAL TABLE

The Dynamic Learning Maps® (DLM®) Alternate Assessment Consortium states organize their educational units in a variety of structures. Some states organize districts into regions; other states define the smallest unit as a school or a building.

Each state also defines its own distribution of authority and responsibility for tasks associated with the DLM alternate assessment. The highest level of authority in the Kite® system for all states is the role of State Assessment Administrator (SAA). The state assessment administrator may retain all authority and responsibility for assessment coordination and data management in Educator Portal, or the SAA may distribute parts of that authority to assessment coordinators and data managers at the regional, district, or school level.<sup>1</sup>

The state assessment administrator is responsible to ensure the state organizational table is current before uploading or editing user accounts, enrolling students, or creating rosters. Data in the User, Enrollment, and Roster Upload Template Files will not upload unless the organizational information in those templates **exactly** matches information in the state organizational table. The state organizational table is located on each state's DLM webpage. Then, Filter For States>select your state>filter District Staff Resources> scroll to State Organizational Table.

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NOTE: The SEA User Guide is the resource specifically written for state level users with the Educator Portal role of State Assessment Administrator (SAA). The guide is available on the secure side of the DLM website. SAAs will find information about the organizational tables and their responsibilities for keeping them current.

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<sup>1</sup>Regardless of the organizational structure, this manual refers to assessment coordinators and data managers outside the state level user as **local**.

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### EDUCATOR PORTAL PROCEDURES FOR DATA MANAGERS

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This section outlines the step-by-step procedures a data manager will use in Educator Portal.

HINT: Always use the most recent edition of the DATA MANAGEMENT MANUAL.

#### OVERVIEW

Educator Portal is the administrative application in which staff and educators manage student data and retrieve reports. Educator Portal is designed to accommodate many centralized, distributed, and decentralized organizational structures. In the Kite® system, the smallest unit in a district is defined as a school.

Several procedures in Educator Portal are necessary to prepare for testing. To understand the complete process, review the entire series of procedures and the required and optional steps before beginning the process.

Upload template files in the following order so that records and relationships are correctly linked.

1. The User Upload Template file: Use this file to create user accounts for state and district users. Users remain in Educator Portal from year to year, and their information typically should not be uploaded again. If necessary, edits can be performed in the user interface in Educator Portal (e.g., email or last name change).
2. The Enrollment Upload Template file: Use this file to create student records in Educator Portal, allowing student access to Kite Student Portal for testing.
3. The Roster Upload Template file: Use this file to link students to their test administrators for each subject being tested and provide test administrators access to their students' information in Educator Portal.

The following are key fields that link together these tables:

- District and School Identifiers: These are unique identifiers in the state organizational table.
- Educator\_Identifier: This links a test administrator to a roster of students.<sup>2</sup>
- State\_Student\_Identifier: This is a number or combination of numbers and letters that uniquely identifies a student.

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<sup>2</sup>The Educator Identifier is required for users with the Educator Portal role of Teacher.

## CHECKLIST TO MANAGE DATA

- User Email: This is the educator's username for signing into Educator Portal. For test administrators, it is also their username for accessing the Required Test Administrator Training in Training Courses.

HINT: Some fields are included in more than one file. The data in these fields **must match** across files, especially when the same data applies to multiple records (e.g., Attendance\_School\_Program\_Identifier in the enrollment file will apply to many students and must match the organization value in the user file). Copy and paste identical data to avoid typographical errors.

Up to 5,000 records at a time may be loaded. However, large files may load slowly and can be difficult to troubleshoot data errors. Loading 100 records or fewer is recommended to expedite troubleshooting.

All files must be saved and uploaded as CSV (comma-delimited) files. Only the CSV (comma-delimited) files will result in successful uploads. All other CSV type files will fail.

HINT: Data upload templates are available on the Dynamic Learning Maps® (DLM®) website. Go to For States in the blue banner at the top of the homepage. On the left side of the screen, filter Assessment Coordinator > District Staff Resources. Templates will appear in alphabetical order. Choose the appropriate one and download. Also, the appropriate templates can be easily downloaded within Educator Portal.

Each of the following sections provides a summary of the steps for uploading the files. Also provided are the field names and definitions for each field in these files. These field definition tables include a list of fields in the same order in which they appear in the upload template files.

## REQUIRED SOFTWARE

### *SUPPORTED BROWSERS*

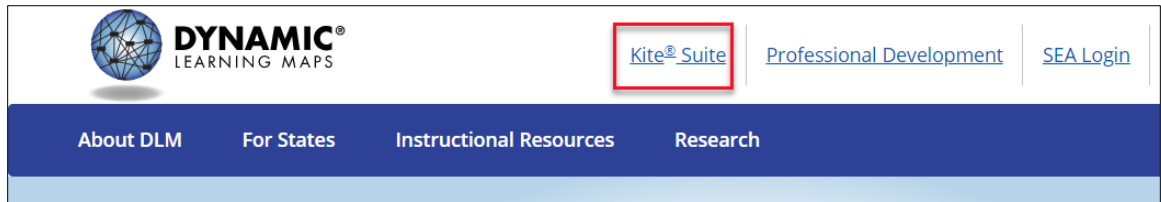
Access the [Kite Requirements](#) webpage to choose a supported browser that will work well with Educator Portal. For more information on browsers and technology in a district, consult the district technology personnel.

At the [Kite Suite](#), readers will find instructions for downloading Student Portal on various devices, icons of supported browsers, and other important information.

1. Go to [Dynamic Learning Maps](#).

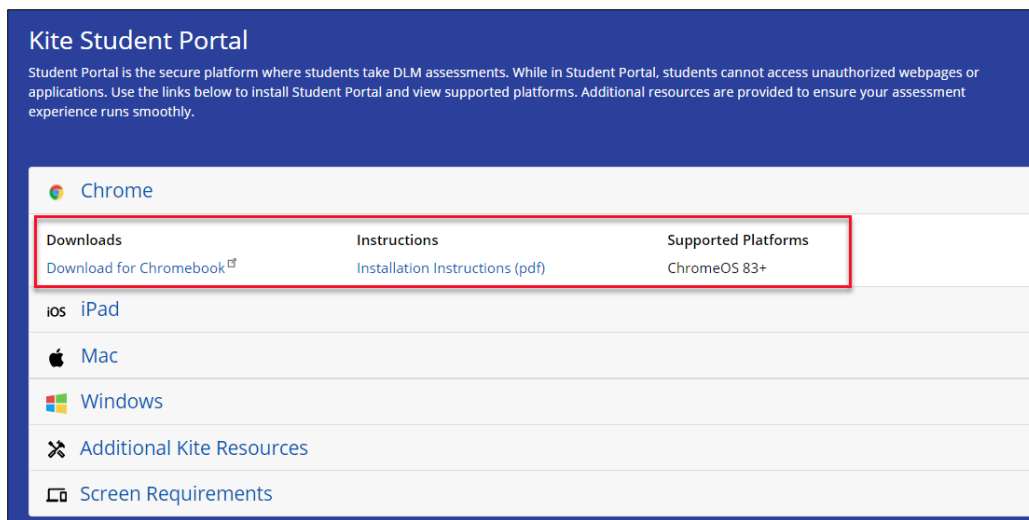
## CHECKLIST TO MANAGE DATA

2. Select [Kite Suite](#).



3. For Student Portal:

- Scroll down the page to find the Student Portal information.
  - Student Portal is a secure platform used by students to take tests. Once launched, students are prevented from accessing any unauthorized webpages or other applications while testing is in progress. Once on the Kite Suite, scroll down to where you will find the icons for accessing Student Portal installation links for each device, installation instructions, a current list of supported platform versions, and additional resources to help guide your testing experience.
4. In the following screenshot, Chrome was selected. Downloads, Instructions, and Supported Platforms then display for Chrome.

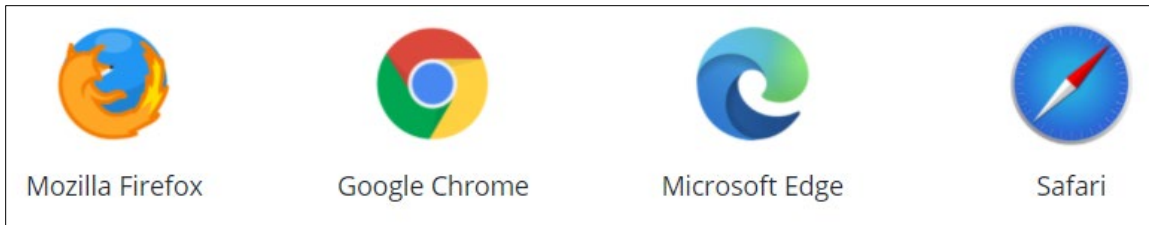


5. For Educator Portal:

- Scroll down to the bottom of the page to find the Educator Portal information.
- Educator Portal is a secure, web-based application designed to aid teachers and administrative users in the administration of assessments, including student enrollment, rostering, and monitoring/tracking results. Educators

## CHECKLIST TO MANAGE DATA

can choose from the following supported browsers to access Educator Portal during the 2021-22 school year.



### *SPREADSHEET-EDITING SOFTWARE*

Data managers will need access to Microsoft® Excel or another spreadsheet-editing software to manipulate the DLM templates for upload template files.

### *PDF VIEWER*

Educators and test administrators will need [Adobe Acrobat Reader DC](#) or other software that allows them to view and print PDFs from Educator Portal (i.e., Testlet Information Pages and Test Tickets).

## MANAGE USER DATA

### *OVERVIEW*

The User Upload Template file is used to create unique user accounts in Educator Portal. Each user is assigned a role(s), which gives the user permission to access specific student data within the assigned school, district, or region and perform certain functions. Users include teachers/test administrators, data managers, and assessment coordinators.

Typically, technology personnel do not need Educator Portal access, but they may have an account when access is needed.

Once uploaded, user accounts stay in Educator Portal from year to year. Returning users may access Educator Portal using their previous username.

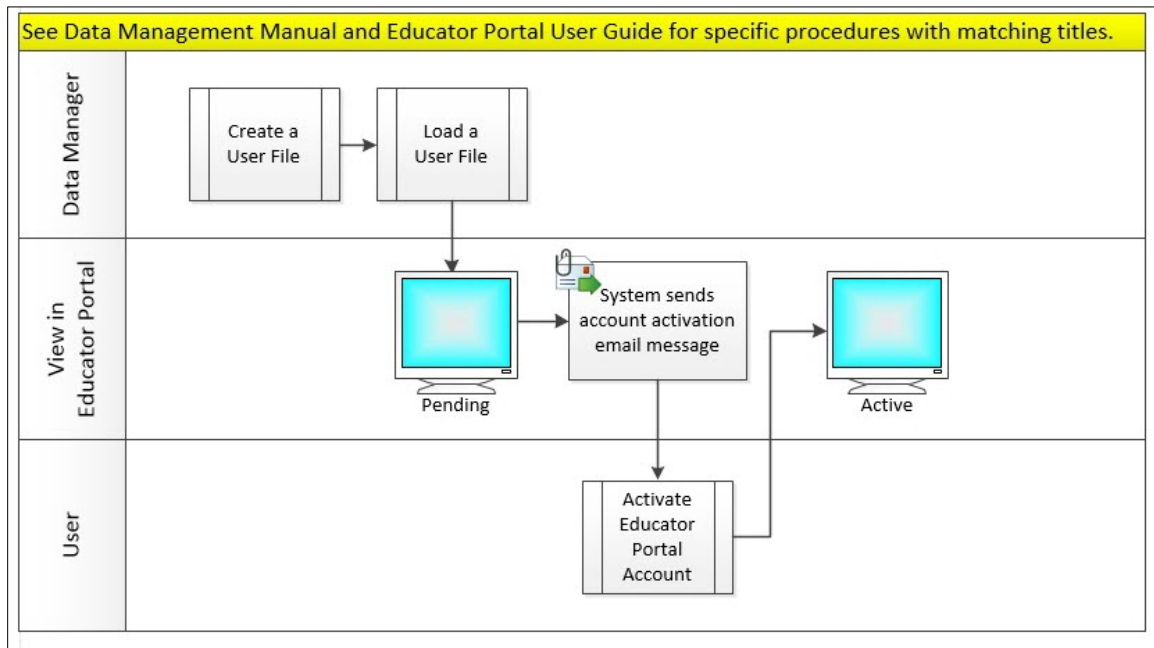
When new users are uploaded, they automatically receive an activation email and must activate their new account by completing the steps from the system-generated activation email message. If users do not activate their account within 20 days, the data manager will need to resend their account activation email.

The following flowchart in Figure 1 shows an overview of the steps required to upload and activate a user account in Educator Portal.

## CHECKLIST TO MANAGE DATA

Figure 1

### *Steps to Upload and Activate a User Account in Educator Portal*



Information about the various roles in Educator Portal is provided on the next tables. Table 5 provides the name of the role with an overview of permissions. Table 6, Table 7, Table 8, Table 9, Table 10, Table 11, Table 12, Table 13, Table 14, and Table 15 show more detailed information about each role, i.e., the reports and extracts that are available to each role and the various procedures each role can perform in Educator Portal.



## CHECKLIST TO MANAGE DATA

### *USER ROLES*

Table 5 is a summary of basic information about the roles in Educator Portal used for the Dynamic Learning Maps Alternate Assessment.

Table 5

#### *Roles and Permissions in Educator Portal*

<b>Role in Educator Portal</b>	<b>Description</b>
<b>State Assessment Administrator (SAA)</b>	<p>This role is only for staff at the State Education Agency (SEA) and assignment of this role is a state-level decision.</p> <p>Educators with this role have the highest level of permissions in Educator Portal for their state and can perform most data management and instructional oversight functions in Educator Portal for any region, district, building, and student within their state.</p> <p>A Service Desk agent assigns this role based on communication from the state education agency (SEA).</p>

## CHECKLIST TO MANAGE DATA

Role in Educator Portal	Description
<b>Regional Test Coordinator (RTC)</b>	<p><b>This role is only available for states that are divided into regions in Educator Portal and every district is assigned to a region.</b></p> <p>Educators with this role have the highest level of permissions in their region and can perform most data management functions in Educator Portal for districts, buildings, and students in their region, but this role does not have access to the Manage Tests tab.</p> <p>This role can be a good match for regional assessment coordinators or regional data managers and can be assigned to more than one user in the region.</p> <p>An SAA can assign the RTC role to a user, or the SAA can authorize in writing that a DLM Service Desk agent assign the RTC role to a user.</p>

## CHECKLIST TO MANAGE DATA

Role in Educator Portal	Description
<b>Regional User (RUS)</b>	<p><b>This role is only available for states that are divided into regions in Educator Portal and every district is assigned to a region.</b></p> <p>Educators with this role have the second-highest level of permissions in their region and can perform most data management functions in Educator Portal for districts, buildings, and students in their region, but this role does not have access to the Manage Tests tab.</p> <p>This role can be a good match for assistant regional administrators or regional data managers and can be assigned to more than one user in the region.</p> <p>An SAA or RTC can assign this role to a user or can authorize in writing that a DLM Service Desk agent assign the RUS role to a user.</p>
<b>District Test Coordinator (DTC)</b>	<p>Educators with this role have the highest level of permissions in their district and can perform most data management and instructional oversight functions in Educator Portal for their district.</p> <p>This role can be a good match for assessment coordinators, district data managers, or other administrators.</p> <p>This role may be restricted by the SEA to only one DTC per district.</p> <p>An SAA, RTC, or RUS can assign this role to a user or can authorize in writing that a DLM Service Desk agent assign the DTC role to a user.</p>

## CHECKLIST TO MANAGE DATA

Role in Educator Portal	Description
<b>District Superintendent (SUP)</b>	<p>An educator with this role has permission to perform many data management functions for the district, but this role does not have access to the Manage Tests tab.</p> <p>This role can be a good match for the district superintendent but can be assigned to more than one user in the district.</p> <p>Assigning this role is a district decision unless contrary to state guidance.</p> <p>An SAA, RTC, RUS, and DTC can assign this role to a user or can authorize in writing that a DLM Service Desk agent assign the SUP role to a user.</p>
<b>District User (DUS)</b>	<p>An educator with this role can perform some of the same data management functions as a DTC, but this role does not have access to the Manage Tests tab.</p> <p>This role can be a good match for assistant data managers, other administrators, or program directors at the district level and can be assigned to more than one user in the district.</p> <p>Assigning this role is a district decision unless contrary to state guidance.</p> <p>An SAA, RTC, RUS, and DTC can assign this role to a user or can authorize in writing that a DLM Service Desk agent assign the DUS role to a user.</p>

## CHECKLIST TO MANAGE DATA

Role in Educator Portal	Description
<b>Building Test Coordinator (BTC)</b>	<p>Educators with this role have the highest level of permissions in their school building and can perform most data management and instructional oversight functions in Educator Portal for their school.</p> <p>This role can be a good match for assessment coordinators, data managers, building principals, or other administrators in the school and can be assigned to more than one user in their school.</p> <p>Assigning this role is a district decision unless contrary to state guidance.</p> <p>An SAA, RTC, RUS, DTC, DUS, and SUP can assign this role to a user or can authorize in writing that a DLM Service Desk agent assign the BTC role to a user.</p>
<b>Building User (BUS)</b>	<p>An educator with this role can perform some of the same data management functions as a BTC, but this role does not have access to the Manage Tests tab.</p> <p>This role can be a good match for assistant data managers, assistant building principals, and other administrators and program directors at the school.</p> <p>Assigning this role is a building-level decision unless contrary to state guidance.</p> <p>An SAA, RTC, RUS, DTC, DUS, SUP, and BTC can assign this role to a user or can authorize in writing that a DLM Service Desk agent assign the BUS role to a user.</p>

## CHECKLIST TO MANAGE DATA

Role in Educator Portal	Description
<b>Teacher (TEA)</b>	<p>An educator with this role typically provides all instruction and performs all assessment administration for the students who are rostered to them.</p> <p>This is a required role for an educator who administers testlets to students.</p> <p>The TEA role must have a unique Educator Identifier that links the educator to their rostered students.</p> <p>A user with the TEA role is required to pass Required Test Administrator Training annually.</p> <p>Assigning this role is a building-level decision unless contrary to state guidance.</p> <p>The SAA, RTC, RUS, DTC, SUP, DUS, BTC, or BUS can assign this role to a user.</p>
<b>Proctor (PRO)</b>	<p>Educators with this role have limited permissions in Educator Portal. This is a building-wide role, which can be associated with all students in the building.</p> <p>This role does not have access to testing in the spring assessment window.</p> <p>Assigning this role is a state-policy decision.</p> <p>The SAA, RTC, RUS, DTC, SUP, DUS, BTC, or BUS can assign this role to a user unless not permitted by state policy.</p>

## CHECKLIST TO MANAGE DATA

### Role: State Assessment Administrator (SAA)

The SAA has access to and can perform the following functions in districts and school buildings across their state.

Table 6

#### *Permissions in Educator Portal for State Assessment Administrator Role*

<b>Upload CSV Template files</b>	User Template file	Enrollment Template file	Roster Template file	TEC Template file	Parent Template file
<b>Access these reports and files</b>	General Research File (GRF)	Aggregate Reports	Special Circumstance File	Exit Student File	Incident File (if applicable)
<b>Access these reports</b>	Student Report Archive	Individual Student Score Reports	Individual Student Score Reports (Bundled)	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report
<b>Access these reports</b>	Student Progress Report**	Class Roster Report**	Parent Portal	<b>** No data in this report for YE states during their spring assessment window</b>	
<b>Extracts</b>	Access				
<b>Users in districts/schools across the state</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
<b>Rosters in districts/schools across the state</b>	Create	Edit			
<b>Students in districts/schools across the state</b>	Add	Edit	Exit	Find and activate	Transfer between districts or schools within the state
<b>Students in districts/schools across the state</b>	Edit/save PNP Profile	View First Contact Survey			

## CHECKLIST TO MANAGE DATA

<b>Instruction &amp; Assessment Planner</b>	Access	Apply Special Circumstances Codes	Cancel Testlet	View and print Fall and Spring EE Status Report**	<b>**Spring Report not available for YE states</b>
<b>Test Management</b>	Access	Apply Special Circumstances Codes			

### Role: Regional Test Coordinator (RTC)

The RTC has access to and can perform the following functions in districts and school buildings across their region.

Table 7

#### *Permissions in Educator Portal for Regional Test Coordinator Role*

<b>Upload CSV Template files</b>	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
<b>Access these district reports</b>	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	Blueprint Coverage Report (IE model state only)	<b>** No data in this report for YE states during their spring assessment window</b>
<b>Extracts</b>	Access				
<b>Users in districts/schools across their region</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
<b>Rosters in districts/schools across their region</b>	Create	Edit			



## CHECKLIST TO MANAGE DATA

<b>Students in districts/schools across their region</b>	Add	Edit	Exit	Find and activate	Transfer between districts or schools within the region
<b>Students in districts/schools across their region</b>	View PNP Profile	View First Contact Survey			
<b>Manage Test Tab</b>	No Access				

### Role: Regional User (RUS)

The RUS has access to and can perform the following functions in districts and school buildings across their region.

Table 8

#### *Permissions in Educator Portal for Regional User Role*

<b>Upload CSV Template files</b>	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
<b>Access these reports</b>	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	<b>** No data in this report for YE model states during their spring assessment window</b>
<b>Extracts</b>	Access				
<b>Users in districts/schools across their region</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
<b>Rosters in districts/schools across their region</b>	Create	Edit			

## CHECKLIST TO MANAGE DATA

<b>Students in districts/schools across their region</b>	Add	Edit	Exit	Find and activate	Transfer between districts or schools within the region
<b>Students in districts/schools across their region</b>	View PNP Profile	View First Contact Survey			
<b>Manage Test Tab</b>	No Access				

### **Role: District Test Coordinator (DTC)**

The DTC has access to and can perform the following functions in school buildings across their district.

Table 9

#### *Permissions in Educator Portal for District Test Coordinator Role*

<b>Upload CSV Template files</b>	User Template file	Enrollment Template	Roster Template file	TEC Template file	Parent Template
<b>Access these files and reports</b>	General Research File (GRF)*	Aggregate Reports*	Student Report Archive*	<i>*Has access if granted by SAA</i>	
<b>Access these reports</b>	Individual Student Score Reports*	Individual Student Score Reports Bundled*	<i>*Has access if granted by SAA</i>		
<b>Access these reports</b>	Student Progress Report**	Class Roster Report**	Monitoring Summary Report	Blueprint Coverage Report (IE model state only)	<b>** No data in this report for YE states during their spring assessment window</b>
<b>Extracts</b>	Access				
<b>Users in schools across the district</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users

## CHECKLIST TO MANAGE DATA

<b>Rosters in schools across the district</b>	Create	Edit			
<b>Students in schools across the district</b>	Add	Edit	Exit	Find and activate	Transfer within the district
<b>Students in schools across the district</b>	Edit/save PNP Profile	Edit/submit First Contact survey			
<b>Instruction &amp; Assessment Planner</b>	Access	Apply Special Circumstances Codes	Cancel testlets	View and print Fall and Spring EE Status Report**	<b>**Spring Report not available for YE states</b>
<b>Test Management</b>	Access	Apply Special Circumstances Codes			

### **Role: District Superintendent (SUP)**

The SUP has access to and can perform the following functions in school buildings across their district.

Table 10

#### *Permissions in Educator Portal for District Superintendent Role*

<b>Upload CSV Template files</b>	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
<b>Access these reports</b>	Aggregate Reports*	Student Report Archive*	Individual Student Score Reports*	Individual Student Score Reports (Bundled) *	<b>*Has access if granted by SAA</b>
<b>Access these reports</b>	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	<b>** No data for YE states during their spring assessment window</b>

## CHECKLIST TO MANAGE DATA

<b>Extracts</b>	Access				
<b>Users in schools across the district</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
<b>Rosters in schools across the district</b>	Create	Edit			
<b>Students in schools across the district</b>	Add	Edit	Exit	Find and activate	Transfer within the district
<b>Students in schools across the district</b>	View PNP Profile	View First Contact Survey			
<b>Manage Test tab</b>	No Access				

### Role: District User (DUS)

The DUS has access to and can perform the following functions in school buildings across their district.

Table 11

### *Permissions in Educator Portal for District User Role*

<b>Upload CSV Template files</b>	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
<b>Access these reports</b>	Aggregate Reports*	Student Report Archive*	<i>*Has access if granted by SAA</i>		
<b>Access these reports</b>	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	<b>** No data for YE state during their spring assessment window</b>
<b>Extracts</b>	Access				
<b>Users in schools across the district</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users

## CHECKLIST TO MANAGE DATA

<b>Rosters in schools across the district</b>	Create	Edit			
<b>Students in schools across the district</b>	Add	Edit	Exit	Find and activate	Transfer within the district
<b>Students in schools across the district</b>	View PNP Profile	View First Contact Survey			
<b>Manage Tests Tab</b>	No Access				

### **Role: Building Test Coordinator (BTC)**

The BTC has access to and can perform the following functions in their school building.

Table 12

#### *Permissions in Educator Portal for Building Test Coordinator Role*

<b>Upload CSV Template files</b>	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
<b>Access these reports in their building</b>	Aggregate Reports*	Student Report Archive*	Individual Student Score Reports*	Individual Student Score Reports (Bundled)*	<i>*Has access if granted by SAA</i>
<b>Access these reports</b>	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	Blueprint Coverage Report (IE model state only)	<i>** No data for YE state during spring window</i>
<b>Extracts</b>	Access				
<b>Users in their school building</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
<b>Rosters in their school building</b>	Create	Edit			

## CHECKLIST TO MANAGE DATA

<b>Students in their school building</b>	Add	Edit	Exit	Find and activate	
<b>Students in their school building</b>	Edit/save PNP Profile	Edit/submit First Contact survey			
<b>Instruction &amp; Assessment Planner</b>	Access	View and print Fall and Spring EE Status Report**	<i>**Spring Report not available for YE states</i>		
<b>Test Management</b>	Access				

### Role: Building User (BUS)

The BUS has access to and can perform the following functions in their school building.

Table 13

#### *Permissions in Educator Portal for Building User Role*

<b>Upload CSV Template files</b>	User Template file	Roster Template file			
<b>Access these reports in their building</b>	Aggregate Reports*	Student Report Archive*	<i>*Has access if granted by SAA</i>		
<b>Access these reports in their school building</b>	Blueprint Coverage Report (IE Model State only)	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	<i>**No data in this report for YE states during their spring assessment window</i>
<b>Extracts</b>	Access				
<b>Users in their school building</b>	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
<b>Rosters in their school building</b>	Create	Edit			

## CHECKLIST TO MANAGE DATA

<b>Students in their school building</b>	View PNP Profile	View First Contact survey			
<b>Manage Test Tab</b>	No Access				

### Role: Teacher (TEA)

The TEA has access to and can perform the following functions for students rostered to them.

Table 14

#### *Permissions in Educator Portal for Teacher Role*

<b>Access these reports</b>	Student Report Archive (Has access if granted by SAA)	Blueprint Coverage Report (IE model state only)	Student Progress Report**	Class Roster Report**	**No data in this report for YE states during their spring assessment window.)
<b>Extracts</b>	Access				
<b>Rosters</b>	View their rosters				
<b>Students on their rosters</b>	Edit/save PNP Profile	Edit/submit First Contact survey	View student data		
<b>Instruction &amp; Assessment Planner</b>	Access	View and print Fall and Spring EE Status Report**	**Spring Report not available for YE states		
<b>Test Management</b>	Access				

## CHECKLIST TO MANAGE DATA

### Role: Proctor (PRO)

The PRO role has access to and can perform the following functions for all rostered students in their school building.

Table 15

#### *Permissions in Educator Portal for Proctor Role*

<b>Rosters in school building</b>	View all rosters				
<b>Students in school building</b>	View PNP Profile	View First Contact survey	View data for all students		
<b>Reports and Extracts</b>	No Access				
<b>Instruction &amp; Assessment Planner</b>	Access	View and print Fall and Spring EE Status Report**	<i>**Spring Report not available for YE states</i>		
<b>Test Management</b>	No Access				

Table 16, Table 17, Table 18, and Table 19 list the extracts and reports that are available in Educator Portal for Year-End model states and for Instructionally Embedded model states. The Educator Portal roles that have access to each extract and report is also provided. Each role is listed by their abbreviation as found on Table 5, Table 6, Table 7, Table 8, Table 9, Table 10, Table 11, Table 12, Table 13, Table 14, and Table 15.

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NOTE: State-specific extracts are not indicated in Table 16 and Table 18.

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## CHECKLIST TO MANAGE DATA

Table 16

### *Alternate Assessment Extracts for Year-End Model States by Educator Portal Role*

<b>Extracts for Year-End model states*</b>	<b>Roles that can access these extracts</b>
Current Enrollment	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
DLM Test Administration Monitoring	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
First Contact Survey	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
General Research File and other end-of-year files and extracts	SAA and DTC
PNP Settings	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
PNP Setting Counts	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Parents	SAA and DTC only in states where available
Roster	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Security Agreement	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Student Roster and First Contact Survey Status	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Training Status	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Users	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS

\*Year-End model states include AK, CO, IL, MD, NH, NJ, NY, OK, PA, RI, UT, WV, WI, plus Miccosukee and the District of Columbia.

Table 17

### *Alternate Assessment Reports for Year-End Model States by Educator Portal Role*

<b>Reports for Year-End model states*</b>	<b>Roles that can access reports</b>
Class Roster Report	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
End-of-Year Reports	Has access if granted by the SAA
Monitoring Summary	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Student Progress Report	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA

\*Year-End model states include AK, CO, IL, MD, NH, NJ, NY, OK, PA, RI, UT, WV, WI, plus Miccosukee and the District of Columbia.

## CHECKLIST TO MANAGE DATA

Table 18

*Alternate Assessment Extracts for Instructionally Embedded Model States by Educator Portal Role*

<b>Extracts for IE model states*</b>	<b>Roles that can access these extracts</b>
Current Enrollment	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
DLM Blueprint Coverage Summary	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
DLM Instructionally Embedded Monitoring	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
First Contact Survey	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
General Research File and other end-of-year files and extracts	SAA and DTC
PNP Settings	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
PNP Setting Counts	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Parents	SAA and DTC only in states where available
Roster	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Security Agreement	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Student Roster and First Contact Survey Status	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Training Status	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Users	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS

\*Instructionally Embedded model states include AR, DE, IA, KS, MO, and ND.

Table 19

*Alternate Assessment Reports for Instructionally Embedded Model States by Educator Portal Role*

<b>Reports for IE model states*</b>	<b>Roles that can access these extracts</b>
Blueprint Coverage Summary	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Class Roster Report	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
End-of-Year Reports	Has access if granted by the SAA
Monitoring Summary	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Student Progress Report	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA

\*Instructionally Embedded model states include AR, DE, IA, KS, MO, and ND.

### *CREATE A USER UPLOAD TEMPLATE FILE*

This is the most efficient procedure for uploading multiple **new** users to Educator Portal.

---

NOTE: Data managers may also manually enter individual users (go to Add a User Manually in this manual).

---

## CHECKLIST TO MANAGE DATA

To create a User Upload Template file, follow these steps:

1. Download the User Upload Template file from the state's DLM webpage.

HINT: Always begin by downloading this year's template to ensure the file is current. Do not use files saved from previous years, as they may not upload correctly.

2. Open the User Upload Template in a spreadsheet program that saves data in the CSV (comma-delimited) format. The template must be uploaded in this format.

NOTE: A few state assessment administrators offer a translation guide that provides a correlation between the codes and identifiers commonly used in their state or district to the field names in the templates. If this type of resource is provided in your state, go the DLM website. In the search feature, type Translation Guide. Select the appropriate guide for your state.

3. Using a new row for each user, type the information for each new user into the template file.
4. If a user serves multiple organizations, use a new row for each of those organizations, but use the same last name, first name, educator identifier, and email address.
5. Complete all required fields.
6. Verify that all column headings appear in the file, even for fields left blank. Changing or removing a column or column headings will create an error, preventing data from being uploaded into Educator Portal.
7. Save the file as a CSV (comma-delimited) file in an easily accessible location. Leave the file **open** until the upload in Educator Portal has been successfully completed to avoid losing formatted information.

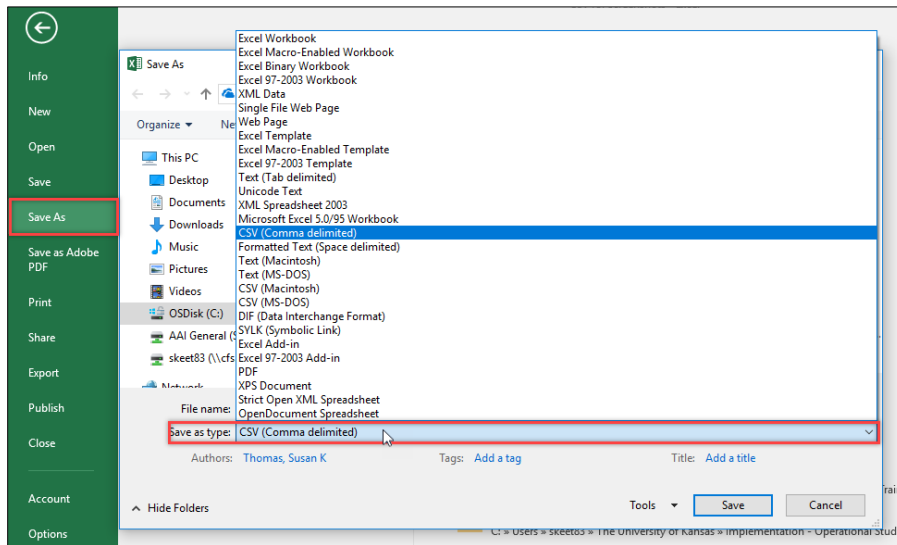
HINT: Data managers may save the original file as an XLS file to preserve all the information for later use. However, prior to an upload, the file must be opened and saved as a CSV (comma-delimited) file, or it will not upload. This is true for all upload template files. Also, do not try to upload a file formatted from a previous year.

Hint: Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format. The CSV format can be found in Microsoft® Excel by going to **File | Save As | Save as type**.

## CHECKLIST TO MANAGE DATA

Figure 2

### *Saving as CSV in Excel*



### Include Leading Zeros in an Upload File

Some states have leading zeros in the district, school, Student State Identifiers, and local identifiers. Additionally, some states have programmed their organizations and student identifiers to have a set number of digits for these same fields. In these cases, when uploading any template file to Educator Portal if the number of digits for the district, school, and the State Student Identifier or local identifier is a programmed number of digits, then leading zeros must be entered to satisfy the programmed number of digits.

In Figure 3, the number of digits is 10 in this state for the district, school, State Student Identifier, and the local identifier. Before uploading, entries with fewer than 10 digits must have leading zeros added so that the field entry is satisfied with 10 digits as programmed. If leading zeros are not added, an error will result.

In Figure 3, since the zeros are missing in the Organization ID column, this User Upload Template file will not upload properly until the required number of leading zeros are added.

## CHECKLIST TO MANAGE DATA

Figure 3

### *Leading Zeroes in Organization ID Column*

	A	B	C	D	E	F	
1	State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organiz
2	DLM QC State	DTC First name1	DTC Last Name1	126575	DTCemail1@gmail.com	320324	
3	DLM QC State	DTC First name2	DTC Last Name2	126561	DTCemail2@gmail.com	978320324	
4	DLM QC State	DTC First name3	DTC Last Name3	126563	DTCemail3@gmail.com	30987908	
5	DLM QC State	DTC First name4	DTC Last Name4	126562	DTCemail4@gmail.com	985675128	

NOTE: Do not include leading zeros in fields which contain dates.

To easily format columns to include leading zeros, do the following.

1. Go to the applicable column heading, hover over the column heading, and select the column to get the small downward pointing arrow for the column.

	A	B	C	D	E	F	
1	State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organiz
2	DLM QC State	DTC First name1	DTC Last Name1	126575	DTCemail1@gmail.com	320324	
3	DLM QC State	DTC First name2	DTC Last Name2	126561	DTCemail2@gmail.com	978320324	
4	DLM QC State	DTC First name3	DTC Last Name3	126563	DTCemail3@gmail.com	30987908	
5	DLM QC State	DTC First name4	DTC Last Name4	126562	DTCemail4@gmail.com	985675128	

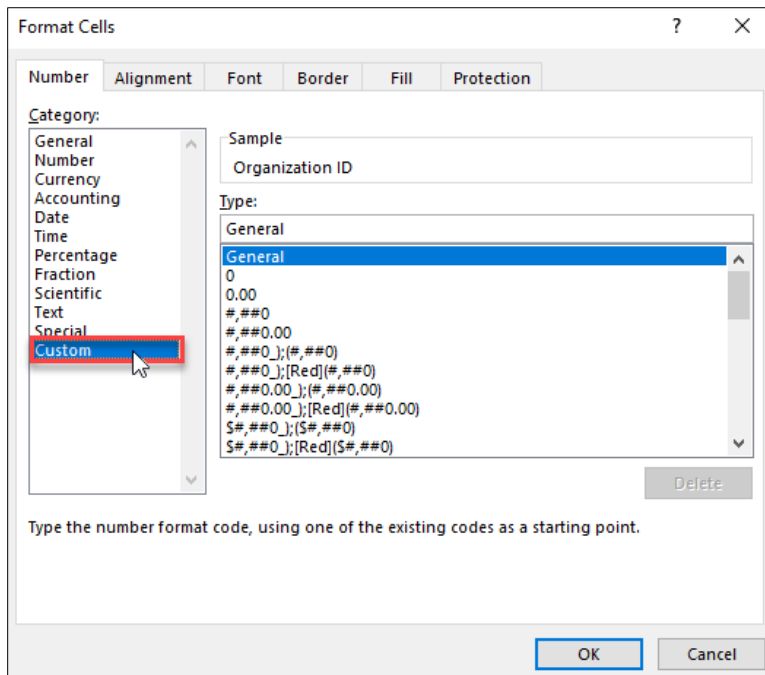
2. Highlight the column. Using the right mouse button, select the column to open the menu. Select **Format Cells**.

	A	B	C	D	E	F	
1	State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organiz
2	DLM QC State	DTC First name1	DTC Last Name1	126575	DTCemail1@gmail.com	320324	
3	DLM QC State	DTC First name2	DTC Last Name2	126561	DTCemail2@gmail.com	978320324	
4	DLM QC State	DTC First name3	DTC Last Name3	126563	DTCemail3@gmail.com	30987908	
5	DLM QC State	DTC First name4	DTC Last Name4	126562	DTCemail4@gmail.com	985675128	
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							

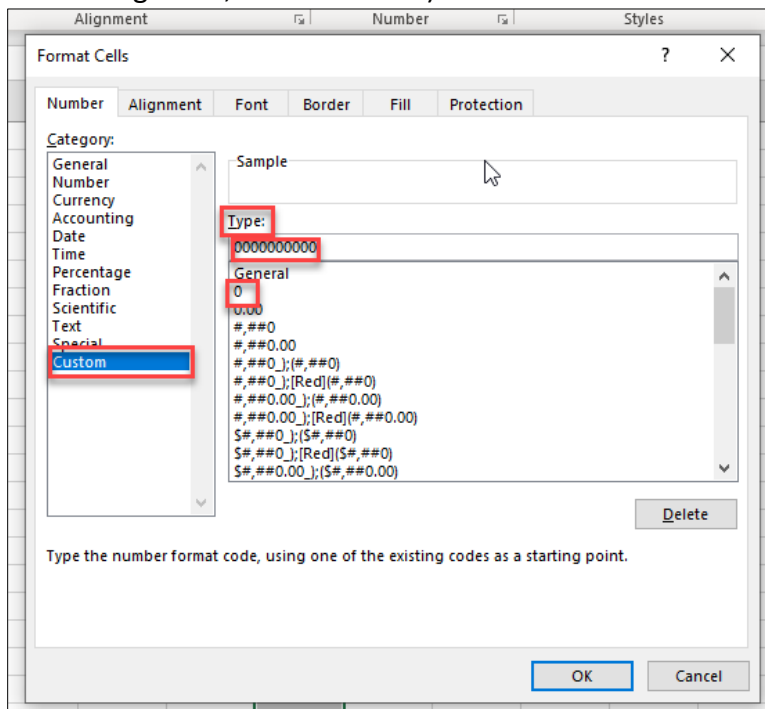
3. The menu typically opens on the Number tab. If it does not, select the Number tab.

## CHECKLIST TO MANAGE DATA

### 4. Select **Custom**.



5. Under Type, select the one zero. Add the number of zeros that matches the number of programmed digits for district, school, State Student Identifier, and local identifier in your state. (e.g., if district has 10-digit numbers, even if some are leading zeros, enter 10 zeros). Select **OK**.



## CHECKLIST TO MANAGE DATA

- The screenshot following displays an example of a state requiring 10 digits, all numbers in the column will have 10 digits, including the additional leading zeros to equal a 10-digit code.

	A	B	C	D	E	F	
1	State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organi
2	DLM QC State	DTC First name1	DTC Last Name1	126575	DTCemail1@gmail.com	0000320324	
3	DLM QC State	DTC First name2	DTC Last Name2	126561	DTCemail2@gmail.com	0978320324	
4	DLM QC State	DTC First name3	DTC Last Name3	126563	DTCemail3@gmail.com	0030987908	
5	DLM QC State	DTC First name4	DTC Last Name4	126562	DTCemail4@gmail.com	0985675128	

- Upload the template file, following the instructions beginning on page 47.

### Best Practices

Here are some best practices for the fields in the User Upload Template file.

Educator Portal displays the **Legal First Name** and **Legal Last Name** exactly as entered in the User file. Best practice is to use mixed case (Sarah DuShagne), not all capitals (SARAH DUSHAGNE). If a user has spaces, hyphenation, or accent marks in their name, use these when uploading the user in Educator Portal. Including this punctuation will help later when a search is performed to find a user in the Educator Portal database. Educator Portal accepts most characters in a user's name.

The **Educator Identifier** field is the required connector between test administrators (those with the role of Teacher) and students. A User Template will not successfully upload unless a unique Educator Identifier field is present for users with the Educator Portal role of Teacher (TEA). Also, this identifier will be required in the Roster Upload Template file. The Educator Identifier is case-insensitive.

Some states do not have numerical or standardized Educator Identifiers. In this case, the test administrator's email address can be used. Users who do not have the role of teacher and who do not need to be connected to students (e.g., assessment coordinators) are not required to have an Educator Identifier. However, best practice is to add the unique Educator Identifier to all user records in case an unexpected need arises.

The **Educator Identifier** must be unique for each individual user within a state. When adding the Educator Identifier, Educator Portal will accept letters, numbers, and most characters. **Never use the social security number** for the Educator Identifier.

The **Organization** field identifies a specific school or district. Educator Portal will display only the student records that match the user's assigned Organization Identifier. Access the state organizational tables on your state's webpage for more information.

Use the **Organization Level** column in Educator Portal to indicate the scope of user access to student data at their district or school level. For example, test administrator accounts will be created at the school level by recording the letters SCH (for School/Building) in the Organization Level column.

## CHECKLIST TO MANAGE DATA

To support a test administrator with responsibilities for classes in multiple schools or who has students in multiple districts, add a row of data in the same template for each school. The teacher's first name, last name, email address, and Educator Identifier should be the same. Ensure each line of data has a unique organizational code. When needed, after the initial upload of the user file, the user interface can be used to add additional organization levels for a user. Go to Add a User Manually on page 51 of this manual for information on adding more organizations.



## User Upload Template File Field Definitions

Table 20

### *User Upload Template File Field Definitions*

Field	Format; Length	Required	Description	Special Notes
Legal_First_Name	Alphanumeric	Yes	The user's first name	Double-check that the first and last names are listed in the correct columns and not transposed.
Legal_Last_Name	Alphanumeric	Yes	The user's last name	Double-check that the first and last names are listed in the correct columns and not transposed.
Educator_Identifier	Alphanumeric; 30  Special characters found in email addresses are allowed.	Yes, for test administrators (those with the role of Teacher in Educator Portal)  Not required for other users	Usually, the user's state license number or another state identification number, but it could be the user's official school email address  <b>NEVER use social security numbers.</b> Check with the State Assessment Administrator with questions about this value.	If a user will not be assigned to students, this field is optional. For example, district or building assessment coordinators do not need an Educator Identifier unless they also test students. However, best practice is to include the unique Educator Identifier for all users.  This value is case-insensitive.

Field	Format; Length	Required	Description	Special Notes
Email	Alphanumeric	Yes	The user's email address  This will become the user's Educator Portal login name.	New users will receive their account activation email at this address. As a key field, it must be accurate. Official, work-issued email addresses are strongly recommended.  This value is case-insensitive.

Field	Format; Length	Required	Description	Special Notes
Organization	Alphanumeric	Yes	The code for the user's district, school, or other organizational unit Must include any leading zeros	<p>Use the organization code from the state organizational table for the district and school. A district-level role must be associated with the district organization code. A school-level role must be associated with the school organization code.</p> <p>Data in the organization field will be matched against the organization information provided by each state and presented in Educator Portal. Failure to match the codes will result in record rejection.</p> <p>Go to page 35 in this manual for instructions on how to Include Leading Zeros in an Upload File.</p> <p>Hint: Excel has several CSV format choices. <b>DLM users must choose CSV (comma-delimited) format.</b></p>

Field	Format; Length	Required	Description	Special Notes
Organization_Level	Alphanumeric UPPERCASE ONLY	Yes	The user's access level (e.g., DT for district, SCH for school/building)	Enter DT to indicate a user at the district level or SCH to indicate a user at the school/building level.  NOTE: If a user has a role at both the district level (e.g., an assessment coordinator) and a role at the school level (e.g., teacher) a row must be entered for each role. Find an example in the screenshot at the end of this table.*
Primary_Role	Alphabetical UPPERCASE ONLY	Yes	The user's default role (the role that automatically appears when the user logs in to Educator Portal)  The role must be one that is valid for the organization (e.g., DTC for district test coordinator or TEA for a teacher role).	If left blank, the upload will generate an error.  Details about possible values are provided in the Codes for the Primary and Secondary Role Fields table on page 47 of this manual. If a user has a role at both the district level (e.g., a DTC) and a role at the school level (e.g., teacher), a row must be entered for each role. Then after entering a row for each role, determine which role is primary and which role is secondary (e.g., the primary role as DTC and the secondary role as TEA).

Field	Format; Length	Required	Description	Special Notes
Secondary_Role	Alphabetical UPPERCASE ONLY	No	A second role for the user  The role must be one that is valid for the organization (e.g., TEA for teacher).	If a user has a second role in Educator Portal, enter it in this column. For example, a District Test Coordinator might also be a building principal. Since a specific building principal role is not available, choose either the BTC or BUS role for this person.  Details about potential values are provided in the Codes for the Primary and Secondary Role Fields table on page 47 of this manual.
Primary_Assessment _Program	Alphabetical UPPERCASE ONLY	Yes	The code associated with the assessment program	Type DLM.

\*If a user has a role at both the district level and school level, a row must be entered for each role.

Figure 4

*Saving as CSV in Excel*

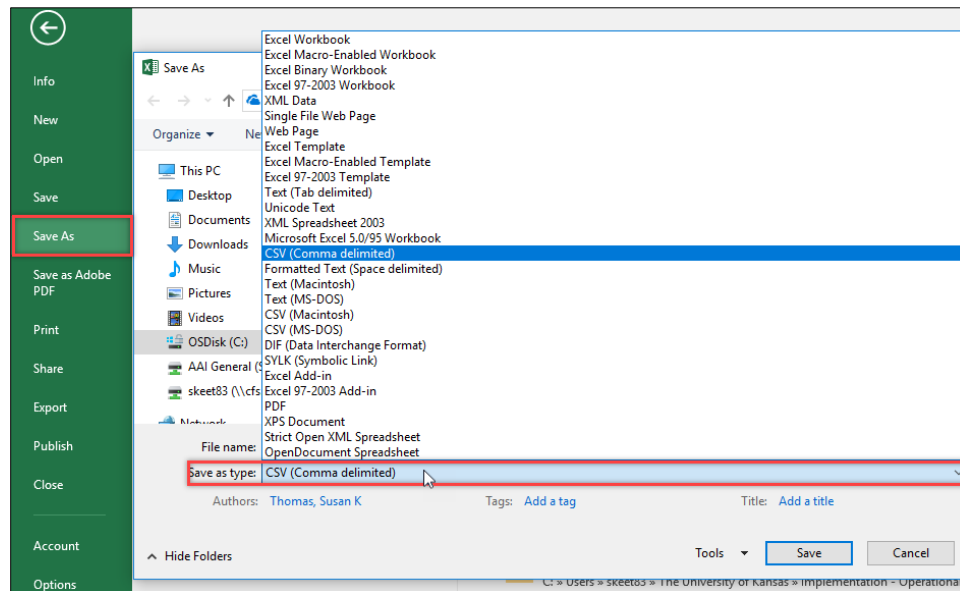


Figure 5

*Entering a Row for Roles at Both District and School Level*

Legal First Name	Legal Last Name	Educator_Identifier	Email	Organization	Organization_Level	Primary_Role	Secondary_Role	Primary_Assessment_Program
Mary	Smith	atlastech785+IET6@gmail.com	atlastech785+IET6@gmail.com	YE_DT	DT	DTC		DLM
Mary	Smith	atlastech785+IET6@gmail.com	atlastech785+IET6@gmail.com	YE_SCH	SCH		TEA	DLM

### Codes for the Primary and Secondary Role Fields

Role Code abbreviations must be used for the Primary\_Role and Secondary\_Role fields (if needed). A building principal can have either the role of BTC or BUS since a specific role is not available for building principal. Access the permissions associated with each role beginning on page 17 of this manual to determine which role would be most appropriate.

Table 21

#### *Codes for the Primary and Secondary Role Fields*

Role Code	Role Name
TEA	Teacher
PRO	Proctor
BTC	Building Test Coordinator
BUS	Building User
SUP	District Superintendent
DTC	District Test Coordinator
DUS	District User
RTC*	Regional Test Coordinator*
RUS*	Regional User*
SAA	State Assessment Administrator

\*Only for use in states that have regions designated in Educator Portal and **all** districts within the state are assigned to one of the regions. If used in a user upload template file in a state that does not meet this criterion, an error message will be generated.

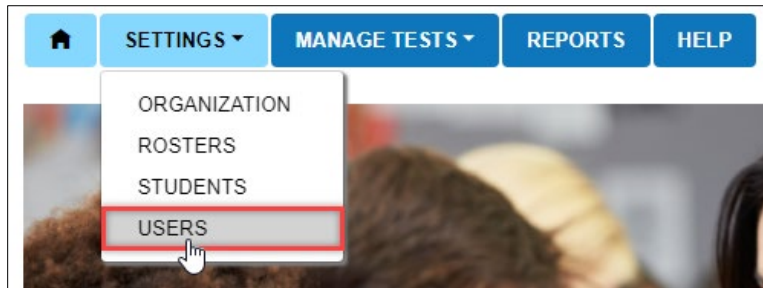
#### *UPLOAD A USER UPLOAD TEMPLATE FILE*

The following is the most efficient procedure for uploading multiple new users to Educator Portal. Data managers may also manually enter individual users. Go to Add a User Manually on page 51 of this manual. Any number of users can be added manually at the data manager's discretion. However, the user interface is most useful when adding five or fewer users at one time or when editing a user's account.

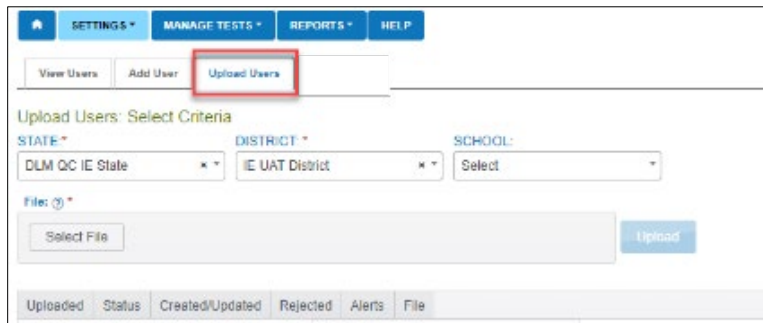
1. Select **Settings**.



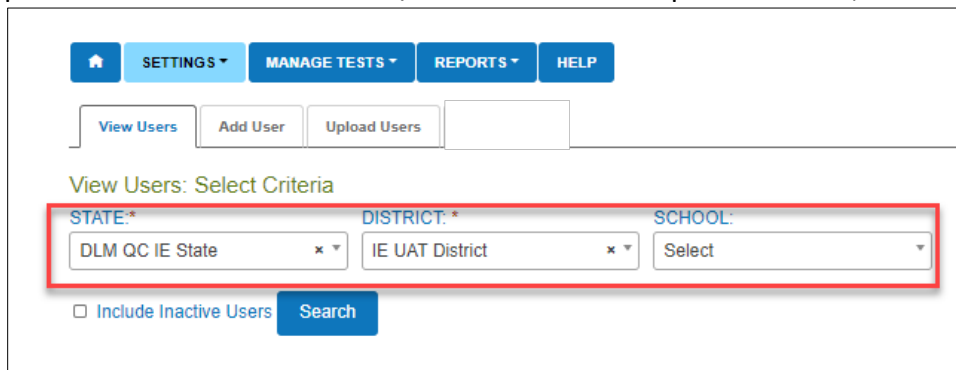
2. Select **Users** from the drop-down menu.



3. The **View Users** tab is the default. Select the **Upload Users** tab.



4. Apply filters in the **Upload Users: Select Criteria** fields to choose the correct levels. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed.





HINT: If the list does not include the correct option, the user's account permissions may need to be changed. Contact the District Test Coordinator.

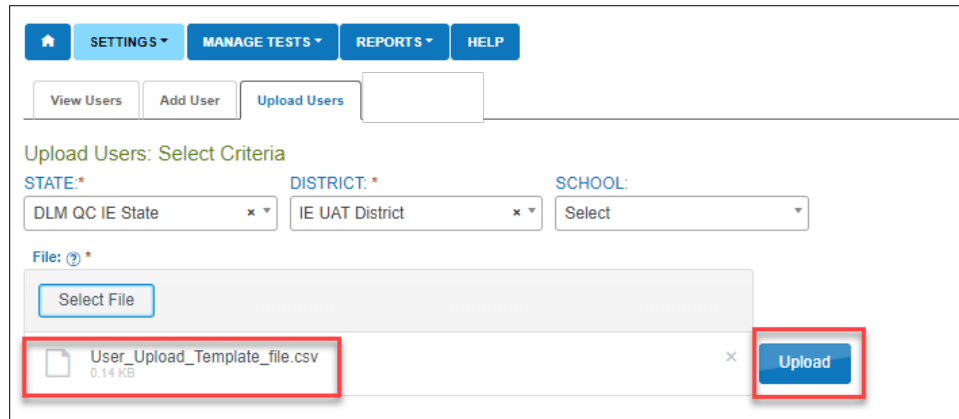
The most current template is available to download by hovering the cursor over the question mark next to the word, **File**.

5. Save the User Upload Template file where it can be easily found but leave the file open until the file has successfully uploaded.
6. Use the **Select File** button to open a browser window.

7. Locate the saved CSV file for upload.
8. Select the file name and **Open**. The file name appears in the File field.


HINT: Verify that the file has a CSV file extension. File names with extensions ending in XLS or XLSX will be rejected.

## 9. Select **Upload**.



10. A message will show the number of records created, updated, or rejected.

11. If a file is rejected, select the CSV icon under **File**. This file will display error messages related to the upload.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Tuesday, July 06, 2021 1:03:10 PM	COMPLETED	0	1	0	

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**HINT:** If a file is rejected, a CSV file will indicate the line(s) where the error occurred and the reason(s) the line was not valid. Correct the data and upload again. Attempting to upload the file with the incorrect template will also cause an error. Use the current year's version of the template.

Each row in the User Upload Template file is one record. A user with multiple roles will have multiple records.

### *WHAT IS THE USER INTERFACE?*

The user interface is a series of screens in Educator Portal where administrative tasks can be performed quickly and practically one at a time. The data manager can easily manage four or five records more quickly with the user interface than uploading a CSV file for so few records.

On the other hand, when working with several hundred records (i.e., the first enrollment for the school year in August), using a CSV file upload is much more efficient than would be practical to do one at a time. Depending on the need, data managers can use the method that works best for them for the situation, whether simply editing an educator's last name or uploading all the students in the district in August.

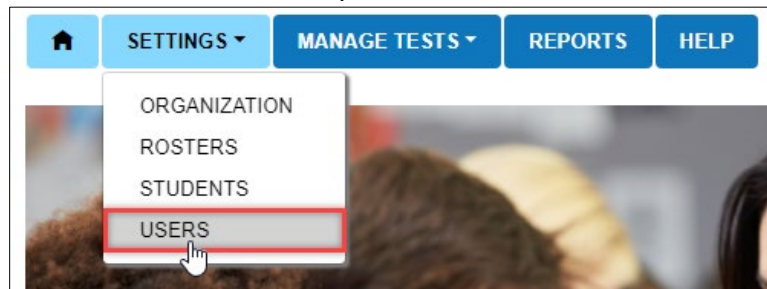
## ADD A USER MANUALLY

This procedure is most helpful when adding five users or fewer. Use the User Upload Template file when adding more than five users at one time. Go to Create a User Upload Template File on page 34 of this manual for information on creating a batch upload using the upload template file.

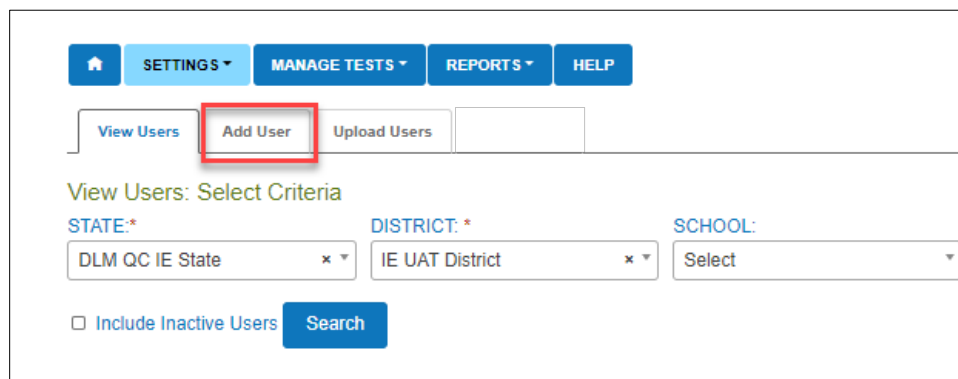
1. Select **Settings**.



2. Select **Users** from the drop-down menu.



3. The **View Users** tab is the default. Select the **Add User** tab.



4. On the **Add User** screen, complete all **User Information** fields (fields marked with a red asterisk are required).

- First Name
- Last Name
- **Email Address** will become the username when signing into Educator Portal.
- **Educator Identifier** is required for users with the teacher role. The Educator Identifier links a teacher to their students when a roster is created. The Educator Identifier is case-insensitive.

User Information Save

FIRST NAME: \*  LAST NAME: \*  EMAIL ADDRESS: \*

EDUCATOR IDENTIFIER:

5. Complete the **Organization & Roles** drop-down fields. Select the **Add** button.

Organization & Roles

STATE: \*

ASSESSMENT PROGRAM: \*

ROLE: \*

DISTRICT: \*

SCHOOL: \*

Add

Default	State	Assessment Progr...	Role	District
No records available				

NOTE: After the **Add** button is selected, the red asterisk will appear above the Educator Identifier field for users with the teacher role, making it a required field. Include the Educator Identifier if not already entered.

User Information

FIRST NAME: \*  LAST NAME: \*  EMAIL ADDRESS: \*

EDUCATOR IDENTIFIER: \*

6. If a user has multiple roles, select the default role at the bottom of the screen. Then select the **Save** button.

Default	State	Assessment Program	Role	District	School
<input checked="" type="radio"/>	DLM QC YE State	DLM	Building User	YE District	YE School
<input type="radio"/>	DLM QC YE State	DLM	Teacher	YE District	YE High Scho

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**Save** Cancel

HINT: If a user has multiple roles in a district or serves multiple schools in the same district, the district data manager should complete steps 5-7 for each role and organization. Select **Add** after adding each role or school. Once all roles or organizations are added and the default role is chosen, select **Save** to complete the process.

When a user with the Teacher role needs to be associated to multiple organizations, the additional organizations should be added to only one teacher account. By following this recommendation, the teacher will complete Required Test Administrator Training only one time to qualify in each organization and will have only one account to use for signing into Educator Portal.

NOTE: If any user serves multiple regions or districts in the same state, only users with the SAA role or a Service Desk agent can complete the above steps for the user.

- After selecting **Save**, a confirmation message will appear, stating that the user account has been successfully created. Log out and sign back in to access the changes.

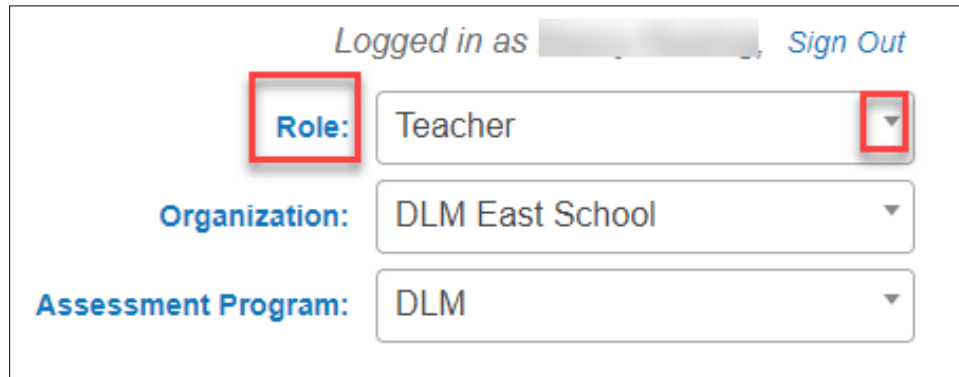
[SETTINGS](#)
[MANAGE TESTS](#)
[REPORTS](#)
[HELP](#)

[View Users](#)
[Add User](#)
[Upload Users](#)

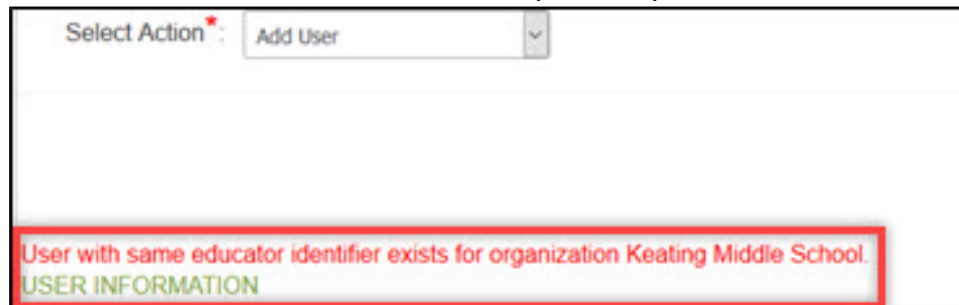
Successfully created User

- For a user with multiple roles, Educator Portal requires a default role. This default role is the one which will display to the user on the home screen when

first logging into Educator Portal. Typically, the default role is the one in which the user spends the most time. The other roles are available to the user when needed and can be changed in the drop-down menu in the upper right corner of the home screen.



9. Sometimes after adding a new user, an error message may display, indicating that a user with the same email is already in the system.



To locate the existing user, go to Activate or Deactivate a User on page 62 of this manual.

### *EDIT A USER'S ACCOUNT*

Use this procedure to edit data in a user's account or to change a user's role(s) or organizations from those previously assigned.

---

NOTE: Do not attempt to transfer a user account from one user to another. Instead, inactivate the user who no longer needs an Educator Portal account. Then create an account for the new user. This process takes only a few minutes.

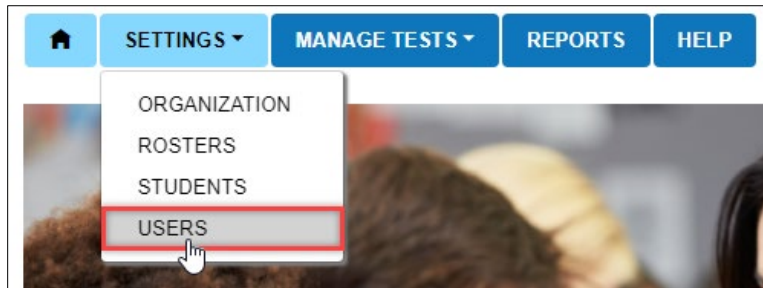
Transferring accounts violates the security agreement.

---

1. Select **Settings**.



2. Select **Users** from the drop-down menu.



3. On the **View Users: Select Criteria** screen, the fields for state, district, and school will prepopulate according to the user's permissions in Educator Portal. Apply filters, using the drop-down arrow in the fields to choose a different organization from those available.

4. Select **Search**.

5. The list of all active or pending users for the applicable organization will appear.

<input type="checkbox"/>	Status ↓	Last Name	First Name	Educator Identifier	Assessment Program(s)
<input type="checkbox"/>	Pending	Smith	Sally		DLM
<input type="checkbox"/>	Active				DLM, I-SMART
<input type="checkbox"/>	Active				DLM

HINT: To include inactive users, check the box next to **Include Inactive Users** before selecting **Search**.

View Users: Select Criteria

STATE: \* DLM QC IE State x ▾ DISTRICT: \* IE UAT District x ▾ SCHOOL: Select ▾

☒ Include Inactive Users Search

6. In the table of available users, select the box on the far left in the row for the user whose account needs editing.
7. At the bottom of the grid, select the **Edit** button (includes the pencil icon). The **Edit User: Enter User Information** screen will appear.

<input type="checkbox"/>	Status	Last Name ↑	First Name	Educ
<input type="checkbox"/>	Active	Austin	Joleen	atlastech7
<input checked="" type="checkbox"/>	Active	Barnett	Landen	atlastech
<input type="checkbox"/>	Active	Burrell	Lexia	atlastech
<input type="checkbox"/>	Active	Hume	Elliott	atlastech7
<input type="checkbox"/>	Active	Jatala	Annie	annieja
<input type="checkbox"/>	Active	Langas	Mari	jayhawk
<input type="checkbox"/>	Active	Westcott	Debbie	atlastech

8. In the upper portion of the **Edit User: Enter User Information** screen, make edits such as changing the last name, correcting spelling errors, etc. If a user's email address changes from one year to the next or during the school year, but the user has not changed organizations, do not create a new user account. Instead, edit the user's email. By following this method, the user's new email address will become the new Educator Portal username, but the user's password will not change.
9. If no changes to roles or organizations are needed for the user, select **Save** at the bottom of the screen. Edits will apply to all associated roles and organizations for the user.



Edit User : Enter User Information

FIRST NAME: \* John

LAST NAME: \* Educator

EMAIL ADDRESS: \* john.educator@email.com

EDUCATOR IDENTIFIER: \* 55551

### Organization & Roles

STATE: \* DLM QC IE State

ASSESSMENT PROGRAM: \* Select

ROLE: \* Select

Add

Default	State	Assessment Program	Role	District	School

Save Cancel

### IMPORTANT MESSAGES ABOUT THE TEACHER ROLE

If the email address changes for a user with the Teacher role, contact the Service Desk. The Service Desk agent will ensure the user's Educator Portal account matches their Required Test Administrator Training account in [Training Courses](#).

If the Educator Identifier changes for a user with the teacher role, use the user interface to make the change. Any new roster being created must match the new Educator Identifier. Existing rosters will be updated automatically. The Educator Identifier is case insensitive.

10. To further modify a user account, such as add more roles or organizations, **before** selecting the **Save** button, scroll to the **Organization & Roles** section in the lower portion of the screen.
11. Select the required **Assessment Program** and **Role**. Additional drop-down fields display depending on the role. Choose the appropriate district and school.

12. After selecting a new role or organization, select **Add**. This process must be followed for each additional role or organization needed.

First Name: \* John

Last Name: \* Educator

Email Address: \* john.educator@email.com

Educator Identifier: \* 55551

**Organization & Roles**

State: \* DLM QC IE State

Assessment Program: \* DLM

Role: \* District User

District: \* IE UAT District

**Add**

Save Cancel

13. When a user has more than one role or serves more than one organization, before selecting **Save**, the default role must be chosen. This role determines the role and organization that first appear when the user signs into Educator Portal. The default role should be the role used the most by the user.

Default	State	Assessment Program	Role	District	School
<input checked="" type="radio"/>	DLM QC YE State	DLM	Building User	YE District	YE School
<input type="radio"/>	DLM QC YE State	DLM	District Test Coordinator	Keating District YE	

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Save Cancel

14. If a role needs to be removed from a user, at the bottom of the screen to the left of the role to be removed, select the trash can icon.

Organization & Roles

STATE:\*

ASSESSMENT PROGRAM:\*

ROLE:\*

	Default	State	Assessment Program	Role	District	School
<input type="checkbox"/>	<input checked="" type="radio"/>	DLM QC IE State	DLM	Teacher	IE UAT District	IE UAT Element
<input type="checkbox"/>	<input type="radio"/>	DLM QC IE State	DLM	Teacher	IE UAT District	IE UAT High Sc
<input type="checkbox"/>	<input type="radio"/>	DLM QC IE State	DLM	District User	IE UAT District	

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15. When all changes have been made and are ready to be saved, select **Save**. This will close the **Edit User: Enter User Information** screen. Messages will appear stating whether the changes were successful or if a required field was missed. Complete the process and then **Save**.

### *CHANGING A USER ACCOUNT*

Table 22 briefly tells where user account changes are made.

Table 22

#### *Changing a User Account*

To Make This Change:	Do This:
Change <b>First Name</b> , <b>Last Name</b> , or <b>Email Address</b> .	Type the new information into the matching field at the top of the <b>Edit User: Enter User Information</b> screen.
Remove a role.	Select the trash can icon in the row for the role to be removed. At least one role must remain for the user.
Add a role.	Under <b>Organization &amp; Roles</b> , use drop-down menus to select appropriate role(s).
Change the default role.	In the list of roles beneath the <b>Organization &amp; Roles</b> section, select the radio button in the <b>Default</b> column to the left of the desired role.
Change Educator Identifier.	Type the new information into the matching field at the top of the <b>Edit User: Enter User Information</b> screen.
Add an organization.	Under <b>Organization &amp; Roles</b> , use drop-down menus to select appropriate organization.
Remove an organization.	On the <b>Edit User: Enter User Information</b> screen on the list of roles beneath the <b>Organization &amp; Roles</b> section, select the trash can icon to remove an organization.

### *MERGE MULTIPLE ACCOUNTS*

If multiple accounts were created for an individual user, best practice is to have those accounts merged into one account. Only a Service Desk agent has the level of permission in Educator Port to merge multiple accounts.

To prepare for the call to the Service Desk, determine which account to retain and use. If the user has the Educator Portal role of Teacher, choose the account associated with the Required Test Administrator Training. Ask the Service Desk agent to make any

needed edits while working with the accounts, i.e., ensuring the email address is correct.

### *RESEND THE KITE ACTIVATION EMAIL MESSAGE*

The Educator Portal logins are connected to email addresses. After the user is loaded into Educator Portal, within a few minutes, the system automatically generates a Kite activation email from [KITE-support@ku.edu](mailto:KITE-support@ku.edu). Using the hyperlink in the email, the user will activate their Educator Portal account. The activation link expires after 20 days. If the user does not receive the email, the district or building technology staff should be contacted. They can usually ensure the Kite activation email address is whitelisted so the email can get through the school's firewall.

HINT: A pending status indicates that the user has not activated their account. The user may have not received the activation email because a spam filter blocked it, or an incorrect email address was used when the account was created. The activation link expires after 20 days and will need to be reactivated.

### **Resend Activation Email**

Use the following procedure to resend the Kite activation email message.

1. Select **Settings**. The View Users: Select Criteria screen will display.



2. On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed.

A screenshot of the 'View Users: Select Criteria' screen. At the top is a navigation bar with buttons for home, 'SETTINGS', 'MANAGE TESTS', 'REPORTS', and 'HELP'. Below this is a sub-header 'View Users: Select Criteria'. Under the sub-header are three buttons: 'View Users' (highlighted with a red box), 'Add User', and 'Upload Users'. Below these buttons are three dropdown menus: 'STATE:' (pre-populated with 'DLM QC IE State'), 'DISTRICT:' (pre-populated with 'IE UAT District' and highlighted with a red box), and 'SCHOOL:' (pre-populated with 'Select' and highlighted with a red box). At the bottom left is a checkbox labeled 'Include Inactive Users' and a 'Search' button.

### 3. Select **Search**.

SETTINGS MANAGE TESTS REPORTS HELP

View Users Add User Upload Users

View Users: Select Criteria

STATE: \* DISTRICT: \* SCHOOL:

DLM QC IE State IE UAT District Select

☐ Include Inactive Users **Search**

### 4. The list of all active or pending users for the applicable organization will appear.

<input type="checkbox"/>	Status ↓	Last Name	First Name	Educator Identifier	Assessment Program(s)
<input type="checkbox"/>	Pending	Smith	Sally		DLM
<input type="checkbox"/>	Active				DLM, I-SMART
<input type="checkbox"/>	Active				DLM

### 5. Locate the user (options to filter, sort, and search are available).

### 6. Select the checkbox to the left of the user's name that is pending. (Uncheck the same box to deselect a user, if needed.) At the bottom of the screen, select the **Send Activation Email** button (includes an envelope icon). The activation email will be resent to the pending user.

<input type="checkbox"/>	Status	Last Name ↑	First Name	Educator Identifier	Email
<input type="checkbox"/>	Active	Almanzar	Belcalis	kyra.atlasku+teach@gmail.com	ats_kite_messages@ku.edu
<input type="checkbox"/>	Active	Austin	Joleen	atlastech785+iebu1@gmail.com	ats_kite_messages@ku.edu
<input type="checkbox"/>	Active	Barnes	Mariah	atlastech785+IESAA@gmail.com	ats_kite_messages@ku.edu
<input type="checkbox"/>	Active	Barnett	Landen	atlastech785+IET4@gmail.com	ats_kite_messages@ku.edu
<input type="checkbox"/>	Active	Blackburn	Pamela	999999999	pam.blackburn@ku.edu CPASS
<input type="checkbox"/>	Active	Broadus	Calvin	kyra.atlasku+teacher@gmail.com	ats_kite_messages@ku.edu
<input type="checkbox"/>	Active	Burrell	Lexia	atlastech785+IET3@gmail.com	ats_kite_messages@ku.edu
<input type="checkbox"/>	Active	Carter	Shawn	kyra.atlasku@gmail.com	ats_kite_messages@ku.edu
<input checked="" type="checkbox"/>	Pending	Chalmers	Carolann	12345	ats_kite_messages@ku.edu
<input type="checkbox"/>	Active	Cooper	Lucas	jlcooper@ku.edu	jlcooper@ku.edu

**Send Activation Email** View Edit Activate Deactivate

### *ACTIVATE OR DEACTIVATE A USER*

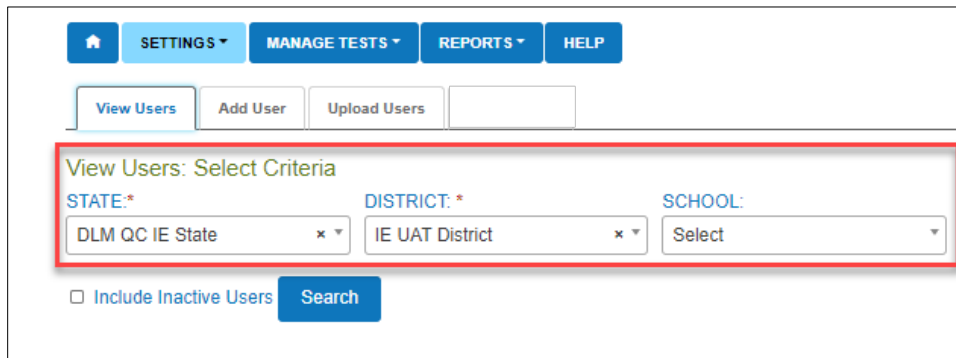
Sometimes users have been deactivated because they no longer needed an account in Educator Portal, i.e., they had left the district. Their account in Educator Portal has become inactive. To activate an inactive user account, i.e., the user has returned to the district, follow these steps.

## Activate a User

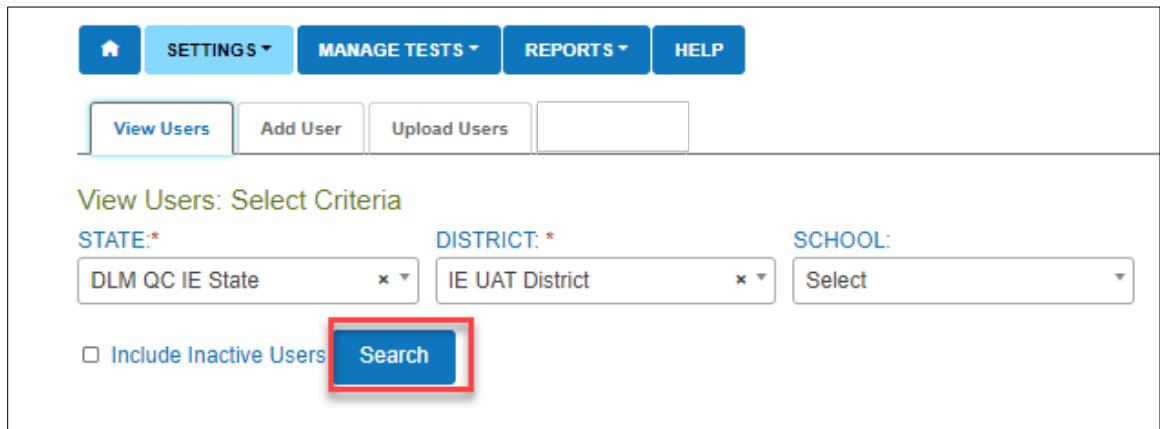
1. Select **Settings**. The View Users: Select Criteria screen will display.



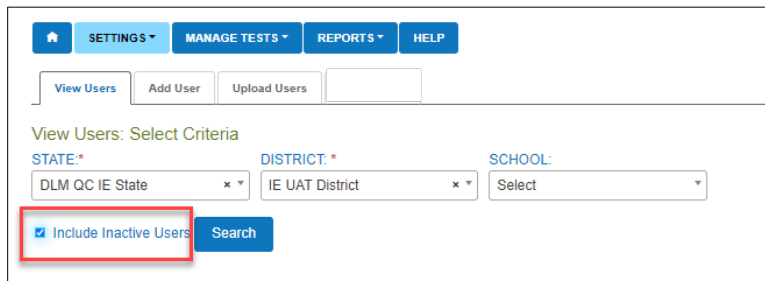
2. On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed.

A screenshot of the 'View Users: Select Criteria' screen. At the top is a navigation bar with 'SETTINGS', 'MANAGE TESTS', 'REPORTS', and 'HELP' buttons. Below this is a sub-navigation bar with 'View Users', 'Add User', and 'Upload Users' buttons. The main section is titled 'View Users: Select Criteria' and contains three dropdown menus: 'STATE: \*' (pre-filled with 'DLM QC IE State'), 'DISTRICT: \*' (pre-filled with 'IE UAT District'), and 'SCHOOL:' (pre-filled with 'Select'). Below these is a checkbox labeled 'Include Inactive Users' and a 'Search' button. The entire filter section is highlighted with a red rectangular box.

3. Select **Search**.

A screenshot of the 'View Users: Select Criteria' screen, identical to the previous one. The 'Search' button, located at the bottom right of the filter section, is highlighted with a red rectangular box.

4. The list of all active or pending users for the applicable organization will appear.
5. Check **Include Inactive Users**, and select Search.

A screenshot of the 'View Users: Select Criteria' screen. The 'Include Inactive Users' checkbox, located at the bottom left of the filter section, is checked and highlighted with a red rectangular box. The 'Search' button is also visible next to it.

6. Find the user to be activated and select the checkbox on the left in the row for the user.

7. Select the **Activate** button (includes a checkmark icon ✓) below the list of users.

<input type="checkbox"/>	Status	Last Name ↑	First Name	Educator
<input checked="" type="checkbox"/>	Inactive	Aaron	Brian	baaron0
<input type="checkbox"/>	Inactive	Abraham	Kathrine	e1
<input type="checkbox"/>	Inactive	Abrahamson	Kiki	e0
<input type="checkbox"/>	Inactive	Abrams	John	
<input type="checkbox"/>	Inactive	Abrams	Jill	86
<input type="checkbox"/>	Inactive	Abrams	Kathy	kabrams@
<input type="checkbox"/>	Inactive	Ackerman	Marcus	ackerm
<input type="checkbox"/>	Inactive	Acosta	Monica	e1
<input type="checkbox"/>	Active	Adamich	Kathy	88
<input type="checkbox"/>	Inactive	Adams	Mary Ann	maryann.adams

8. After activating the user, the user will quickly receive an activation email. The user's account must be activated within 20 days.

### Deactivate a User

If a user no longer needs an Educator Portal account, a user with Educator Portal permissions will need to deactivate the user. Deactivated users will no longer be able to log into Educator Portal.

1. Select **Settings**. The View Users: Select Criteria screen will display.



2. On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu if needed.

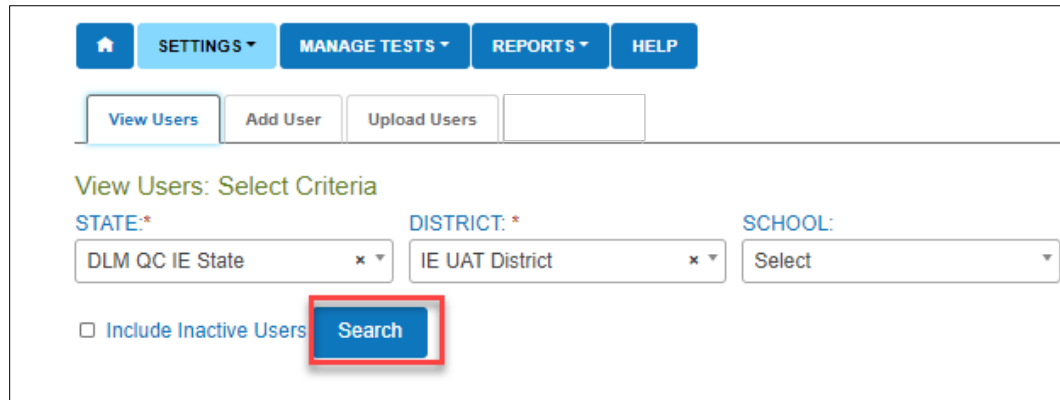
View Users: Select Criteria

STATE: \* 
 DISTRICT: \* 
 SCHOOL:

☐ Include Inactive Users



3. Select **Search**.



The screenshot shows the 'View Users' interface. At the top, there are navigation buttons: 'SETTINGS', 'MANAGE TESTS', 'REPORTS', and 'HELP'. Below these are buttons for 'View Users', 'Add User', and 'Upload Users'. The 'View Users' button is selected. Under 'View Users: Select Criteria', there are three dropdown menus: 'STATE' (set to 'DLM QC IE State'), 'DISTRICT' (set to 'IE UAT District'), and 'SCHOOL' (set to 'Select'). Below these is a checkbox for 'Include Inactive Users' and a 'Search' button, which is highlighted with a red box.

4. The list of all active or pending users for the applicable organization will appear.

HINT: A user with the teacher role should never be deactivated for an organization before checking with the SAA, RTC, or the organization's DTC. The account and organization may be for a test administrator who is rostered to students in multiple organizations.

5. Locate the user (options to filter, sort, and search are available), and select the checkbox to the left of the user's information.

6. Select the **Deactivate** button (includes the stop icon) at the bottom of the screen to deactivate the user.

<input type="checkbox"/>	Status	Last Name ↑	First Name	Educator Identifier	Email	Assessm
<input type="checkbox"/>	Active	Adamich	Kathy	8830311	ats_kite_messages@ku.edu	
<input type="checkbox"/>	Active	Agerter	Sibongile	7098235	ats_kite_messages@ku.edu	
<input type="checkbox"/>	Active	Agne	Teofilo		ats_kite_messages@ku.edu	
<input type="checkbox"/>	Active	AHNUPKANA	WENDY	17962	ats_kite_messages@ku.edu	
<input type="checkbox"/>	Active	AHONEN	ADAM	6046137	ats_kite_messages@ku.edu	
<input type="checkbox"/>	Active	AINSWORTH	JUSTIN	19189	ats_kite_messages@ku.edu	
<input type="checkbox"/>	Active	ALANIVA	CHAD	17385	ats_kite_messages@ku.edu	
<input type="checkbox"/>	Pending	ALBINA	SUSAN	susan.albina@matsuk12.us	ats_kite_messages@ku.edu	
<input type="checkbox"/>	Active	ALEXANDER	JANELLE	7850615	ats_kite_messages@ku.edu	
<input checked="" type="checkbox"/>	Active	Allen	Laura	7974740	ats_kite_messages@ku.edu	

At the bottom of the table, there are four buttons: 'Send Activation Email', 'Edit', 'Activate', and 'Deactivate'. The 'Deactivate' button is highlighted with a red box.

The deactivated user will be removed from **all organizations** to which they are associated.

### *VIEW USER EXTRACT*

The User Extract includes all user records in Educator Portal for the user's organization, including those uploaded via User Upload Template file or those added manually with the user interface. The extract also displays the user status: active, inactive, or pending. For steps on how to access the user extract, go the Educator Portal User Guide and find the section Understanding the User Extract for All States.

HINT: If a user is assigned to multiple organizations or has multiple roles in one organization, that user will have a line or record for each organization or role in the extract. This is expected and does not mean that the user has multiple accounts in Educator Portal.

### **MANAGE ENROLLMENT DATA**

Each year at the end of July, the Kite system deactivates (removes from view) student records in Educator Portal. Enrollment files must be created each year to **reactivate** student records from previous years or to enroll students who are new to Educator Portal.

---

NOTE: The Current Enrollment extract should be downloaded and saved before the last week in July to have a record of all students who were enrolled. This extract can be modified and used to upload students for the upcoming school year. All extracts, except the User extract, will be removed the last week of July.

---

The main enrollment file should be uploaded once per year after August 1. The upload can be done locally by the district or building data manager or at the state level, depending on state policy. Changes can be made as needed by subsequent uploads or manual entries using the user interface in Educator Portal.

Student data from the previous year should be edited for corrections before uploading the file. Depending on state policy, the student should be promoted to the next grade in the file before the upload. The grade level determines the testlets available for the student.

Students can be enrolled in large batches, which will be described first, or students can be enrolled one at a time with the user interface, which will be described later in this section. Users with the Teacher role do not have Educator Portal permissions to enroll students.

### *CREATE AN ENROLLMENT UPLOAD TEMPLATE FILE*

This is the optimal procedure for uploading multiple students into Educator Portal.

To create an enrollment file, follow these steps.

1. Download the Enrollment Upload Template file from the state's DLM webpage or from within Educator Portal on the Upload Enrollment screen.

HINT: To ensure the most current file is used, always start by downloading a new template.

2. Open the Enrollment Upload Template file in a spreadsheet program that can save data in the CSV format. After entering student data in the template, it **must** be uploaded as a CSV (comma-delimited) file. All other file formats will be rejected.
3. Using a new row for each student, enter the information into the Enrollment Upload Template file.

---

NOTE: On occasion, a student will be enrolled to receive instruction for one subject in one organization and another subject in a different organization. A student enrolled in more than one organization will need a row for each organization.

---

4. Complete all required fields. For best results for future searches in the database, complete as many optional fields as possible except for those that are to be left blank as noted on the chart of field requirements. This can be especially helpful in large districts with many students.

---

NOTE: A few state assessment administrators offer a translation guide that provides a correlation between the codes and identifiers commonly used in their state to the field names in the templates. If this type of resource is provided in your state, go the DLM website. In the search feature, type Translation Guide. Select the appropriate guide. Verify that all column headings appear in the file, even if optional columns are left blank. Do not remove optional columns or edit column headings.

---

5. Save the file as a CSV (comma-delimited) file in an easily accessible location. Leave the file open. If the file is closed, the formatting changes are typically lost. The system will load only open files saved in CSV (comma-delimited) format.

HINT: Students who change schools within the district or who leave the district can be moved manually. Go to Management of Student Moves and Transfers on page 116 of this manual.

Use the tables on the next several pages to compile enrollment information. Some of the fields with limited or complex entry structures are explained at the end of this section.

## ENROLLMENT FIELD DEFINITIONS

Table 23

### Enrollment Field Definitions

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
A	Accountability_District_Identifier	Alphanumeric; 30	No	The unique code assigned to the district as listed in the state organizational table in Column D	<p>The Accountability District Identifier (Column A) is <b>not</b> a required field in the Enrollment Upload Template file. It is available for state use if desired.</p> <p>If the codes are numeric and contain leading zeros, ensure that the leading zeros* are retained after each save.</p> <hr/> <p>NOTE: The Accountability District Identifier only becomes required if the Accountability School Identifier code is entered in column B.</p> <hr/>
B	Accountability_School_Identifier	Alphanumeric; 30	No	The unique code assigned to the school as listed in the state organizational table in column B	<p>The Accountability School Identifier (Column B) is <b>not</b> a required field in the Enrollment Upload Template file. It is available for state use if desired.</p> <p>If the code is numeric and contains leading zeros, ensure that the leading zeros* are retained after each save.</p> <hr/> <p>NOTE: The Accountability District Identifier only becomes required if the Accountability School Identifier code is entered in column B.</p> <hr/>

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
C	Attendance_District_Identifier	Alphanumeric; 30	Yes	The unique code assigned to the district where the student attends school and identifies the parent organization for a school (such as the school district)	Use a code from the District Number column (Column D) provided in the state organizational table. An entry in the template must be identical to a district code in the organizational table.  If a code is numeric, and contains leading zeros, ensure that the leading zeros* are retained after each save.
D	Student_Legal_Last_Name	Alphanumeric; 60	Yes	The student's last name	Use spaces and hyphenation where needed.  This entry will appear on the Individual Student Score Report.
E	Student_Legal_First_Name	Alphanumeric; 60	Yes	The student's first name	Use spaces and hyphenation where needed.  This entry will appear on the Individual Student Score Report.
F	Student_Legal_Middle_Name	Alphanumeric; 60	No	The student's middle name	If this field is entered, this entry will appear on the Individual Student Score Report.  Use spaces and hyphenation where needed.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
G	Generation_Code	Alphanumeric; 10	No	The part of the student's name used to denote the generation in the student's family (e.g., Jr., Sr., III, etc.)	If this field is entered, this entry will appear on the Individual Student Score Report.
H	Gender	Numeric; 1 0 = Female 1 = Male 2 = Nonbinary/undesignated	Yes	The student's gender	State policy in each state determines gender codes to use in the Enrollment Template Upload. Use of any other code will generate an error at the time of the upload.
I	Date_of_Birth	MM/DD/YYYY; 10	Yes	The date (month, day, and year) of the student's birth	Two-digit month/two-digit day/four-digit year

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
J	Current_Grade_Level	Numeric; 2 3-12  <b>Do NOT use leading zeros in single number grades, e.g., 3.</b>	Yes	The grade level at which a student enters and receives services in a school or an educational institution during a given academic session (e.g., 3 = third grade, 11 = eleventh grade)	Some states provide a birthdate chart to help data managers align the student's age with the grade to be assessed. Data managers are to refer to their state's DLM webpage. In the search feature, type birthdate chart. Select the one appropriate for your state.  The grade entered will appear on the Individual Student Score Report.
K	Local_Student_Identifier	Alphanumeric; 10	No	The unique code assigned to the student by the school or local education agency	If the code is numeric and contains leading zeros, ensure the leading zeros* are retained in a student's local student identifier.
L	State_Student_Identifier	Numeric; 10	Yes	The student's state identifier	If the code is numeric and contains leading zeros, ensure the leading zeros* are retained in a student's local student identifier.  The State Student Identifier may appear on the Individual Student Score Report, depending on state policy.



Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
M	Current_School_Year	YYYY; 4	Yes	The ending year of the current school year (e.g., for the 2021-2022 school year, enter 2022)	Use 2022.
N	Attendance_School_Program_Identifier	Alphanumeric; 10	Yes	The school code (typically four digits) or other location identifier that represents where the student attends school (i.e., the school whose staff will access the student information, including the student username and password for Student Portal)	Use a School Number provided in the state organizational table (Column B).  If the code is numeric and contains leading zeros, ensure the leading zeros* are retained in the attendance school program identifier. The number for the attendance school must exactly match a number in the organization table or the file upload will fail.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
O	School_Entry_Date	MM/DD/YYYY; 10	Yes	The date on which the student enrolls and begins to receive instructional services in a school. If the student leaves and then reenrolls, this date is to reflect the most recent enrollment date.	Two-digit month/two-digit day/four-digit year This entry <b>cannot</b> be left blank. If date is unknown and a fictitious date is entered to satisfy the field, this date should be realistic and as accurate as possible. If the student leaves and then reenrolls, this date is to reflect the most recent enrollment date.
P	District_Entry_Date	MM/DD/YYYY; 10	No	The date (month, day, and year) on which the student enrolls and begins to receive instructional services in a school district	Two-digit month/two-digit day/four-digit year If unknown, this entry can be left blank.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
Q	State_Entry_Date	MM/DD/YYYY; 10	No	The date on which the student enrolls and begins to receive instructional services in the state. If the student leaves the state and then reenrolls in school, this date is to reflect the most recent enrollment date.	Two-digit month/two-digit day/four-digit year If unknown, this entry can be left blank.
R	Comprehensive_Race	Numeric; 1	Yes	General racial category (or categories) that most clearly reflects the individual's recognition of their racial background	A table of potential values is provided on page 79 of this manual.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
S	Primary_Disability_Code	Alpha; 2 letters for each code	Yes	Indicates whether the student has an active IEP under the Individuals with Disabilities Education Act (IDEA—Part B)	Each entry is alpha (e.g., AM Autism, DB Deaf Blindness). Tables of potential values are provided on page 80 of this manual.
T	Gifted_Student	Alpha; 5  TRUE or FALSE	No	Indicates whether the student has an active IEP for giftedness	<b>Must leave blank</b> for students taking the DLM assessments.
U	Hispanic_Ethnicity	Alphanumeric	Yes	The code that reflects the individual's recognition of their Hispanic ethnicity background (Yes or No)	

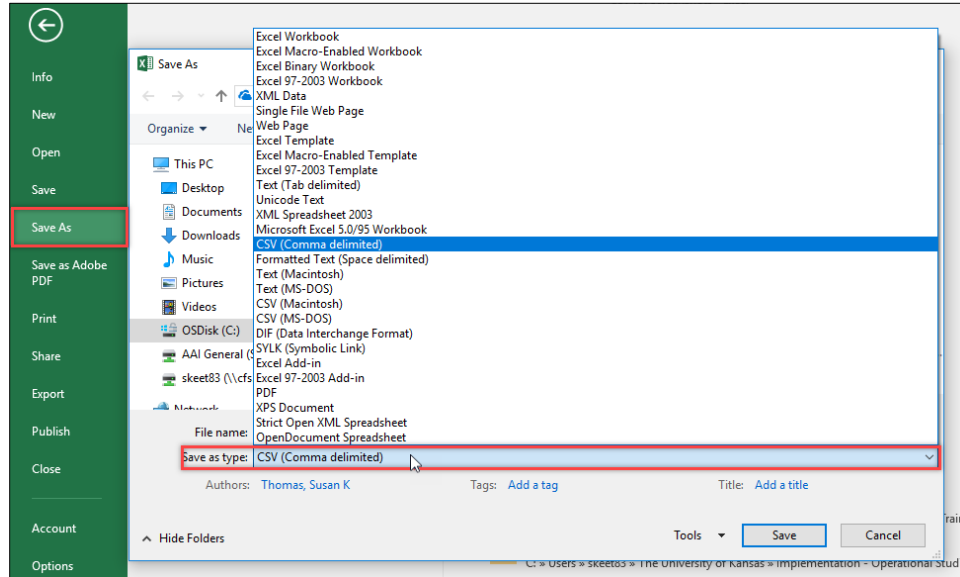
Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
V	First_Language	Alphanumeric; 1 or 2	No	The code for the primary language or dialect (not ethnicity) of the student	Tables of potential values are provided on page 81 of this manual.
W	ESOL_Participation_Code	Numeric; 1 number only	Yes	The number entered identifies the type of ESOL program in which the student participates.	English for Speakers of Other Languages (ESOL). A table of potential values is provided on page 82 of this manual.
X	Assessment_Program_1	Alphanumeric; 30	Yes	The code to enable the DLM system for the student	Enter the code DLM in all caps.
Y	Assessment_Program_2	Alphanumeric; 30	No	Allows the student to be assigned to an additional assessment program	<b>Must leave blank.</b>

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
Z	Assessment_ Program_3	Alphanumeric; 30	No	Allows the student to be assigned to an additional assessment program	<b>Must leave blank.</b>

\*For help preserving leading zeros, go to Include Leading Zeros in an Upload File on page 36.

Hint: Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format. No other one will upload successfully.

Figure 6  
*Saving as CSV in Excel*



### Comprehensive Race

Comprehensive\_Race (column R) is a required field and cannot be left blank. Enter a number from Table 24 that best aligns to the student's race. For questions or direction about comprehensive race, ask the assessment coordinator or the state assessment administrator.

Table 24

### Comprehensive Race

Entry	Definition
1	White
2	African American
4	Asian
5	American Indian
6	Alaska Native
7	Two or more races
8	Native Hawaiian or Pacific Islander

### Primary Disability Code

The column Primary\_Disability\_Code (column S) is a required field and cannot be left blank. Enter one of the codes from Table 25 that best aligns to the student's primary disability.

Table 25

#### *Primary Disability Code*

Entry	Definition
AM	Autism
DB	Deaf/blindness
DD	Developmentally delayed (ages 3-9 only)
ED	Emotional disturbance
HI	Hearing impairment
ID	Intellectual disability
LD	Specific learning disability
MD	Multiple disabilities
EI	Eligible individual
DA	Decline to answer
ND	No disability
OH	Other health impairment
OI	Orthopedic impairment
SL	Speech or language impairment
TB	Traumatic brain injury
VI	Visual impairment
WD	Documented disability



## First Language

First\_Language (column V) is an optional field and can be left blank. If using this column for English speakers, leave the field blank. For other first languages, use one of the numbers from Table 26 that best aligns to the student's first language.

Table 26

### *First Language*

Entry	Definition
Blank	English
1	Chinese (Mandarin or Cantonese)
2	Dinka (Sudanese)
3	French
4	High German
5	Hmong
6	Khmer (Cambodian)
7	Korean
8	Lao
10	Filipino or Tagalog (Philippines)
11	Russian
13	Spanish
14	Vietnamese
15	Arabic
16	Other
17	Somali
18	Thai
19	Portuguese
20	Farsi (Iranian)
21	Chuukese (e.g., Marshall Island, Micronesia)
22	Bosnian
23	Burmese

Entry	Definition
24	Hindi
25	Urdu
26	Swahili
27	Nepali
28	American Sign Language (ASL)
29	Serb
30	Croatian
31	Turkish
32	Karen languages (e.g., Burma, Myanmar)
33	Haitian/Haitian Creole
34	Gujarati
35	Punjabi
36	Pashto
37	Dari
38	Quiche
39	Mam
40	Ilokano
41	Visayan
42	Low German
43	Other signed language
44	English—with other language background
45	Native American languages

### English for Speakers of Other Languages (ESOL\_Participation\_Code)

The column ESOL\_Participation\_Code (column W) is a required field and cannot be left blank. Enter the participation number from Table 27 that best aligns to the program in which the student participates.

Table 27

#### *ESOL Participation Code Column*

Entry	Definition
0	Neither an ESOL-eligible student nor an ESOL-monitored student
1	Title III Funded
2	State ESOL/bilingual funded
3	Both Title III and state ESOL/bilingual funded
4	Monitored ESOL student
5	Eligible for ESOL program based on an English language proficiency test but not currently receiving ESOL program services. Example: a child whose parents/guardians have waived them out of ESOL services, but the district is still obligated to provide ESOL support.
6	Receives ESOL services and not funded with Title III and/or state ESOL funding

#### *UPLOAD AN ENROLLMENT UPLOAD TEMPLATE FILE*

This is the most efficient procedure for uploading (activating) multiple students into Educator Portal.

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NOTE: For some DLM Consortium states, all student data for the entire state is entered at the state level.

A state may have a system in place for directly submitting multiple student records to Educator Portal, i.e., OneRoster.

Before using the following procedures, check with the assessment coordinator and/or the DLM Service Desk about the policy in your state.

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When using the Enrollment Upload Template file, each row that has a new State Student Identifier results in the creation of a unique student record. In a row with an existing or previously enrolled/uploaded State Student Identifier, the new upload overwrites and updates the previous record.

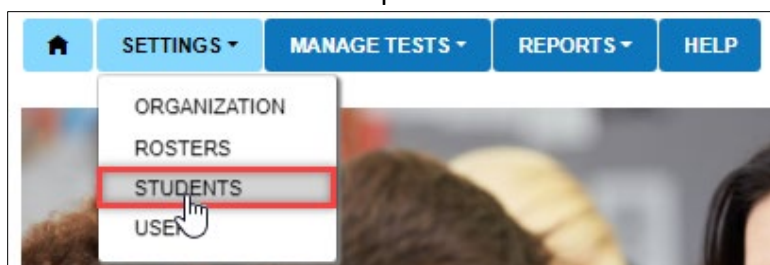
NOTE: Occasionally, a student is enrolled in one school for one subject and different school for a different subject. These students will have a line for each organization.

HINT: Up to 5,000 records at a time may be loaded. However, large files may load slowly and be difficult to troubleshoot. Loading 100 records or fewer is recommended to expedite troubleshooting.

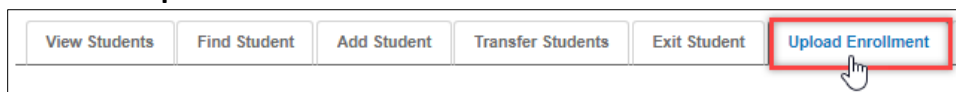
1. Select **Settings**.



2. Select **Students** from the drop-down menu.



3. Select the **Upload Enrollment** tab.



4. In the **Select Criteria** fields, apply filters to choose the correct level. If a state level user is uploading for the entire state, the district/school are left blank. For a district or building level user, the fields will prepopulate according to the user's level of permissions. When needed, select the district/school from the drop-down menu.

A screenshot of the 'Upload Enrollment: Select Criteria' form. The form has a header with navigation buttons. Below the header is a row of buttons: 'View Students', 'Find Student', 'Add Student', 'Transfer Students', 'Exit Student', and 'Upload Enrollment'. The 'Upload Enrollment' button is highlighted. Below the buttons is the form title 'Upload Enrollment: Select Criteria'. The form contains three fields: 'STATE:\*' with a dropdown menu showing 'DLM QC YE State', 'DISTRICT:' with a dropdown menu showing 'Select', and 'SCHOOL:' with a dropdown menu showing 'Select'. These three fields are highlighted with a red rectangular box. Below the fields is a 'File: ?\*' label, a 'Select File' button, and an 'Upload' button.

5. Select the **?\*** icon next to the word File to download the Current Enrollment Upload Template file.

6. Enter enrollment data for all students for the current school year. Each row in the enrollment file is for one student record. Save the file as a CSV (comma-delimited) file. Leave the file open. Use the **Select File** button to choose the saved Enrollment Upload Template file.

SETTINGS MANAGE TESTS REPORTS DASHBOARD HELP

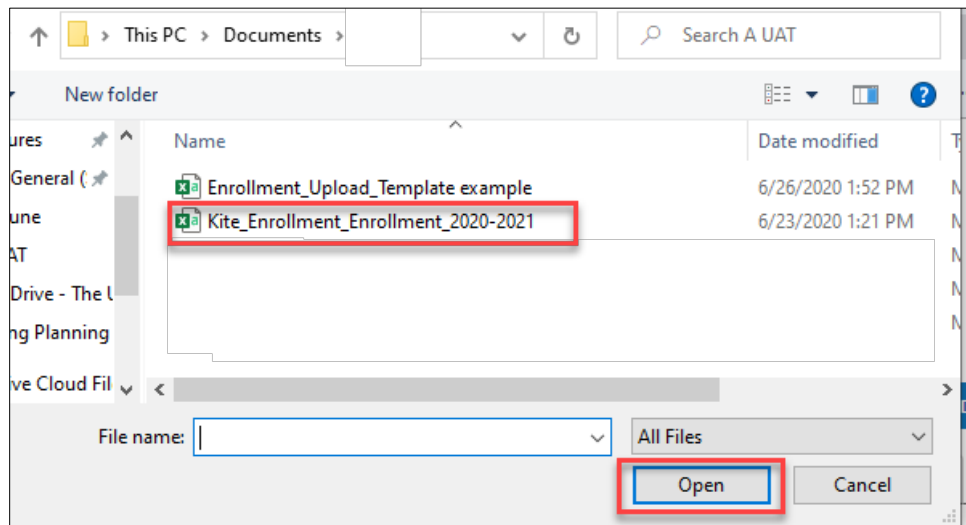
View Students Find Student Add Student Transfer Students Exit Student Upload Enrollment Upload

Upload Enrollment: Select Criteria

STATE: DLM QC YE State DISTRICT: Select SCHOOL: Select

File: \* Select File Upload

7. Locate the saved Enrollment Upload Template file that contains the updated student data for the new school year. Verify that the saved file has a CSV (comma-delimited) file extension. File names with extensions ending in XLS or XLSX will be rejected.



8. Select **Open**. The file name will then appear in the File field.

Upload Enrollment: Select Criteria

STATE:  DISTRICT:  SCHOOL:

File:

Uploaded	Status	Created/Updated	Rejected	Alerts	File

9. Select the **Upload** button.


10. The confirmation message indicates the number of records uploaded and, if applicable, the number of records rejected. In the following example, 30 records were uploaded (Completed/Updated) without an error.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Tuesday, June 23, 2020 1:28:08 PM	COMPLETED	30	0	0	

Page 1 of 1

11. The following information will display for each upload:

- Uploaded: Date and Time of the upload
- Status: Completed or Rejected
- Created/Updated: Number of records uploaded successfully
- Rejected: Number of records with errors
- Alerts: A message about a row in the file, i.e., a student already exists for this record in the state using this State Student Identifier and a different date of birth
- File: A CSV icon will display if the file has errors. The example following shows a file that was rejected because of errors.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Monday, June 22, 2020 2:19:17 PM	COMPLETED	0	1	0	

Page 1 of 1

12. Select the CSV file icon to open the file and read the error messages related to each line in the upload that was rejected. Make corrections and upload again, following the upload steps previously outlined.

HINT: Some alerts in the enrollment upload notify users that the student is also enrolled in another school. Clarify where the student is currently enrolled.

### *ENROLLMENT FIELD VALIDATION*

A system validation is applied to help prevent duplicate enrollments within a state when enrolling a student. If one student's last name, first name, gender, and date of birth match another student's, the data manager will receive this alert:

*"Another student in your state is already enrolled who has matching first name, last name, gender, and date of birth, but a different state ID. If you think this is an error, contact your State Assessment Administrator for direction."*

Both records will be created, but the data manager can edit one or both records in the User Interface in Educator Portal.

### *CHANGE ENROLLMENT DATA PREVIOUSLY UPLOADED*

To correct or change a previous uploaded record, prepare a new file with the corrected information and repeat the upload steps outlined in the section Upload an Enrollment Upload Template File on page 82. The new record will be matched to the previous record using the State\_Student\_Identifier field. The new record overwrites and updates the previous record.

HINT: If the student has left the district or transferred to another building within the district, remove the student from the enrollment file. District-level users can transfer students from one building to another within their district. Go to Management of Student Moves and Transfers on page 82.

On occasion, a student may be enrolled in more than one organization (e.g., one for ELA and another for mathematics). When this occurs, the student will have a record or line for each organization.

### *USING THE CURRENT ENROLLMENT EXTRACT TO UPDATE ENROLLMENT RECORDS*

The Current Enrollment extract includes all records for students who are enrolled in the user's organization. The records include those uploaded via an Enrollment Upload Template file, the manual user interface, or a web service. The Current Enrollment extract is a valuable resource for reviewing, editing, and then using for uploads. If the Current Enrollment extract was downloaded and saved before the annual Educator Portal data rollover the last week of July, the extract can be used to update enrollment records for the upcoming school year. Follow these steps:

1. Delete the first five columns in the extract so it exactly matches the Enrollment Upload Template file for the current year. The first five columns to be deleted are:
  - A. Extract State
  - B. Extract District
  - C. Extract School Name
  - D. Extract Last Modified Time
  - E. Extract Last Modified By
2. Modify the file as needed (i.e., promote the students to the next grade).
3. Ensure all other student data are correct.
4. Perform the upload.

Remove a Student from Educator Portal is on page 103.

Contact the State Assessment Administrator or a Service Desk agent to transfer the student from one district to another. In states with regions, the Regional Test Coordinator or the Regional User can transfer the student from one district to another within the region.

### *ADD A STUDENT RECORD MANUALLY*

This procedure is most helpful when adding only a few students, typically five or fewer. When adding more than five students, using the Enrollment Template is more efficient. However, the manual process can be used for any number of students, one at a time, at the data manager's discretion.

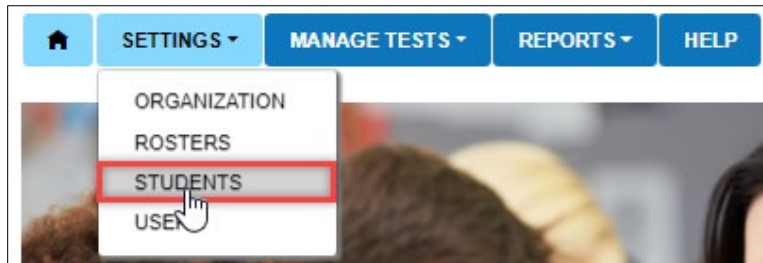
HINT: Students can be manually enrolled using the Add Student feature in the user interface if they have **not** been enrolled since the 2015-2016 school year or if they have never had an Educator Portal account.

To reactivate a few students, use the Find a Student feature described on page 101 of this manual.

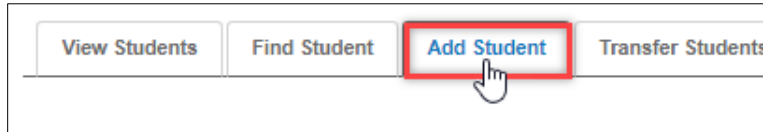
1. Select **Settings**.



2. Select **Students** from the drop-down menu.



3. Select the **Add Student** tab.



4. Enter the State Student Identifier and Select **Add**.

A screenshot of the 'Add Student' form. At the top, there is a navigation bar with buttons: 'HOME', 'SETTINGS', 'MANAGE TESTS', 'REPORTS', 'DASHBOARD', and 'HELP'. Below this is a tabbed interface with tabs: 'View Students', 'Find Student', 'Add Student', 'Transfer Students', 'Exit Student', and 'Upload Enrollment'. The 'Add Student' tab is active. The form contains the text 'Add Student: Enter State Student Identifier' and a label 'STATE STUDENT IDENTIFIER: \*' above a text input field. The input field is highlighted with a red rectangular box. At the bottom left of the form is a blue button labeled 'Add'.



5. All fields with a red asterisk are required. Fill in as many fields as possible. However, the Gifted field **must say NO**.

<b>Student</b>		
LEGAL FIRST NAME:*	LEGAL MIDDLE NAME:	LEGAL LAST NAME:*
<input type="text"/>	<input type="text"/>	<input type="text"/>
GENERATION:		
<input type="text" value="Select"/>		
<b>Demographic</b>		
GENDER:*	DATE OF BIRTH:*	FIRST LANGUAGE:
<input type="text" value="Select"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Select"/>
COMPREHENSIVE RACE:*	HISPANIC ETHNICITY:*	
<input type="text" value="Select"/>	<input type="text" value="Select"/>	
<b>Profile</b>		
PRIMARY DISABILITY CODE:*	GIFTED STUDENT:	ASSESSMENT PROGRAM:*
<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Dynamic Learning Maps"/>
ESOL PARTICIPATION CODE:*	ESOL ENTRY DATE:	USA ENTRY DATE:
<input type="text" value="Select"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>
<b>School Enrollment for 2021</b>		
DISTRICT:*	SCHOOL:*	GRADE:*
<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>
ACCOUNTABILITY DISTRICT:	ACCOUNTABILITY SCHOOL:	LOCAL STUDENT IDENTIFIER:
<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>
STATE ENTRY DATE:	DISTRICT ENTRY DATE:	SCHOOL ENTRY DATE:*
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>
		<input type="button" value="Save"/> <input type="button" value="Reset"/>

6. Select **Save**.
7. A message will appear reading, "This student record has successfully saved." However, if each required field is not entered, a message in red will appear under any unfilled required field.
8. System validations are applied to manual enrollments like they are to the batch enrollments. The State Student Identifier is validated first. If another student is

already in the system for the school year with the same identifier, a message will display letting the data manager know that another student has the same identifier. The data manager will need to edit the identifier and select the **Add** button again. In the case where a student will be enrolled in two different schools at the same time, the data manager will need to use the Enrollment Upload Template file to accomplish this special enrollment. The student will have a line for each organization in which they are enrolled.

The screenshot shows the 'Add Student' form in a web application. At the top, there is a navigation bar with buttons for 'SETTINGS', 'MANAGE TESTS', 'REPORTS', 'DASHBOARD', and 'HELP'. Below this is a sub-navigation bar with buttons for 'View Students', 'Find Student', 'Add Student' (which is highlighted), 'Transfer Students', 'Exit Student', 'Upload Enrollment', and 'Upload'. The main content area is titled 'Add Student: Enter State Student Identifier'. It contains a label 'STATE STUDENT IDENTIFIER: \*' and a text input field with the value '3896299743'. Below the input field is a blue 'Add' button. An orange error message box is displayed at the bottom right, containing the text: '© 2020 University of Kansas. A student with the entered State Student Identifier already exists and is active for this school year. To make changes, please use the upload, edit or transfer functions.'

9. If no matching State Student Identifier is found, the system continues the next validation of the student's legal first name, legal last name, gender, and date of birth. If all four of these fields match an existing student, the data manager will receive the following warning message:

The screenshot shows a 'Warning' dialog box with a title bar that says 'Warning' and a close button. The main text of the dialog reads: 'Warning: Another student in your state is already enrolled who has matching first name, last name, gender, and date of birth, but, a different state ID. If you think this is an error, contact your State Assessment Administrator for direction.' Below this text, it says 'Select Continue to enroll the student or Cancel to go back and review.' At the bottom of the dialog are two buttons: 'Continue' and 'Cancel'.

### Student Upload Definitions for Manual Uploads in the User Interface

The information in this table applies only when adding a student manually, one at a time, using the user interface. Field names with an asterisk are required. When uploading multiple students using an Enrollment Upload Template file, use the definition table(s) on page 69 of this manual.

Table 28

#### *Student Upload Definitions for Manual Uploads*

Field Name	Required	Definition	Special Notes
State Student Identifier*	The unique alphanumeric code assigned to the student by the school or local education agency	Include leading zeros when applicable	This entry may appear on the Individual Student Score Report depending on state policy.
STUDENT	Required	Definition	Special Notes
Legal First Name*	Yes	The student's first name	Required, cannot leave blank. This entry will appear on the Individual Student Score Report.
Legal Middle Name	No	The student's middle name	This is an optional field and can remain blank. If entered, this entry will appear on the Individual Student Score Report.

Field Name	Required	Definition	Special Notes
Legal Last Name*	Yes	The student's last name	Required, cannot leave blank. This entry will appear on the Individual Student Score Report.
Generation	No	The part of the student's name that denotes the family generation (e.g., Jr., Sr., III, etc.)	This is an optional field and can remain blank. If entered, this entry will appear on the Individual Student Score Report.
DEMOGRAPHIC	Required	Definition	Special Notes
Gender*	Yes	The student's gender: F = Female M = Male N = Non-binary/undesigned	Required, cannot leave blank. Only the genders available for selection in your state will display.
Date of Birth	Yes	DD/MM/YYYY	Required, cannot leave blank
First Language	No	This field can be used to describe a student's first language.	First Language is an optional field and can remain blank.
Comprehensive Race*	Yes	General racial category (or categories) that most clearly reflects a student's recognition of their racial background	Required, cannot leave blank. Choose from options presented.
Hispanic Ethnicity*	Yes	A student's recognition of their Hispanic ethnicity (Yes or No)	Required, cannot leave blank. Choose from options presented.
PROFILE	Required	Definition	Special Notes
Primary Disability Code*	Yes	Does the student have an active IEP under the Individuals with Disabilities Education Act (IDEA—Part B)	Required, cannot leave blank. Choose from options presented.

Field Name	Required	Definition	Special Notes
Gifted Student	No	Does the student have an active IEP for giftedness (Yes or No)	<b>Must choose No</b> for students taking the DLM alternate assessments
Assessment Program*	Yes	Enables DLM alternate assessment and the First Contact survey for the student	This field prepopulates to Dynamic Learning Maps.
ESOL Participation Code*	Yes	English for Speakers of Other Languages (ESOL)  The type of ESOL/bilingual program in which the student participates	Required, cannot leave blank
ESOL Entry Date	No	The date the ESOL participation began	Not required and can remain blank. However, if the specific date is known, it can be entered.
USA Entry Date	No	The date of entry into USA	Not required and can remain blank. However, if the specific date is known, it can be entered.

Field Name	Required	Definition	Special Notes
<b>SCHOOL ENROLLMENT FOR 2021</b>			
District*	Yes	The unique alphanumeric code assigned to the district by the DLM alternate assessment. This identifies the parent organization for a school (such as the school district).	Required, cannot leave blank. This field will prepopulate for district- and building-level users, but for a state-level user, district options are available for selection in a drop-down menu. Choose from options presented.
School*	Yes	The school code (typically four digits) or other location identifier that represents where the student attends school. This is the school whose staff accesses the student information, including the student username and password for Student Portal.	Required, cannot leave blank. This field will prepopulate for district- and building-level users, but for a state-level user, district options are available for selection in a drop-down menu. Choose from options presented.

Field Name	Required	Definition	Special Notes
Grade*	Yes	The grade level that is entered should be the grade in which the student receives services in a school or an educational institution during a given academic session.	Required, cannot leave blank. Some states provide a birthdate chart to help data managers align the student's birthdate with the grade to be assessed. Refer to the state's DLM webpage. Select the Supplemental Resource tab to access the birthdate chart so the correct grade can be entered.
Accountability District	No	The unique alphanumeric code that has been assigned to a district as listed in each state's organizational table	Not required and can remain blank. However, this field only becomes required if an Accountability School is entered.  Other accountability district options are available for selection by district or building level users who have permission to enroll students.

Field Name	Required	Definition	Special Notes
Accountability School	No	The unique alphanumeric code assigned to a school as listed in each state's organizational table	<p>Not required and can remain blank. However, if a school code is entered, then the corresponding accountability district field must also be entered to validate that the district and school match in the organizational table.</p> <p>Other accountability school options are available for selection by district or building level users who have permission to enroll students.</p>
Local Student Identifier	No	The unique alphanumeric code assigned to the student by the school or local education agency—include leading zeros when applicable.	
State Entry Date	No	The date on which the student enrolls and begins to receive instructional services in the state	<p>Not required and can remain blank. However, if the specific date is known, it can be entered.</p> <p>If the student leaves and then reenrolls, this date is to reflect the most recent enrollment date.</p>



Field Name	Required	Definition	Special Notes
District Entry Date	No	The date on which the student enrolls and begins to receive instructional services in a district	<p>Not required and can remain blank. However, if the specific date is known, it can be entered.</p> <p>If the student leaves and then reenrolls, this date is to reflect the most recent enrollment date.</p>
School Entry Date*	Yes	The date on which the student enrolls and begins to receive instructional services in a school	<p>Required, cannot leave blank. If the specific date is unknown and a fictitious date is entered to satisfy the field, this date should be as realistic and accurate as possible.</p> <p>If the student leaves and then reenrolls, this date should reflect the most recent enrollment date.</p>

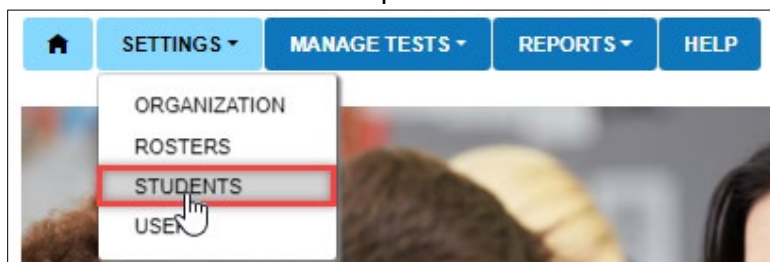
## EDIT A STUDENT RECORD MANUALLY

This procedure cannot be used to change the school or district associated with a student record. For information about changing a school or district, go to the section Management of Student Moves and Transfers on page 116 of this manual.

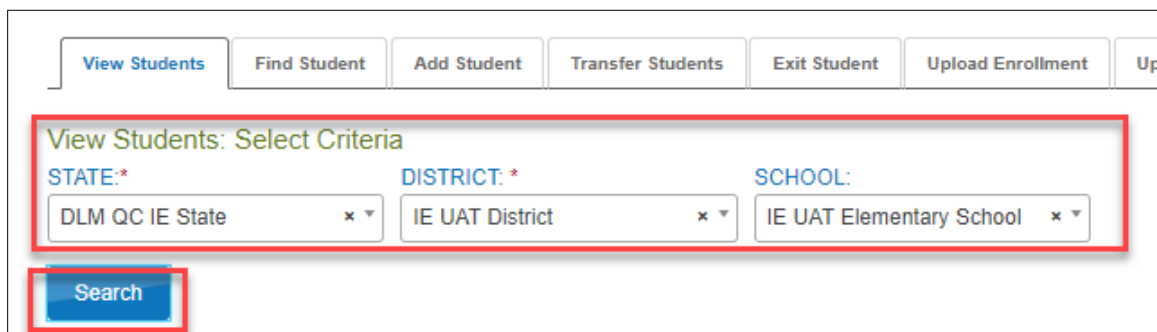
1. Select **Settings**.



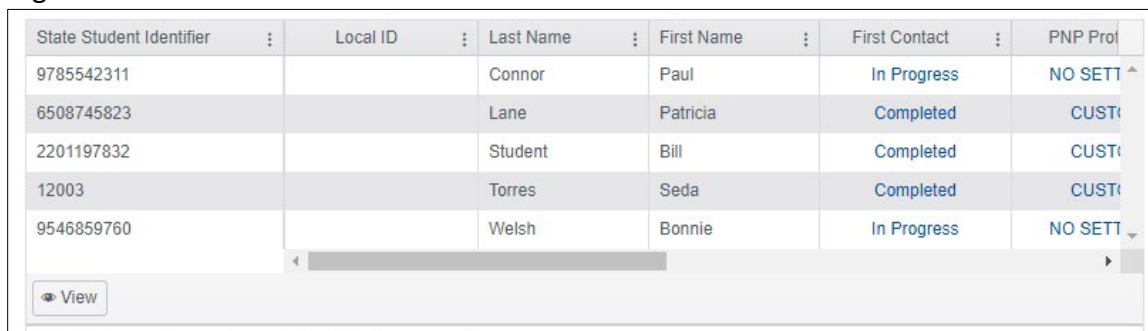
2. Select **Students** from the drop-down menu.



3. On the **View Students** tab under **Select Criteria**, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed.

A screenshot of the 'View Students: Select Criteria' form. At the top, there is a row of buttons: 'View Students', 'Find Student', 'Add Student', 'Transfer Students', 'Exit Student', 'Upload Enrollment', and 'Up'. Below this, the form has three dropdown menus labeled 'STATE:', 'DISTRICT:', and 'SCHOOL:'. The 'STATE:' dropdown is set to 'DLM QC IE State', 'DISTRICT:' is set to 'IE UAT District', and 'SCHOOL:' is set to 'IE UAT Elementary School'. Each dropdown has a small 'x' icon and a downward arrow. Below these fields is a blue 'Search' button, which is highlighted with a red rectangular box.

4. Select **Search**. A list of students will become available for the selected organization.




State Student Identifier	Local ID	Last Name	First Name	First Contact	PNP Prof
9785542311		Connor	Paul	In Progress	NO SETT ^
6508745823		Lane	Patricia	Completed	CUST
2201197832		Student	Bill	Completed	CUST
12003		Torres	Seda	Completed	CUST
9546859760		Welsh	Bonnie	In Progress	NO SETT v

View

NOTE: All students displayed in screenshots throughout this manual are fictitious.

5. To edit a student record, highlight the row with the State Student Identifier to be edited.
6. Select the **View** button at the bottom of the screen.

State Student Identifier	Local ID	Last Name	First Name	First Contact	PNP Profile
9785542311		Connor	Paul	In Progress	NO SETTINGS
6508745823		Lane	Patricia	Completed	CUSTOM
2201197832		Student	Bill	Completed	CUSTOM
12003		Torres	Seda	Completed	CUSTOM
9546859760		Welsh	Bonnie	In Progress	NO SETTINGS

 View

7. The **View Student Record** screen with the student's name will appear. At the top right of the screen, select the word **Edit**.

View Student Record - Paul Connor

Student

Student State ID: 9785542311

Date of Birth: 04/12/2011

Demographic

Gender: Male

First Language: Dinka (Sudanese)

Comprehensive Race: Two or More Races

Hispanic Ethnicity: Yes

Primary Disability: Speech or Language Impairment

Assessment Program: DLM - Dynamic Learning Maps

ESOL Participation: Title III Funded

USA Entry:

PNP Profile: [No Settings](#)

First Contact Survey: [In Progress](#)

ESOL Entry:

School Enrollment

- IE UAT District (IE\_UAT\_DT) / IE UAT Elementary School (IE\_UAT\_ES) Grade 3, School Year 2020

Accountability:

Student Local ID:

State Entry:

Subject:

Gifted Student:

District Entry:

Course

School Entry: 07/01/2020

Educator

Roster

NOTE: Only state-, district-, or building-level staff with permission to edit student data can edit student records and have the edit button available. Teachers and Proctors can view the student's record and should convey any necessary corrections to the appropriate district/building staff. In the Edit Student Record window, edits can be made. Scroll to the bottom of the screen to select the Save button.

**Edit Student Record - Paul Connor**

**Profile**

PRIMARY DISABILITY:\*  
SL - Speech or Language Im... x v

ASSESSMENT PROGRAM:\*  
DLM-Dynamic Learning Maps x

GIFTED STUDENT:  
Select v

ESOL PARTICIPATION:\*  
1 - Title III Funded [1] x v

ESOL ENTRY DATE:  
mm/dd/yyyy

USA ENTRY DATE:  
mm/dd/yyyy

**School Enrollment for Year 2020**

DISTRICT:  
IE\_UAT\_DT - IE UAT District

SCHOOL:  
IE\_UAT\_ES - IE UAT Elementary School

GRADE :\*  
Grade 3 x v

ACCOUNTABILITY DISTRICT:

ACCOUNTABILITY SCHOOL:

LOCAL STUDENT IDENTIFIER:

STATE ENTRY DATE:  
mm/dd/yyyy

DISTRICT ENTRY DATE:  
mm/dd/yyyy

SCHOOL ENTRY DATE :\*  
07/01/2020

**Save**

8. A message at the top of the window indicates that student updated successfully. Close the Edit Student Record window by selecting the X in the upper right corner.

**Edit Student Record - Paul Connor**

**Student**

LEGAL FIRST NAME :\*  
Paul

LEGAL MIDDLE NAME:

LEGAL LAST NAME :\*  
Connor

GENERATION:  
Select v

STATE STUDENT ID :\*  
9785542311

**Demographic**

GENDER :\*  
Male x v

DATE OF BIRTH :\*  
04/12/2011

FIRST LANGUAGE:  
2 - Dinka (Sudanese) x v

COMPREHENSIVE RACE :\*  
7 - Two or More Races x v

HISPANIC ETHNICITY :\*  
Yes x v

**Profile**

PRIMARY DISABILITY :\*  
ASSESSMENT PROGRAM :\*  
GIFTED STUDENT :

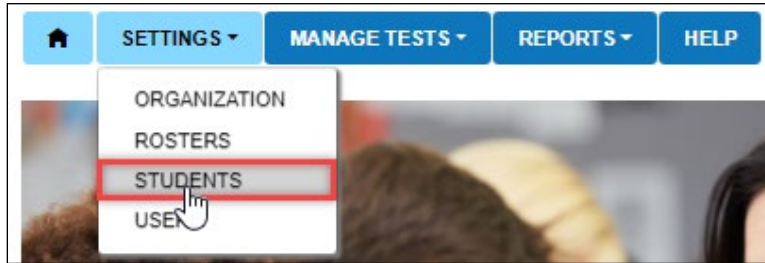
## FIND A STUDENT

State, district, and building users with appropriate permission levels may use a State Student Identifier to locate an inactive student record in their state and to reactivate the student's record for the current school year.

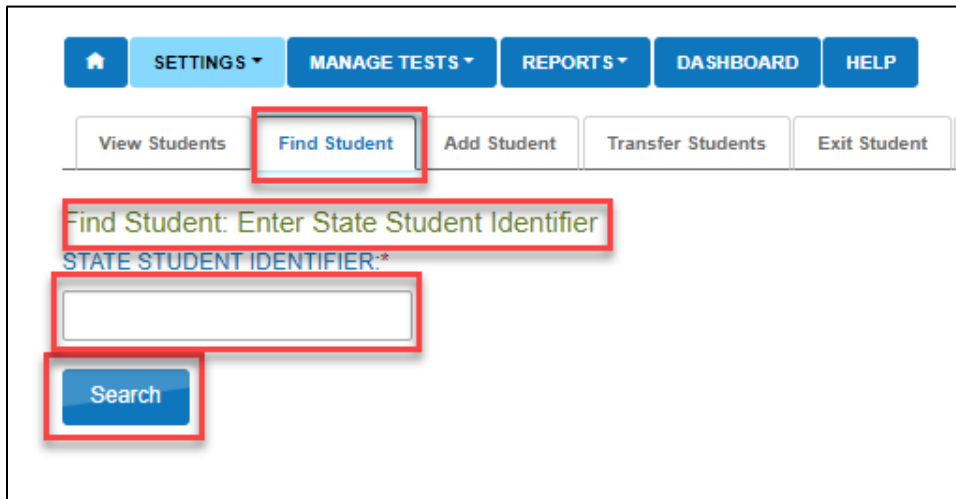
1. Select **Settings**.



2. Select **Students** from the drop-down menu.



3. Select the **Find Student** tab.
4. Enter the State Student Identifier.
5. Select the **Search** button.

A screenshot of the 'Find Student' form. The 'Find Student' tab is highlighted with a red box. Below the navigation bar, there are five tabs: 'View Students', 'Find Student' (highlighted), 'Add Student', 'Transfer Students', and 'Exit Student'. The main content area has a heading 'Find Student: Enter State Student Identifier' and a label 'STATE STUDENT IDENTIFIER: \*' above a text input field. Below the input field is a blue 'Search' button, both of which are highlighted with red boxes.

HINT: The State Student Identifier must be an exact match to a student's previous enrollment record, including capitalization or lowercase for alpha characters.

To protect student privacy, wildcard searches are not allowed.

6. If the student record is found in the district and school in which the user is searching, the system will automatically pull up the **View Student Record** screen where the student's information can be reviewed. If any information needs to be

updated, a user with appropriate Educator Portal permissions can edit the student's information (e.g., change the grade).

View Student Record - Olly Atwood

**Student** [Edit](#)

Student State ID: 1776121 Date of Birth: 01/01/2019

**Demographic**

Gender: Male Comprehensive Race: Native Hawaiian or Pacific Islander  
First Language: Ilokano Hispanic Ethnicity: Yes [Profile](#)

Primary Disability: Autism PNP Profile: [Custom](#)  
Assessment Program: DLM - Dynamic Learning Maps First Contact Survey: [Completed](#)

**School Enrollment**

- IE District (IM\_DT) / IE School (IE\_SCH) Grade 3, School Year 2020

Accountability:  
Student Local ID: 1776121 Gifted Student:  
State Entry: District Entry: School Entry: 07/10/2019

Subject:	Course	Educator	Roster
English Language Arts		Lexia Burrell	Burrell ELA
Mathematics		Lexia Burrell	Burrell Math
Science		Lexia Burrell	Burrell Science

NOTE: All students displayed in screenshots throughout this manual are fictitious.

7. If a State Student Identifier is entered for a student who has never previously been enrolled in Educator Portal or for a student who may have been enrolled prior to the 2015–2016 school year, this student will not be found using the Find Student feature. A message in red will display letting the data manager know that the student does not exist in the database in Educator Portal. The student must be enrolled using either the Add Student feature or uploaded using an Enrollment Upload Template file.

View Students Find Student Add Student Transfer Students

Find Student: Enter State Student Identifier

STATE STUDENT IDENTIFIER:\*

1776999

State Student Identifier does not exist.

Search

### *MESSAGES IN EDUCATOR PORTAL*

When Find Student and Add Student features are used in Educator Portal, the data manager will receive messages about the status of the student, i.e., Student State Identifier does not exist. Other messages like these are given to the user and provide easy-to-follow instructions or questions.

### *REMOVE A STUDENT FROM EDUCATOR PORTAL*

This procedure is required when a student moves out-of-state or will no longer participate in the DLM alternate assessment. This procedure can be used by a district data manager when a student is transferring to a new district within the state. Once the student is exited from district A, the new district (district B) can enroll the student.

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Note: In states with regions, a Regional Test Coordinator or a Regional User can transfer a student from one district or school to another within the region. In states without regions, only a state assessment administrator or a Service Desk agent can transfer students from one district to another within the state.

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Some districts and states have additional accountability recommendations that result in students being removed from Educator Portal (i.e., student does not meet eligibility requirements for alternate assessment).

Best practice is to exit students before an assessment window opens. Many states provide dates for district data cleanup.

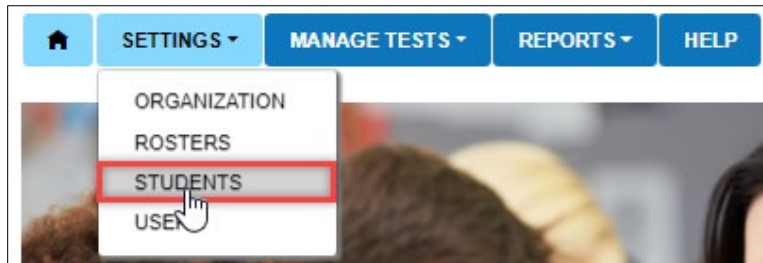
HINT: Students who move from one state to another in the DLM Consortium will receive a new State Student Identifier after being enrolled in a school in the new state. The student will have an entirely new record in Educator Portal. Their previous data does not travel with them.

HINT: Exiting a student will automatically remove the student from all rosters. Do not remove a student from a roster before exiting them from the district/region/state.

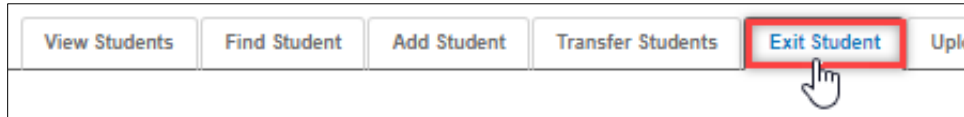
#### 1. Select **Settings**.



2. Select **Students** from the drop-down menu.



3. Select the **Exit Student** tab.



4. The state will prepopulate. The other fields will prepopulate entries according to the user's level of permissions.

5. Select the district and school if needed.

A screenshot of the 'Exit Student' form. At the top, there are navigation buttons: 'SETTINGS', 'MANAGE TESTS', 'REPORTS', 'DASHBOARD', and 'HELP'. Below these are tabs: 'View Students', 'Find Student', 'Add Student', 'Transfer Students', 'Exit Student', 'Upload Enrollment', and 'Upload TEC'. The 'Exit Student' tab is highlighted. The form title is 'Exit Student: Select Organization then Student(s)'. There are three dropdown menus: 'STATE:\*' with 'DLM QC YE State' selected, 'DISTRICT:\*' with 'YE District' selected, and 'SCHOOL:\*' with 'YE School' selected. A 'Search' button is highlighted with a red rectangle.

6. Select **Search**.

7. Select the student to be exited; select **Continue**.

A screenshot of the 'Exit Student' form, showing the results of a search. The form title is 'Exit Student: Select Organization then Student(s)'. There are three dropdown menus: 'STATE:\*' with 'DLM QC YE State' selected, 'DISTRICT:\*' with 'YE District' selected, and 'SCHOOL:\*' with 'YE School' selected. A 'Search' button is highlighted with a red rectangle. Below the search results, there is a table with columns: 'State Student Identifier', 'Local IDs', 'Last Name', 'First Name', 'Grade', and 'Residence'. The first row is highlighted with a red rectangle. To the right of the table, there is a 'Continue' button highlighted with a red rectangle.

State Student Identifier	Local IDs	Last Name	First Name	Grade	Residence
431776121	431776121	Paige	Deacon	Grade 3	YE_DT
431776122	431776122	Josephs	Leanora	Grade 3	YE_DT



8. On the Exit Student screen, the student's name will appear. Ensure the correct student record is being exited before continuing. The exit date field prepopulates with the date on which this procedure is being performed. This will be the date when the exit is effective. To change the exit date, select the calendar icon. A drop-down menu appears. Choose a new date.

The screenshot shows the 'Exit Student : Deacon Paige' window. At the top, the title bar reads 'Exit Student : Deacon Paige'. Below the title bar, the text 'Student's Exit date, the date on which the change is effective:' is followed by a date field containing '06/30/2020' and a calendar icon. A red box highlights the date field and the calendar icon. A calendar for June 2020 is open, showing the date '30' selected. The calendar is titled 'June 2020' and shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa). The date '30' is highlighted in blue. Below the calendar, the text 'Monday, July 13, 2020' is displayed. To the right of the calendar, the text 'Student Record - Deacon Paige' is displayed. Below this, the text 'Date of Birth: 01/01/2019' is displayed. Below that, the text 'Comprehensive Race: Native Hawaiian or Pacific Islander' and 'Hispanic Ethnicity: Yes' are displayed. At the bottom, the text 'Assessment Program: DLM - Dynamic Learning Maps' and 'School Enrollment' are displayed. On the right side of the window, there is a blue button labeled 'Exit Student'.

9. Select **Reason for Removing Student** (exit reason) from the drop-down menu. Only exit codes selected by the state will be available in the user interface. Slide the scroll bar down the page to access more options. The Exit Student button will be disabled until an exit reason is chosen.

The screenshot shows the 'Exit Student : Deacon Paige' window. At the top, the title bar reads 'Exit Student : Deacon Paige'. Below the title bar, the text 'Student's Exit date, the date on which the change is effective:' is followed by a date field containing '06/30/2020' and a calendar icon. Below the date field, the text 'Reason for Removing Student:' is followed by a drop-down menu. A red box highlights the drop-down menu. The drop-down menu is open, showing a list of reasons for removing a student. The first option is '30 Student no longer meets eligibility criteria for...'. Below this, there is a 'Select' button. Below the 'Select' button, there are several options: '19 Transfer to an adult education facility (i.e., for GED completion)', '20 Transfer to juvenile or adult correctional facility-no', '21 Student moved to another country, may or may not be continuing enrollment', and '30 Student no longer meets eligibility criteria for alternate assessment'. The option '30 Student no longer meets eligibility criteria for alternate assessment' is highlighted in blue. To the right of the drop-down menu, there is a blue button labeled 'Exit Student'. Below the drop-down menu, the text 'Primary Disability: Autism' and 'Assessment Program: DLM - Dynamic Learning Maps' are displayed. Below that, the text 'School Enrollment' is displayed. On the right side of the window, there is a blue button labeled 'Exit Student'.

10. After an exit option is chosen, the Exit Student button is enabled. Select the **Exit Student** button.

11. The Exit Student message will appear with a question. Answer the question either Yes or No.

12. Select **Yes** or **No**.

13. If yes is selected, a message displays that the student was successfully exited.

HINT: The Exit Student button is disabled until both an exit date and a reason are selected.

### *REMOVE MULTIPLE STUDENTS AT ONE TIME FROM EDUCATOR PORTAL*

To remove/exit multiple students at one time from Educator Portal, follow these steps.

1. Download the TEC (Test, Exit, and Clear) Upload Template file from the state's DLM resources webpage or by using the question mark icon in Educator Portal.

HINT: To ensure a current file is used, always start by downloading the template.

2. Open the TEC (Test, Exit, and Clear) Upload Template file in a spreadsheet program that can save data in CSV (comma-delimited) format. Only a file in this format can be uploaded successfully.
3. Using a new row for each student, enter the information into the TEC Upload Template file.
4. Complete all required fields, except column F, Test Type, which **MUST** be left **blank**. Do not remove this column or heading.

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NOTE: A few state assessment administrators offer a translation guide that provides a correlation between the codes and identifiers commonly used in their state to the field names in the templates. If this type of resource is provided in your state, go the DLM website. In the search feature, type Translation Guide. Select the appropriate guide. Verify that all column headings appear in the file, even if some columns are left blank.

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5. Save the file as a CSV (comma-delimited) file, but keep the CSV file open so it can be uploaded. The system will only upload files saved in this format.

HINT: Up to 5,000 records at a time may be uploaded to be exited at one time using this method. However, large files may upload slowly and can be difficult to troubleshoot. DLM staff recommend uploading 100 or fewer records at a time. Save the file in an easily accessible location.

## Test, Exit, and Clear Field Definitions

Table 29

### *Test, Exit, and Clear Field Definitions*

	Field	Format; Length	Required	Description	Special Notes
A	Record_Type	Alpha: Test Exit Clear	Yes	Each record in the TEC Upload Template file will have one of the following types: Test— <b>not</b> used by DLM users Exit—marks the student to be removed from enrollment in a location Clear— <b>not</b> used by DLM users	For DLM alternate assessment, choose <b>Exit</b> . Do not use Test or Clear.
B	State_Student_Identifier	Numeric; 10	Yes	Student State Identifier	Include leading zeros if the code is numeric and contains leading zeros.  Ensure leading zeros are entered where appropriate. Hint: Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format.*
C	Attendance_School_Program_Identifier	Alphanumeric; 30	Yes	This identifier must match a School Number found in Column B of the organization file. The number may include alpha characters. This is the school whose staff accesses the student information, including the student username and password for Student Portal.	Find the organizational file on your state DLM webpage.

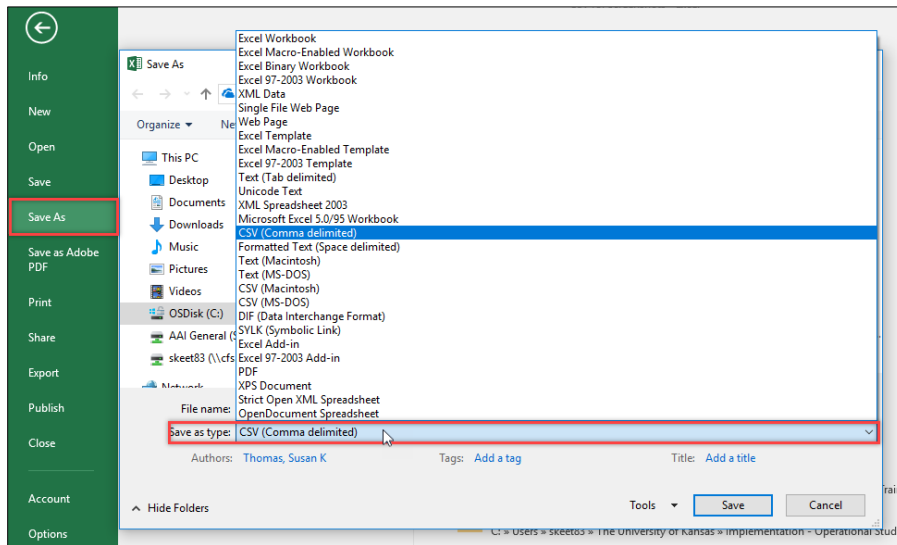
	Field	Format; Length	Required	Description	Special Notes
D	Exit_Reason	Numeric; 2	Yes		<p>Go to the Exit_Reason Field table on page 111 of this manual.</p> <hr/> <p>NOTE: some states allow only certain exit codes to be used. Ask your assessment coordinator for those codes. If an exit code is used that is not allowed in your state, the upload will fail, and the following error reason will appear: "This record is rejected because exit code 'xxx' is not valid in your state."</p> <hr/>
E	Exit_Date	MM/DD/YYYY	Yes	The date on which the exit is effective	
F	Test_Type	Alphanumeric; 1	No	The type of test. DLM users must leave this cell blank.	Test Type <b>MUST be left blank.</b>
G	Subject	Alpha; 3	No	<p>Enter the subject for the test. Current choices are</p> <p>M = mathematics</p> <p>ELA = English language arts</p> <p>SCI = science</p> <p>SS = social studies</p>	<p>DLM Science is not tested in all consortium states.</p> <p>Social studies is only tested in a few consortium states.</p>

	Field	Format; Length	Required	Description	Special Notes
H	School_Year	YYYY	Yes	The school year for which the change is effective.	Use 2022.

\* Go to page 36, Include Leading Zeros in an Upload File.

Figure 7

### *Saving as CSV in Excel*



### Exit\_Reason Field

These values are used in a TEC (Test, Exit, and Clear) Upload Template for the Exit\_Reason column. Enter the numbers **exactly** as they appear in Table 30. Do not add leading zeros to the numbers, or the system will reject the file. In the TEC Upload template, select only the values chosen by your state.

Table 30

*Exit Reason Field*

Entry	Definition	Entry	Definition
1	Transfer to public school, same district	13	Reached maximum age for services
2	Transfer to public school, different district, same state	14	Discontinued schooling
3	Transfer to public school, different state	15	Transfer to accredited or non-accredited juvenile correctional facility—educational services provided
4	Transfer to an accredited private school	16	Moved within the United States, not known to be enrolled in school
5	Transfer to a non-accredited private school	17	Unknown
6	Transfer to homeschooling	18	Student data claimed in error/never attended
7	Matriculation to another school	19	Transfer to an adult education facility (e.g., for GED completion)
8	Graduated with regular diploma	20	Transfer to a juvenile or adult correctional facility—no educational services provided
9	Completed school with other credentials (e.g., district-awarded GED)	21	Student moved to another country—may or may not be continuing enrollment
10	Student death	30	Student does not meet eligibility criteria for alternate assessment
11	Student illness	98	Unresolved exit
12	Student expulsion (or long-term suspension)	99	Undo a previously submitted exit record



HINT: Choose only the exit codes valid for the state. If exit codes are chosen that are not valid in the state, users will receive the error message: “This record is rejected because exit code ‘xxx’ is not valid in your state.” Ask the district assessment administrator or the state assessment administrator for the codes that are valid for your state.

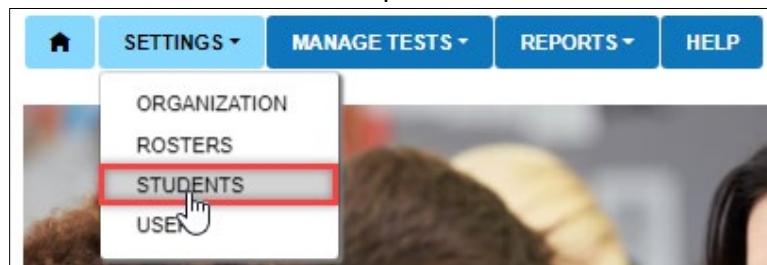
HINT: Students who are exited will also be removed from all rosters. To undo a previously submitted exit record for a student, data managers may submit another TEC (Test, Exit, and Clear) Upload Template file using exit code 99. The student will be restored to their previous school. However, the student **will not** be restored to any rosters. After the students are rostered again, all completed testlets, all plans created using the Instruction and Assessment Planner, and any assigned testlets will be restored.

To upload a TEC (Test, Exit, and Clear) Upload Template, follow these steps.

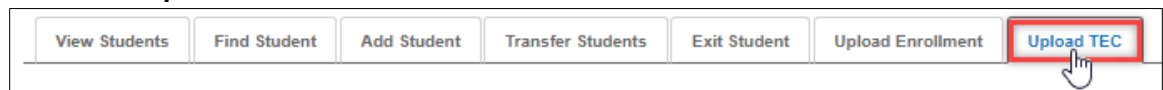
1. Select **Settings**.



2. Select **Students** from the drop-down menu.



3. Select the **Upload TEC** tab.



4. Apply filters in the **Select Criteria** fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed.

SETTINGS MANAGE TESTS REPORTS HELP

View Students Find Student Add Student Transfer Students Exit Student Upload Enrollment Upload TEC

Upload TEC: Select Criteria

STATE: \* DISTRICT: \* SCHOOL:

DLM QC YE State x v YE District x v Select v

File: ? \* Select File Upload

5. Select the school from the drop-down menu if desired.
6. Select the **question mark** to retrieve the most current TEC Upload Template file.

View Students Find Student Add Student Transfer Students Exit Student Upload Enrollment Upload TEC

Upload TEC: Select Criteria

STATE: \* DISTRICT: \* SCHOOL:

Please use the current version of the TEC Upload Template. x v YE District x v Select v

File: ? \* Select File Upload

7. Complete the TEC Upload Template file and save as a CSV (comma-delimited) file, but leave the file open until the file has successfully uploaded. File formatting may be lost if the file is closed.
8. Select the **File** button to open a browser window.

SETTINGS MANAGE TESTS REPORTS HELP

View Students Find Student Add Student Transfer Students Exit Student Upload Enrollment Upload TEC

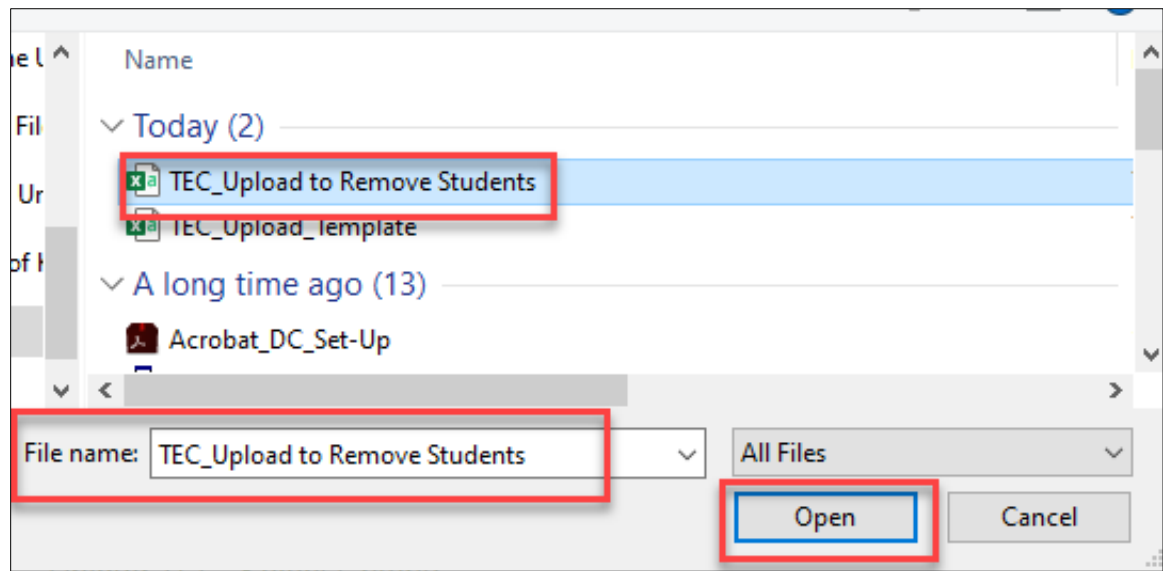
Upload TEC: Select Criteria

STATE: \* DISTRICT: \* SCHOOL:

DLM QC YE State x v YE District x v Select v

File: ? \* Select File Upload

9. Locate the saved CSV file for upload.



10. Select the file name and **Open**. The file name appears in the **File** field, and the blue **Upload** button becomes enabled.

11. Select **Upload**.

A screenshot of the 'Upload TEC' interface. At the top, there are several tabs: 'View Students', 'Find Student', 'Add Student', 'Transfer Students', 'Exit Student', 'Upload Enrollment', and 'Upload TEC'. Below the tabs, there are three dropdown menus: 'STATE' (set to 'DLM QC YE State'), 'DISTRICT' (set to 'YE District'), and 'SCHOOL' (set to 'Select'). Below these is a 'File' field with a 'Select File' button. The file 'TEC\_Upload\_Template.CSV' (0.12 KB) is shown in the file field, highlighted with a red box. To the right of the file field is a blue 'Upload' button, also highlighted with a red box. At the bottom, there is a table with columns: 'Uploaded', 'Status', 'Created/Updated', 'Rejected', 'Alerts', and 'File'.


HINT: Verify that the file has a CSV file extension. File names with extensions ending in XLS or XLSX will be rejected.

12. The confirmation message indicates the number of records uploaded and, if applicable, the number of records rejected. In the example following, 30 records were uploaded (Completed/Updated) successfully. None were rejected because of errors.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Tuesday, June 23, 2020 1:28:08 PM	COMPLETED	30	0	0	

13. The following information will display for each upload:

- Uploaded: Date and time of the upload
- Status: Completed or Rejected
- Created/Updated: Number of records uploaded successfully
- Rejected: Number of records with errors
- Alerts: A message about a row in the file
- File: A CSV icon will display if the file has errors. The following example shows a file that was rejected because of errors.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Monday, June 22, 2020 2:19:17 PM	COMPLETED	0	1	0	

14. Select the CSV file icon to open the file and read the error messages. Each line in the upload that was rejected contains an error message. Make corrections and upload again, following the upload steps previously outlined.

## MANAGEMENT OF STUDENT MOVES AND TRANSFERS

The procedures in this section describe the recommended steps for using the user interface to transfer five or fewer students. To transfer numerous students at one time, go to Transfer Multiple Students Using CSV Upload Templates on page 121 of this manual.

HINT: Only a user with the Educator Role of State Assessment Administrator or a Service Desk agent can transfer students between districts.

The user interface is an efficient feature for a district data manager to use when transferring records for five or fewer students to a new school **within their district**. State assessment administrators can use this process to move five or fewer students to a different district **within their state**.

Once the transferred students are enrolled and rostered in the new school or district, all completed testlets, all plans created using the Instruction and Assessment Planner, and

all assigned testlets move with the students' records. Assessment at the new district or school may continue where the students left off as soon as they are rostered to their new teacher(s). Kite Student Portal will not generate testlets for a student who has not been rostered.

HINT: The Current Enrollment extract includes all records for students who are enrolled in the user's organization. The records include those uploaded via an Enrollment Upload Template file, the manual user interface, or a web service. The Enrollment Extract is a valuable resource for reviewing, editing, and then using the extract for uploads. The EDUCATOR PORTAL USER GUIDE has more information about this extract.

On occasion, a student may be enrolled in more than one organization (e.g., one for ELA and another for mathematics). When this occurs, the student will have a record or line for each organization.

#### *TRANSFER A STUDENT MANUALLY*

- The **leaving** district/school is referred to by some states as the **sending** district/school.
- The **destination** district/school is referred to by some states as the **receiving** district.

---

Note: District-level users can transfer students between schools within their district. Building-level users do not have Educator Portal permissions to transfer students between schools within their district.

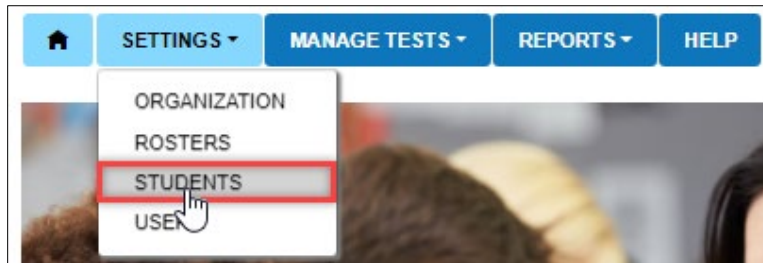
---

This procedure allows the transfer of five or fewer students at one time. Additionally, this procedure can also be used to transfer multiple students at one time if all selected students are transferring from the same leaving district/school to the same destination district. The destination school within a district can be different for each student if needed (i.e., from district A/school A to district B/school A, B, or C, etc.)

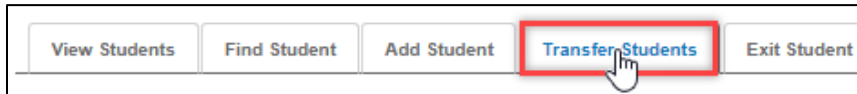
1. Select **Settings**.



2. Select **Students**.



3. Select the **Transfer Students** tab.



4. Use the Select Organization then Students fields to filter to the applicable district or school. The fields will prepopulate entries according to the user's level of permissions. All organization fields are required fields.

A screenshot of the 'Transfer Students' form. At the top, there are tabs for 'View Students', 'Find Student', 'Add Student', 'Transfer Students' (which is active and highlighted with a red box), 'Exit Student', and 'Upload Enrollment'. Below the tabs, the text 'Transfer Students: Select Organization then Student(s)' is displayed. There are three dropdown menus: 'STATE' (set to 'DLM QC IE State'), 'DISTRICT' (set to 'IE District'), and 'SCHOOL' (set to 'IE High School'). Each dropdown is highlighted with a red box. Below these is a blue 'Search' button, also highlighted with a red box. A note at the bottom states: 'Note: destination district (not school) must be the same for selected students'.

5. Select the student(s) to be transferred; select **Next**.

A screenshot of the student selection table in the 'Transfer Students' form. The table has columns for 'State Student Identifier', 'Local ID', 'Last Name', 'First Name', 'Grade', and 'District ID'. The first two rows are highlighted in blue and have checkboxes in the 'Local ID' column that are checked. A red box highlights the note: 'Note: destination district (not school) must be the same for selected students'. Below the table is a 'Search' button.

State Student Identifier	Local ID	Last Name	First Name	Grade	District ID
9785542311	<input checked="" type="checkbox"/>	Connor	Paul	Grade 3	IE_UAT_DT
6508745823	<input checked="" type="checkbox"/>	Lane	Patricia	Grade 7	IE_UAT_DT
2201197832	<input type="checkbox"/>	Student	Bill	Grade 6	IE_UAT_DT
12003	<input type="checkbox"/>	Torres	Seda	Grade 3	IE_UAT_DT
9546859760	<input type="checkbox"/>	Welsh	Bonnie	Grade 4	IE_UAT_DT

HINT: Under the **District** drop-down menu, an SAA, Regional Test Coordinator, Regional User, or Service Desk agent will be able to select the destination attendance district that is different from the leaving attendance district. Selecting an accountability district is optional.

6. Read the directions on the screen to help with the transfer process.
7. Select the destination attendance district, if available. This field will populate for a district level user and cannot be changed.
8. Select an **Exit Reason** for each student, using the drop-down menu. Only exit reasons chosen by the state will be available when using the user interface.

View Students Find Student Add Student **Transfer Students** Exit Student Upload Enrollment Upload TEC

Transfer Students: Select Organization then Student(s)

**DISTRICT\***

Select destination District, if different than existing District: IE UAT District ?

- Select destination Attendance School for all students, or for each individual student.

**ACCOUNTABILITY DISTRICT:**

Select a new destination Accountability District, if different than existing Accountability District: Select ?

- Select option to keep or remove existing Accountability School, or select an Accountability School for all students or for each individual student.
- Select option to keep or remove Local Ids for all students, or enter/edit individual student's Local Ids.
- Select applicable Exit Reason for all Students or for each individual student.

State Student Identifier	Local ID	Destination Local ID	Exit Reason	Last Name
		Select	01 Transfer to Public School, Same District	
9785542311			01 Transfer to Public School, Same District	Connor
6508745823			01 Transfer to Public School, Same District	Lane

Next

HINT: Scroll to the right to view additional columns.

9. Move the scroll bar to the right to find the required Destination Attendance School. The Attendance School can be different for each student within the same Destination Attendance District. Use the drop-down menu to choose the destination attendance school for each student.
10. Select the **Next** button.

Last Name	First Name	Destination Attendance School	Existing Accountability School	Destination Accountability School
		IE UAT Middle S...		Select
Connor	Paul	IE UAT Middle Sch...		Select
Lane	Patricia	IE UAT Middle Sch...		Select


Next

11. The next screen asks the data manager to verify the transfer. Remove any students not to be transferred to the listed destination school by using the

**Delete** button in any applicable rows. Using this function deletes the student from the transfer process.

12. Select the **Next** button.

Transfer Students: Verify Transfers

Remove any students not to be transferred to the listed destination school, then click Next:  
Note: the flag  indicates student already in destination school, will NOT transfer.

State ID	Last Name	First Name	Middle Name	Destination Attendance School	Existing Accountability School
9785542311	Connor	Paul		IE UAT Middle School	
6508745823	Lane	Patricia		IE UAT Middle School	

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HINT: Helpful directions are printed above the table, asking the data manager to carefully review again before concluding the transfer. Once a student is transferred to the destination school, all student data, including test records, are transferred from the leaving district/school to the destination district/school.

Please review before concluding the transfer.  
Listed students will be exited from the leaving school(s) and enrolled in the selected destination school(s). Students' general information, demographic and profile, as well as test records for the current year will be transferred to the destination school(s).

Transfer Students: Review & Select Yes to Transfer or No to Cancel.

**Yes** **No**

State ID	Last Name	First Name	New School Name	New Accountability School Name	New Local ID	District Entry Date
9785542311	Connor	Paul	IE UAT Middle School			
6508745823	Lane	Patricia	IE UAT Middle School			

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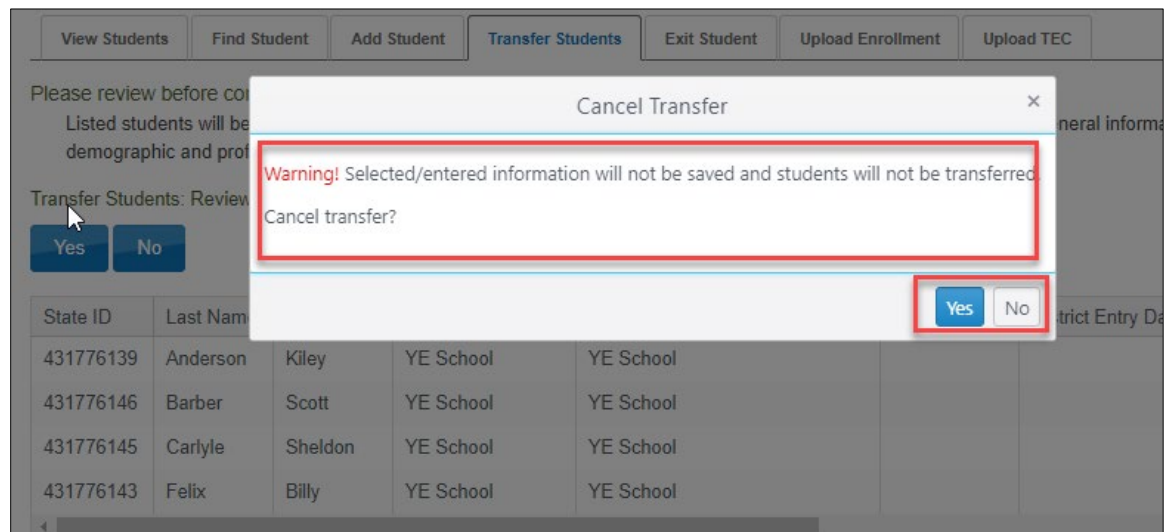
13. Select **Yes** or **No**.

14. If a student is already enrolled in the destination school, the student is denoted by a flag icon and will not be transferred.

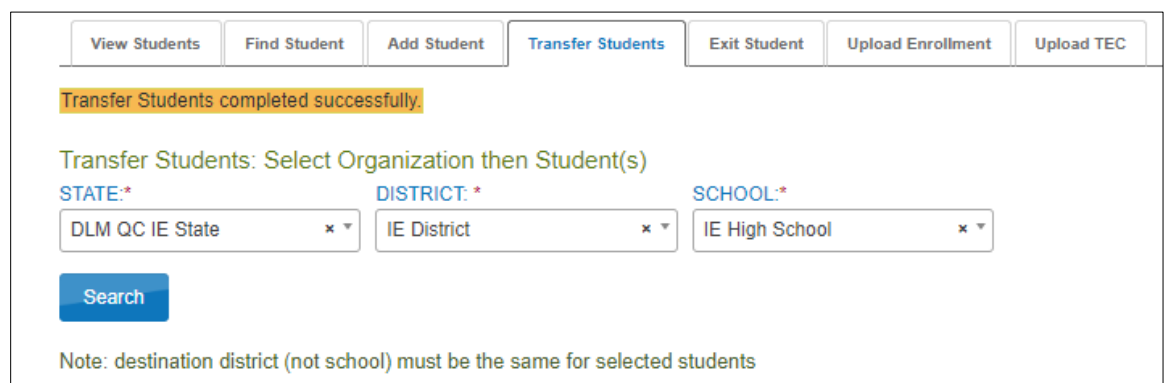
15. A warning screen will display before a student is transferred. This is the final decision the data manager makes before the transfer takes place.



16. If the data manager selects **No**, a warning message will appear asking them to confirm the cancellation of the transfer.
17. Selecting **Yes**, means that the user is saying, “Yes, I want to cancel this transfer.” Selecting **No** means that the user is saying, “I do not want to continue the cancellation of the transfer, but instead, I want to transfer the student. “



18. Immediately after selecting **No**, a message appears confirming that the student has been transferred successfully.



19. After students are transferred, they must be rostered to test administrators in the destination school by following the steps outlined in Manage Roster Data in this manual.

### *TRANSFER MULTIPLE STUDENTS USING CSV UPLOAD TEMPLATES*

HINT: This complex process is best used when transferring numerous students (more than five). When transferring a small number of students (five or fewer), use the user interface and the procedure Transfer a Student Manually in this manual.

## Move Multiple Students from One School to Another School within a District

- The **leaving** district/school is referred to by some states as the **sending** district/school.
- The **destination** district/school is referred to by some states as the **receiving** district.

---

NOTE: In states with regions, an RTC or RU can perform the entire transfer process within their region. A DTC or DU may perform the entire transfer process within their district. A BTC or BU can perform individual tasks in the process of transferring a student from one school to another within the same district.

---

Building-level users cannot transfer students using the user interface. However, they can do one part of the transfer process. Follow these steps in order.

1. The building-level user in the leaving school, School A, exits the students, using exit code 1: Transfer to public school same district. When this step is completed, the students are automatically removed from all rosters in School A, and School A will no longer have access to the students' data.
2. The building-level user in the new destination school, School B, enrolls the students in School B. (For convenience, use the Enrollment Upload Template when more than five students need to be enrolled. If enrolling five or fewer students, the user interface is recommended.)
3. Once the enrollment process is complete, the newly transferred students must be rostered to test administrators in School B for each subject appropriate for the students' grade.
4. The School B test administrator must submit the First Contact survey and review the PNP Profile and save any changes. Go to the section Complete the PNP Profile and Complete the First Contact Survey in the EDUCATOR PORTAL USER GUIDE.

HINT: Returning students (i.e., students who were previously in the school to where the student is being transferred) cannot be manually enrolled with the Add Student feature in the user interface. However, they can be enrolled using the Enrollment Upload Template or using the Find Student feature on page 101 of this manual.

## *MOVE A STUDENT FROM ONE REGION/DISTRICT TO ANOTHER REGION/DISTRICT IN THE SAME STATE*

Only a state assessment administrator or DLM Service Desk agent may perform the entirety of the following outlined process when a single student or multiple students transfer from one region to another region within the state, in states with regions, or

one district to another within the state that does not have regions, using the steps found in Management of Student Moves and Transfers in this manual.

A district-level user can perform individual tasks within their districts, using the following steps. In states that have regions, the following steps also apply. Substitute regional-level users for district-level users.

1. The district-level user in the leaving school, District A, exits the students, using exit code 2: Transfer to public school, different district, same state. When this step is complete, the student is automatically removed from all rosters in District A, and District A will no longer have access to the students' data.
2. The district-level user in the new destination district, District B, enrolls the students in District B. (For convenience, use the Enrollment Upload Template when more than five students need to be enrolled. If enrolling five or fewer students, the user interface can be used.)
3. Once the enrollment process has been completed, the newly transferred students must be rostered to test administrators in District B for each subject appropriate for their grade.
4. The District B test administrator(s) must complete and submit the First Contact survey and should review the PNP Profile and make any appropriate changes. Go to the section Complete the PNP Profile and Complete the First Contact Survey in the EDUCATOR PORTAL USER GUIDE.

HINT: Returning students (i.e., students who were previously in the district to where the student is being transferred) cannot be manually enrolled with the Add Student feature in the user interface. However, they can be enrolled using the Enrollment Upload Template or using the Find Student feature on page 101 of this manual.

## MANAGE ROSTER DATA

A student must be rostered to an Educator Portal user with the role of teacher (TEA) before a student can be assessed. Using a Roster Upload Template file is one of two ways rostering can be accomplished. By using the template file, several students can be rostered at one time. To create five or fewer rosters one at a time, the user interface can be used. Go to Create a Roster Manually on page 134 of this manual.

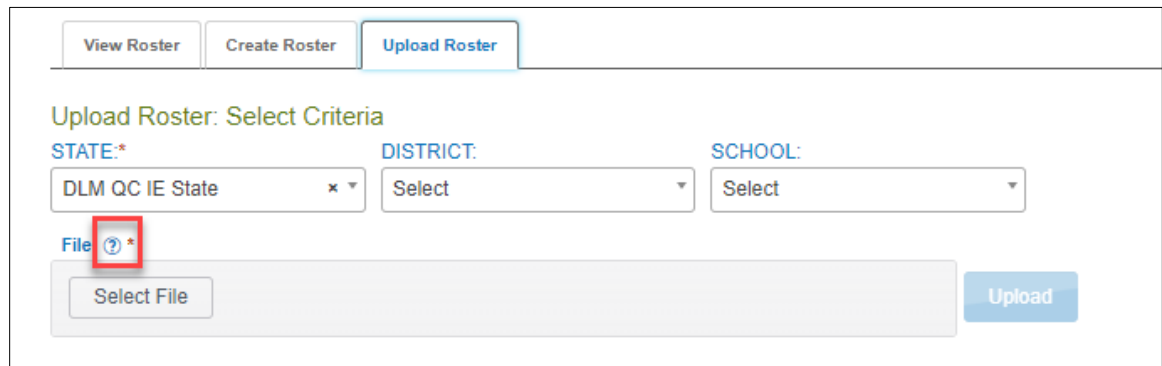
HINT: Students must be rostered for each DLM subject area in which they will be tested in the current school year.

### *CREATE A ROSTER UPLOAD TEMPLATE FILE*

The Roster Upload Template file will contain one row per student per DLM subject that is being tested by the state for the student's grade, i.e., one line for ELA, one line for mathematics, and one line for science. In some states, students may also be rostered to social studies.

To create a Roster Upload Template file, follow these steps.

1. Download a current Roster Upload Template file. Go to the DLM website > For States > select your state > Assessment Coordinator > District Staff Resources > scroll to the roster template.
2. The roster template can be downloaded from within Educator Portal on the Upload Roster screen by selecting the question mark icon.



HINT: The educator identifier in the Roster Upload Template file must **exactly match** the educator identifier in the user's record in Educator Portal.

3. Open the Roster Upload Template file in a spreadsheet program that can save data in CSV (comma-delimited) format. The template must be uploaded using this format.
4. Enter the information into the CSV file. Use a new row for each student and for each DLM subject being assessed in the state for the student's grade.

---

NOTE: A few state assessment administrators offer a translation guide that provides a correlation between the codes and identifiers commonly used in their state to the field names in the templates. If this type of resource is provided in your state, go the DLM website. In the search feature, type Translation Guide. Select the appropriate guide.

---

5. Verify that all column headings appear in the file. Do not remove any columns or headings.

Hint: Column M (Remove from Roster) is only used to remove students from a roster. Otherwise, **leave column M blank**.

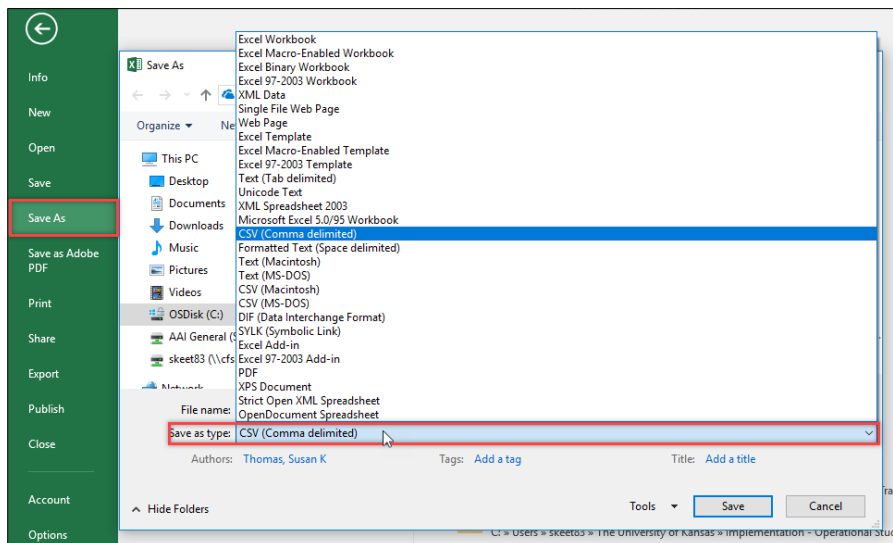
6. Save the file as a CSV (comma-delimited) file, but leave the file open.

HINT: Up to 5,000 records at a time may be uploaded. However, large files may upload slowly and can be difficult to troubleshoot. For best results, upload 100 or fewer records at a time. Save the file in an easily accessible location.

The file can be given any name that helps identify the group of students it contains.

Figure 8

### *Saving as CSV in Excel*



7. Go to page 36, Include Leading Zeros in an Upload File.
8. Check that the leading zeros are retained after each save but keep the file open. Formatting changes are typically lost when the file is closed.

## Roster Field Definitions

Table 31

### *Roster Field Definitions*

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
A	Roster Name	Yes	Alphanumeric	The name for the roster (go to Best Practices for Naming Rosters on page 130 of this manual)
B	Subject	Yes	Alphanumeric	<p>Use only the following subject abbreviations. No other abbreviations will be accepted.</p> <p>Use only the entries for subjects assessed in your state. Testlets will not be provided for any subjects other than those tested in your state from those in the following list.</p> <p>M = Mathematics</p> <p>ELA = English language arts</p> <p>SCI = Science</p> <p>SS = Social Studies</p>
C	Course	No	Alphanumeric	Some states assess an end-of-instruction biology course in high school. Verify with the assessment coordinator regarding courses within a subject (e.g., subject: science, course: biology).

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
D	School Identifier	Yes	Alphanumeric up to 10	<p>Identification codes assigned by the state (or other organization) that indicate where the student attends school</p> <p>The School Identifier code entered in the Roster Upload Template file must match <b>exactly</b> a School Identifier code (Column B) in the state organizational table located on your state's DLM webpage.</p> <p>If the codes do not match exactly, the upload will fail.</p> <p>Ensure leading zeros are entered where appropriate. Hint: Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format.*</p>
E	School Year	Yes	YYYY	The four-digit year that concludes the current school year (e.g., for the 2021-2022 school year, enter 2022)
F	State Student Identifier	Yes	Numeric up to 10	<p>A State Student Identifier in the Roster Upload Template file must match <b>exactly</b> a State Student Identifier in a student's enrollment record in Educator Portal. If the two do not match exactly, the roster record will fail to upload.</p> <p>Ensure leading zeros are entered where appropriate.</p> <p>Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format.*</p>

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
G	Local Student Identifier	No	Numeric up to 10	<p>This is not a required field and can be left blank. However, if entered, a Local Student Identifier in the Roster Upload Template file must match <b>exactly</b> a Local Student Identifier in a student's enrollment record in Educator Portal. If the two do not match exactly, the record will fail to upload.</p> <p>Ensure leading zeros are entered where appropriate.</p> <p>Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format.*</p>
H	Student Legal First Name	Yes	Alphanumeric	<p>A student's first name in the Roster Upload Template file must match <b>exactly</b> a student's first name in a student's enrollment record in Educator Portal. If the two do not match exactly, the record will fail to upload.</p>
I	Student Legal Last Name	Yes	Alphanumeric	<p>A student's last name in the Roster Upload Template file must match <b>exactly</b> a student's last name in a student's enrollment record in Educator Portal. If the two do not match exactly, the record will fail to upload.</p>
J	Educator Identifier	Yes	Alphanumeric	<p>This is a required field for a user with the Educator Portal role of Teacher (TEA).</p> <p>A teacher's Educator_Identifier in the Roster Upload Template file must match <b>exactly</b> an Educator Identifier in an educator's account in Educator Portal. If the two do not match exactly, the record will fail to upload.</p>

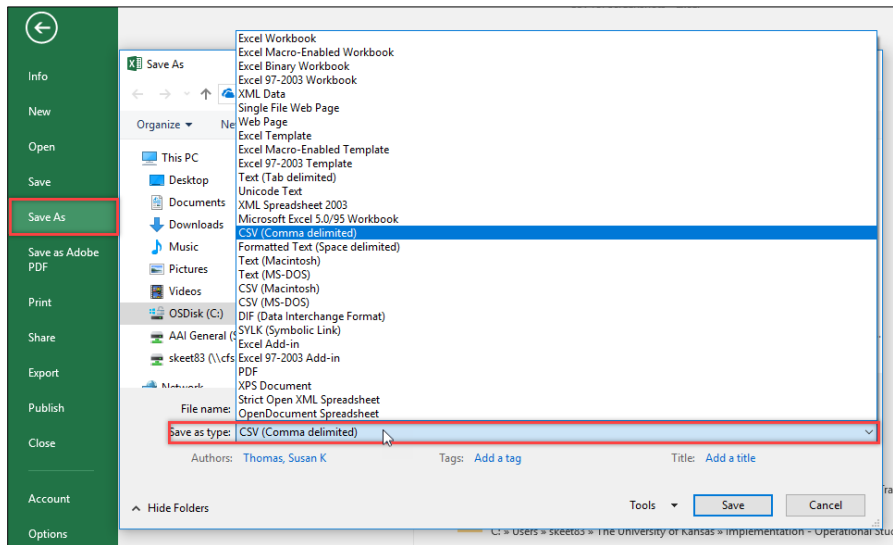


CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
K	Educator First Name	Yes	Alphanumeric	The educator's first name entered in the Roster Upload Template file must match <b>exactly</b> the educator's first name in the educator's account in Educator Portal. If the two do not match exactly, the record will fail to upload.
L	Educator Last Name	Yes	Alphanumeric	The educator's last name entered in the Roster Upload Template file must match <b>exactly</b> the educator's last name in the educator's account in Educator Portal. If the two do not match exactly, the record will fail to upload.
M	Remove from roster	No	Remove or leave blank	<p>If a student is no longer to be rostered to a teacher, the student can be removed from a previously created roster by typing REMOVE in column M. Otherwise, the field should remain blank.</p> <hr/> <p>NOTE: A roster can also be removed manually using the user interface.</p> <hr/>

\* Go to page 36, Include Leading Zeros in an Upload File.

Figure 9

### *Saving as CSV in Excel*



NOTE: Each state determines which subjects and grades are assessed. Ask the district assessment coordinator about subjects before rostering students in subjects and grades.

### Best Practices for Naming Rosters

Consider defining a standard naming convention for rosters, which can make sorting and finding a specific roster easier later. In these examples, rosters that use a standard naming convention appear neatly grouped when sorted alphabetically.

HINT: Create a roster for each subject tested in the state.

### Example:

#### Teacher Last Name Teacher First Name Subject

- Wheeler Lisa ELA
- Wheeler Lisa Math
- Wheeler Lisa Science

Figure 10

### Roster Names

View Roster | Create Roster | Upload Roster

View Rosters: Select Criteria

STATE: DLM QC IE State | DISTRICT: IE District | SCHOOL: Select

Search

Roster Name	Educator Last Name	Educator First Name	Subject	Course	Educator Identifier
Barnett ELA	Barnett	Landen	English Language Arts		atlastech785+IE
Barnett Math	Barnett	Landen	Mathematics		atlastech785+IE
Barnett Sci	Barnett	Landen	Science		atlastech785+IE
Burrell ELA	Burrell	Lexia	English Language Arts		atlastech785+IE
Burrell Math	Burrell	Lexia	Mathematics		atlastech785+IE
Burrell Science	Burrell	Lexia	Science		atlastech785+IE
Derby Math	Derby	Lou	Mathematics		atlastech785+IE
Durant ELA	Durant	Marissa	English Language Arts		atlastech785+IE
Durant Math	Durant	Marissa	Mathematics		atlastech785+IE
Durant Science	Durant	Marissa	Science		atlastech785+IE

### UPLOAD A ROSTER UPLOAD TEMPLATE FILE

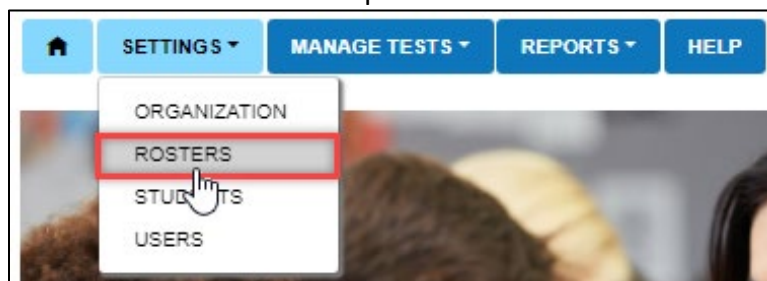
HINT: For best results, upload a Roster Upload Template File separately by school. This helps with tracking. Also, the educator's first name, last name, and Educator\_Identifier entered on the Roster Upload Template File **must match exactly** their Educator Portal account, or the upload will fail.

If the Educator Identifier is missing for a user with the Educator Portal role of Teacher (TEA), the roster upload will also fail.

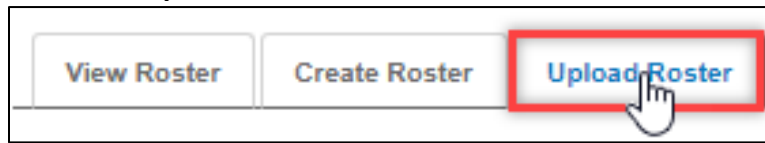
1. Select **Settings**.



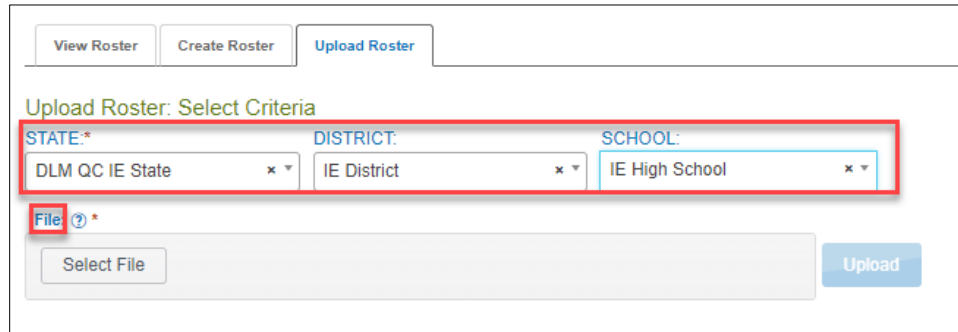
2. Select **Rosters** from the drop-down menu.



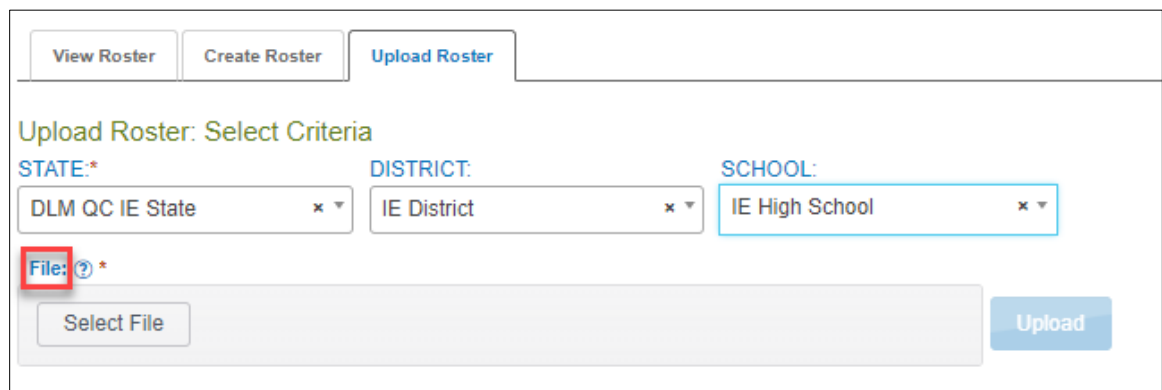
3. Select the **Upload Roster** tab.



4. Apply filters in the **Select Criteria** fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed.
5. Select the word **File** to open a browser window.

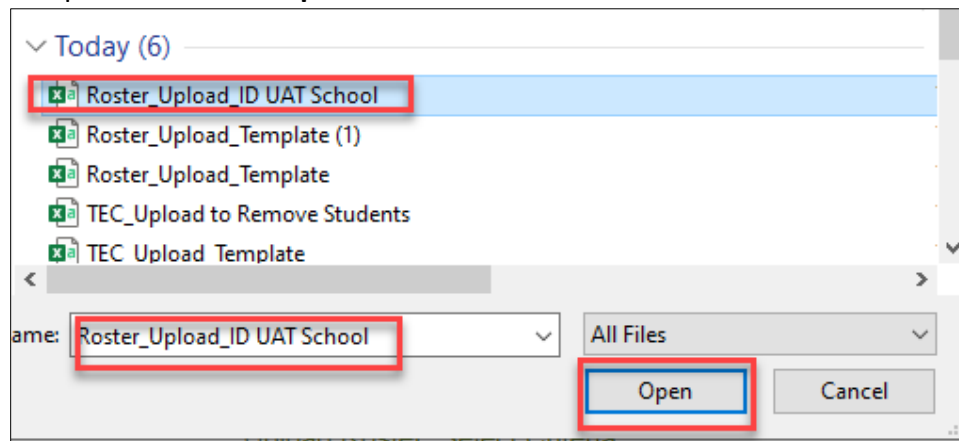


6. Locate the Roster Upload Template file that contains student data. The file will need to have been saved as a CSV (comma-delimited) file and left open in order to upload into Educator Portal.

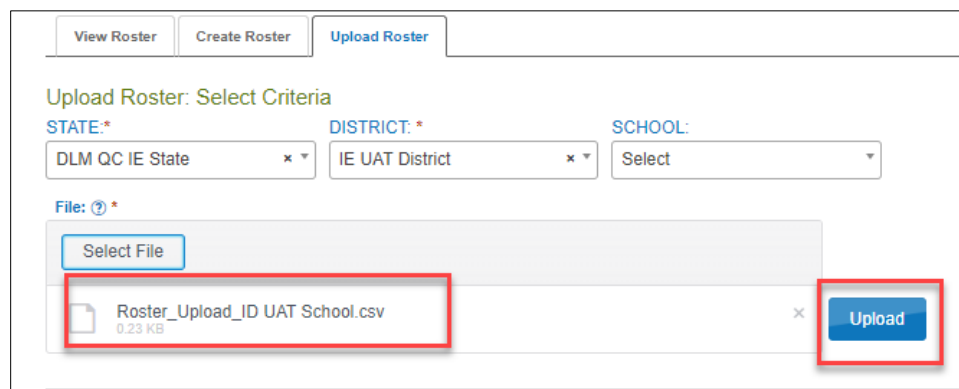


7. Select the **Select File** button.

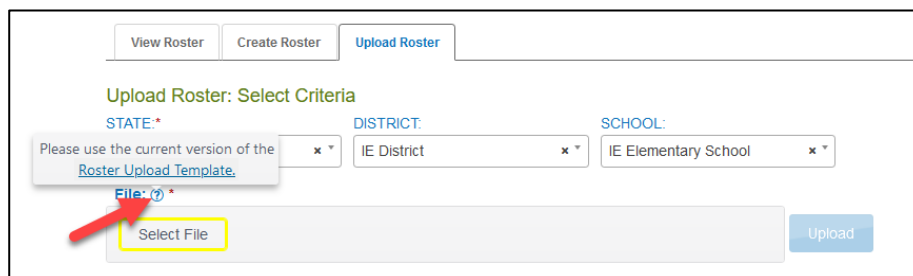
8. The browser window opens. Find the saved ready-to-upload Roster Upload Template file. Select **Open**.



9. The file name appears in the **File** field. Select the blue **Upload** button.




10. Either use the most current Roster Upload Template file found on the DLM state website or select the question mark icon next to the word File to download the most current version of the template. The most current template must be used, or the file will not upload.



11. A message will display showing the number of records created, rejected, updated, and with alerts. Each line in the CSV file is one record.
12. The following screenshot is an example of 32 rosters being uploaded successfully and one roster failing to upload because of an error. Select the **CSV file icon** in the **File** column to access error messages related to the upload. Review the

message for errors. The error file will display the line number for the record that has the error.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Wednesday, July 08, 2020 4:42:22 PM	COMPLETED	32	1	0	
Wednesday, July 08, 2020 4:38:45 PM	COMPLETED	33	0	0	

- Fix the error in the file and upload again, following the previous directions. Following is an example of the message when 33 rosters were successfully created.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Wednesday, July 08, 2020 4:38:45 PM	COMPLETED	33	0	0	

Page 1 of 1

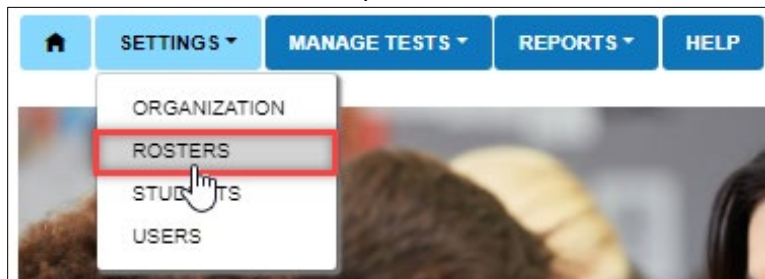
### CREATE A ROSTER MANUALLY

The user interface is an efficient tool for creating five or fewer rosters. Follow this procedure to manually create a roster.

- Select **Settings**.



- Select **Rosters** from the drop-down menu.



- The View Rosters tab will be open. The Select Criteria will be available.
- Apply filters in the Select Criteria fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed. Select **Search**.



5. Complete all fields on the **Create Rosters: Select Criteria** screen. Create the **Roster Name** using the naming conventions suggested in Best Practices for Naming Rosters on page 130 of this manual.
6. Choose the **Subject** for this roster from the drop-down menu, ensuring only the subjects being tested in your state are chosen.
7. The Course field will be blank for most states. However, in states testing high school biology, select science for the Subject and biology will populate in the Course field. Select biology.
8. Apply filters to choose the correct organizations. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed. These are all required fields.
9. Select the blue **Search** button.
10. Choose the educator from the **Select Educator** drop-down menu.
11. Choose the students to roster by selecting the checkbox to the right of their last name in the **Select Student** grid.

**ROSTER NAME:** \* Para ELA

**SUBJECT:** \* English Language ...

**COURSE:** Select

**STATE:** \* DLM QC IE State x

**DISTRICT:** \* IE UAT District x

**SCHOOL:** \* IE UAT High School x

**Search**

**SELECT EDUCATOR:** Para, Cara (55553) - Active

**SELECT STUDENTS:**

State Student Identifier		Last Name	First Name	Middle Name	Gender
12005	<input checked="" type="checkbox"/>	Almeida	Gisilfrid	Senka	Female
12008	<input checked="" type="checkbox"/>	Bellamy	Kori	Polycarp	Female
12001	<input type="checkbox"/>	Capello	Fehim	Cosmas	Female

**HINT:** Use the arrows at the bottom of the screen to move between pages when multiple students are listed. Multiple students can be selected.

Page 1 of 2

**Save**

**NOTE:** All students displayed in screenshots throughout this manual are fictitious.

12. Select **Save**.

13. The data manager will receive a notification about each student who is currently on another roster for the subject. In the notification, the data manager is asked to confirm their decision to remove the student from the first roster to add the student to the new roster by selecting the blue **OK** button to continue or the **Cancel** button to return to the list of students.

The screenshot shows the 'SELECT STUDENTS' interface. At the top, there is a 'SELECT EDUCATOR\*' dropdown menu with 'Derby, Lou (atlastech785+IET10@gmail.co...)' selected. Below this is a table of students with columns: State Student Identifier, Last Name, First Name, Middle Name, and Gender. The table lists several students, including Izabelle Harrison (1776146) and Bonnie Welsh (1776145908). A confirmation dialog box is overlaid on the table, stating: 'Student [Izabelle Harrison - 1776146] is already assigned to a roster for the subject you selected. Do you want to remove the student from the other roster and add them to this roster?'. The dialog has 'OK' and 'Cancel' buttons. At the bottom of the interface, there is a 'Save' button and a pagination control showing 'Page 1 of 1'.

14. After making the decisions about each student and selecting **OK**, the system creates the new roster. The system returns to the previous screen and displays a message that the new roster was successfully created.

The screenshot shows the 'Create Roster: Select Criteria' interface. At the top, there are three tabs: 'View Roster', 'Create Roster', and 'Upload Roster'. The 'Create Roster' tab is active. Below the tabs, there is a green message box that says 'Successfully created: Paro ELA'. The interface contains several dropdown menus for selecting criteria: 'ROSTER NAME:', 'SUBJECT:', 'COURSE:', 'STATE:', 'DISTRICT:', and 'SCHOOL:'. The 'STATE:' dropdown is set to 'DLM QC IE State', and the 'DISTRICT:' dropdown is set to 'IE UAT District'. There is a 'Search' button at the bottom left.



HINT: To test a student, the student must be rostered to one educator with the Educator Portal role of teacher per school, per grade, and per subject. If an existing roster has an incorrect subject (a subject not tested in the state), a new roster with the correct subject must be created to rectify the problem. Adding the students to the new correct roster automatically removes them from the incorrect roster. After all students have been removed from the incorrect roster, it will be deleted automatically.

### *CHANGE ROSTER DATA OR REMOVE A ROSTER*

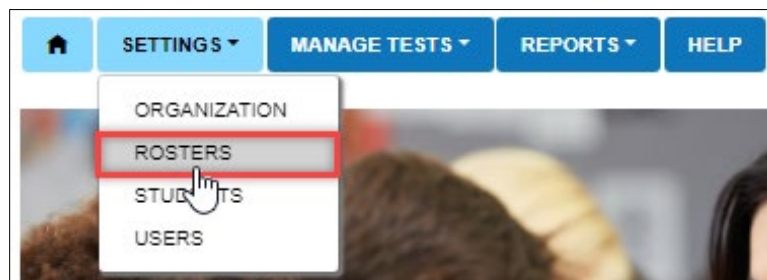
HINT: Exiting a student will automatically remove the student from all rosters. Do not remove a student from a roster before exiting them from the district/region/state.

Follow this procedure to change roster data or to remove a roster. To change roster data, follow these steps.

1. Select **Settings**.



2. Select **Rosters** from the drop-down menu. The View Roster: Select Criteria screen opens.



3. Apply filters in the **Select Criteria** fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu, if needed. All required fields must be completed.

4. Select **Search**.

The screenshot shows the 'View Rosters' form with the following elements highlighted by red boxes:

- View Roster** button
- Select Criteria** button
- STATE:** dropdown menu with 'DLM QC IE State' selected
- DISTRICT:** dropdown menu with 'IE District' selected
- SCHOOL:** dropdown menu with 'IE High School' selected
- Search** button

5. All previously created rosters will display.

The screenshot shows the 'View Rosters' form with the following elements highlighted by red boxes:

- View Roster** button
- Create Roster** button
- Upload Roster** button
- View Rosters: Select Criteria** header
- STATE:** dropdown menu with 'DLM QC IE State' selected
- DISTRICT:** dropdown menu with 'IE District' selected
- SCHOOL:** dropdown menu with 'Select' selected
- Search** button
- Roster List Table:** A table with columns: Roster Name, Educator Last Name, Educator First Name, Subject, Course, and Educator. The first row is highlighted in blue.

Roster Name	Educator Last Name	Educator First Name	Subject	Course	Educator
Barnett ELA	Barnett	Landen	English Language Arts		atlas
Barnett Math	Barnett	Landen	Mathematics		atlas
Barnett Sci	Barnett	Landen	Science		atlas
Burrell ELA	Burrell	Lexia	English Language Arts		atlas
Burrell Math	Burrell	Lexia	Mathematics		atlas
Burrell Science	Burrell	Lexia	Science		atlas
Derby Math	Derby	Lou	Mathematics		atlas
Durant ELA	Durant	Marissa	English Language Arts		atlas
Durant Math	Durant	Marissa	Mathematics		atlas
Durant Science	Durant	Marissa	Science		atlas

6. Select the desired roster to edit/delete.

The screenshot shows the 'View Rosters' form with the following elements highlighted by red boxes:

- View Roster** button
- Create Roster** button
- Upload Roster** button
- View Rosters: Select Criteria** header
- STATE:** dropdown menu with 'DLM QC IE State' selected
- DISTRICT:** dropdown menu with 'IE District' selected
- SCHOOL:** dropdown menu with 'Select' selected
- Search** button
- Roster List Table:** A table with columns: Roster Name, Educator Last Name, Educator First Name, Subject, Course, and Educator. The first row is highlighted in blue.

Roster Name	Educator Last Name	Educator First Name	Subject	Course	Educator
Barnett ELA	Barnett	Landen	English Language Arts		atlastech785+IE
Barnett Math	Barnett	Landen	Mathematics		atlastech785+IE
Barnett Sci	Barnett	Landen	Science		atlastech785+IE
Burrell ELA	Burrell	Lexia	English Language Arts		atlastech785+IE
Burrell Math	Burrell	Lexia	Mathematics		atlastech785+IE

7. The **View/Edit Roster** screen will automatically display. In the screenshot following the list of possible edits, the three students highlighted in blue are currently rostered to Linden Barnett. Some edits can be made to a roster.

- Change the Roster Name.
- Change the educator connected to the roster by choosing another educator from those available in the Select Educator drop-down menu.
- Change the students connected to the roster from those displaying in the Select Students section of the screen.
- Deselect an individual student to be removed from the roster.
- Select a student not currently rostered and add the student to a roster.
- Deselect all students to completely remove the roster.

View/Edit Roster - Barnett ELA

**ROSTER NAME:** Barnett ELA

**SUBJECT:** English Language Arts

**COURSE:** Select

**SELECT EDUCATOR**  
Barnett, Landen (atlastech785+IET4@gmail.co...)

**SELECT STUDENTS**

State Student Identifier		Last Name	First Name	Middle Name	Gender
<b>Currently Assigned to This Roster</b>					
1776125	<input checked="" type="checkbox"/>	Dukes	Lindon		Female
1776124	<input checked="" type="checkbox"/>	Haynes	Wilburn		Male
1776126	<input checked="" type="checkbox"/>	Read	Garrett		Male
<b>Not Currently Assigned to This Roster</b>					
1776121	<input type="checkbox"/>	Atwood	Olly		Male
1776142	<input type="checkbox"/>	Beake	Jarred		Male
1776128	<input type="checkbox"/>	Boon	Vaughn		Male
1776147	<input type="checkbox"/>	Collins	Chase		Male

8. Once all desired edits from the available choices are made, scroll to the bottom of the screen, and select the blue **Save** button.
9. The subject and course fields are not editable. If either of these fields must change, a new roster must be created for the correct subject and course. The teacher is selected, and the students are selected, which moves them from the incorrect roster to the correct roster. Once all students are removed from the incorrect roster, the incorrect roster is automatically deleted.
10. To quickly remove all students on a roster, select the checkbox next to the State Student Identifier.

ROSTER NAME: \*  
 Para Cara ELA

SUBJECT: \*  
 English Language Arts

COURSE:  
 Select

SELECT EDUCATOR  
 Para, Cara (55553) - Active

SELECT STUDENTS

State Student Identifier	<input checked="" type="checkbox"/>	Last Name ↑	First Name	Middle Name	Gender
Currently Assigned to Roster					
12005	<input checked="" type="checkbox"/>	Almeida	Gisilfrid	Senka	Female
12008	<input checked="" type="checkbox"/>	Bellamy	Kori	Polycarp	Female
12001	<input checked="" type="checkbox"/>	Capello	Fehim	Cosmas	Female
12006	<input checked="" type="checkbox"/>	Elvis	Andreas	Oda	Female
12002	<input checked="" type="checkbox"/>	Goodwin	Vera	Samir	Male
12004	<input checked="" type="checkbox"/>	Khoroushi	Muna	Eber	Male
12007	<input checked="" type="checkbox"/>	Lovel	Zacarias	Ianus	Female
12009	<input checked="" type="checkbox"/>	Oleksandra	Lalitha	Mac	Male

11. Select the check box a second time to unselect all students, and select **Save**.

### Using the Roster Extract to Update Roster Records

The roster extract includes all records for students who are assigned to a roster within the user's organization. This includes students uploaded via a Roster Upload Template file, manually with the user interface, or a web service. This extract can be used as an upload for roster records. Delete the first 10 columns in the extract so that it matches the Roster Upload Template file. Those are columns A-J. Once these columns are deleted, save the file as a CSV (comma-delimited) file. Follow the steps outlined in Upload a Roster Upload Template File in this manual.

HINT: If you do not remove these columns, any changes made to data in these columns will not be applied to 2021-2022 rosters.

The first 10 columns are:

- A. Extract\_State
- B. Extract\_District
- C. Extract\_School
- D. Extract\_Last\_Modified\_Time
- E. Extract\_Last\_Modified\_By
- F. Extract\_Assessment\_Program\_1
- G. Extract\_Assessment\_Program\_2
- H. Extract\_Assessment\_Program\_3
- I. Extract\_Assessment\_Program\_4
- J. Extract\_Student\_Grade

HINT: For a teacher to work with a student in the Instruction and Assessment Planner or for testing to occur in the spring assessment window, the student must be rostered to a teacher, per school, per grade, and per subject. The student must also have a submitted First Contact survey.

## MANAGE DATA VERIFICATION AND REVISIONS

To prepare for an assessment window BEFORE it opens, data must be verified in Educator Portal and revised, as needed. The data manager is best suited to organize the effort. State and school educators also have a role in verification.

### *WHY DATA VERIFICATION AND REVISION ARE IMPORTANT*

**Incorrect information results in incorrect testlet assignment.** Accurate information about educators (users), students (enrollment), and rosters is needed. Also, students' First Contact survey must be submitted, and their PNP Profile should be reviewed and saved so that all students who participate in the DLM alternate assessments have accurate records and receive testlets that best match their needs and abilities.

Most student data entered in Educator Portal directly affect other fields in Educator Portal and subsequent reports. For example, a misspelled student name in an enrollment record will carry over to the Individual Student Score Report that is delivered to the student's parents or guardians. Other errors in a student's enrollment record may also result in errors on a student's permanent record.

### *WHEN TO CONDUCT DATA VERIFICATION AND REVISIONS*

HINT: Go to the EDUCATOR PORTAL USER GUIDE for information about reports and data extracts.

Follow these steps to begin verifying and revising data for their district.

1. Assemble the plan and team members who will conduct data verification and revision.
2. Determine how to communicate responsibilities about the data verification and revision process.
3. Download the data extracts from Educator Portal to view current data.
4. Edit the data against state or district data.
5. Look for duplicate student records across different schools in the district. Exit or transfer students from schools or districts in which they are no longer enrolled by following the procedure to Update Enrollment Records, page 86.
6. The Current Enrollment extract includes all records for students who are enrolled in the user's organization. The records include those uploaded via an Enrollment Upload Template file, the manual user interface, or a web service. The

Enrollment Extract is a valuable resource for reviewing, editing, and then using the extract for uploads. The Educator Portal User Guide has more information about this extract.

HINT: On occasion, a student may be enrolled in more than one organization (e.g., one for ELA and another for mathematics). When this occurs, the student will have a record or line for each organization.

See Remove a Student from Educator Portal on page 103 in this manual.

**Optional:** Download a new data extract to check the work and/or distribute new extracts to appropriate staff for them to check the information.

The following steps are for district assessment coordinators and data managers to use to verify and revise data for their district. The EDUCATOR PORTAL USER GUIDE includes procedures for checking student information.

- Review each student's PNP profile and direct the test administrator to complete each of their students' PNP profiles as needed.
- Review and check student data (spelling, date of birth, grade, race, gender, etc.).
- Review the Student Roster and First Contact Survey Status extract for each student. Ensure students are rostered to the correct teacher and correct subject for their grade. Direct the test administrator to submit each student's First Contact survey if not in the Completed status.

HINT: The First Contact survey is submitted in Educator Portal.

The ACCESSIBILITY MANUAL is a valuable resource for educators who must make decisions about the PNP Profile.

#### *DATA MANAGER ACTIONS*

While data collection and comparison can be addressed simultaneously for all three types of files, data upload templates must be processed in a specific order so that records and relationships (e.g., first users, second enrollments, and third rosters) are correctly linked.

Table 32

*Data Manager Actions*

Data Manager Actions	Procedure Title in the Manual
<p><b>User</b></p> <ul style="list-style-type: none"> <li>• View the user extract.</li> <li>• Compare the extract data against district or state data.</li> <li>• Correct data where needed.</li> <li>• Ensure educators with the role of Teacher have an Educator Identifier associated with their account.</li> <li>• Upload the User Upload Template file.</li> </ul>	<p>Manage User Data, beginning on page 15 of this manual</p> <p>Data in Educator Portal typically displays in grids, whether it is a list of users, students, rosters, etc. The grids can be customized to some degree for each user. The user can select which columns they want displayed. This can help to lessen the amount of horizontal scrolling that is needed. The user can select columns they want hidden from view. The columns can be accessed again when needed. The columns can be rearranged by selecting the column heading, holding down the right mouse button, and dragging the column to arrange the columns in a different order. Some columns also have a lock feature. Once the columns have been selected and ordered, they can be locked.</p> <p>Filtering options are available. These options may be most useful in large districts which have multiple pages of data to display.</p> <p>Note: Grid customization is not permanent. When the user logs out of Educator Portal, the grids will return to their original order.</p>

Data Manager Actions	Procedure Title in the Manual
<p><b>Enrollment</b></p> <ul style="list-style-type: none"> <li>• View the current enrollment extract.</li> <li>• Compare the extract data against state or district data.</li> <li>• Keep rows of information that require correction.</li> <li>• Delete rows of information that do not require correction.</li> <li>• If using the Enrollment extract for an upload, delete the first five specified columns previously described to prepare the extract for use as an enrollment file.</li> <li>• Upload the Enrollment Upload Template file.*</li> <li>• Exit students from the system if needed.</li> </ul>	<p>Manage Enrollment Data, beginning on page 66 of this manual</p> <p>Enrollment Field Validations</p> <p>Change Enrollment Data Previously Uploaded</p> <p>System validations are applied to prevent duplicate enrollments within a state when enrolling a student. The first validation that is applied is the State Student Identifier. If the same State Student Identifier exists for another student, the data manager will receive an alert stating that a student with that State Student Identifier already exists and is active for the school year. The student record can then be edited if necessary.</p> <p>The second validation that is applied is the student's last name, first name, gender, and date of birth. If all four of them match, again the data manager will receive an alert and can then edit the student's record where necessary.</p>



Data Manager Actions	Procedure Title in the Manual
<b>Roster</b> <ul style="list-style-type: none"> <li>View the Roster extract.</li> <li>Compare the extract data against state or district data.</li> <li>Keep rows of information that require correction.</li> <li>Delete rows of information that do not require correction.</li> <li>If using the Roster extract to upload rosters, delete the first 10 specified columns previously described to prepare the extract for use as a roster file.</li> <li>Upload the Roster Upload Template file.*</li> </ul>	Manage Roster Data, beginning on page 123 of this manual

\*Some information may be edited manually, using the User Interface.

#### *USE THE DATA EXTRACTS FOR DATA CLEANUP*

Here are some suggestions for comparing the Educator Portal extracts against district or state data to identify needed corrections.

- Consider whether the right students are in the right schools. If not, go to Management of Student Moves and Transfers on page 116 of this manual to add them to the new/receiving school or district and remove them from the sending school or district.

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NOTE: Although Educator Portal allows for dual enrollments when needed, unintended duplicate student enrollment records could result in errors in student reports. Correct the student information, if needed.

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- Look for students enrolled more than once with identical information except for perhaps one field (e.g., the Student State Identifier). A student may have been enrolled using a Student State Identifier with a transposed number and then a second time with the correct identifier. Determine which is correct and edit.
- If testing has already begun, before removing the wrong entry, check either the DLM Test Administration Monitoring Extract or the DLM Instructionally Embedded Monitoring extract to confirm if the student may have been tested on more than one account. If the student was tested on the wrong account or on both accounts, call the DLM Service Desk to have the accounts corrected and reconciled.
- Correct inaccurate data by using administrative staff knowledge, educator reference, or school- or district-level databases.

Experienced Excel users might consider using these features to review and compare data (select the links for tutorials):

- [Sort](#) the data by a specific column to identify duplicates (e.g., name).
- Apply a [filter](#) to a column to view select records (e.g., in the enrollment file, choose Current\_School\_Year and filter out the correct value to confirm which records have incorrect data or blanks).
- Use [VLOOKUP](#) to search for a value and return a value from a related cell.

#### *THE EDUCATOR PORTAL USER GUIDE*

The EDUCATOR PORTAL USER GUIDE includes procedures for checking student information:

- Understanding the PNP Settings Counts Extract for All States
- View and Check Student Data
- View and Check Roster
- Complete PNP Profile
- Complete the First Contact Survey

#### *WHERE TO FIND HELP*

Common error messages and solutions related to Educator Portal file uploads are summarized on the [Kite Troubleshooting](#) webpage.

Go to Finding Help on page 2 of this manual for additional assistance.

HINT: Do not send Personally Identifiable Information or screenshots of testlets to the Service Desk via email. Doing this would violate a student's privacy.

For questions about data not collected by the DLM alternate assessment, contact the SEA.

## TROUBLESHOOTING

### *COMMON ISSUES*

Common questions and problems can be diagnosed and solved using the [Additional Kite Resources](#) on the Kite Suite website. If the problems are not resolved using these resources, contact the Service Desk using the number in the footer of this manual.

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## GLOSSARY

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This glossary compiles definitions and acronyms relevant to assessment for the Dynamic Learning Maps® (DLM®) alternate assessment.

Term	Definition
<b>Educator Portal</b>	Educator Portal is a secure, web-based application designed to aid teachers and administrative users in the administration of assessments, including student enrollment and monitoring/tracking results. Users can access Educator Portal using any supported browser via <a href="https://educator.kiteaai.org/">https://educator.kiteaai.org/</a> . For information on working within Educator Portal, access the DATA MANAGEMENT MANUAL and the EDUCATOR PORTAL USER GUIDE on the DLM website.
<b>Personal Learning Profile</b>	A collective term used to describe a student's personal needs and preferences settings entered in the PNP Profile in addition to information about the student entered in the First Contact survey in Educator Portal.
<b>State Assessment Administrator (SAA)</b>	An Educator Portal role assigned to staff at the state education agency who have the highest level of access and permissions in Kite Educator Portal for an external user. An SAA can transfer students between districts, assign the District Test Coordinator role, inactivate users, and have access to all student reports and extracts.
<b>State Education Agency (SEA)</b>	A state department of education.

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## STATE APPENDIX

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### DOCUMENT HISTORY

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NOTE: Page numbers are valid only for the date and version noted.  
They may change in future versions.

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Date	Section Name/Summary of Changes	Starting Page
08/25/2021	Security agreement updates	8
08/25/2021	New tables added for Roles and Permissions in Educator Portal	17
08/25/2021	Update to Roles—added Regional Test Coordinator and Regional User roles	18
08/25/2021	Updates throughout due to website changes	Throughout
08/25/2021	General edits throughout	Throughout

# Data Management Manual **CLARIFICATION**

## Supplemental Directions for Maryland Early Fall Assessment: Enrollment and Rostering

### How to roster and enroll students for the early fall assessment:

#### Column M on the enrollment template

- Use the year 2022 for the current school year.

#### Column E on the roster template

- Use the year 2022 for the current school year.
- Use the grade level in which the student was enrolled for 2021. See Table 1 for assessment requirements by grade and subject.
- Roster the student to their current teacher in their current district/building.
- All other data fields within the Data Management Manual can be used as described.

Table 1: 2020-2021 Maryland Assessment Requirements by grade and subject area.

Grade	EL A	Mathematics	Science
3	Yes	Yes	No
4	Yes	Yes	No
5	Yes	Yes	Yes
6	Yes	Yes	No
7	Yes	Yes	No
8	Yes	Yes	Yes
11	Yes	Yes	Yes