DATA MANAGEMENT MANUAL 2022–2023

ELA, MATH, AND SCIENCE

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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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VERY IMPORTANT NOTE for 2022–2023

At the request of consortium state leaders, the order of the columns and heading titles in the 2022–2023 upload template files and extracts were changed to be more in alignment with each other.

If an extract from 2021–2022 was downloaded and saved by an organization for the purpose of modifying it and using it for a 2022–2023 upload, the columns in the extract must be rearranged to match **EXACTLY** the order in the new 2022–2023 upload template files.

The heading titles must also match **EXACTLY**. All heading names in the 2022–2023 template include an underscore between words, and some heading names are slightly different, i.e., Current_School_Year compared to School_Year.

All heading titles and order of columns must match **EXACTLY** the 2022–2023 upload template file or the uploads will fail.

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 DLM-support@ku.edu
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 five business days)	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 2022–2023

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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
Timeframe for testlet resets updated to five business days	3
New Find Student feature	103
New User, Enrollment, and Roster Template Upload Files	Throughout
New instructions for using an extract for file uploads	Throughout
New restrictions in rostering to only those subjects and grades that count towards accountability per state	Throughout

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

INTRODUCTION

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 one or more grades in 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 should 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.

Each year, the most current version of Student Portal must be installed on the student's testing device.

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

CHECKLIST TO MANAGE DATA

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 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 16 of this manual.

Data managers should 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

☑	Steps
	1. Read this DATA MANAGEMENT MANUAL.
	2. Use the resources on your state's page to become familiar with the Dynamic Learning Maps® (DLM®) alternate assessments and the procedures to prepare the district's data. Go to the Access Additional Resources section on page 7 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, new or closed buildings 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.

☑	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. Ensure users' email addresses are accurate.
	9. Confirm that educators and students 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.
	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 **never** 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. 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 Training Courses account for the Required Test Administrator Training.
	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 with a new password.
	13. Assign a role or roles to each user as needed. Go to page 55 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 create rosters using the user interface.
	16. Notify the assessment coordinator and educators when data uploads are complete.

CHECKLIST TO MANAGE DATA

☑	Steps
	17. Manage student moves as needed. Go to page 122 of this manual to Management of Student Moves and Transfers.
	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.

STATE ORGANIZATIONS AND AUTHORITY

NOTE: In preparation for the assessment windows, the organizational file setup must be completed before any other data work can begin in Educator Portal.

THE STATE ORGANIZATIONAL TABLE

States that are part of the Dynamic Learning Maps® (DLM®) Alternate Assessment Consortium 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 SAA 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.[1]

The SAA is responsible for ensuring 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 | filter **For States** | select your state | filter **Data Manager** or **Assessment Coordinator** | **District Staff Resources** | scroll to State Organizational Table.

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, plus other important guidance

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

EDUCATOR PORTAL PROCEDURES FOR DATA MANAGERS

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. Do not use manuals or templates from previous years.

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 new district and building users and to inactivate users who should no longer have access to Educator Portal information.

   Users remain in Educator Portal from year to year and should not be uploaded more than one time. When edits are needed (e.g., email or last name change), those edits should be performed in the user interface in Educator Portal, which is described later in this manual.

2. The Enrollment Upload Template file: Use this file annually to create student records in Educator Portal.
3. The Roster Upload Template file: Use this file annually to link students to their test administrators for each subject being tested and to provide test administrators access to their students' information in Educator Portal.

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. Copy and paste identical data to avoid typographical errors.

Up to 5,000 records at a time may be uploaded. However, large files may upload slowly and can be difficult to troubleshoot data errors. Uploading 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 template files 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** or **Data Manager** | **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. Do **not** use templates from previous years.

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. The field definition tables include a list of fields in the same order in which they appear in the upload template files.

REQUIRED SOFTWARE

Educator Portal is the application where uploads are performed. Use the TECHNOLOGY SPECIFICATIONS MANUAL for information about supported browsers to use for Educator Portal and download instructions for Student Portal. The Kite Suite will also provide that information.

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 new unique user accounts in Educator Portal and to deactivate users who should no longer have access to data in Educator Portal. Each user is assigned at least one role but could have multiple roles if needed. Depending on the assigned role, the user will have permission to perform certain functions and to access specific student data within the assigned school, district, or region. 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.

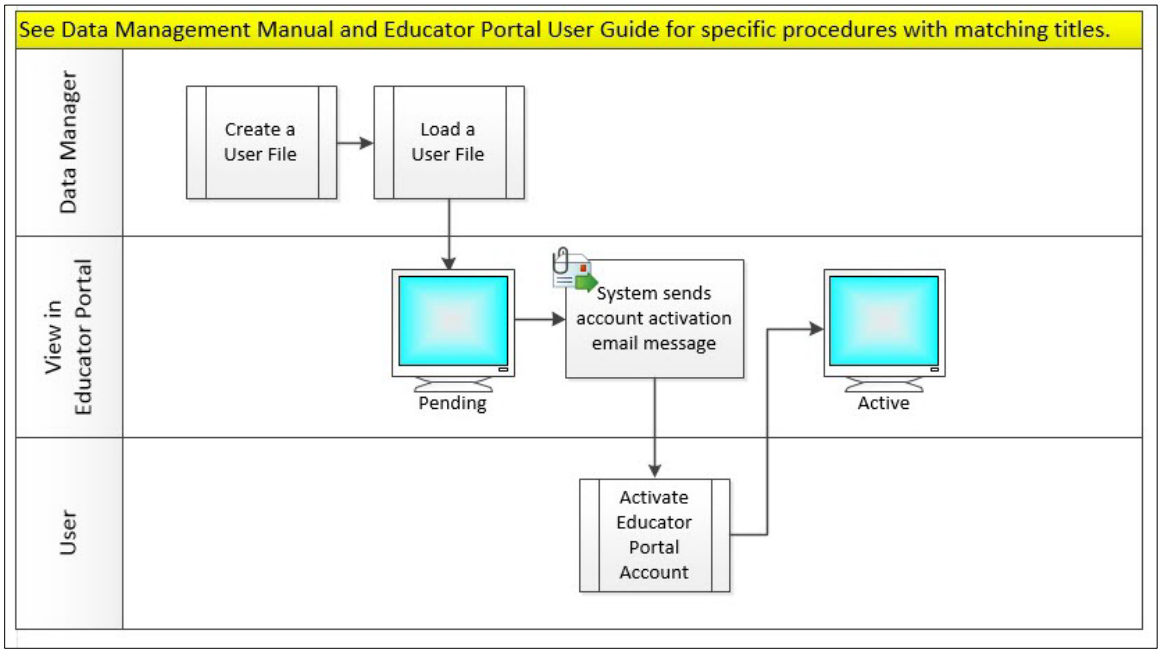
Once uploaded, user accounts stay in Educator Portal from year to year. Returning users may access Educator Portal using their previous username. When users are deactivated, they will no longer automatically appear in Educator Portal. However, they will appear in a User extract where the User Status column will show them as Inactive.

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.

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 through Table 15 show more detailed information about each role, i.e., the reports and extracts that are available to each role and the various tasks each role can perform in Educator Portal.

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

Role in Educator Portal	Description
State Assessment Administrator (SAA)	This role is only for staff at the State Education Agency (SEA), and assignment of this role is a state-level decision. 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. Only a Service Desk agent can assign this role based on communication from the state education agency (SEA).

Role in Educator Portal	Description
Regional Test Coordinator (RTC)	**This role is only available for states that are divided into regions in Educator Portal with every district in the state assigned to a region.** 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. 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. An SAA can assign the RTC role to a user, or the SAA can authorize in writing that a DLM Service Desk agent assigns the RTC role to a user.

Role in Educator Portal	Description
Regional User (RUS)	**This role is only available for states that are divided into regions in Educator Portal with every district in the state assigned to a region.** 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. 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. An SAA or RTC can assign this role to a user or can authorize in writing that a DLM Service Desk agent assigns the RUS role to a user.
District Test Coordinator (DTC)	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. This role can be a good match for assessment coordinators, district data managers, or other administrators. This role may be restricted by the SAA to only one DTC per district. An SAA, RTC, or RUS can assign this role to a user or can authorize in writing that a DLM Service Desk agent assigns the DTC role to a user.

Role in Educator Portal	Description
District Superintendent (SUP)	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. This role can be a good match for the district superintendent but can be assigned to more than one user in the district. Assigning this role is a district decision unless contrary to state guidance. An SAA, RTC, RUS, and DTC can assign this role to a user or can authorize in writing that a DLM Service Desk agent assigns the SUP role to a user.
District User (DUS)	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. 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. Assigning this role is a district decision unless contrary to state guidance. An SAA, RTC, RUS, and DTC can assign this role to a user or can authorize in writing that a DLM Service Desk agent assigns the DUS role to a user.

Role in Educator Portal	Description
Building Test Coordinator (BTC)	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. 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. Assigning this role is a district decision unless contrary to state guidance. 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 assigns the BTC role to a user.
Building User (BUS)	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. This role can be a good match for assistant data managers, assistant building principals, and other administrators and program directors at the school. Assigning this role is a building-level decision unless contrary to state guidance. 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.

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

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

Upload CSV Template files	User Template file	Enrollment Template file	Roster Template file	TEC Template file	Parent Template file
Access these reports and files	General Research File (GRF)	Aggregate Reports	EOY Special Circumstance File and OnDemand Special Circumstance File	EOY Exited Student File and OnDemand Exited Student File	Incident File (if applicable)
Access these reports	Student Report Archive	Individual Student Score Reports	Individual Student Score Reports (Bundled)	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report
Access these reports	Student Progress Report**	Class Roster Report**	Parent Portal	Fall and Spring Performance Report**	***No data in this report for YE model states during their spring assessment window*
Extracts	Access				
Users in districts/schools across the state	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
Rosters in districts/schools across the state	Create	Edit			

Students in districts/schools across the state	Add	Edit	Exit	Find and activate	Transfer between districts or schools within the state
Students in districts/schools across the state	Edit/save PNP Profile	View First Contact Survey			
Instruction & Assessment Planner	Access*	Apply/Edit/Delete Special Circumstances Codes	Cancel Testlet	Fall and Spring Performance Report*	***No data for YE model states during spring assessment window*
Test Management	Access	Apply/Edit/Delete 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

Upload CSV Template files	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
Access these district reports	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	Blueprint Coverage Report (IE model state only)	***No data in this report for YE model states during their spring assessment window*
Extracts	Access				

Users in districts/schools across their region	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
Rosters in districts/schools across their region	Create	Edit			
Students in districts/schools across their region	Add	Edit	Exit	Find and activate	Transfer between districts or schools within the region
Students in districts/schools across their region	View PNP Profile	View First Contact Survey			
Manage Test Tab	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

Upload CSV Template files	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
Access these reports	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	*** No data in this report for YE model states during their spring assessment window*
Extracts	Access				

Users in districts/schools across their region	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
Rosters in districts/schools across their region	Create	Edit			
Students in districts/schools across their region	Add	Edit	Exit	Find and activate	Transfer between districts or schools within the region
Students in districts/schools across their region	View PNP Profile	View First Contact Survey			
Manage Test Tab	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

Upload CSV Template files	User Template file	Enrollment Template	Roster Template file	TEC Template file	Parent Template
Access these files and reports	General Research File (GRF)*	Aggregate Reports*	Student Report Archive*	OnDemand Special Circumstance File*	**Has access if granted by SAA*
Access these reports	Individual Student Score Reports*	Individual Student Score Reports Bundled*	Monitoring Summary Report		**Has access if granted by SAA*

Access these reports	Student Progress Report**	Class Roster Report**	Blueprint Coverage Report (IE model state only)	Fall and Spring Performance Reports	***No data in this report for YE model states during their spring assessment window*
Extracts	Access				
Users in schools across the district	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
Rosters in schools across the district	Create	Edit			
Students in schools across the district	Add	Edit	Exit	Find and activate	Transfer within the district
Students in schools across the district	Edit/save PNP Profile	Edit/submit First Contact survey			
Instruction & Assessment Planner	Access*	Apply/Edit/Delete Special Circumstances Codes if permitted by SAA	Cancel testlets	Fall and Spring Performance Report*	**No data for YE model states during the spring assessment window*
Test Management	Access	Apply/Edit/Delete Special Circumstances Codes*			**If permission allowed by SAA*

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

Upload CSV Template files	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
Access these reports	Aggregate Reports*	Student Report Archive*	Individual Student Score Reports*	Individual Student Score Reports (Bundled)*	**Has access if granted by SAA*
Access these reports	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	***No data for YE model states during their spring assessment window*
Extracts	Access				
Users in schools across the district	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
Rosters in schools across the district	Create	Edit			
Students in schools across the district	Add	Edit	Exit	Find and activate	Transfer within the district
Students in schools across the district	View PNP Profile	View First Contact Survey			
Manage Test tab	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

Upload CSV Template files	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
Access these reports	Aggregate Reports*	Student Report Archive*	**Has access if granted by SAA*		
Access these reports	Blueprint Coverage Report (IE model state only)	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	***No data for YE model states during their spring assessment window*
Extracts	Access				
Users in schools across the district	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
Rosters in schools across the district	Create	Edit			
Students in schools across the district	Add	Edit	Exit	Find and activate	Transfer within the district
Students in schools across the district	View PNP Profile	View First Contact Survey			
Manage Tests Tab	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

Upload CSV Template files	User Template file	Enrollment Template file	Roster Template file	TEC Template file	
Access these reports in their building	Aggregate Reports*	Student Report Archive*	Individual Student Score Reports*	Individual Student Score Reports (Bundled)*	**Has access if granted by SAA*
Access these reports in their building	Monitoring Summary Report	Student Progress Report**	Class Roster Report**	Blueprint Coverage Report (IE model state only)	***No data for YE model states during spring assessment window*
Access these reports in their building	Fall and Spring Performance Report*	**No data for YE model states during their spring assessment window*			
Extracts	Access				
Users in their school building	Activate	Deactivate	Add and Assign Roles	Edit	Send activation email to pending users
Rosters in their school building	Create	Edit			
Students in their school building	Add	Edit	Exit	Find and activate	
Students in their school building	Edit/save PNP Profile	Edit/submit First Contact survey			

Instruction & Assessment Planner	Access*	Apply/Edit/Delete Special Circumstances Codes if permitted by SAA	Fall and Spring Performance Report*	**No data for YE model states during their spring assessment window*	
Test Management	Access	Apply/Edit/Delete Special Circumstances Codes*			**If permission allowed by SAA*

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

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

Access these reports	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 model states during their spring assessment window*
Access these reports	Fall and Spring Performance Report*	**No data for YE model states during their spring assessment window*			
Extracts	Access				
Rosters	View their rosters				
Students on their rosters	Edit/save PNP Profile	Edit/submit First Contact survey	View student data		
Instruction & Assessment Planner	Access*	Fall and Spring Performance Report*	**No data for YE model states during their spring assessment window*		
Test Management	Access				

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

Rosters in school building	View all rosters				
Students in school building	View PNP Profile	View First Contact survey	View data for all students		
Reports and Extracts	Limited Access	Fall and Spring Performance Report*	**No data for YE model states during their spring assessment window*		
Instruction & Assessment Planner	Access*	Fall and Spring Performance Report*	**No data for YE model states during their spring assessment window*		
Test Management	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.

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

Table 16

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

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

Extracts and Files for Year-End model states	Roles that can access the extracts and files
Current Enrollment extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
DLM On-Demand Exited Student file	SAA only
DLM On-Demand Special Circumstance file	SAA, DTC*, BTC* (*depending on the state)
DLM Test Administration Monitoring extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
First Contact Survey file	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
General Research File and other end-of-year files and extracts	SAA, DTC* (*depending on the state)
PNP Setting Count extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
PNP Settings extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Parents extract	SAA, DTC* (*depending on the state)
Parent Portal Registration extract	SAA only
Roster extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Security Agreement extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Student Roster and First Contact Survey Status extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
TIP Access extract	SAA, DTC, BTC
Training Status extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Users extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS

Table 17

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

Reports for Year-End model states	Roles that can access reports
Class Roster Report	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
End-of-Year Reports	Some roles have access if allowed 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
Fall Performance Report	SAA, DTC, BTC, TEA, PRO

Table 18

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

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

Extracts and files for IE model states	Roles that can access the extracts and files
Current Enrollment extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
DLM Blueprint Coverage Summary extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
DLM Instructionally Embedded Monitoring extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
DLM On-Demand Exited Students File	SAA only
DLM On-Demand Special Circumstances File	SAA, DTC*, BTC* *depending on the state
First Contact Survey file	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
General Research File and other end-of-year files and extracts	SAA, DTC* *depending on the state
PNP Setting Counts extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
PNP Settings extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Parents extract	SAA, DTC* *depending on the state
Parent Portal Registration extract	SAA only
Roster extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Security Agreement extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Student Roster and First Contact Survey Status extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS, TEA
Tips Access extract	SAA, DTC, BTC
Training Status extract	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS
Users	SAA, RTC, RUS, SUP, DTC, DUS, BTC, BUS

Table 19

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

Reports for IE model states	Roles that can access these extracts
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
Fall/Spring Performance Report	SAA, DTC, BTC, TEA, PRO

Create a User Upload Template File

This is the most efficient procedure for uploading multiple **new** users to Educator Portal and for deactivating users who should no longer have accounts in Educator Portal.

NOTE: Data managers may also manually enter individual users using the user interface. Go to Add a User Manually in this manual.

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 the system will reject them.

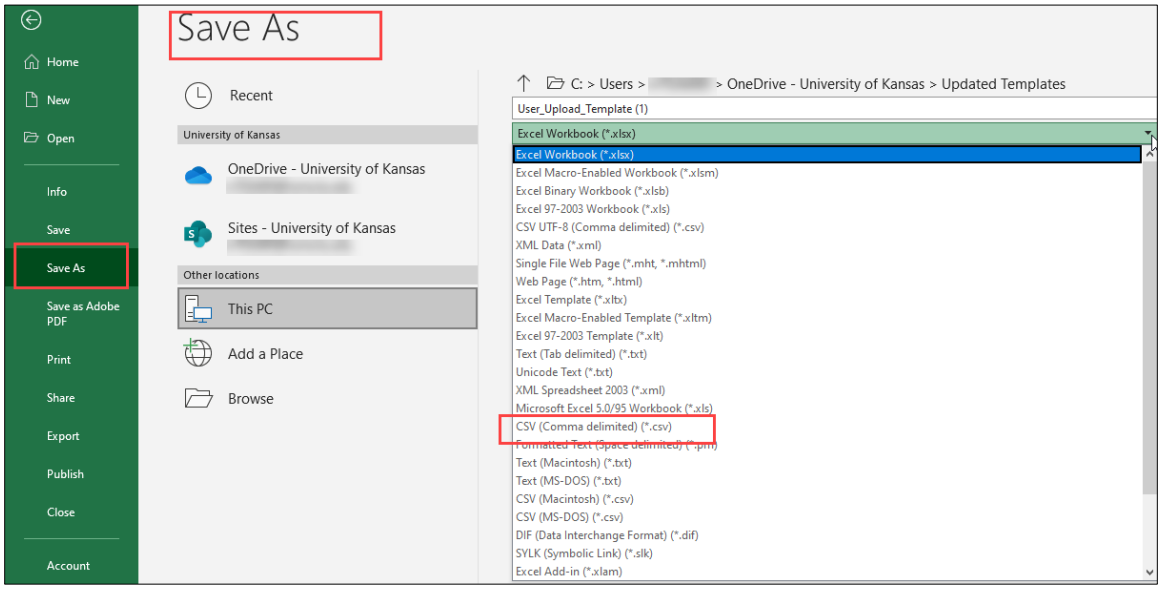
2. Open the User Upload Template in a spreadsheet program that saves data in the CSV (comma-delimited) format. The template must be uploaded in this format.
3. Using a new row for each user, type the information for each new user into the template file.
4. If one user serves multiple organizations, use a new row for each of those organizations, but use the same last name, first name, educator identifier, and email address.
5. For users who should be deactivated, complete all required fields.
6. Complete all required fields.
7. Verify that all column headings appear in the file, even for fields left blank. Changing or removing a column or column headings will generate an error, preventing data from being uploaded into Educator Portal.

8. Save the file as a CSV (comma-delimited) file in an easily accessible location. Leave the file **open** until the file in Educator Portal has been successfully uploaded 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.
>
> 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**.

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. Since the zeros are missing in the Organization ID column, this User Upload Template file will not upload successfully until the required number of leading zeros is added.

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	

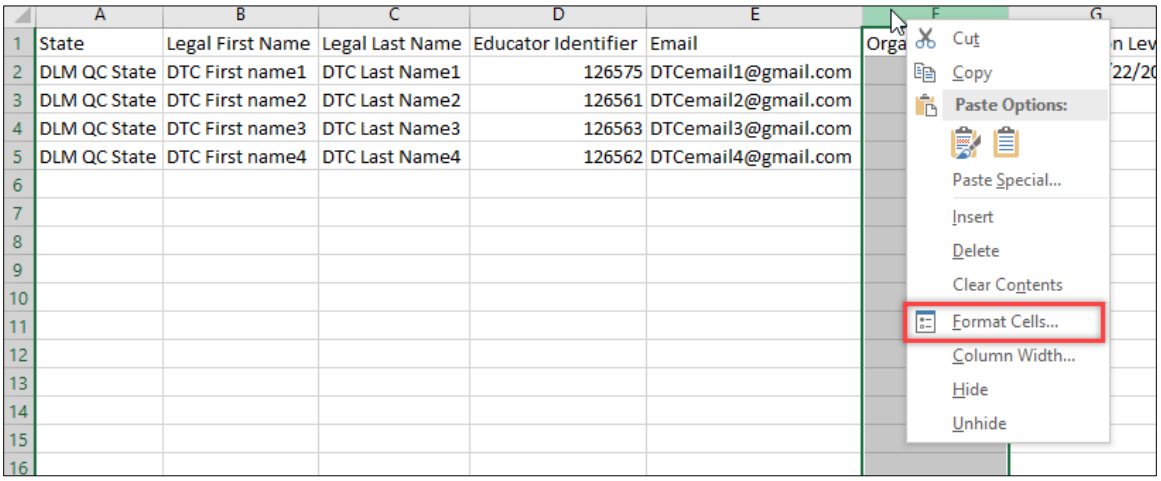
NOTE: In fields that require a date, format the cells for MM/DD/YYYY.

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

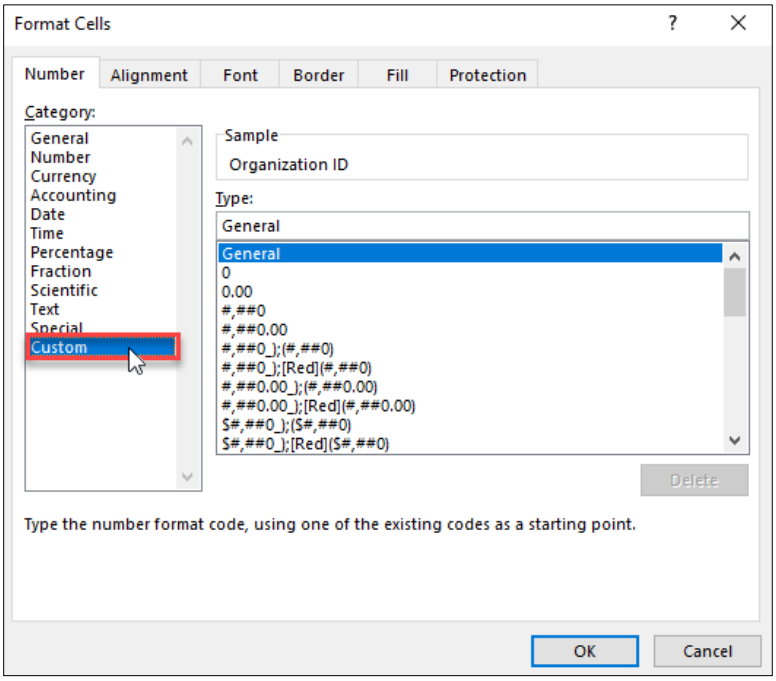
1. Go to the applicable column heading, hover over the column heading, and select the column to get the small downward pointing arrow for the column.

	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	

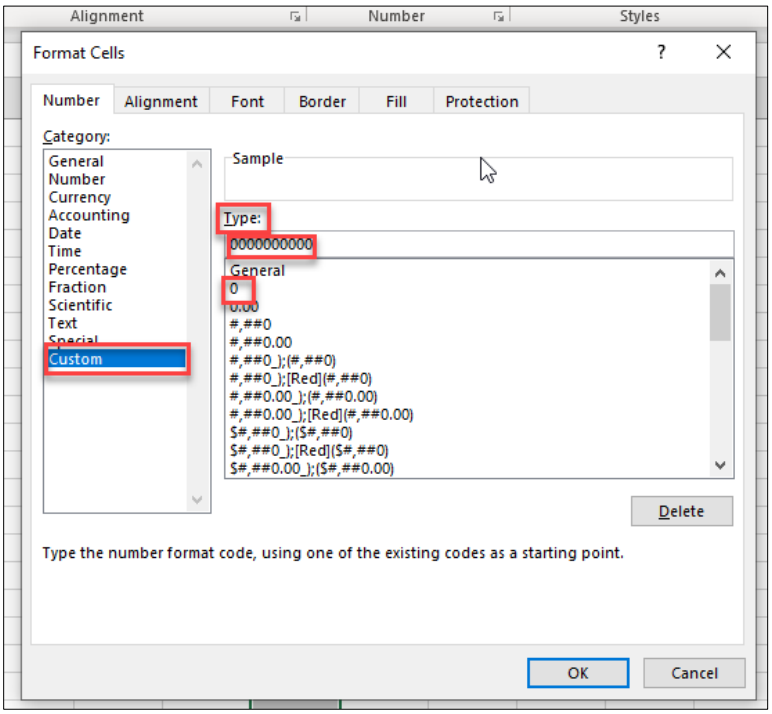
2. Highlight the column. Using the right mouse button, select the column to open the menu. Select **Format Cells**.



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



The following screenshot 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	

6. Upload the template file following the instructions beginning on page 48.

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 users have spaces, hyphenation, or accent marks in their name, use these when uploading the users in Educator Portal. Including this punctuation will help later when a search is performed to find them 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 in Educator Portal) 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.

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 52 of this manual for information on adding more organizations.

VERY IMPORTANT NOTE for 2022–2023

At the request of consortium state leaders, the columns and heading names in the 2022–2023 upload template files and extracts were changed to be more in alignment with each other.

The User Upload Template file for 2022–2023 must be used for uploading batches of users in Educator Portal. Template files from previous years will be rejected by the system.

Create a new user record before attempting to enroll students or create rosters.

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 maximum 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 **NEVER use social security numbers.** 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
Educator_Email_Address	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_ID	Alphanumeric	Yes	The code for the user's district, school, or other organizational unit Must include any leading zeros	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. 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. Go to page 36 in this manual for instructions on how to Include Leading Zeros in an Upload File. Hint: Excel has several CSV format choices. **DLM users must choose CSV (comma-delimited) format.**

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.*

Field	Format; Length	Required	Description	Special Notes
Primary_Role	Alpha 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 48 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	Alpha 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 48 of this manual.
Primary_Assessment_Program	Alpha UPPERCASE ONLY	Yes	The code associated with the assessment program	Type DLM.
Deactivate_User	Alpha	No	This field is only used when deactivating a user.	If a user should no longer have access in Educator Portal, type **deactivate** in this field. This field is case-insensitive.

*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

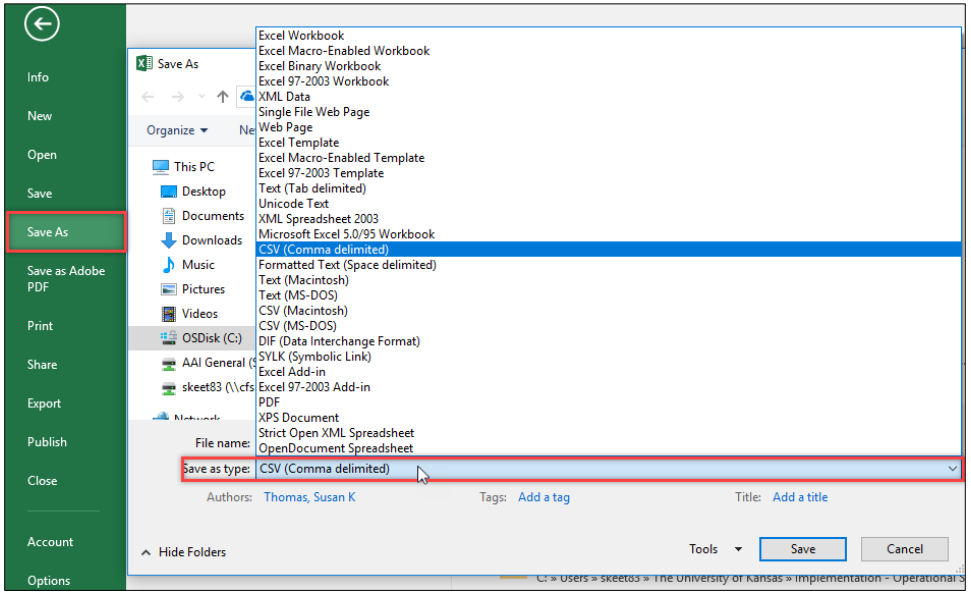


Figure 5

Entering a Row for Roles at Both District and School Level

	A	B	C	D	E	F	G	H	I	J
1	Legal_First_Name	Legal_Last_Name	Educator_Identifier	Educator_Email_Address	Organization ID	Organization_Level	Primary_Role	Secondary_Role	Primary_Assessment_Program	Deactivate_User
2	Mary	Smith	msmith@schools.state.gov	msmith@school.state.gov	38010	DT	DTC		DLM	
3	Mary	Smith	msmith@schools.state.gov	msmith@schools.state.gov	38010	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 16 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

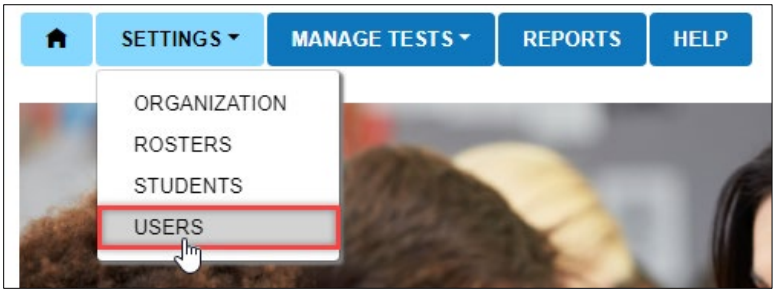
*Only for use in states that have regions designated in Educator Portal. In those states, **all** districts within the state are assigned to one of the regions. If used in a user upload template file in a state that does not meet this criterion, an error message will be generated.

Upload a User Upload Template File

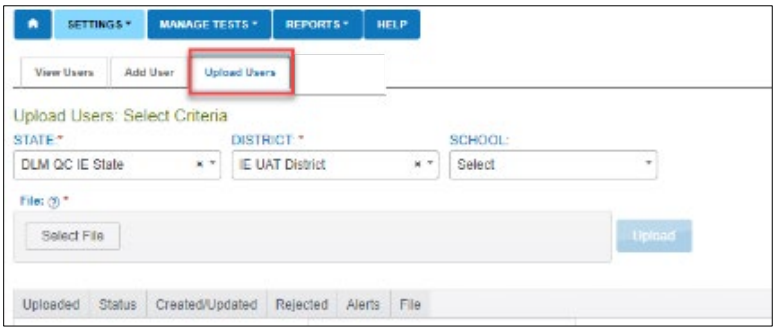
The following is the most efficient procedure for uploading multiple new users to Educator Portal. Data managers may also manually enter individual users. Go to Add a User Manually on page 52 of this manual. Any number of users can be added manually at the data manager's discretion. However, the user interface is most useful when adding five or fewer users at one time or when editing a user's account.

1. Select **Settings**.

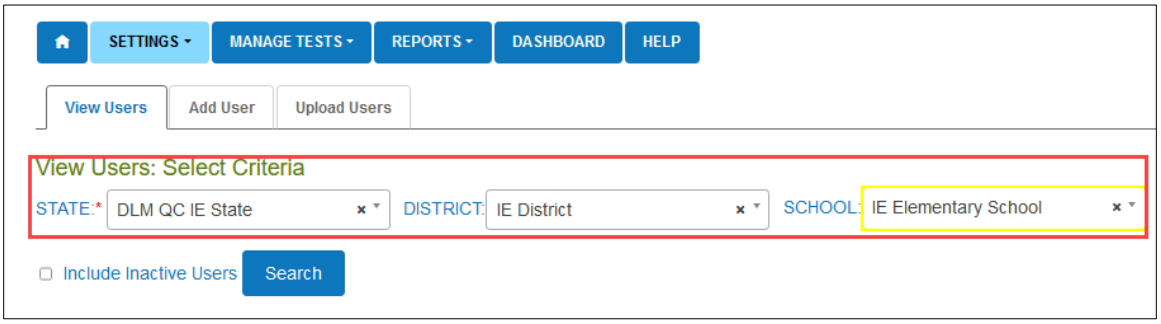
2. Select **Users** from the drop-down menu.



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

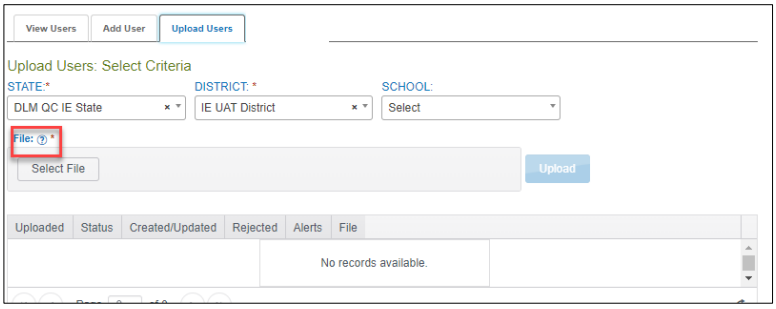


4. Apply filters in the Upload Users: Select Criteria fields to choose the correct levels. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu.

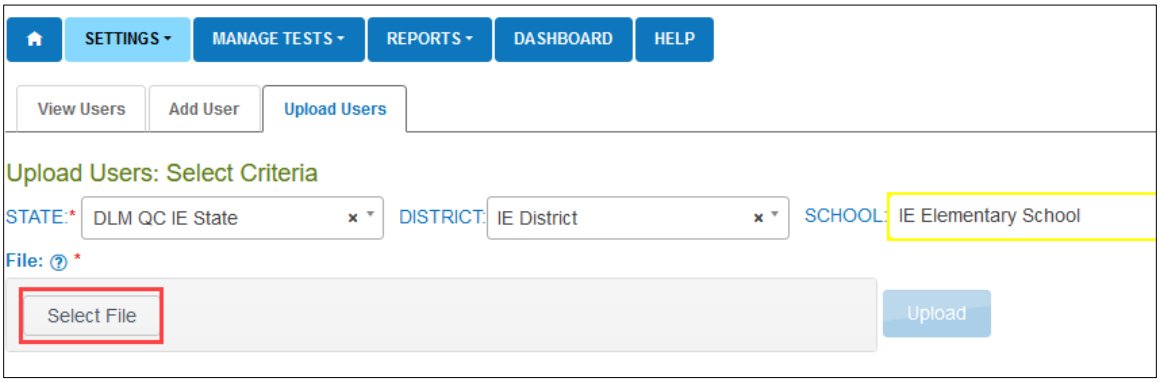


HINT: If the list does not include the correct option, contact the District Test Coordinator.

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



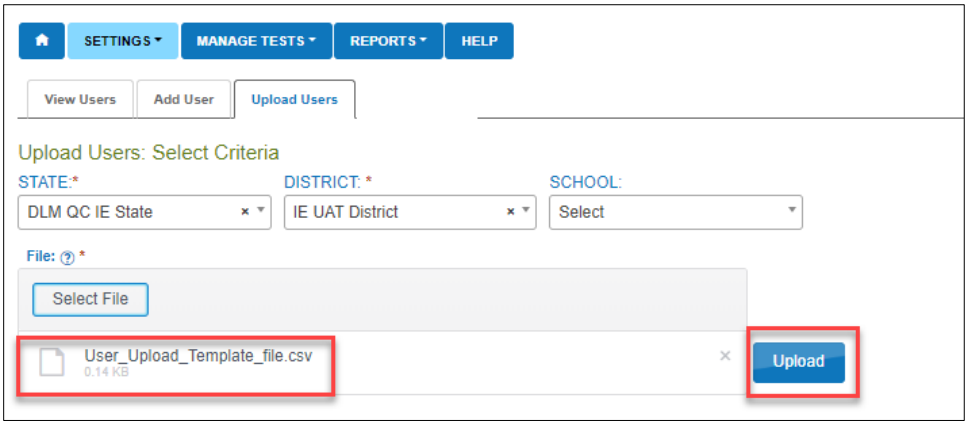
5. Save the User Upload Template file where it can be easily found, but leave the file open until the file has successfully uploaded.
6. Use the **Select File** button to open a browser window.



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 for each line where an error occurred.

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.

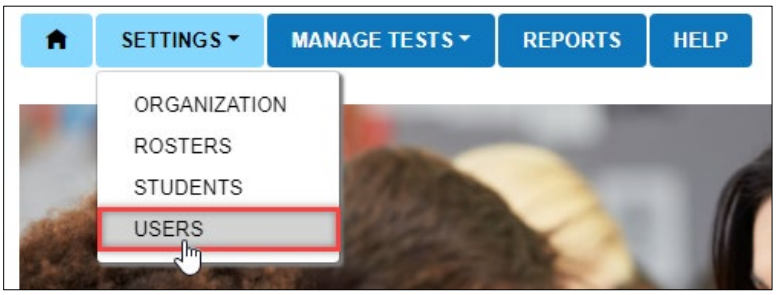
On the other hand, when working with several hundred records (i.e., the first enrollment for the school year in August), using a CSV file upload is much more efficient than uploading one at a time. Depending on the need, data managers can use the method that works best for them for the situation, whether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

ADD A USER MANUALLY

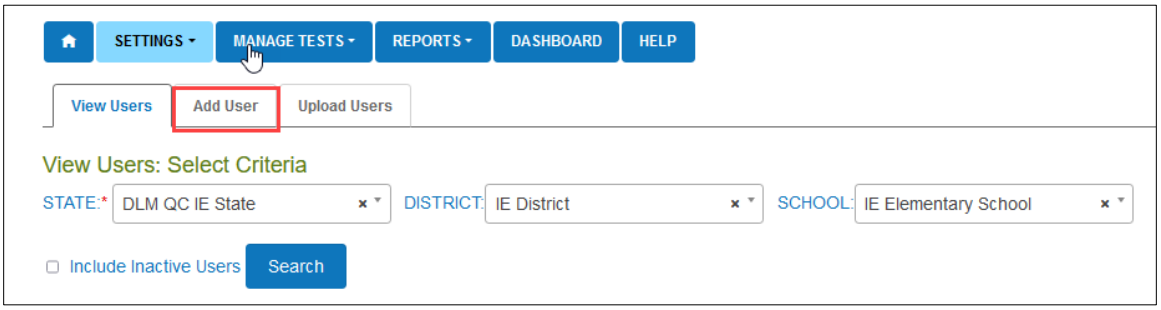
This procedure is most helpful when adding five users or fewer. Use the User Upload Template file when adding more than five users at one time. Go to Create a User Upload Template File on page 35 of this manual for information on creating a batch upload using the upload template file.

1. Select **Settings**.

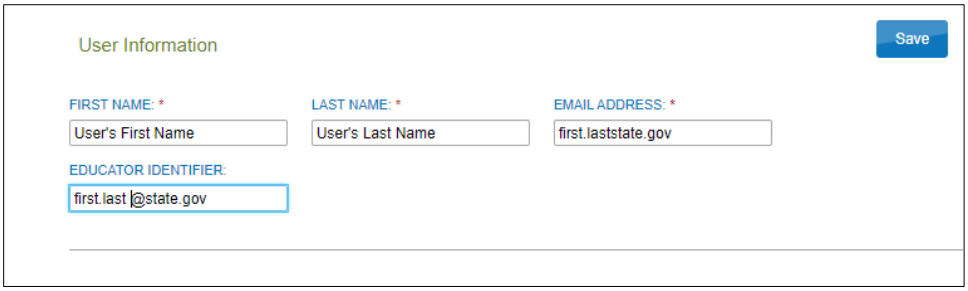
2. Select **Users** from the drop-down menu.



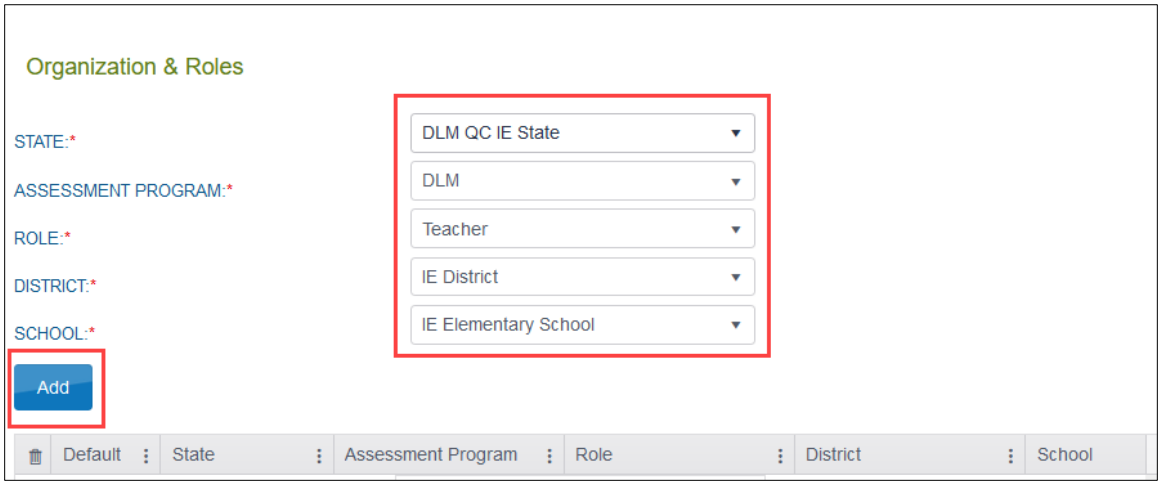
3. The View Users tab is the default. Select the **Add User** tab.



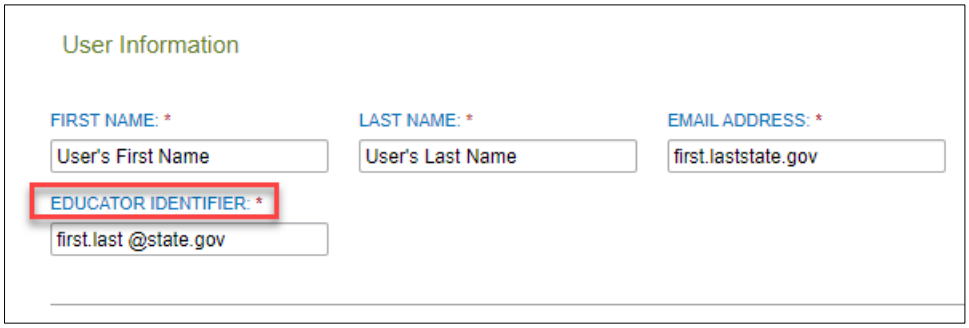
4. On the Add User screen, complete all User Information fields (fields marked with a red asterisk are required).
   - **First Name**
   - **Last Name**
   - **Email Address** will become the username when signing into Educator Portal.
   - **Educator Identifier** is required for users with the teacher role. The Educator Identifier links a teacher to their students when a roster is created. The Educator Identifier is case-insensitive.



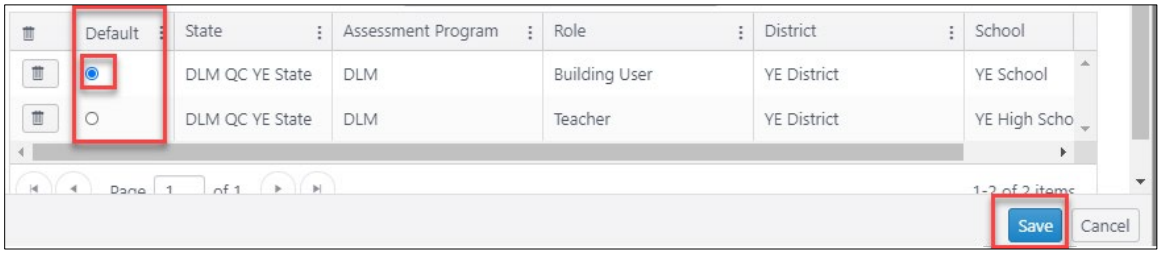
5. Complete the Organization & Roles drop-down fields. Select the **Add** button.



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.



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

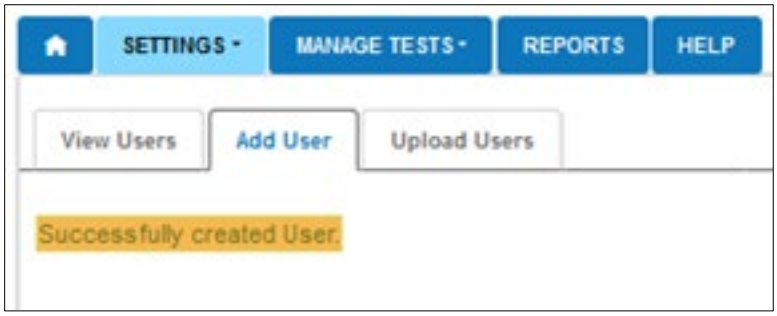


HINT: If a user has multiple roles in a district or serves multiple schools in the same district, the district data manager should complete steps 5-7 for each role and organization. Select **Add** after adding each role or school. Once all roles or organizations are added and the default role is chosen,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

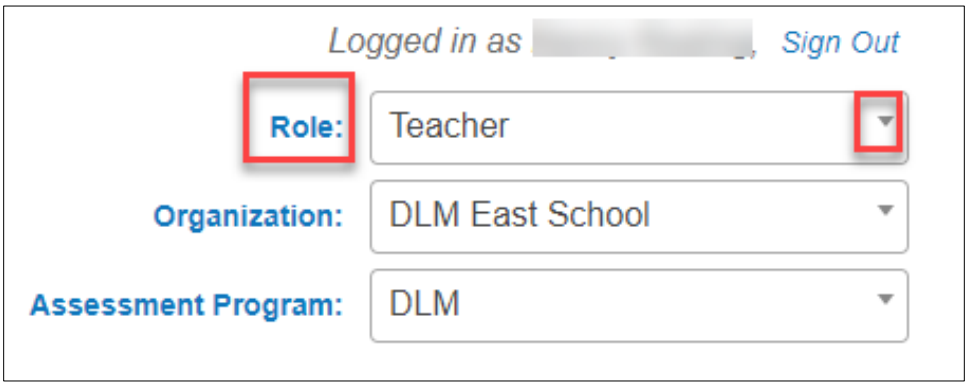
When a user with the Teacher role needs to be associated with multiple organizations, the additional organizations should be added to only one teacher account. By following this recommendation, the teacher will complete Required Test Administrator Training only one time to qualify in each organization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

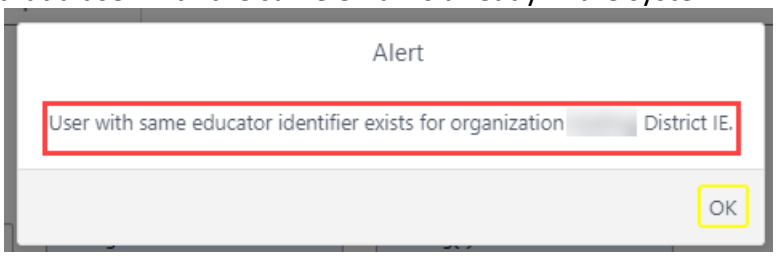
7. After selecting **Save**, a confirmation message will appear, stating that the user account has been successfully created. Log out and sign back in to access the changes.



8. 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.



10. To locate the existing user, use the following procedure for editing a user's account.

Edit a User's Account

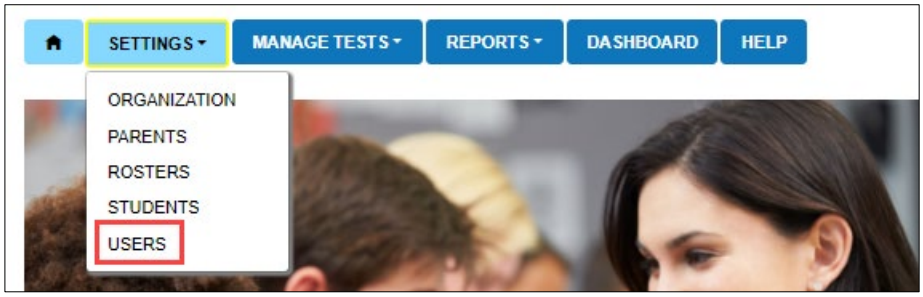
Use this procedure to edit data in a user's account or to change a user's role(s) or organizations from those previously assigned.

NOTE: Do not attempt to transfer an Educator Portal account from one user to another. This violates the security agreement. Instead, deactivate 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.

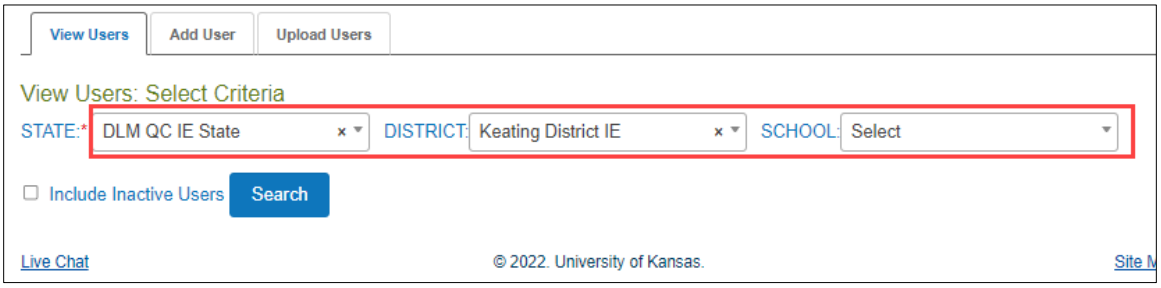
---

1. Select **Settings**.

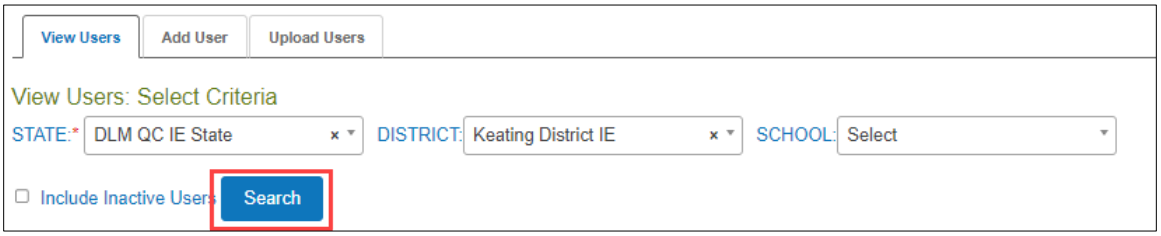
2. Select **Users** from the drop-down menu.



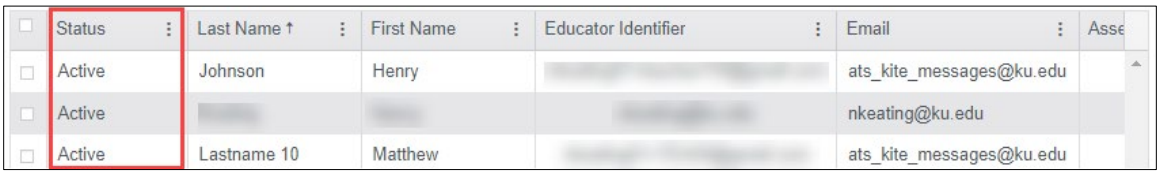
3. On the View Users: Select Criteria screen, the fields for state, district, and school will prepopulate according to the user's permissions in Educator Portal. If needed, apply filters. Use the drop-down arrow in the fields to choose a different organization from those that prepopulated.



4. Select **Search**.

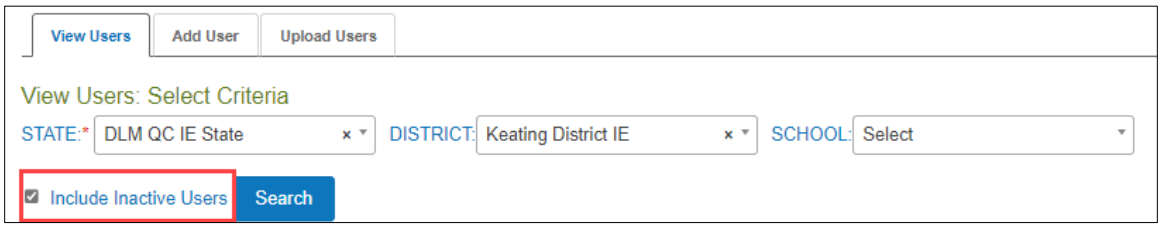


5. The list of all active or pending users for the applicable organization will appear.

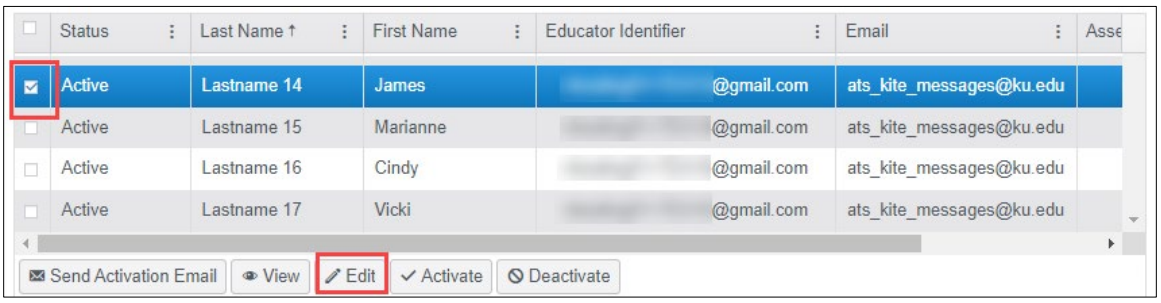


Status	Last Name	First Name	Educator Identifier	Email	Asse
Active	Johnson	Henry		ats_kite_messages@ku.edu	
Active				nkeating@ku.edu	
Active	Lastname 10	Matthew		ats_kite_messages@ku.edu	

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

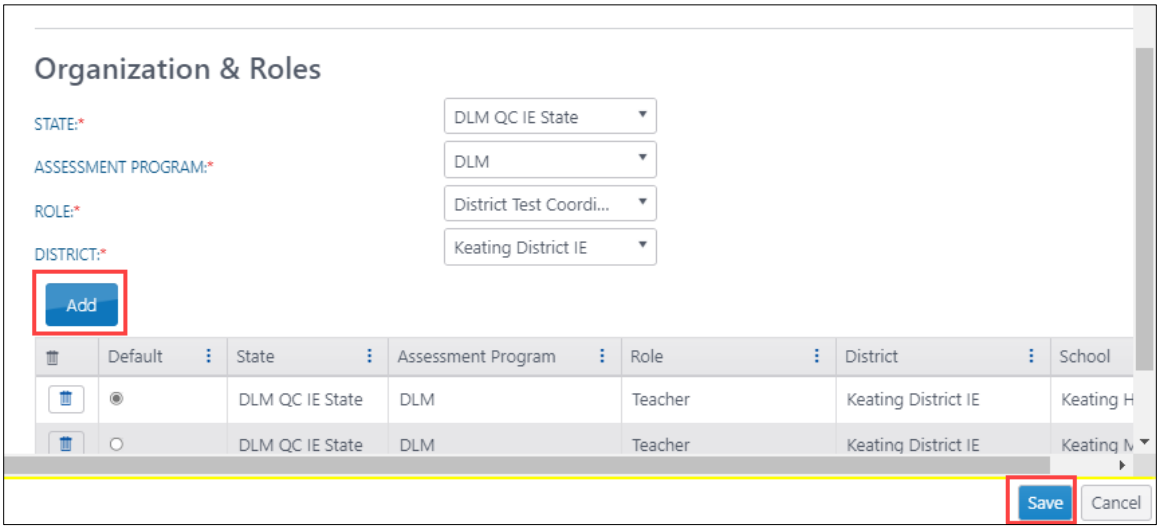


6. In the table of available users, select the box on the far left in the row for the user whose account needs editing.
7. At the bottom of the grid, select the **Edit** button (includes the pencil icon). The Edit User: Enter User Information screen will appear.



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.



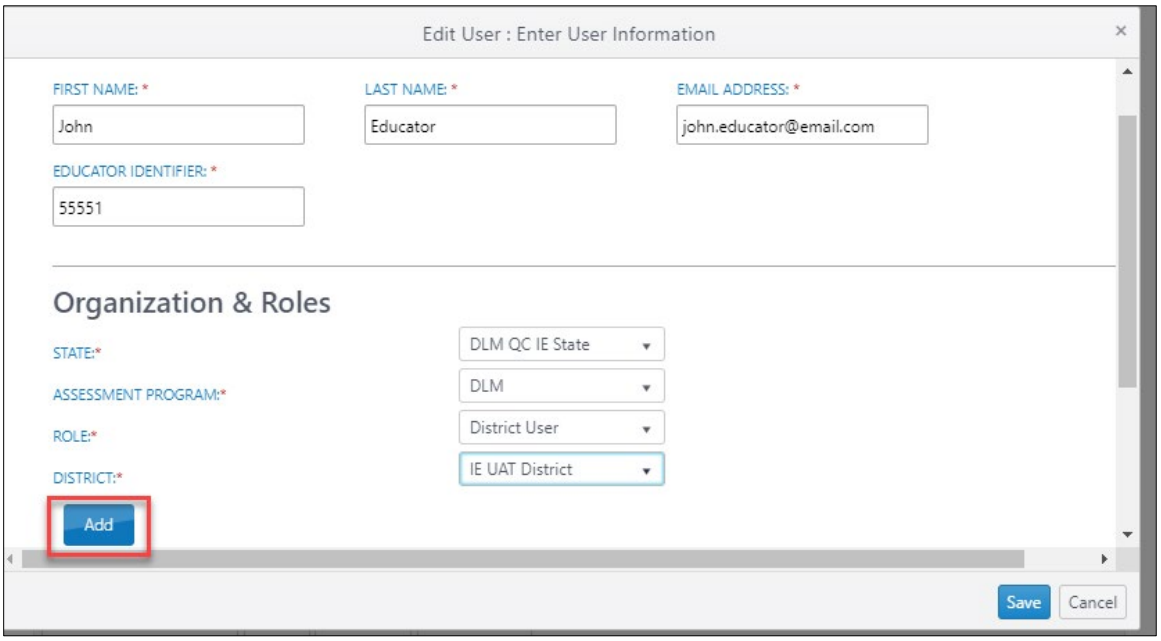
IMPORTANT MESSAGES ABOUT THE TEACHER ROLE

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.

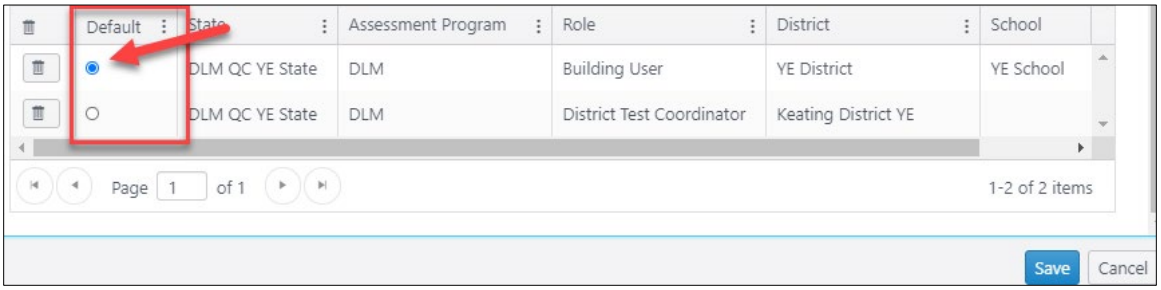
If the Educator Identifier changes for a user with the teacher role, use the user interface to make the change. Any new roster being created must match the new Educator Identifier. Existing rosters will be updated automatically. The Educator Identifier is case insensitive.

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.

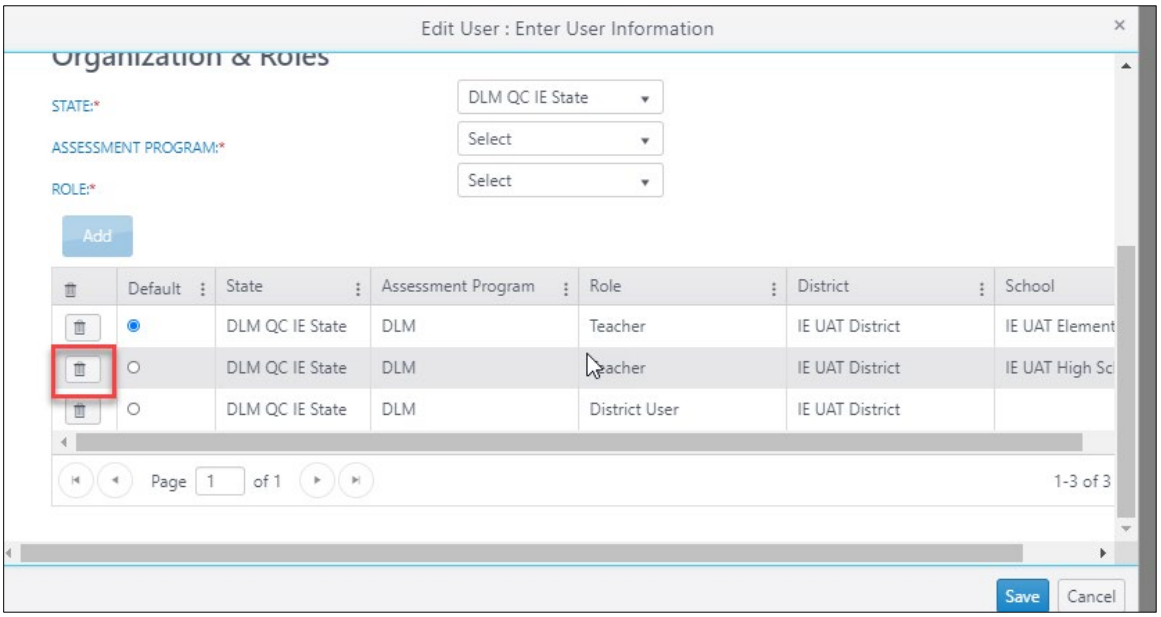
12. After selecting a new role or organization, select **Add**. This process must be repeated for each additional role or organization needed.



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 appears when the user signs into Educator Portal. The default role should be the role used the most by the user.



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.



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**. The message also recommends signing out of Educator Portal and then signing back in to see the changes.

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 on the Edit User: Enter User Information Screen
Change **First Name**, **Last Name**, or **Email Address**.	Type the new information into the matching field at the top of the Edit User: Enter User Information 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 Organization & Roles, use drop-down menus to select appropriate role(s).
Change the default role.	In the list of roles beneath the Organization & Roles section, select the radio button in the Default column to the left of the desired role.
Change Educator Identifier.	Type the new information into the matching field at the top of the Edit User: Enter User Information screen.
Add an organization.	Under Organization & Roles, use drop-down menus to select appropriate organization.
Remove an organization.	On the Edit User: Enter User Information screen on the list of roles beneath the Organization & Roles 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 Portal 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. 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.

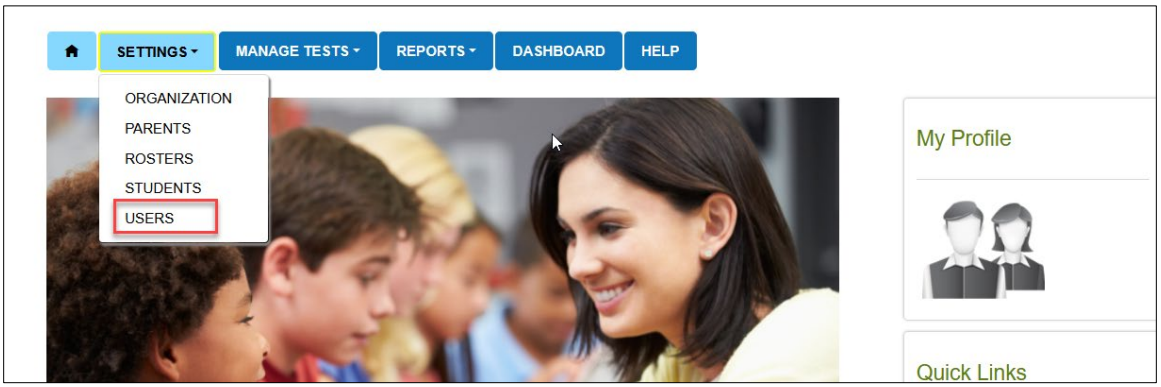
> HINT: A pending status indicates that the user has not activated their account. The user may have not received the activation email because a spam filter blocked it or an incorrect email address was used when the account was created. The activation link expires after 20 days and will need to be reactivated.

Resend Activation Email

Use the following procedure to resend the Kite activation email message to a pending user.

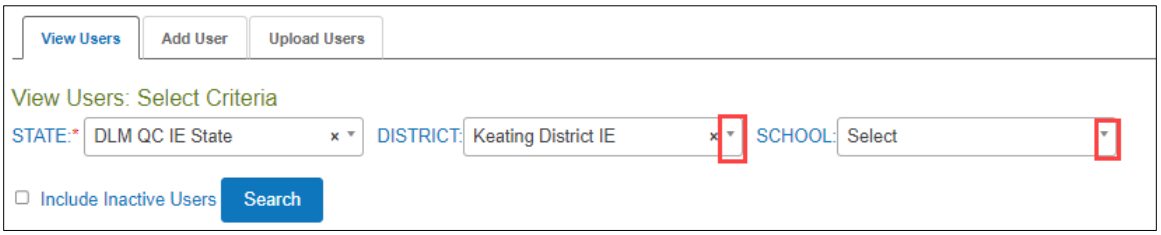
1. Select **Settings**.

2. In the dropdown menu, select **Users**.

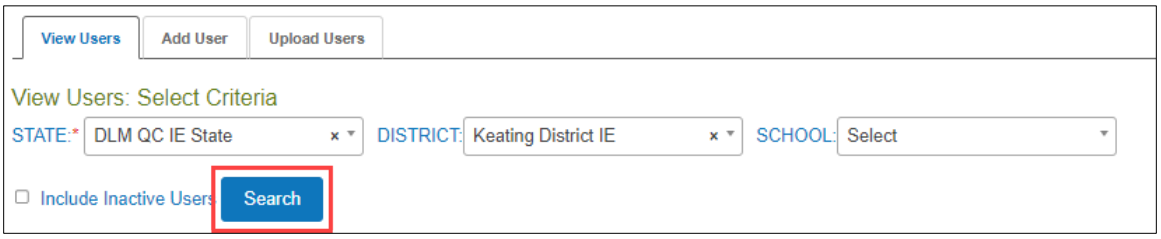


3. The View Users: Select Criteria screen will display.

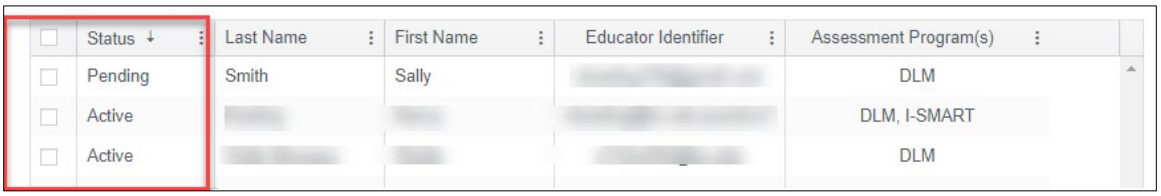
4. On that screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu.



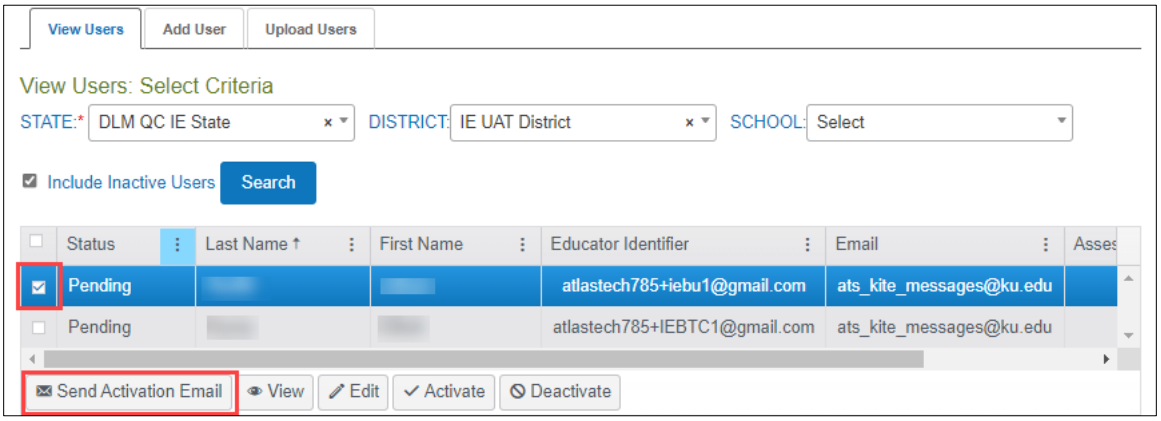
5. Select **Search**.



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



7. Locate the pending user (options to filter, sort, and search are available).
8. Select the checkbox to the left of the user's name that is pending. (Uncheck the same box to deselect a user, when 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.



Activate or Deactivate a User

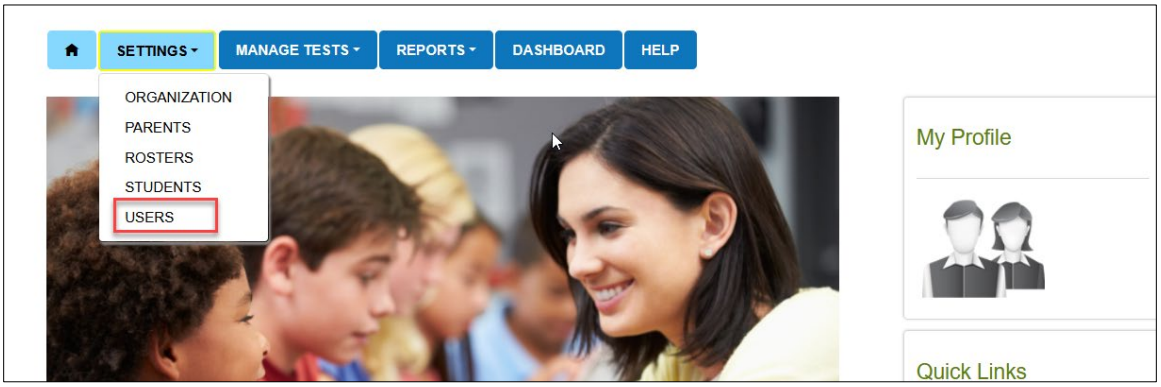
Sometimes users have been deactivated because they no longer needed an account in Educator Portal, i.e., they left the district. Their account in Educator Portal is now

inactive. To activate an inactive user account, i.e., the user has returned to the district, follow these steps.

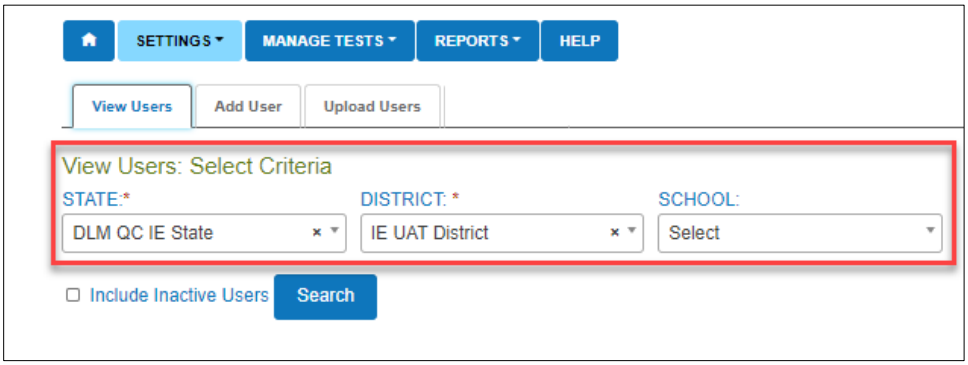
Activate a User

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

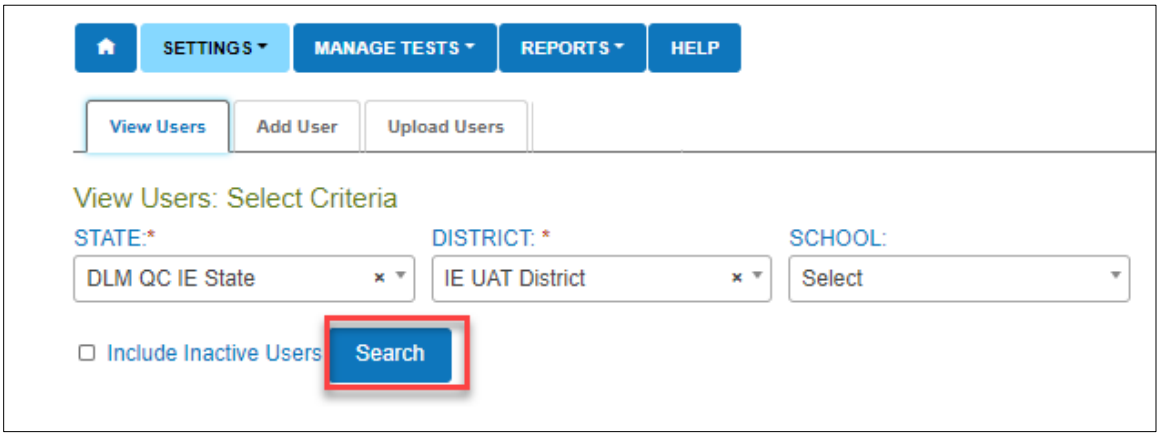
2. In the drop-down menu, select **Users**.



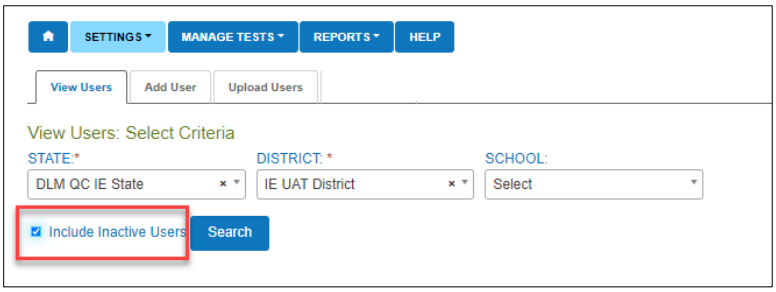
3. On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu.



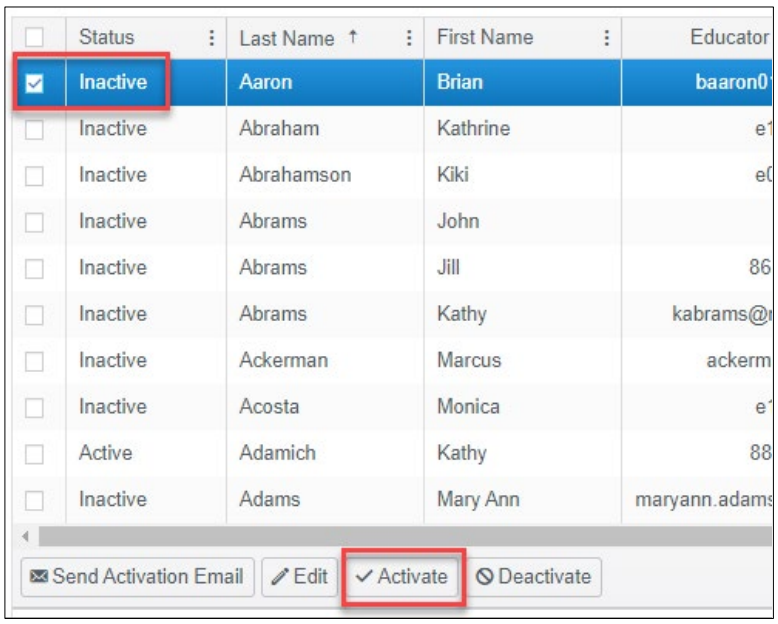
4. Select **Search**.



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



7. Find the inactive user and select the checkbox on the left in the row for the user.
8. Select the **Activate** button (includes a checkmark icon) below the list of users.



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

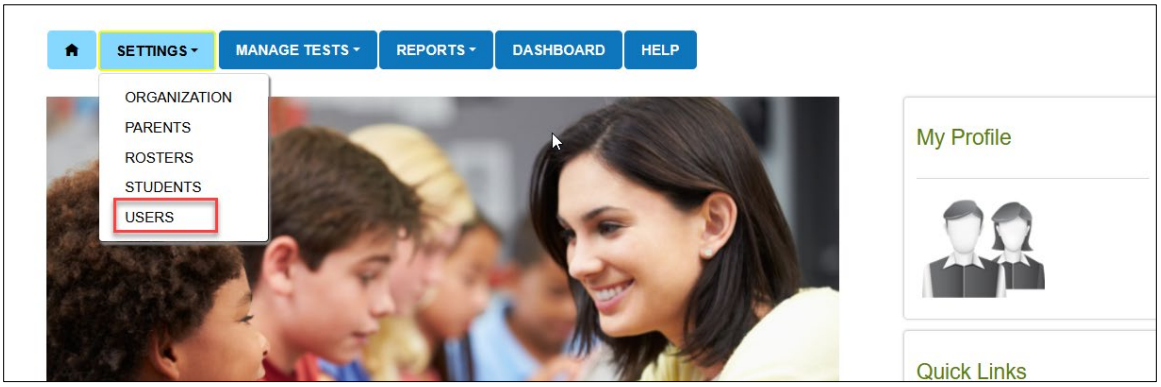
Deactivate a User

If a user no longer needs an Educator Portal account, the account should be deactivated.

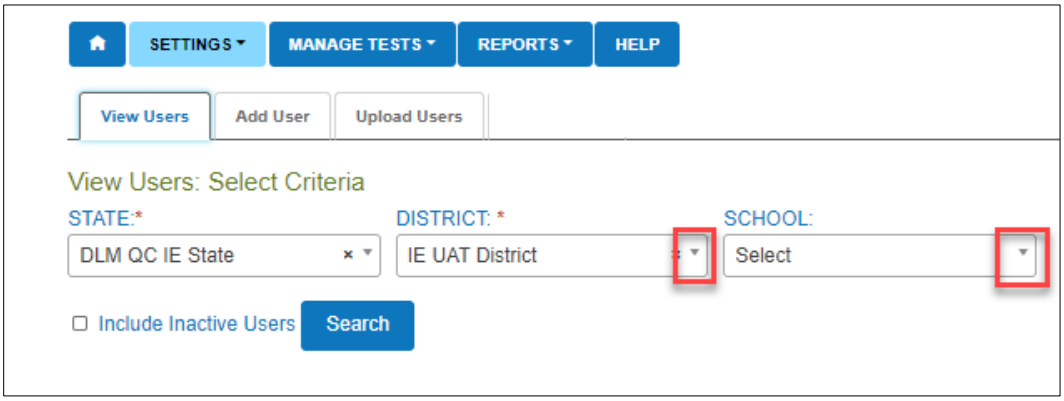
> HINT: A user with the teacher role should never be deactivated for an organization before checking with the SAA, RTC, or the organization's DTC. The account and organization may be for a test administrator who is rostered to students in multiple organizations.

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

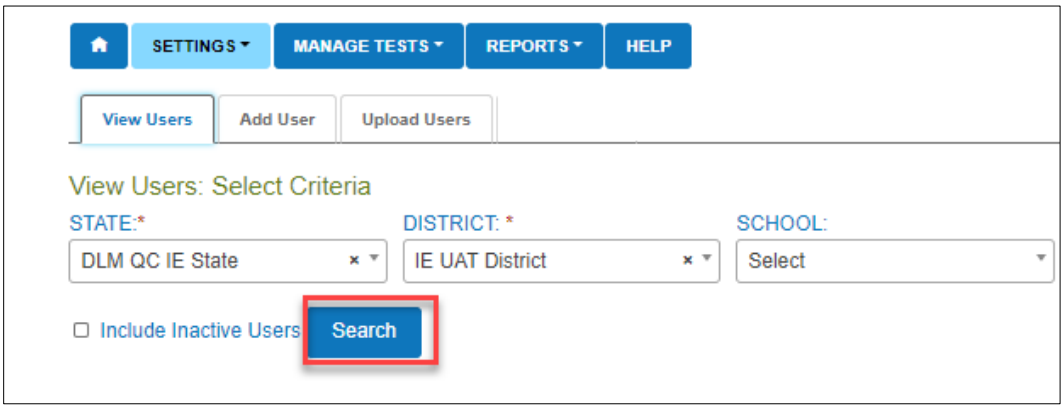
2. In the dropdown menu, select **Users**.



3. 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.

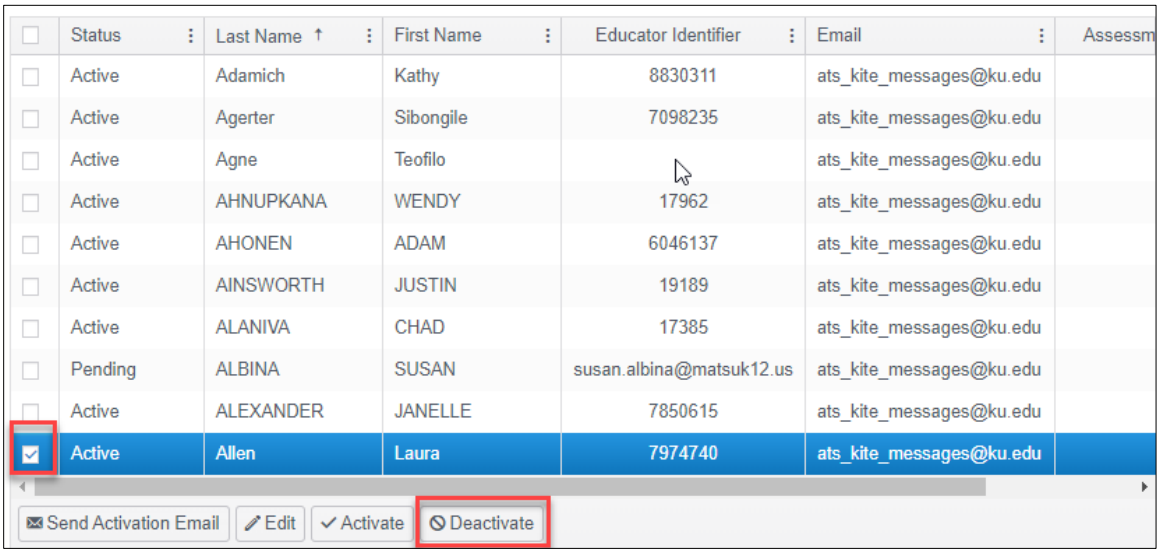


4. Select **Search**.



5. The list of all active or pending users for the applicable organization will appear.
6. Locate the user (options to filter, sort, and search are available) and select the checkbox to the left of the user's information.

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



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

Send Activation Email | Edit | Activate | Deactivate

The deactivated user will not be visible in any organizations with which they were 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 to 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, the extract will include one line (record) for each organization or role with which the user is associated. 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, in Educator Portal, the Kite system deactivates (removes from view) student records in Educator Portal. Beginning in early August, students can be enrolled again for the new school year. The enrollment template file uploads **reactivate** student records from previous years or 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 during the previous school year. This extract can be modified and used to upload students as appropriate for the upcoming school year.

VERY IMPORTANT NOTE for 2022–2023

At the request of consortium state leaders, the columns and heading names in the 2022–2023 Enrollment Upload Template file were changed to be more in alignment with other template files and extracts.

If an Enrollment extract from 2021–2022 was downloaded and saved by an organization for the purpose of modifying it and using it for a 2022–2023 Enrollment Upload Template file, the first five columns must be removed from the extract, and the other columns must be rearranged to match **EXACTLY** the order in the new 2022–2023 Enrollment Upload Template file.

The heading names must also match **EXACTLY**. All heading names in the 2022–2023 Enrollment Upload Template file include an underscore between words, and some heading names are slightly different, i.e., Current_School_Year compared to School_Year.

All headings and columns must match **EXACTLY** the 2022–2023 Enrollment Upload Template file or the upload will fail.

Use the table beginning on page 71 to accurately rearrange the extract columns and to accurately modify the heading names to match the 2022–2023 Enrollment Upload Template file.

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

NOTE: Before attempting to enroll students locally, check with the state assessment administrator to ensure local enrollments are permitted. Some states upload all student enrollments at the state level.

Student data from the previous year should be edited for corrections and, depending on state policy, the students should be **promoted** to the next grade in the file before the upload. The student's grade level on the Enrollment Template Upload file determines the appropriate testlets that become available for the student when the assessment window opens.

Students can be enrolled in large batches, which will be described first.

NOTE: If a student changes grades after their initial enrollment, edit the student's grade as soon as possible using the procedure Change Enrollment Data Previously Uploaded, beginning on page 88, or Edit a Student Record Manually, beginning on page 101.

If the student has already started testing, in most cases, the student will need to start testing over.

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 who is enrolled in more than one organization must have 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 must be left blank as noted on the chart of field requirements. This can be especially helpful in large districts with many students.
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 122 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	The Accountability District Identifier (Column A) is **not** a required field in the Enrollment Upload Template file. It is available for state use if desired. Save the file but do not close it before uploading it in Educator Portal because any special formatting will likely be lost, i.e., leading zeros. If the codes are numeric and contain leading zeros, ensure that the leading zeros* are retained after each save. Note: The Accountability District Identifier only becomes required if the Accountability School Identifier code is entered in column B.
B	Accountability_ School_Identifier	Alphanumeric; 30	No	The unique code assigned to the school as listed in the state organizational table in column B	The Accountability School Identifier (Column B in the state organizational table) is **not** a required field in the Enrollment Upload Template file. It is available for state use if desired. If the code is numeric and contains leading zeros, ensure that the leading zeros* are retained after each save. Save the file but do not close it before uploading it in Educator Portal because any special formatting will likely be lost, i.e., leading zeros.

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 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. Save the file but do not close it before uploading it in Educator Portal because any special formatting will likely be lost, i.e., leading zeros. Note: The Accountability District Identifier only becomes required if the Accountability School Identifier code is entered in column B.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
D	Attendance_School_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 in the state organizational table). 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. Save the file but do not close it before uploading it in Educator Portal because any special formatting will likely be lost, i.e., leading zeros.
E	School_Year	YYYY; 4	Yes	The ending year of the current school year (e.g., for the 2022-2023 school year, enter 2023)	Use 2023.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
F	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. Save the file but do not close it before uploading it in Educator Portal because any special formatting will likely be lost, i.e., leading zeros. The State Student Identifier may appear on the Individual Student Score Report, depending on state policy.
G	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. Save the file but do not close it before uploading it in Educator Portal because any special formatting will likely be lost, i.e., leading zeros.
H	Student_Legal_ First_Name	Alphanumeric; 60	Yes	The student's first name	Use spaces, accent marks, and hyphenation where needed. This entry will appear on the Individual Student Score Report.
I	Student_Legal_ Last_Name	Alphanumeric; 60	Yes	The student's last name	Use spaces, accent marks, and hyphenation where needed. This entry will appear on the Individual Student Score Report.
J	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
K	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)	If this field is entered, this entry will appear on the Individual Student Score Report.
L	Gender	Numeric; 1 0 = Female 1 = Male 2 = Nonbinary/ undesignated	Yes	The student's gender	State policy in each state determines the gender codes available to use in the Enrollment Template Upload. Use of any other code will generate an error at the time of the upload.
M	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
N	Current_Grade_ Level	Numeric; 2 3-12 **Do NOT use leading zeros in single number grades, e.g., 3.**	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 is grade 3, 11 is grade 11)	Some states provide a birthdate chart to help data managers align the student's age with the grade to be assessed. Data managers should 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.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
O	School_Entry_Date	MM/DD/YYYY; 10	Yes	The date (month, day, and year) 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 **cannot** be left blank. If date is unknown and a fictitious date is entered to satisfy the field, this date should be as realistic and 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 (month, day, and year) 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 82 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 is Autism, DB is Deaf/blindness). Tables of potential values are provided on page 83 of this manual.
T	Gifted_Student	Alpha; 5 TRUE or FALSE	No	Indicates whether the student has an active IEP for giftedness	**Must leave blank** 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 84 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 85 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	**Must leave blank**.

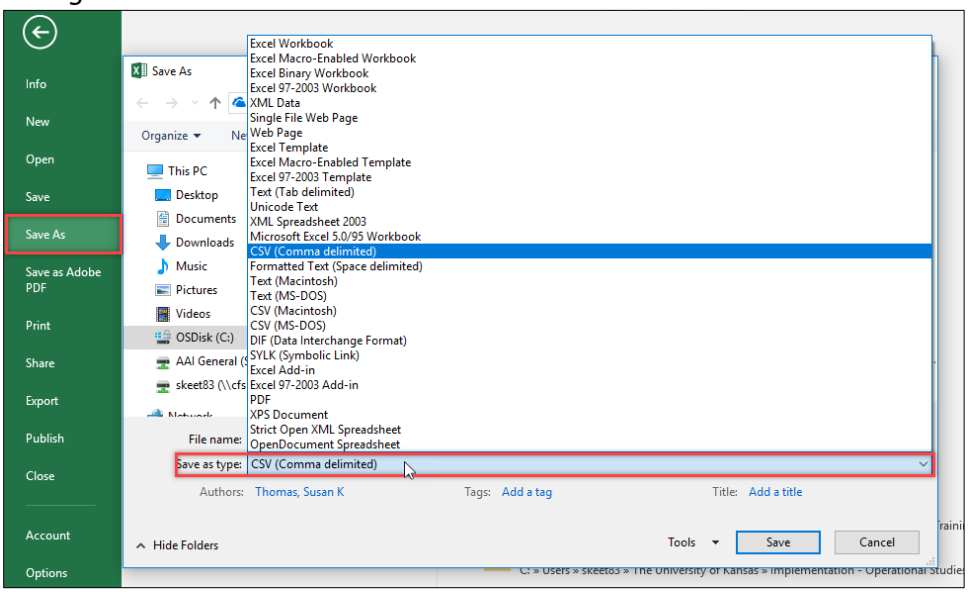
Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
Z	Assessment_ Program_3	Alphanumeric; 30	No	Allows the student to be assigned to an additional assessment program	**Must leave blank.**

*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 format 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, use one of the numbers from Table 26 that best aligns to the student's first language.

Table 26

First Language

Entry	Definition
0	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, Micronesian)
22	Bosnian
23	Burmese
24	Hindi

Entry	Definition
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
46	Japanese
47	Amharic

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's 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

Uploading an Enrollment Upload Template file is the most efficient method for enrolling (activating) multiple students into Educator Portal.

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

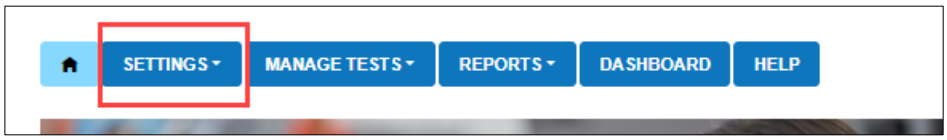
A state may have a system in place for directly submitting multiple student records to Educator Portal, i.e., OneRoster.

Before enrolling students, check with your state assessment administrator and/or the DLM Service Desk about the policy in your state for enrolling students.

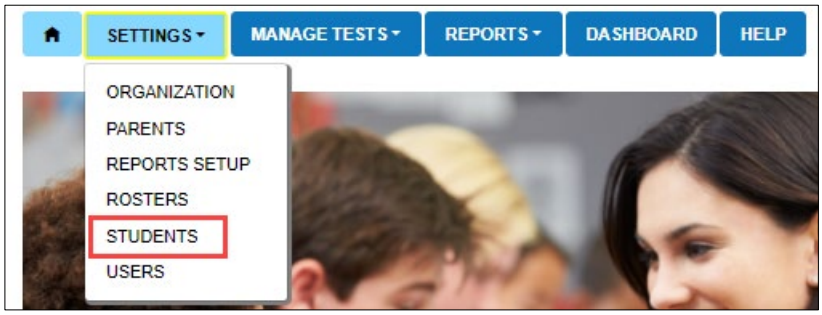
When using the Enrollment Upload Template file, each row that has a new State Student Identifier results in the creation of a unique student record. In a row with an existing or previously enrolled/uploaded State Student Identifier, the new upload overwrites and updates the previous record.

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

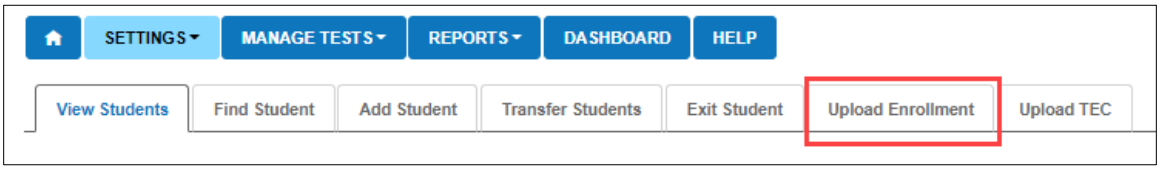
1. Select **Settings**.



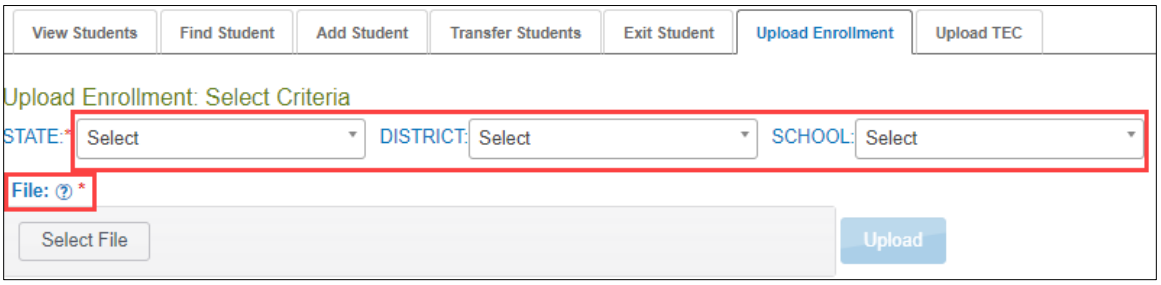
2. Select **Students** from the drop-down menu.



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

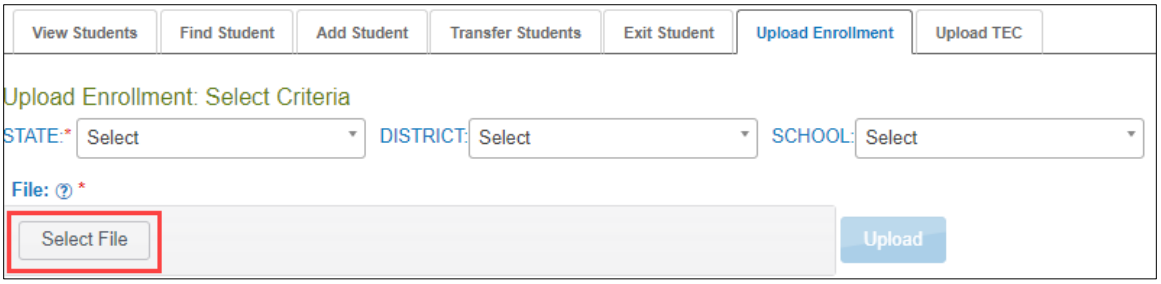


4. In the Select Criteria fields, if a state-level user is uploading for the entire state, the district/school are left blank. For a district- or building-level user, the fields will prepopulate according to the user's level of permissions. When needed, select the district/school from the drop-down menu.

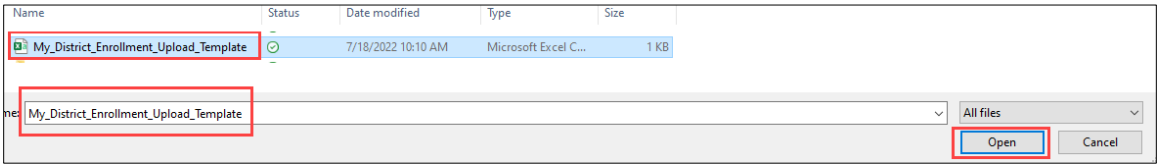


5. Select the question mark **?*** icon next to the word File to download the Current Enrollment Upload Template file.
6. Enter enrollment data in the file for all students for the current school year. Each row in the enrollment file is for one student record.
7. Save the file as a CSV (comma-delimited) file but **leave the file open** to preserve formatting, i.e., aleading zeros. File formatting may be lost if the file is closed.

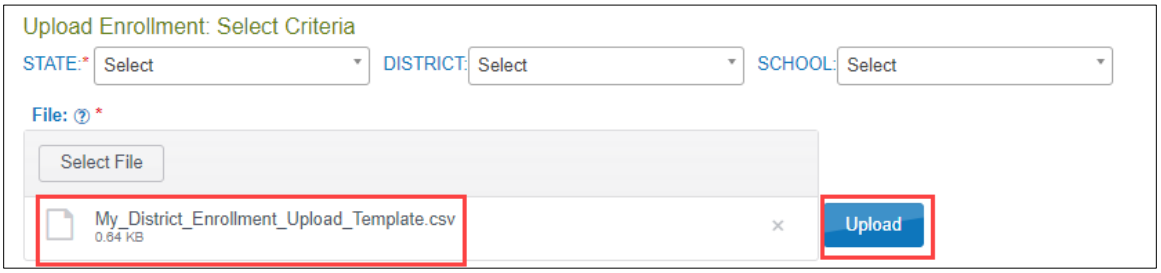
8. Use the **Select File** button to choose the saved Enrollment Upload Template file.



9. 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.
10. Select **Open**. The file name will then appear in the File field.



11. Select the **Upload** button.



12. The confirmation message indicates the number of records uploaded and the number of records rejected, if applicable. In the following example, one record was uploaded (Completed/Updated) without an error.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Tuesday, June 28, 2022 1:50:16 PM	COMPLETED	1	0	0	

13. The following information will display for each upload.
    a. Uploaded: Date and Time of the upload
    b. Status: Completed or Rejected
    c. Created/Updated: Number of records uploaded successfully
    d. Rejected: Number of records with errors
    e. 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

f. 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, July 11, 2022 4:33:22 PM	COMPLETED	0	1	0	

14. 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 or that another student with the same first name, last name, date of birth and gender is enrolled with a different state student ID.

Preventing Duplicate Enrollments

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."

The alert message is given to draw attention to the situation, but the alert message **DOES NOT prevent both records from being created.** When needed, the data manager can edit one or both records in the User Interface in Educator Portal if needed.

NOTE: If two accounts have been created for the same student, remove the incorrect record as soon as possible using the Exit Student process described on page 109 in this manual, Exit a Student from Educator Portal.

The incorrect record should be removed **before** an assessment window opens so the student does not accidentally take testlets on the wrong account or both accounts. However, if a window is open and the student has already tested on both accounts, only the Service Desk can reconcile the two accounts before removing the incorrect account. Contact them as soon as possible.

Change Enrollment Data Previously Uploaded

To correct or change a previously 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 85. 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. This is one of the ways to update a grade level.

If a student changes grades after their initial enrollment, edit the student's grade as soon as possible using this procedure, or the student record can be changed manually using the procedure Edit a Student Record Manually beginning on page 101.

If the student has already started testing, in most cases, the student will need to start testing over.

> HINT: If the student has moved to another building within the district, district-level users can transfer students from one building to another within their district. Go to Management of Student Moves and Transfers on page 122.
>
> Contact the state assessment administrator to transfer a student from one district to another.

Using the Current Enrollment Extract to Update Enrollment Records

VERY IMPORTANT NOTE for 2022–2023

At the request of consortium state leaders, the columns and heading titles in the 2022–2023 Enrollment Upload Template file were changed to be more in alignment with other template files and extracts.

If an Enrollment extract from 2021–2022 was downloaded and saved by an organization for the purpose of modifying it and using it for a 2022–2023 Enrollment Upload Template file, the first five columns must be removed from the extract, and the other columns must be rearranged to match **EXACTLY** the order in the new 2022–2023 Enrollment Upload Template file.

The heading titles must also match **EXACTLY**. All heading titles in the 2022–2023 Enrollment Upload Template file include an underscore between words, and some heading titles are slightly different, i.e., Current_School_Year compared to School_Year.

All heading titles and the order of columns must match **EXACTLY** the 2022–2023 Enrollment Upload Template file or the upload will fail.

Always create a new user record first before attempting to enroll students or created rosters.

The Current Enrollment extract includes all records for students who were uploaded into the user's organization. The records include those uploaded via an Enrollment Upload Template file, the manual user interface, or a web service like OneRoster. The

Current Enrollment extract is a valuable resource for reviewing, editing, and then later 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. 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. Ensure the column order and the head names match **EXACTLY** the Enrollment Upload Template file.
3. Update any records as needed (i.e., correct any typos or incorrect information for a student, promote the students to the next grade).
4. Perform the upload.

> HINT: 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 a student from one district to another within the region. For more information about transferring students, go to the section Management of Student Moves and Transfers on page 122.

Add a Student Record Manually

This procedure is most helpful when adding only a few students, typically five or fewer. Using the manual process enrolls students one at a time.

> 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 Student Feature described on page 103 of this manual.

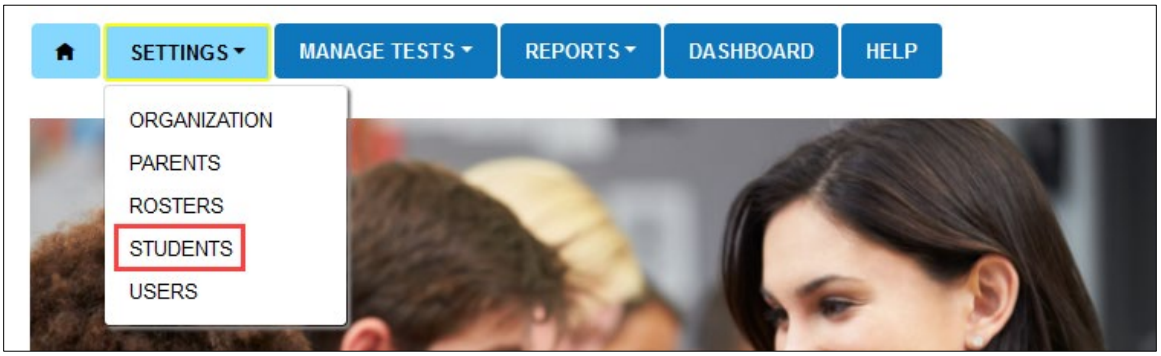
The Find Student feature allows a search within a state by the state student identifier (SSID) or by the student's first and last name. Most users at the state, regional, district, and building level may access the Find Student feature.

NOTE: Some states allow the search only by state student identifier. In those states, the name option fields will not be displayed.

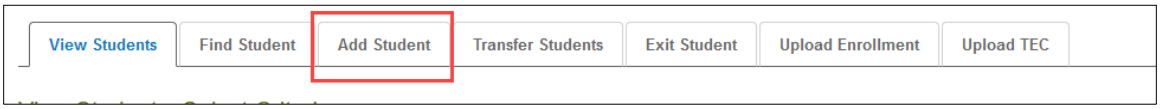
Searching by State Student Identifier (SSID)

1. Select **Settings**.

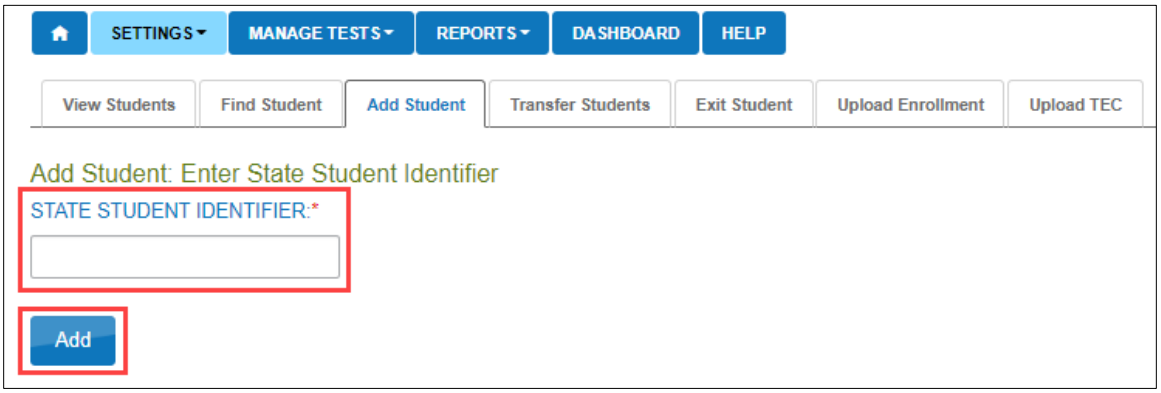
2. Select **Students** from the drop-down menu.



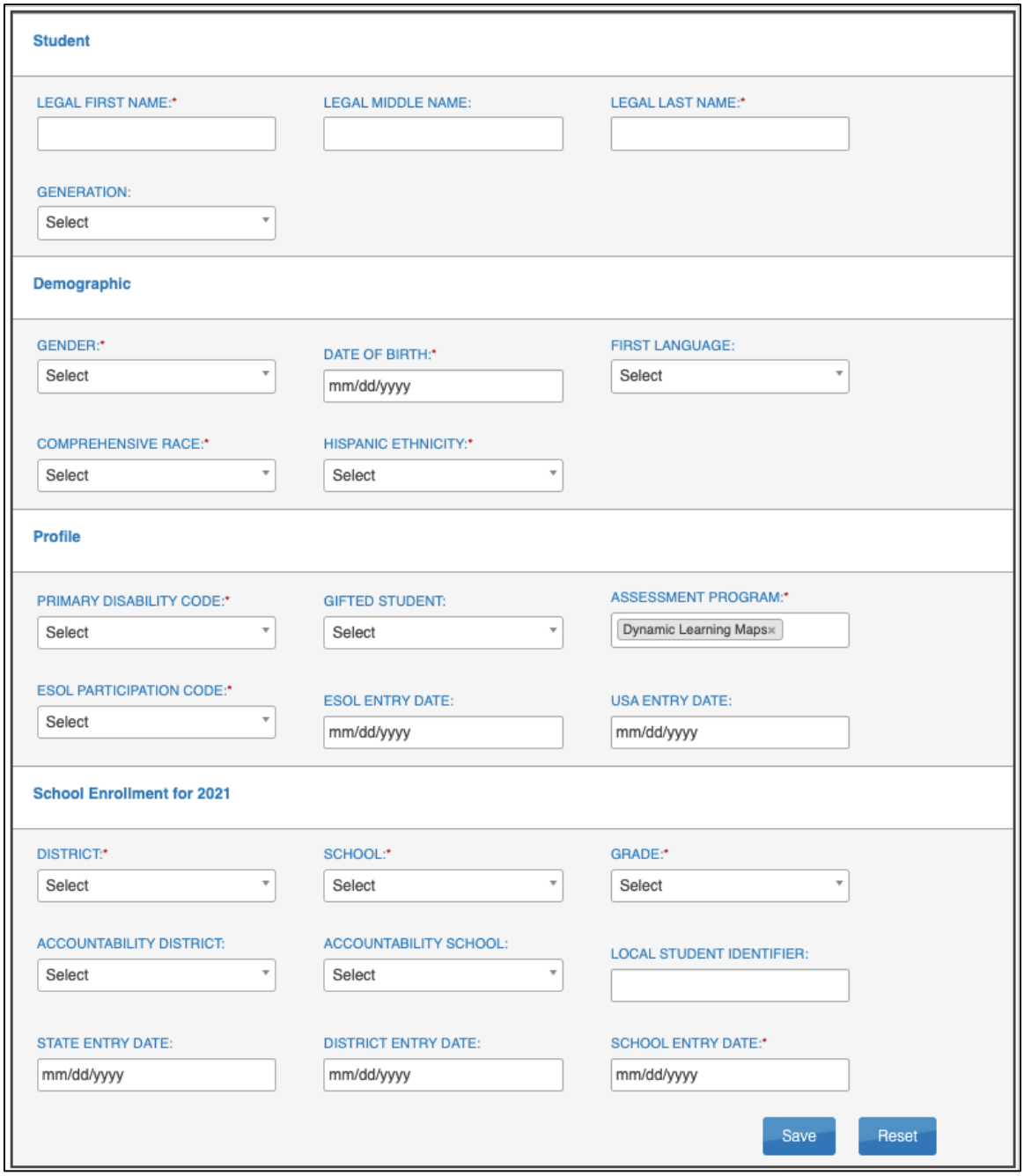
3. Select the **Add Student** tab.



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

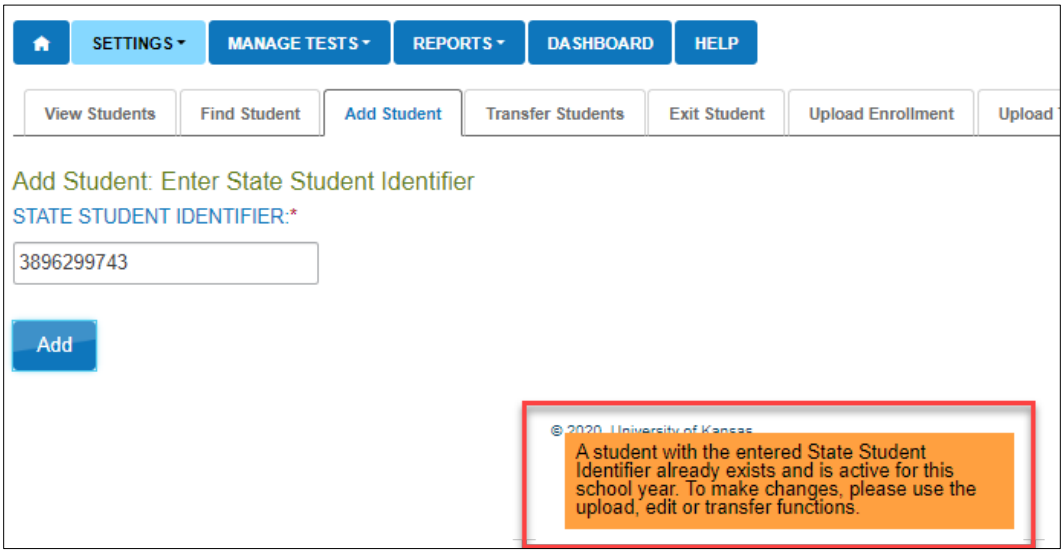


5. All fields with a red asterisk are required. Fill in as many fields as possible. However, the Gifted field **must always say NO**.

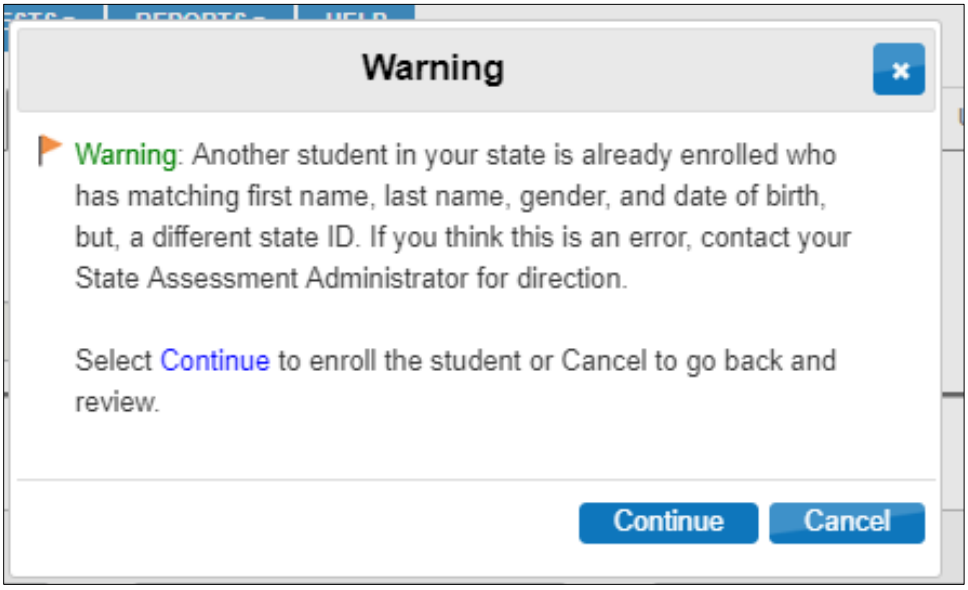


6. Select **Save**.
7. A message will appear reading, “This student record was successfully saved.” However, if each required field is not entered, a message in red will appear under any unfilled required field.
8. System validations are applied to manual enrollments like they are to the batch enrollments. 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.



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:



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 71 of this manual.

Table 28

Student Upload Definitions for Manual Uploads

Field Name	Required	Definition	Special Notes
State Student Identifier*	Yes	The unique alphanumeric code assigned to the student by the school or local education agency	Required, cannot leave blank. This entry may appear on the Individual Student Score Report depending on state policy. Include leading zeros when applicable.
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. Best practice is to use upper- and lowercase letters. Accent marks and hyphens can be used.

Field Name	Required	Definition	Special Notes
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. Best practice is to use upper- and lowercase letters. Accent marks and hyphens can be used.
Legal Last Name*	Yes	The student's last name	Required, cannot leave blank. This entry will appear on the Individual Student Score Report. Best practice is to use upper- and lowercase letters. Accent marks and hyphens can be used.
Generation	No	The part of the student's name that denotes the family generation (e.g., Jr., Sr., III, etc.)	Select from the drop-down menu. 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/undesignated	Required, cannot leave blank. Only the genders available for selection in your state will display.

Field Name	Required	Definition	Special Notes
Date of Birth*	Yes	MM/DD/YYYY	Required, cannot leave blank
First Language	No	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.
Gifted Student	No	Does the student have an active IEP for giftedness (Yes or No)	**Must choose No** 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

Field Name	Required	Definition	Special Notes
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.
SCHOOL ENROLLMENT FOR 2022			
District*	Yes	The unique alphanumeric code that has been assigned to a district as listed in column D in each state's organizational table. 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.

Field Name	Required	Definition	Special Notes
School*	Yes	The unique alphanumeric code that has been assigned to a school as listed in each state's organizational table. 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/school options are available for selection in a drop-down menu. Choose from options presented.
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 your state's DLM webpage 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.

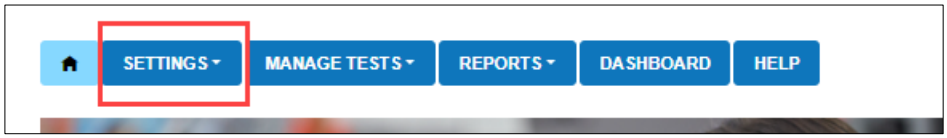
Field Name	Required	Definition	Special Notes
Accountability School	No	The unique alphanumeric code assigned to a school as listed in each state's organizational table	Not required and can remain blank. However, if a school code is entered, then the corresponding accountability district field must also be entered to validate that the district and school match in the organizational table.
Local Student Identifier	No	The unique alphanumeric code assigned to the student by the school or local education agency.	Include leading zeroes when applicable.
State Entry Date	No	The date on which the student enrolls and begins to receive instructional services in the state	Not required and can remain blank. However, if the specific date is known, it can be entered. If the student leaves and then reenrolls, this date is to reflect the most recent enrollment date.

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	Not required and can remain blank. However, if the specific date is known, it can be entered. If the student leaves and then reenrolls, this date is to reflect the most recent enrollment date.
School Entry Date*	Yes	The date on which the student enrolls and begins to receive instructional services in a school	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. If the student leaves and then reenrolls, this date should reflect the most recent enrollment date.

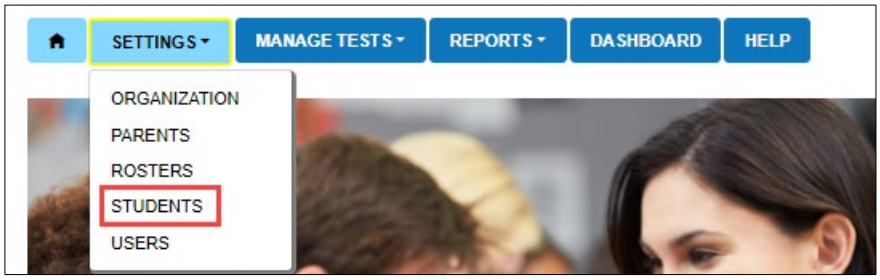
Edit a Student Record Manually

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 122 of this manual.

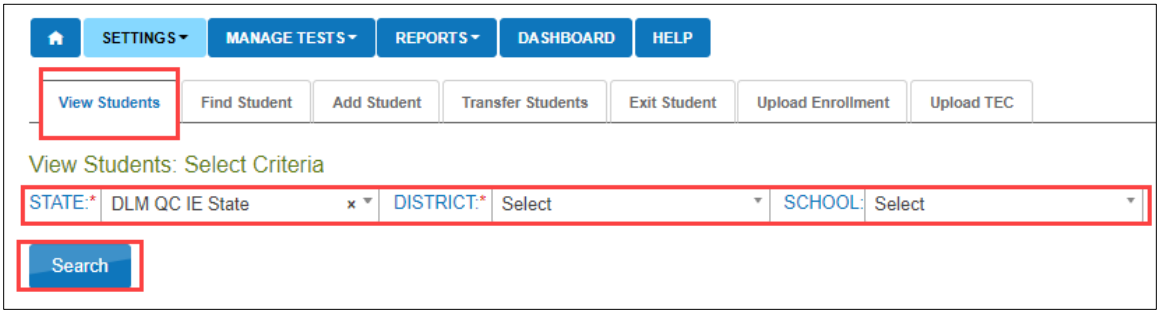
1. Select **Settings**.



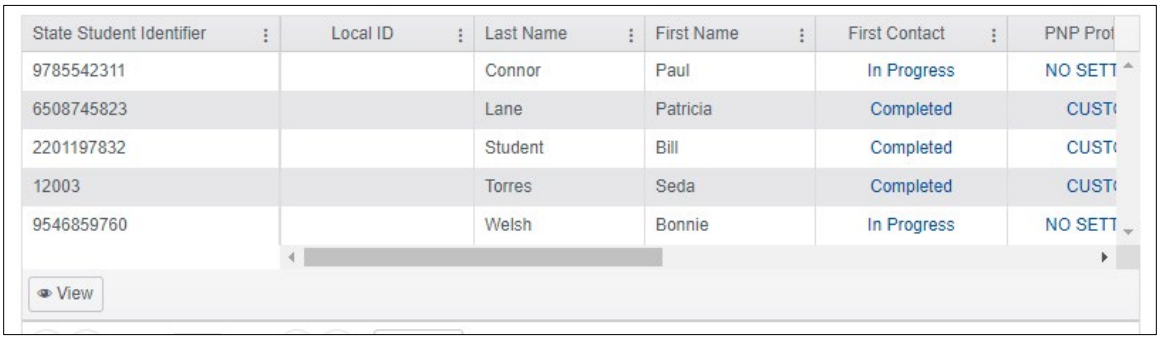
2. Select **Students** from the drop-down menu.



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.



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

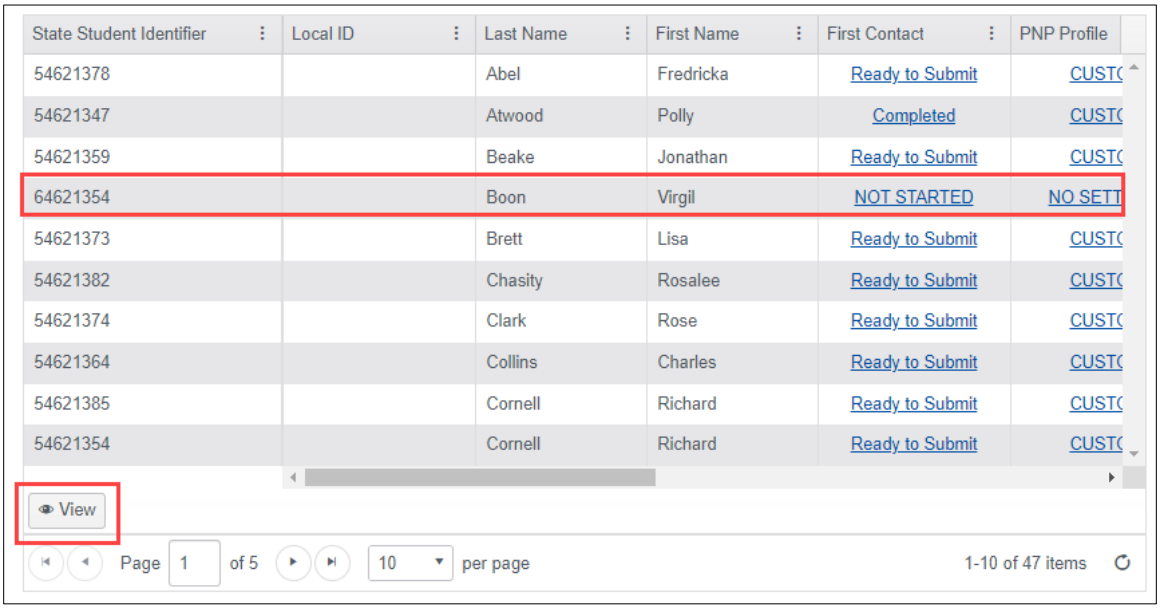


State Student Identifier	Local ID	Last Name	First Name	First Contact	PNP Prof
9785542311		Connor	Paul	In Progress	NO SETT
6508745823		Lane	Patricia	Completed	CUST
2201197832		Student	Bill	Completed	CUST
12003		Torres	Seda	Completed	CUST
9546859760		Welsh	Bonnie	In Progress	NO SETT

View

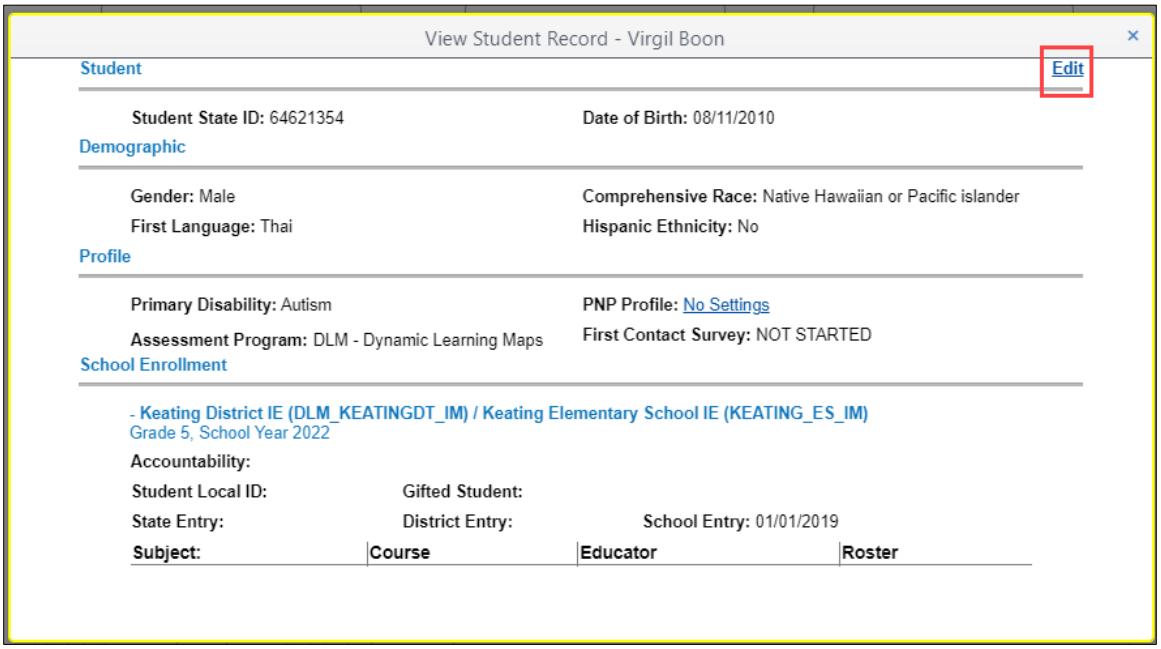
NOTE: All students displayed in screenshots throughout this manual are fictitious.

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.

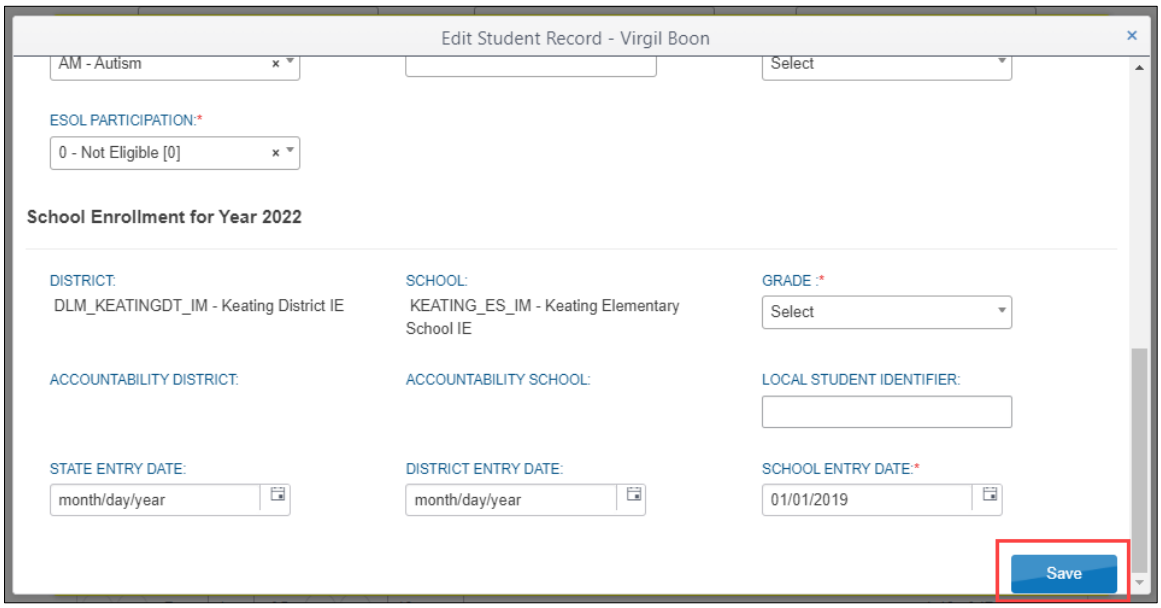


State Student Identifier	Local ID	Last Name	First Name	First Contact	PNP Profile
54621378		Abel	Fredricka	Ready to Submit	CUSTO
54621347		Atwood	Polly	Completed	CUSTO
54621359		Beake	Jonathan	Ready to Submit	CUSTO
64621354		Boon	Virgil	NOT STARTED	NO SETT
54621373		Brett	Lisa	Ready to Submit	CUSTO
54621382		Chasity	Rosalee	Ready to Submit	CUSTO
54621374		Clark	Rose	Ready to Submit	CUSTO
54621364		Collins	Charles	Ready to Submit	CUSTO
54621385		Cornell	Richard	Ready to Submit	CUSTO
54621354		Cornell	Richard	Ready to Submit	CUSTO

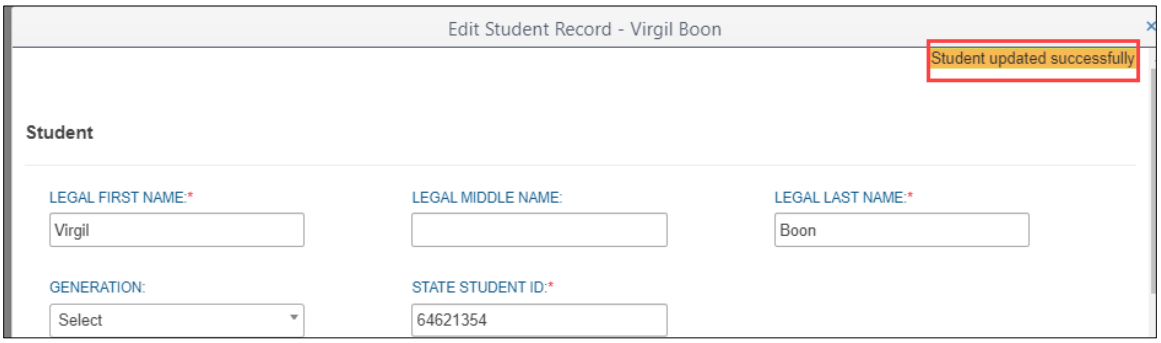
7. The View Student Record screen with the student's name will appear. At the top right of the screen, select the word **Edit**.



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. After making any necessary edits, scroll to the bottom of the screen to select the **Save** button.



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



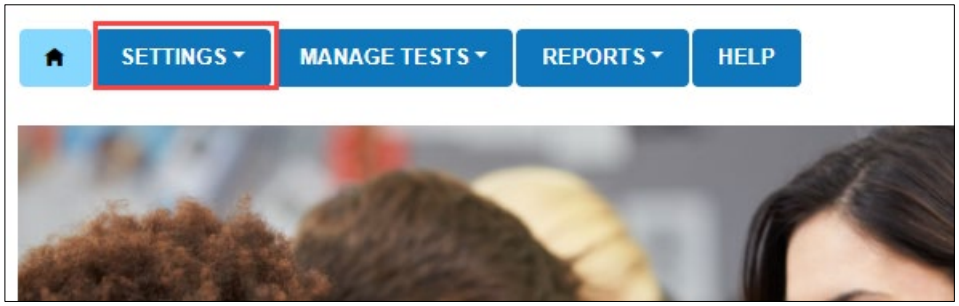
The Find Student Feature

The Find Student feature allows a search within a state by the state student identifier (SSID) or by the student's first and last name. Most users at the state, regional, district, and building level may access the Find Student feature.

NOTE: Some states allow the search only by state student identifier. In those states, the name option fields will not be displayed.

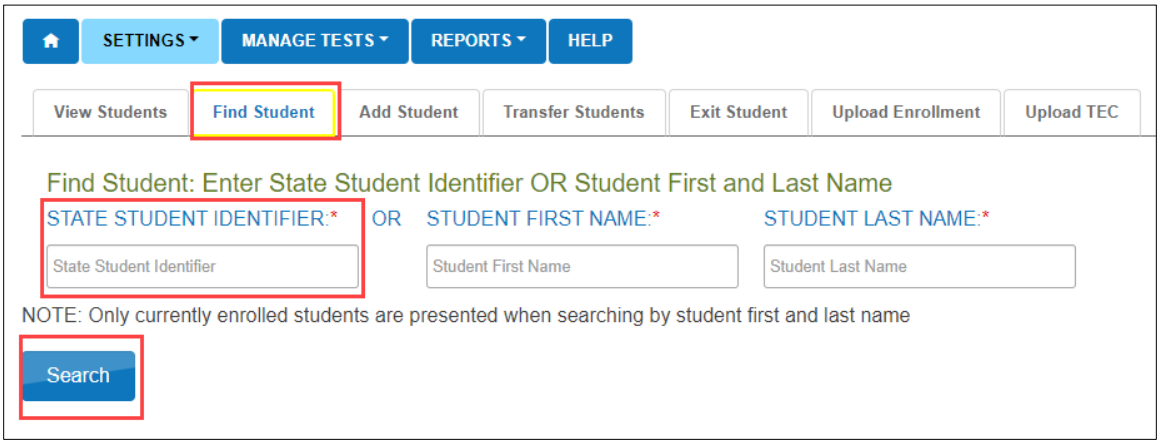
Searching by State Student Identifier (SSID)

1. Select **Settings**.



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

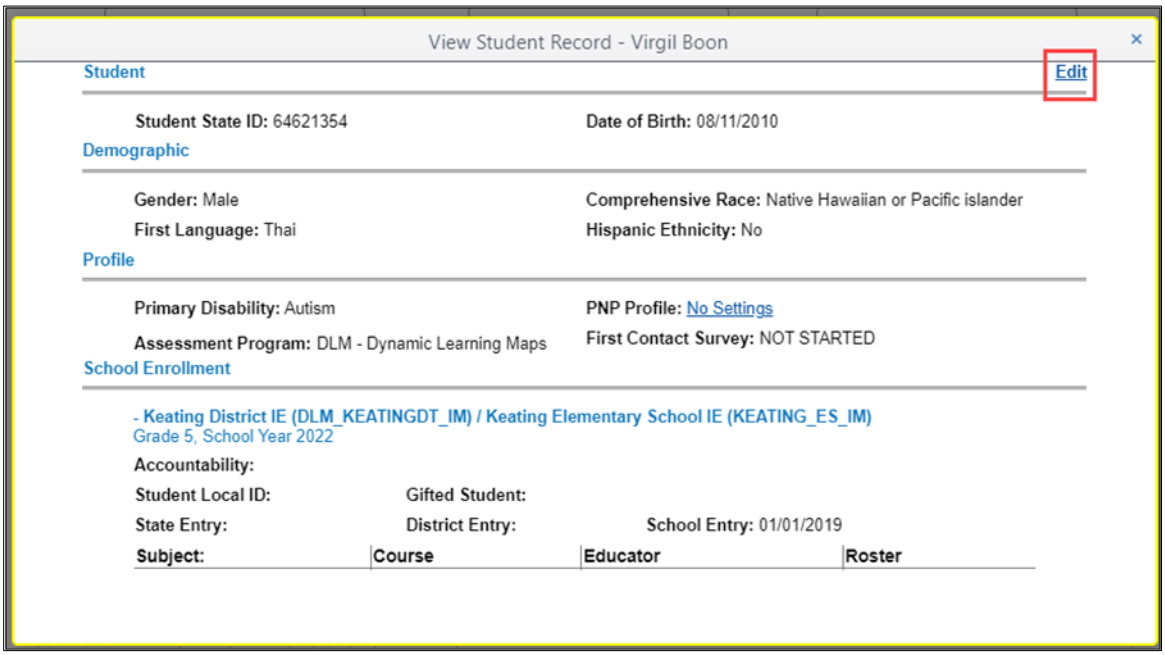
3. Select the **Find Student** tab.
4. Enter the State Student Identifier. The entry must **EXACTLY** match a student's SSID in the state or a matching record will not be found.
5. Select the blue **Search** button.



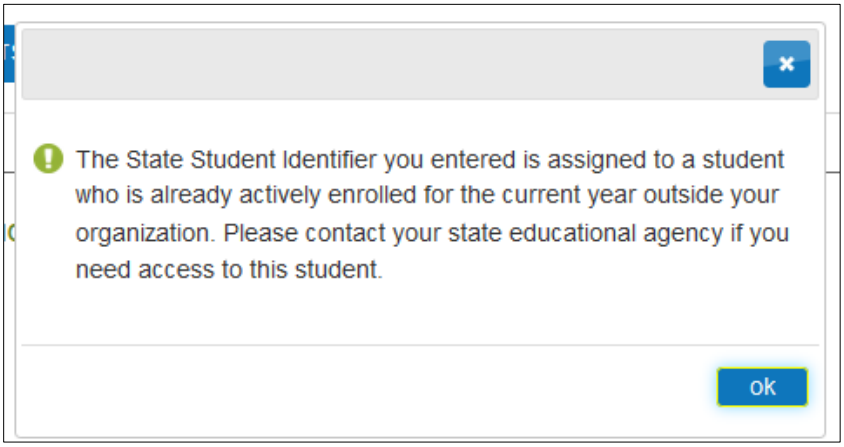
HINT: To protect student privacy, wildcard searches are not allowed.

When Find Student is used to search for the state student identifier in Educator Portal, one of five search results will occur.

- If a matching SSID exists for an active enrollment in the user's organization, the system will automatically pull up the View Student Record screen with the student's name displayed at the top. The user should review the information for accuracy and make corrections if needed by selecting the word **Edit** in the upper right corner of the screen. After making any edits, select **Save**.

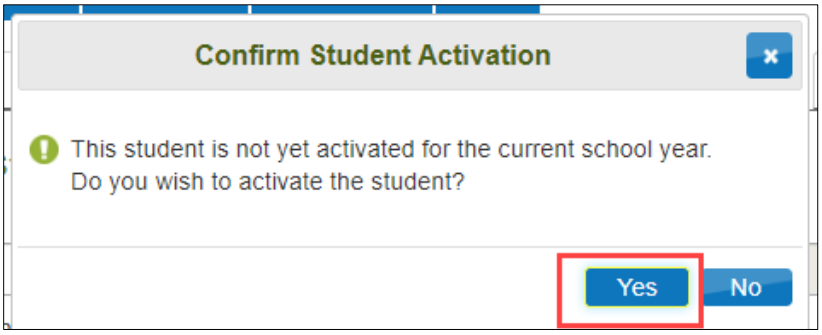


- If a matching SSID exists for an active enrollment in the user's state but is **not** within the user's organizational level (i.e., district or school), the system displays the following message: "The State Student Identifier you entered is assigned to a student who is already actively enrolled for the current year outside your organization. Please contact your state educational agency if you need access to this student."



Select either the **OK** or the **X** to go back to the Find Student screen.

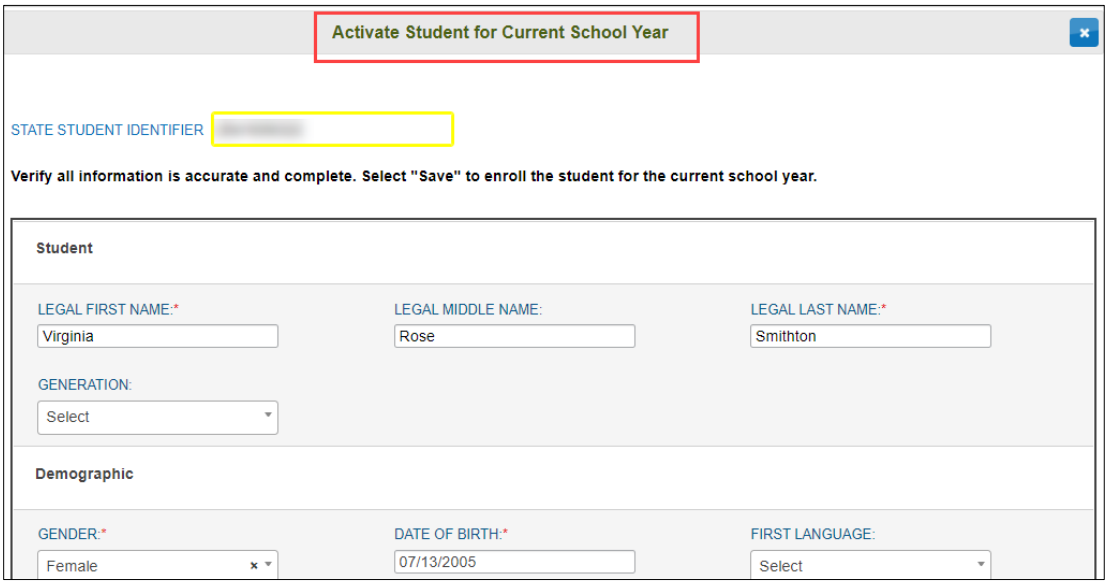
- If a matching SSID exists but the enrollment is inactive, the system displays a prompt asking if the user wants to activate the student.



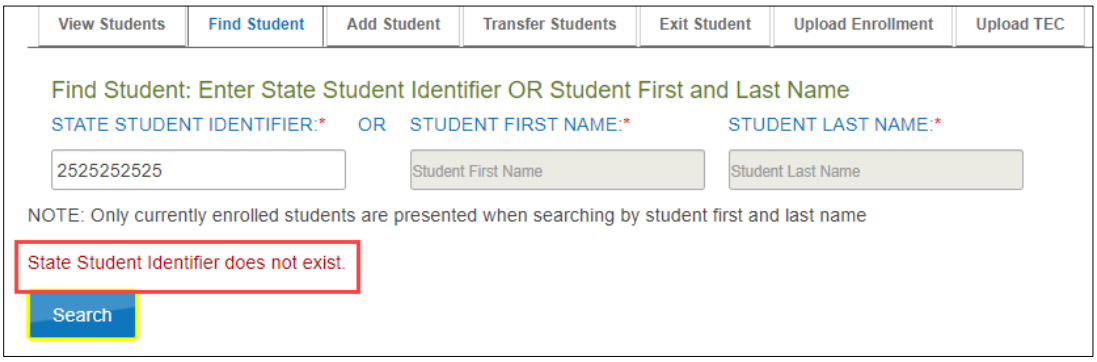
  - If **Yes** is selected, the user is taken to the Activate Student screen. The student's information can be updated as needed on this screen, i.e., a typo, the student's grade.

NOTE: The state student identifier cannot be changed on this screen.

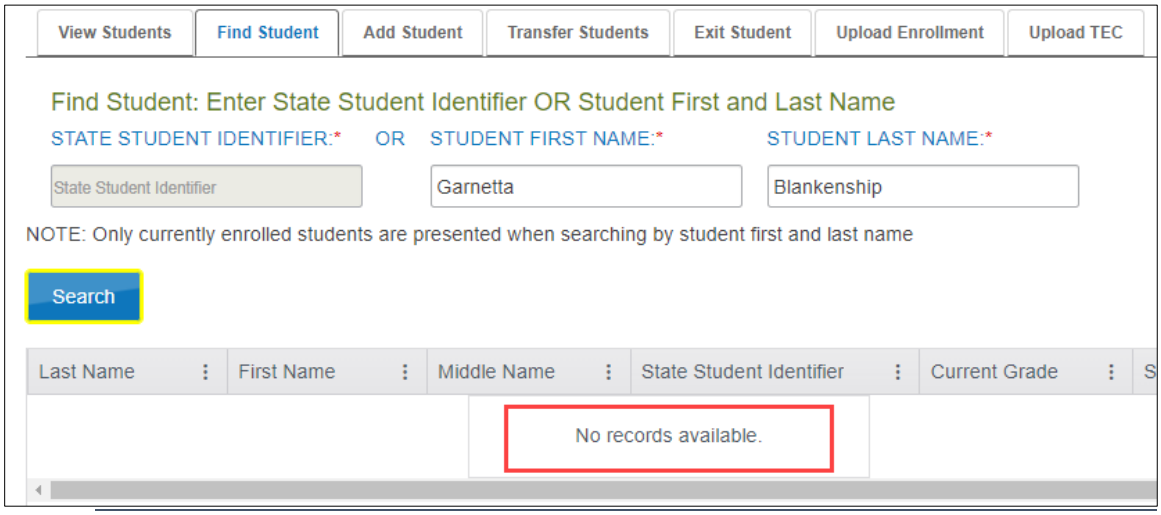
  - If **No** is selected, the user is returned to the Find Student screen.



- If no matching SSID exists for a student in the user's state, the system displays this message in red font: "State Student Identifier does not exit." An informational note informs the user that only currently enrolled students are presented when searching by student first and last name.



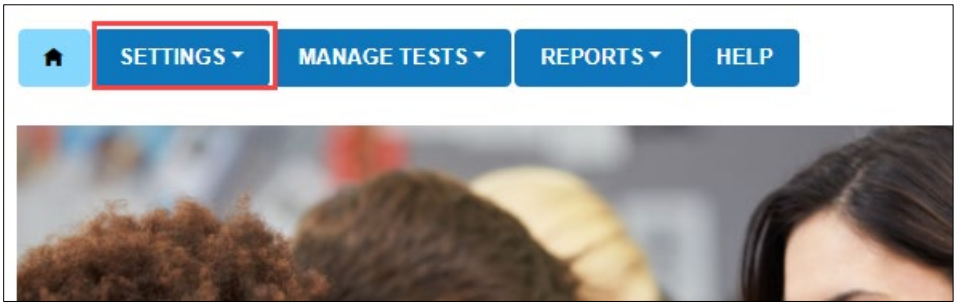
- If no matching first and last name exists in the user's organization and state, the system displays this message: "No records available."



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

Searching by First and Last Name

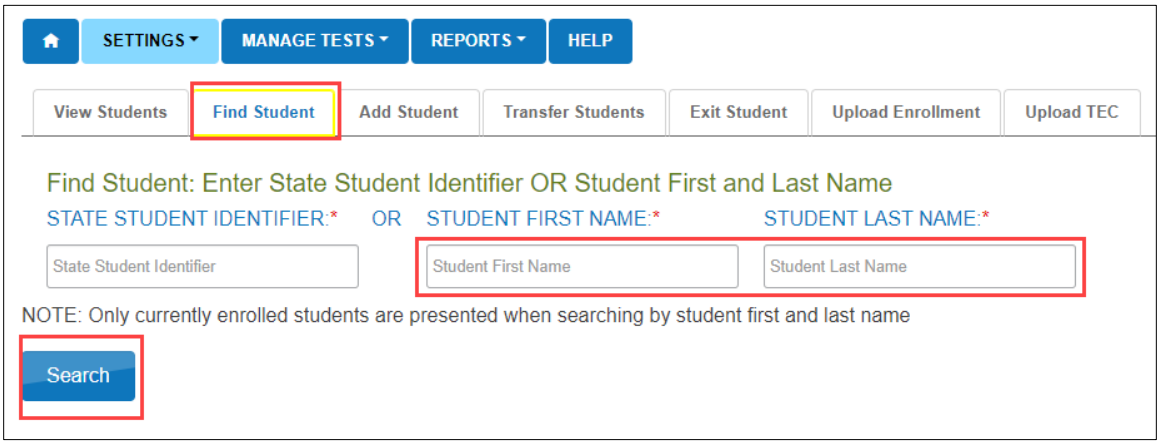
1. Select **Settings**.



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

3. Select the **Find Student** tab.
4. Enter the student's first and last name. (The field is case-insensitive.) The entry must **EXACTLY** match a currently enrolled student's first and last name in the user's organization or a student record will not be found.
5. Select the blue **Search** button.

NOTE: The search using a student's first and last name will only determine if a student is currently enrolled in the user's organization.



One of two search results will display.

- If no matches are found in the user's organization, the following message displays on the screen: "No records found."
- If a match is found, the system displays all student records that match the first and last name of a currently enrolled student in the user's organization. The user must select the correct student record.

When no students are found by either a matching SSID or student first and last name, the student can be enrolled by using the Add Student feature or by uploading an Enrollment Upload Template file.

Exit a Student from Educator Portal

This procedure is required when a student was uploaded in error, 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.

> 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.

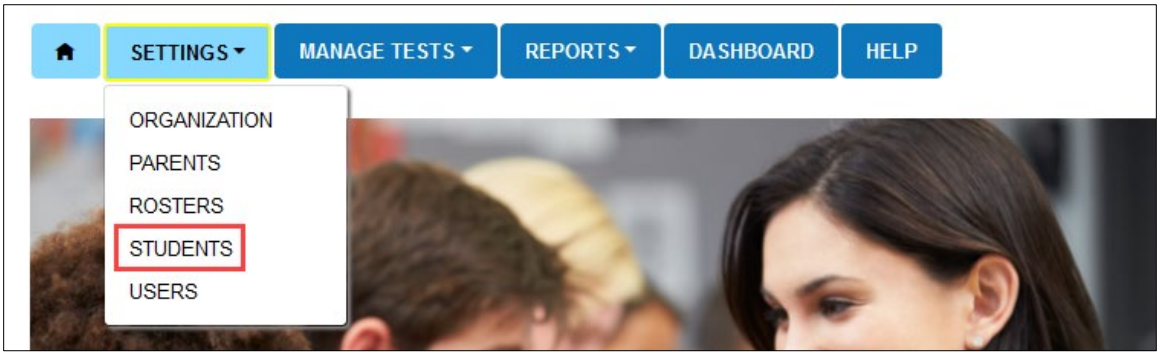
Some districts and states have additional accountability recommendations that result in students being removed from Educator Portal (i.e., student does not meet eligibility requirements for alternate assessment). Many states provide dates for district data cleanup.

Best practice is to exit students before an assessment window opens. Exiting a student will automatically remove the student from all rosters. **Do not remove a student from a roster** before exiting the student from the district/region/state.

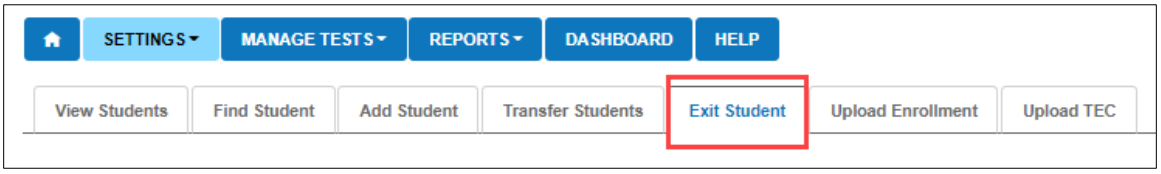
> HINT: Students who move from one state to another in the DLM Consortium will receive a new State Student Identifier in a school in the new state. The student will have an entirely new record in Educator Portal. Their previous data does not travel with them.

1. Select **Settings**.

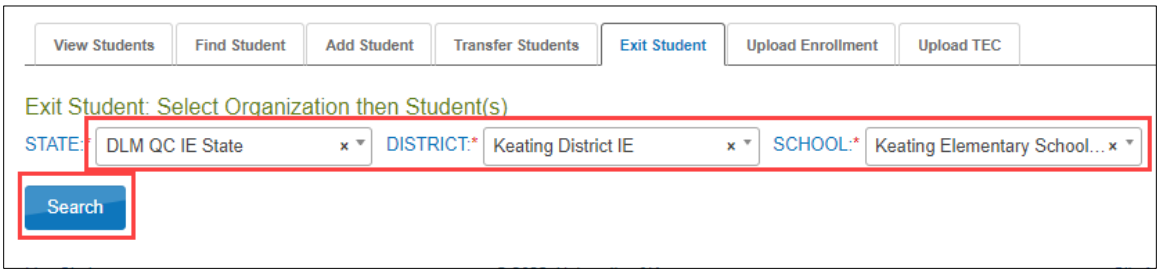
2. Select **Students** from the drop-down menu.



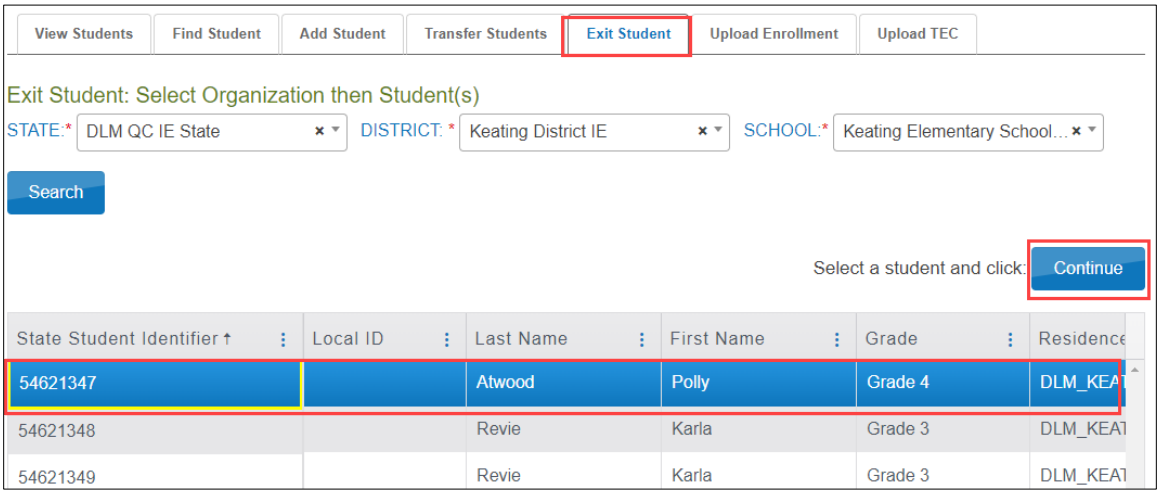
3. Select the **Exit Student** tab.



4. The state will always prepopulate. The other fields will prepopulate entries according to the user's level of permissions.
5. Select the district and school if needed.

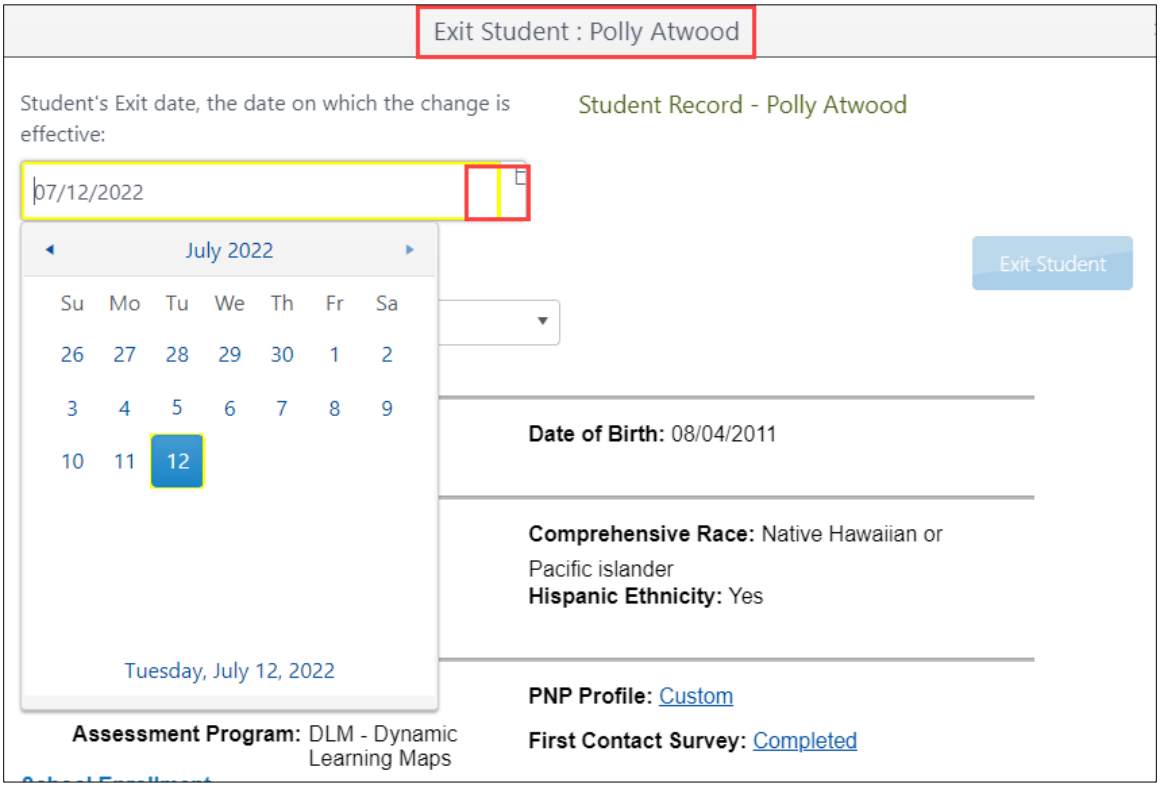


6. Select **Search**.
7. Select the student to be exited; select **Continue**.

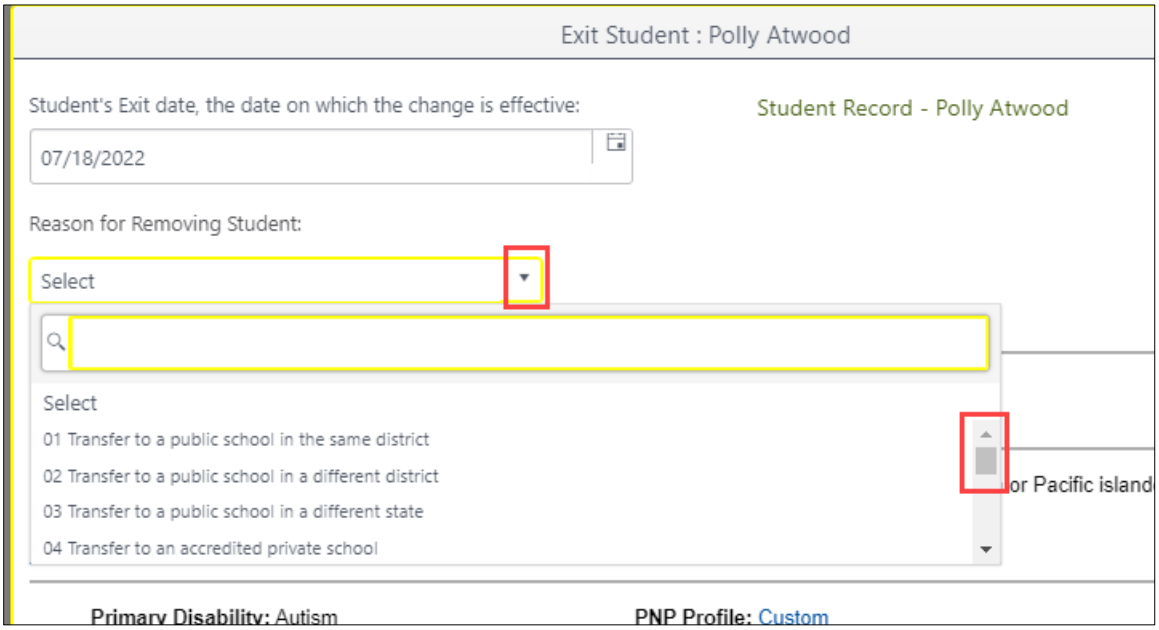


8. At the top of the Exit Student screen, the student's name will appear. Ensure the correct student record is being exited before continuing. The exit date field

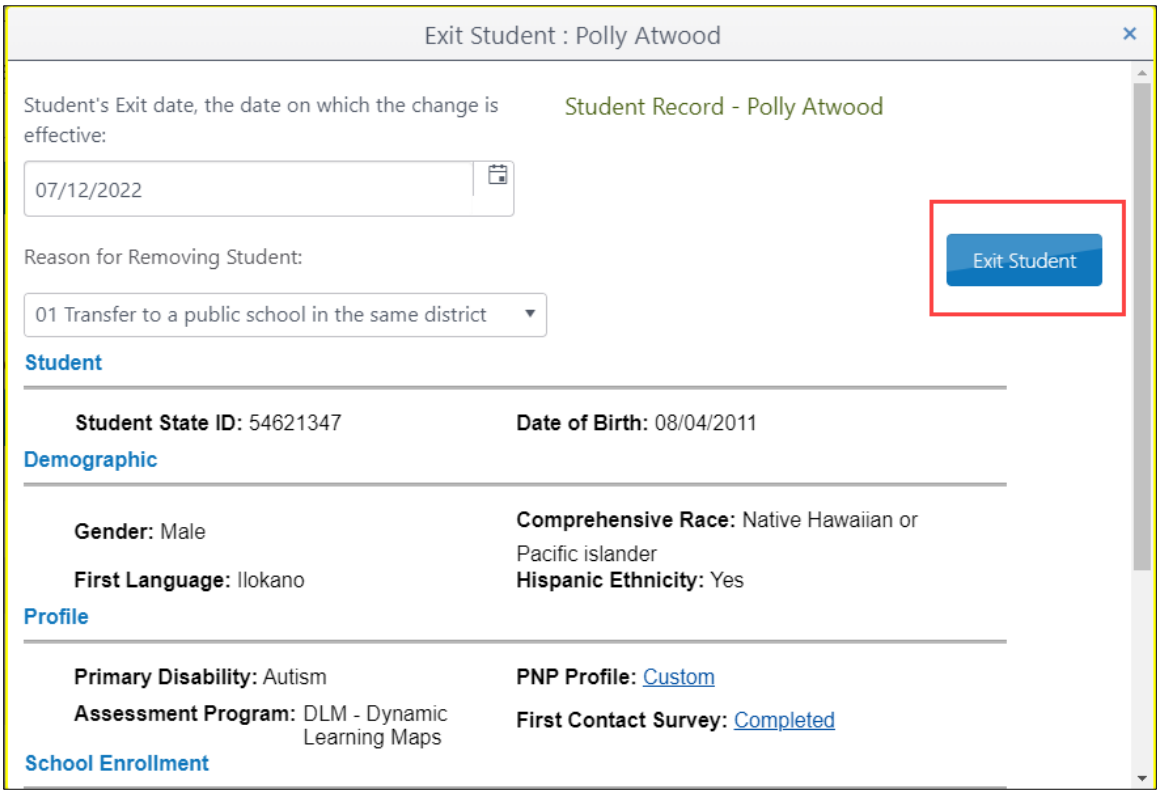
prepopulates with the date on which this procedure is being performed. This will be the date when the exit is effective. To change the exit date, select the calendar icon. A drop-down menu appears. Choose a new date.



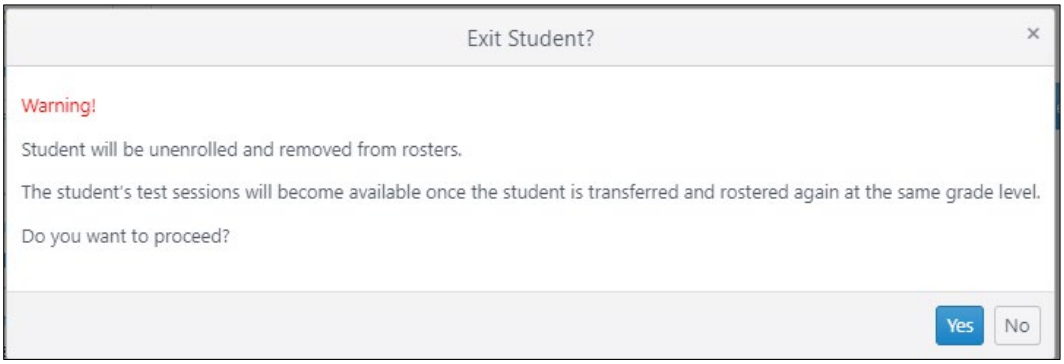
9. Select **Reason for Removing Student** (exit reason) from the drop-down menu. Only exit codes selected by the state will be available in the user interface. Slide the scroll bar down the page to access more options. The Exit Student button will be disabled until an exit reason is chosen.



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



11. The Exit Student warning will appear with the question, "Do you want to proceed?" 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.
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 and left open.

   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

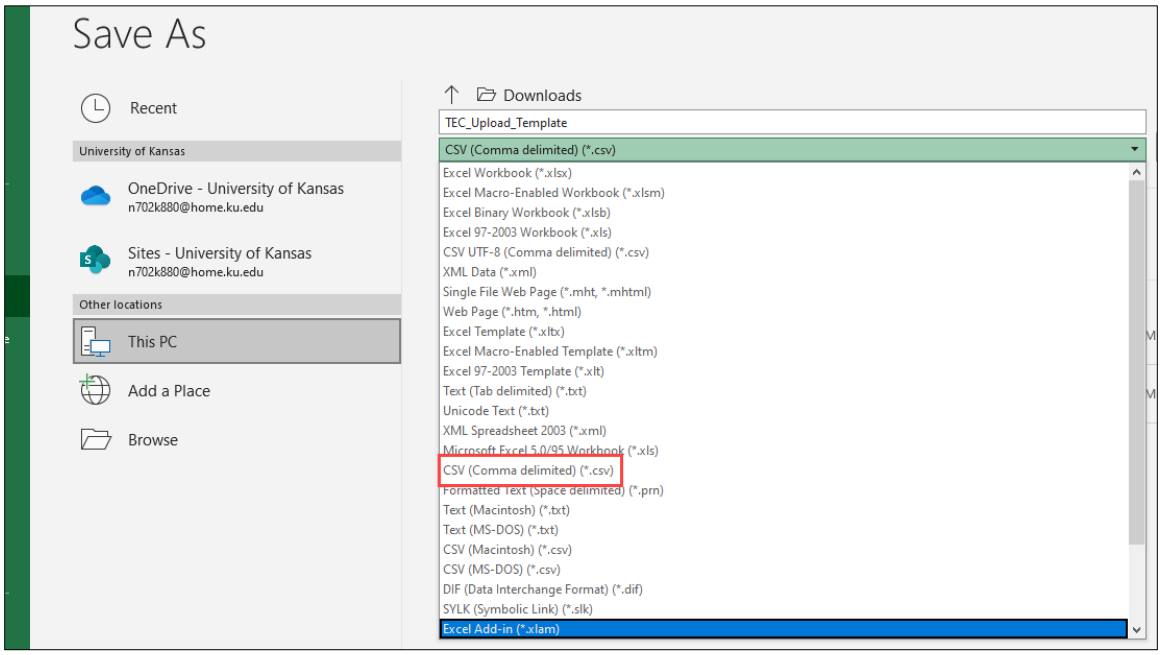
	Field	Format; Length	Required	Description	Special Notes
A	Record_Type	Alpha: Test Exit Clear	Yes	Each record in the TEC Upload Template file will have one of the following types: Test—**not** used by DLM users Exit—marks the student to be removed from enrollment in a location Clear—**not** used by DLM users	For DLM alternate assessment, choose **Exit**. 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		Go to the Exit_Reason Field table on page 118 of this manual. 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 'xx' is not valid in your state."
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 must be left **blank**.
G	Subject	Alpha; 3	No	DLM users must leave this cell blank.	Leave the subject field **blank**.
H	School_Year	YYYY	Yes	The school year for which the change is effective.	Use 2023.

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

Figure 7

Saving as CSV in Excel



Exit_Reason Field

Table 30 lists the values that are used in a TEC (Test, Exit, and Clear) Upload Template for the Exit_Reason column. Enter a number **exactly** as it appears 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
1	Transfer to public school, same district
2	Transfer to public school, different district, same state
3	Transfer to public school, different state
4	Transfer to an accredited private school
5	Transfer to a non-accredited private school
6	Transfer to homeschooling
7	Matriculation to another school
8	Graduated with regular diploma
9	Completed school with other credentials (e.g., district-awarded GED)
10	Student death
11	Student illness
12	Student expulsion (or long-term suspension)

Entry	Definition
13	Reached maximum age for services
14	Discontinued schooling
15	Transfer to accredited or non-accredited juvenile correctional facility—educational services provided
16	Moved within the United States, not known to be enrolled in school
17	Unknown
18	Student data claimed in error/never attended
19	Transfer to an adult education facility (e.g., for GED completion)
20	Transfer to a juvenile or adult correctional facility—no educational services provided
21	Student moved to another country—may or may not be continuing enrollment
30	Student does not meet eligibility criteria for alternate assessment
98	Unresolved exit
99	Undo a previously submitted exit record

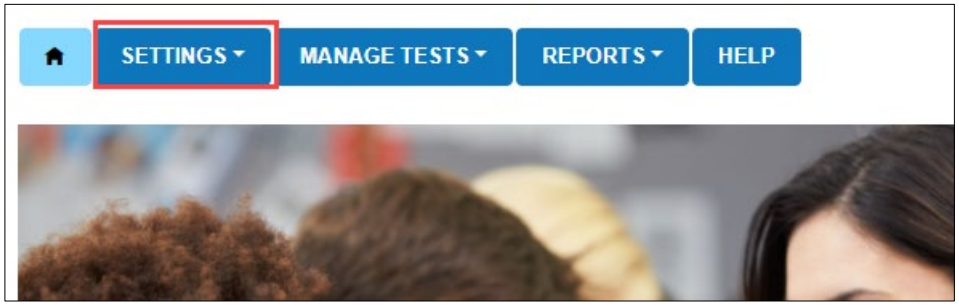
HINT: Choose only the exit codes valid for the state. If exit codes are chosen that are not valid in the state, users will receive the error message: "This record is rejected because exit code 'xx' is not valid in your state." Ask the district assessment administrator or the state assessment administrator 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 reason code 99. The student will be restored to their previous school. However, the student **will not** be restored to any previous rosters. After the student is rostered again, any testlets the student completed will be restored. Also, all work in the Instruction and Assessment Planner will be restored, which includes any plans that were created and any testlets that were assigned.

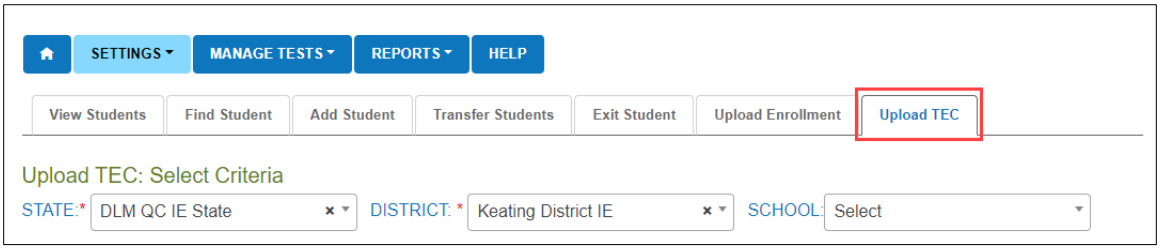
To upload a TEC (Test, Exit, and Clear) Upload Template, follow these steps.

1. Select **Settings**.

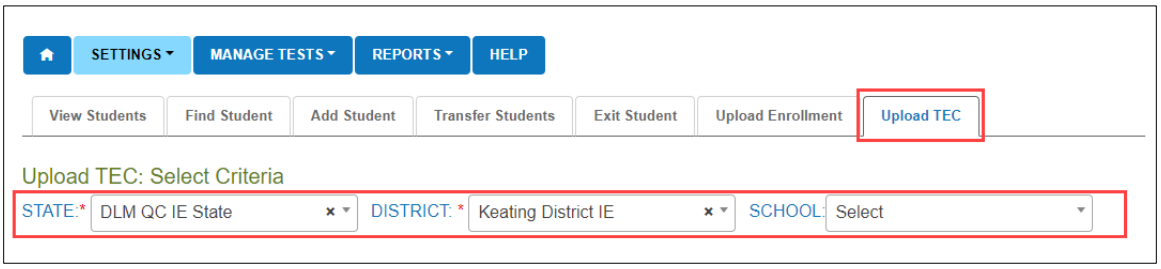


2. Select **Students** from the drop-down menu.

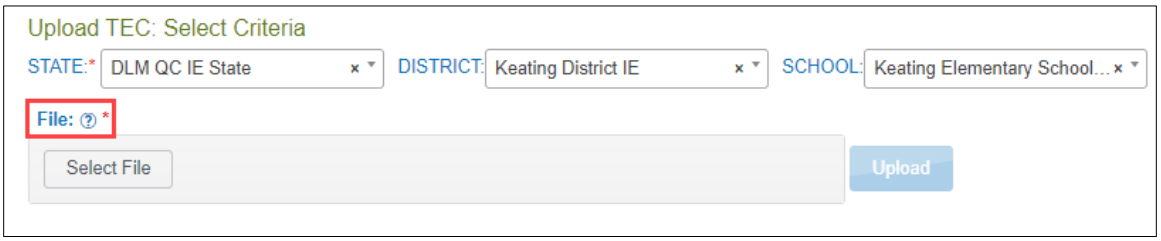
3. Select the **Upload TEC** tab.



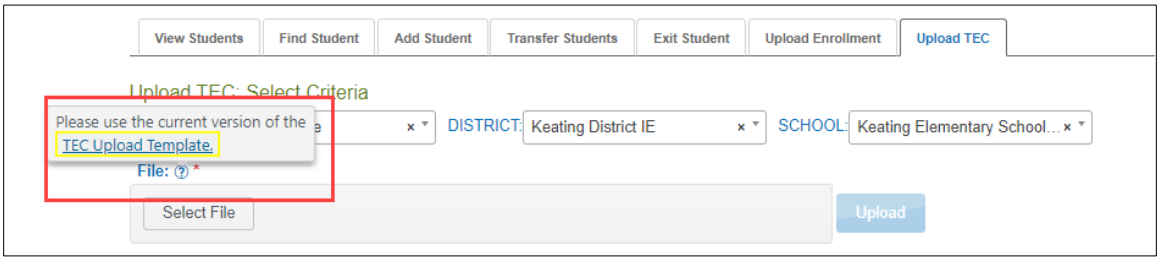
4. Apply filters in the Select Criteria fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu.



5. Select the question mark.



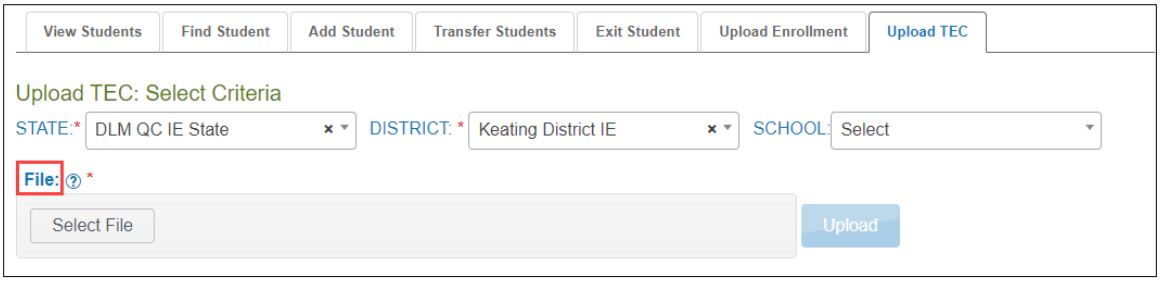
6. The most current TEC Upload Template file becomes available for selection. Select the file name **TEC Upload Template**.



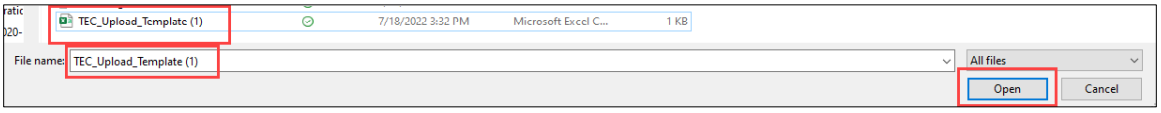
7. Complete the TEC Upload Template file and save as a CSV (comma-delimited) file, but leave the file open until the file has successfully uploaded. File formatting will likely be lost if the file is closed.

HINT: File names with extensions ending in XLS or XLSX will be rejected.

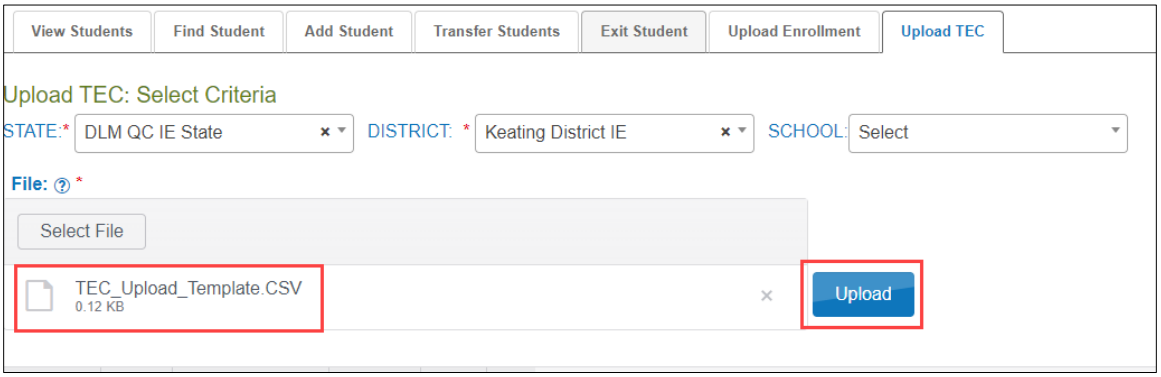
8. Select the **File** button to open a browser window.



9. Locate the saved CSV file for upload.
10. Select the file name and **Open**.



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



13. 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 28, 2022 1:50:16 PM	COMPLETED	1	0	0	

14. The following information will display for each upload:
    a. Uploaded: Date and time of the upload
    b. Status: Completed or Rejected
    c. Created/Updated: Number of records uploaded successfully
    d. Rejected: Number of records with errors
    e. Alerts: A message about a row in the file that should be read

f. 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, July 11, 2022 4:33:22 PM	COMPLETED	0	1	0	

15. 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 transferring five or fewer students. To transfer numerous students at one time, go to Transfer Multiple Students Using CSV Upload Templates on page 127 of this manual.

> HINT: Only a state or a regional user (in states divided into regions) 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 rostered in the new school or district, all completed testlets, plans created using the Instruction and Assessment Planner, and 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.

TRANSFER A STUDENT MANUALLY

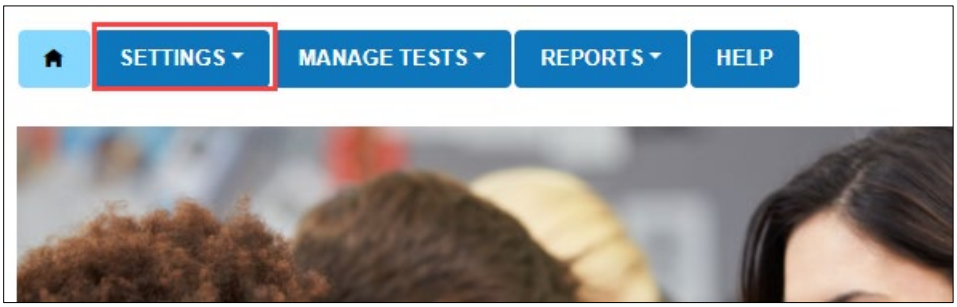
- The **leaving** district/school is referred to by some states as the **sending** district/school.
- The **destination** district/school is referred to by some states as the **receiving** district/school.

> 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

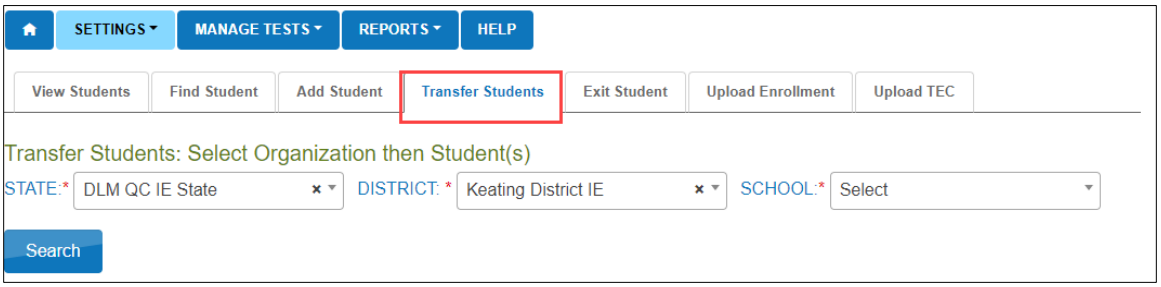
students are transferring from the same leaving district/school to the same destination district. The destination school within a district can be different for each student if needed (i.e., from district A/school A to district B/school A, B, or C, etc.).

1. Select **Settings**.

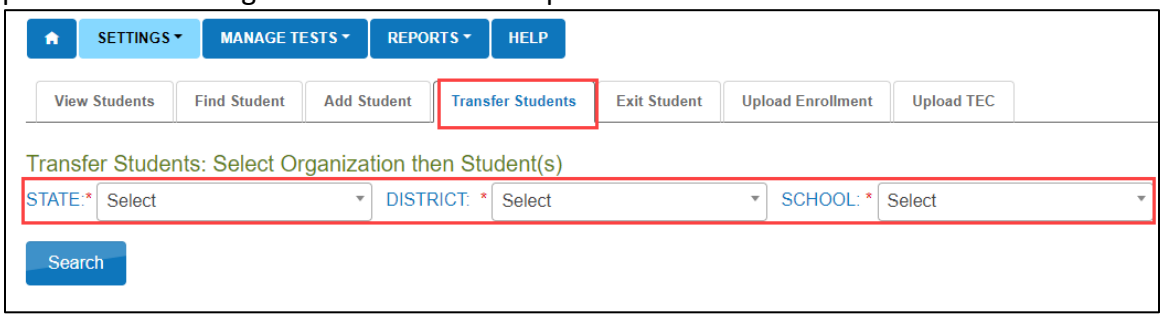


2. Select **Students**.

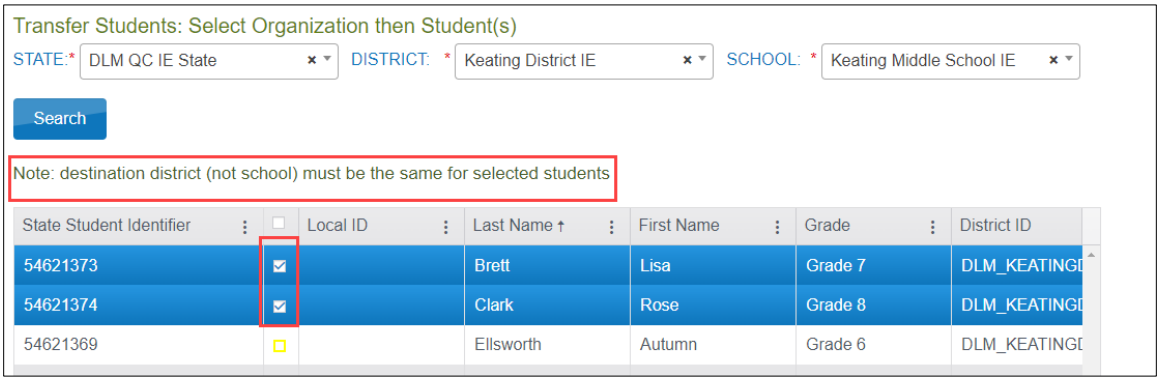
3. Select the **Transfer Students** tab.



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.



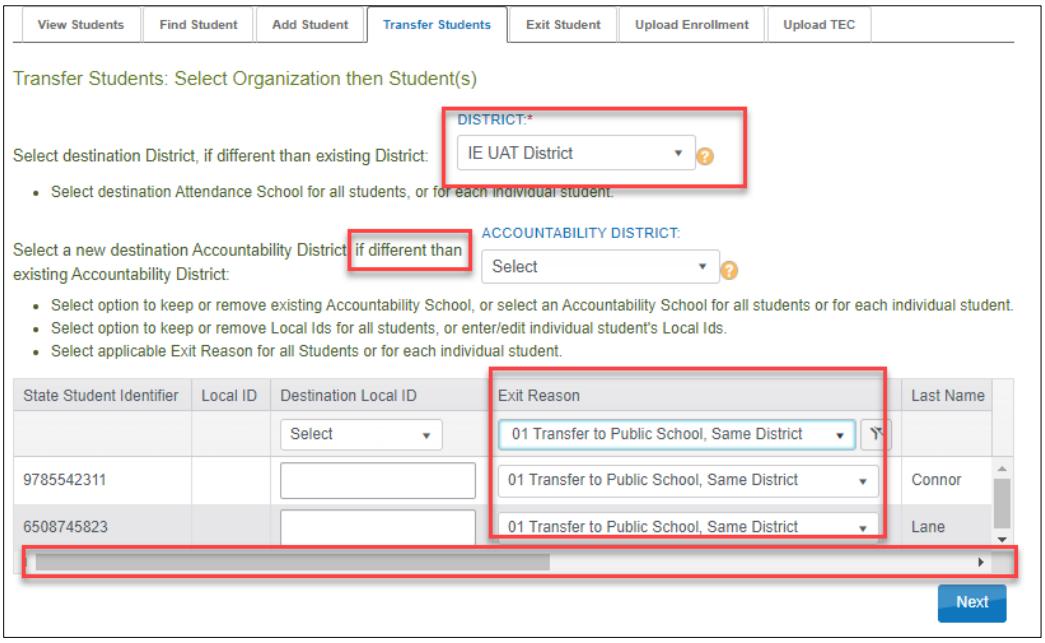
5. Select the student(s) to be transferred; select **Next**.



HINT: Under the District drop-down menu, a state user, regional user, and 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.

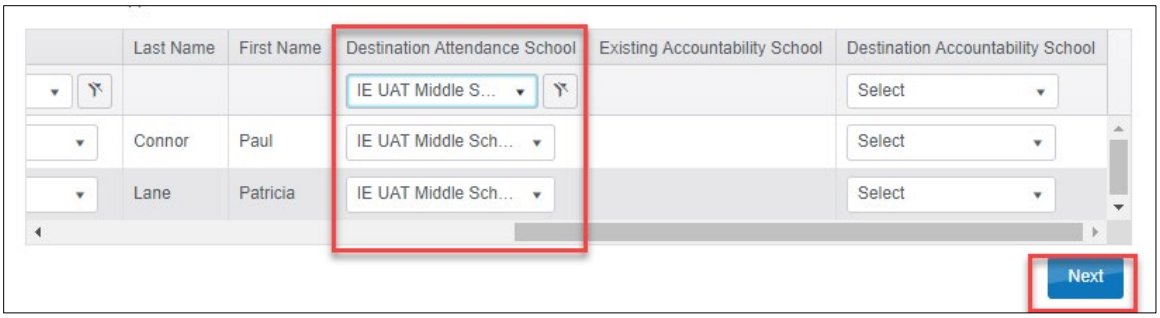
6. Read the directions on the screen to help with the transfer process.
7. Select the destination attendance district if available. This field will populate for a district level user and cannot be changed.

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.



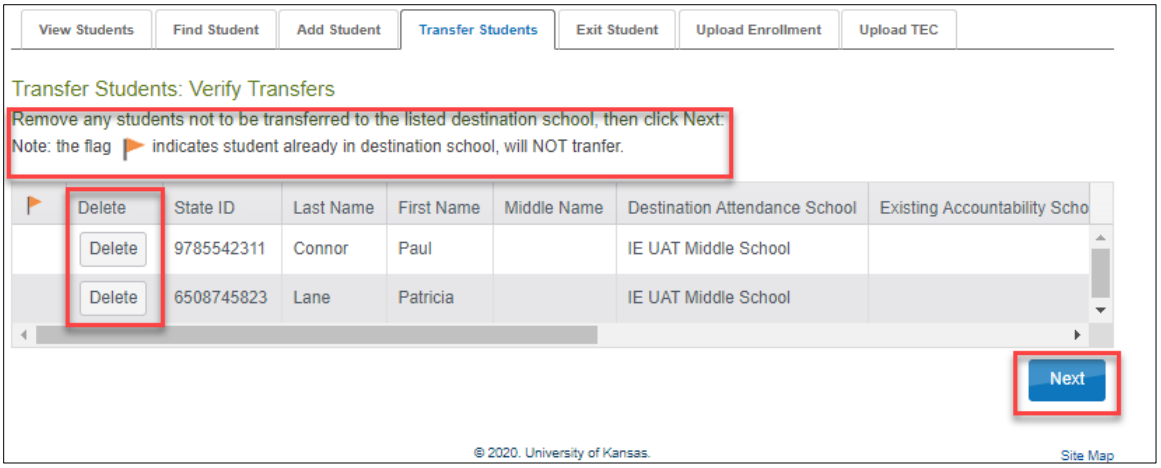
HINT: Scroll to the right to view additional columns.

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.

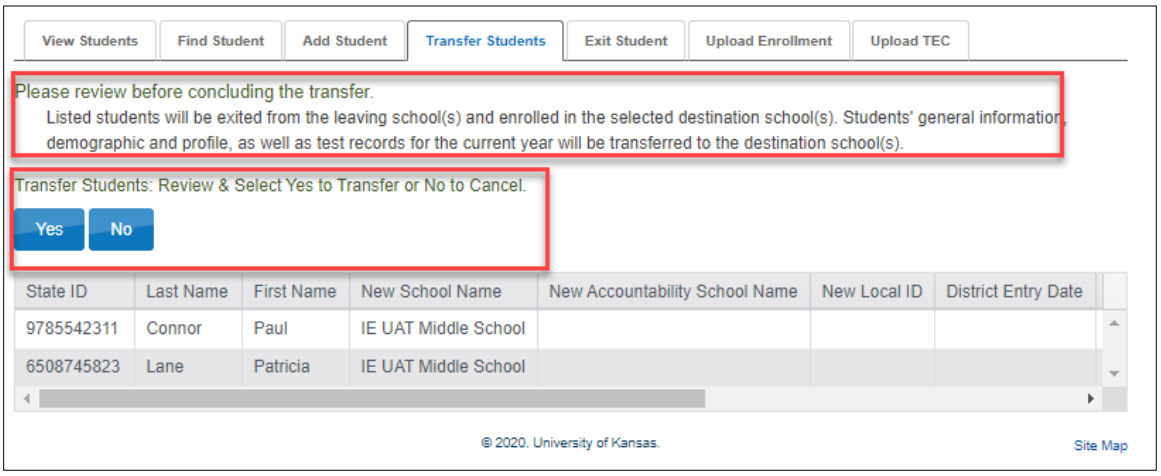


11. The next screen asks the data manager to verify the transfer. Remove any students not to be transferred to the listed destination school by using the **Delete** button in any applicable rows. Using this function deletes the student from the transfer process.

12. Select the **Next** button.

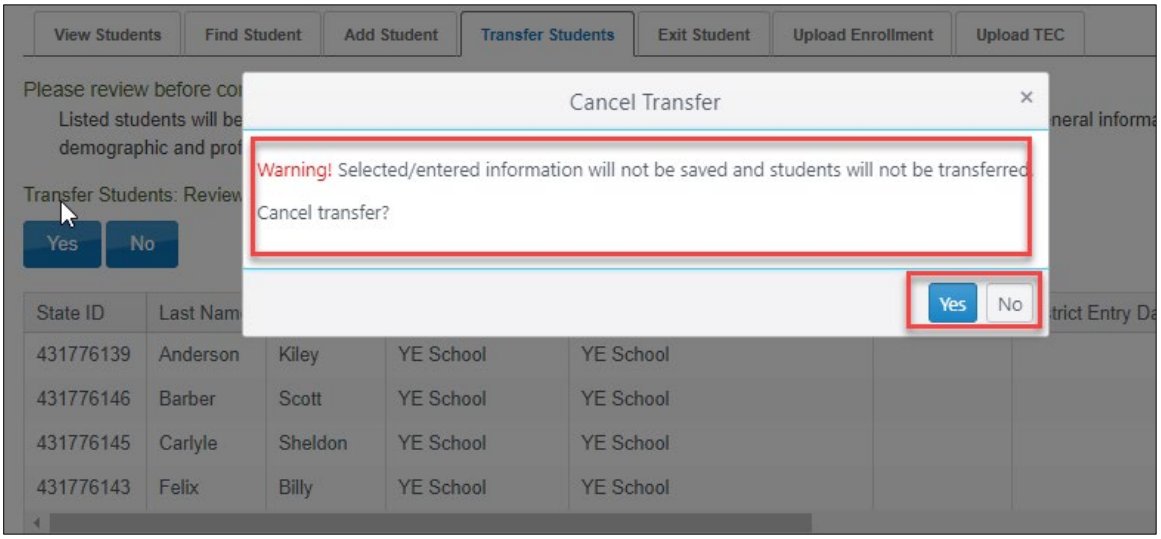


HINT: Helpful directions are printed above the table, asking the data manager to carefully review again before concluding the transfer. Once a student is transferred to the destination school, all student data, including test records, are transferred from the leaving district/school to the destination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

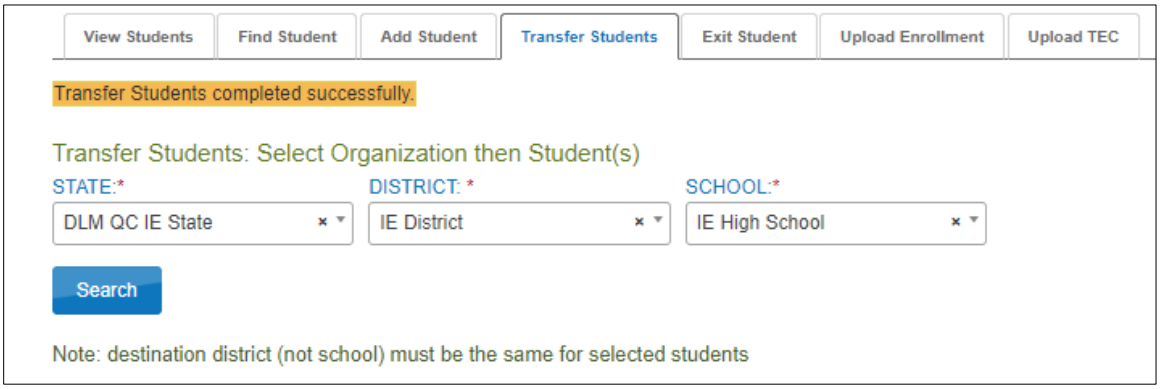


13. Select **Yes** or **No**.
14. If a student is already enrolled in the destination school, the student is denoted by a flag icon and will not be transferred.
15. A warning screen will display before a student is transferred. This is the final decision the data manager makes before the transfer takes place.
16. If the data manager selects **No**, a warning message will appear asking the data manager 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 for each applicable subject in the destination school. After the students are transferred and rostered, any testlets they completed in the previous school will follow them to the new school.
20. Follow the steps outlined in Manage Roster Data on page 129 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 just described.

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/school.

NOTE: In states with regions, a user with a regional role can perform the entire transfer process for students within their region. A DTC or DUS may perform the entire transfer process for students within their district. A BTC or BUS 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 the first part of the transfer process by following 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, 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 which 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 103 of this manual.

MOVE A STUDENT FROM ONE DISTRICT TO ANOTHER DISTRICT IN THE SAME STATE

Only a state assessment administrator or DLM Service Desk agent may transfer a student from one district another district within the state. In states with regions, a regional user can transfer students from one district to another district, but only within

their region. Use the steps found in Management of Student Moves and Transfers in this manual.

A district-level user can perform the first part of the transfer 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.

   If a student has completed any testlets, the testlets will follow the student to the new distict/school.

   HINT: Returning students (i.e., students who were previously in the district to which 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 103 of this manual.

MANAGE ROSTER DATA

VERY IMPORTANT NOTE for 2022–2023

At the request of consortium state leaders, the heading titles in the 2022–2023 Roster Upload Template file were changed to be more in alignment with other templates and extracts.

If a Roster extract from 2021–2022 was downloaded and saved before July 27, 2022, by an organization for the purpose of modifying it and using it for a 2022–2023 Roster Template Upload file, it must be modified for use. The first 10 columns must be deleted. Then, the Roster extract heading titles must match **EXACTLY** those in the new 2022–2023 Roster Upload Template file.

All heading titles in the 2022–2023 template include an underscore between words, and some heading titles are slightly different, i.e., School_Identifier compared to Attendance_School_Identifier. If heading titles do not **EXACTLY** match the 2022–2023 Roster Upload Template file, the upload will fail.

Always create a new user record first before attempting to enroll students or create rosters.

Each row in the Roster Upload Template file connects one teacher to one student for one subject, thus creating one roster. Each roster can connect several students from various grades for the same subject to the same teacher.

For example, using a Roster Upload Template file, a roster can be created for Mrs. Smith named Smith-ELA. All of Mrs. Smith's students who take ELA can be on the Smith-ELA roster, even if some students are in grade 5, some in grade 6, and some in grade 7. On the same upload, a roster can be created for Mr. Greene for mathematics named Greene-Math. All of Mr. Greene's students who take mathematics can be connected to the Greene-Math roster, even if in more than one grade. The same is true for other subjects/courses offered in the state.

While up to 5,000 rosters can be created with a single upload, the upload processing will be very slow, and troubleshooting will likely be laborious. The recommendation is to create only 50–100 rosters with one upload. Some large districts find troubleshooting to be easier for a data manager by performing uploads for individual schools.

The data manager must keep in mind the following:

- One student for one subject cannot be connected to more than one teacher.
- One student can be connected to more than one teacher if the subjects are different.
- Students must be rostered for each DLM subject in which they will be testing in the current school year.
- Students can only be rostered in the subjects and grades available for testing in the state, i.e., science grades 5, 8, and 11.
- The number of rosters to create with a single upload is the preference of the data manager.
- A state-level user can create rosters for teachers from several districts across their state with a single upload.

- A regional-level user can create rosters for teachers from several districts across their region with a single upload.
- A district-level user can create rosters for teachers from several schools across their district with a single upload.
- A building-level user can create rosters for all teachers in their school with a single upload.

NOTE: Five or fewer rosters can be created manually with the user interface. Go to Create a Roster Manually on page 140 of this manual.

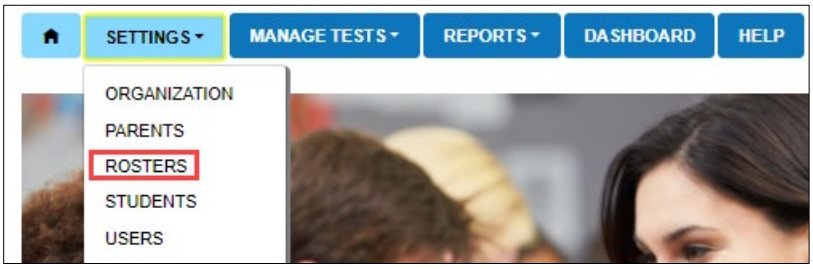
Create a Roster Upload Template File

Use either the modified Roster extract as described in the previous paragraph or access the current Roster Upload Template file to create rosters. The current Roster Upload Template file can be accessed from one of two places.

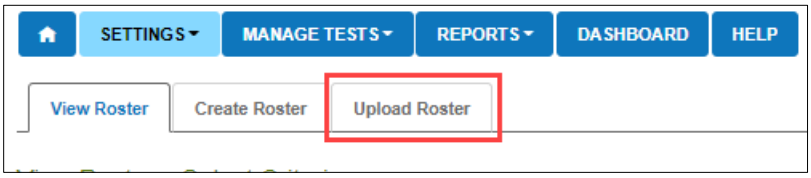
- The current Roster Upload Template file can be accessed on each state's webpage. Go to the DLM website | **For States** | select your state | filter roles to Data Manager | **District Staff Resources** | scroll to the Roster Upload Template.
- Follow these steps for accessing the current Roster Upload Template file from Educator Portal.

1. Select **Settings**.

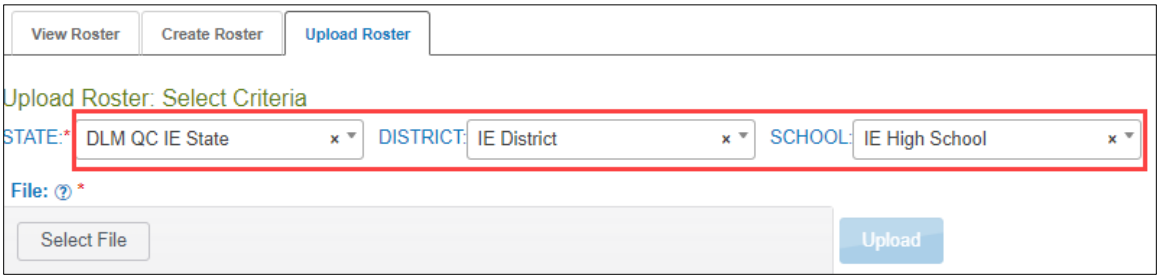
2. Select **Rosters** from the drop-down menu.



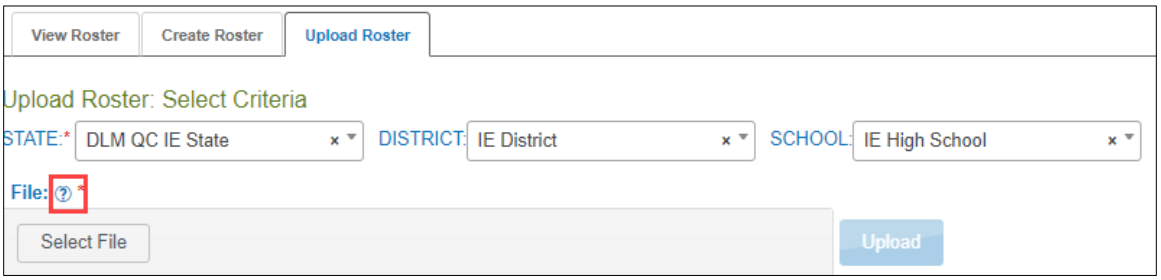
3. Select the **Upload Roster** tab.



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.



5. Select the question mark symbol next to the word File to open the current Roster Upload Template file.



6. A small pop-up window will display the current version of the Roster Upload Template file.

7. Select the link and 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 **only this format**.
8. Enter the roster data 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. A student can be entered more than once with a different subject and a different teacher. Students in other grades can be entered for the same subject and teacher.

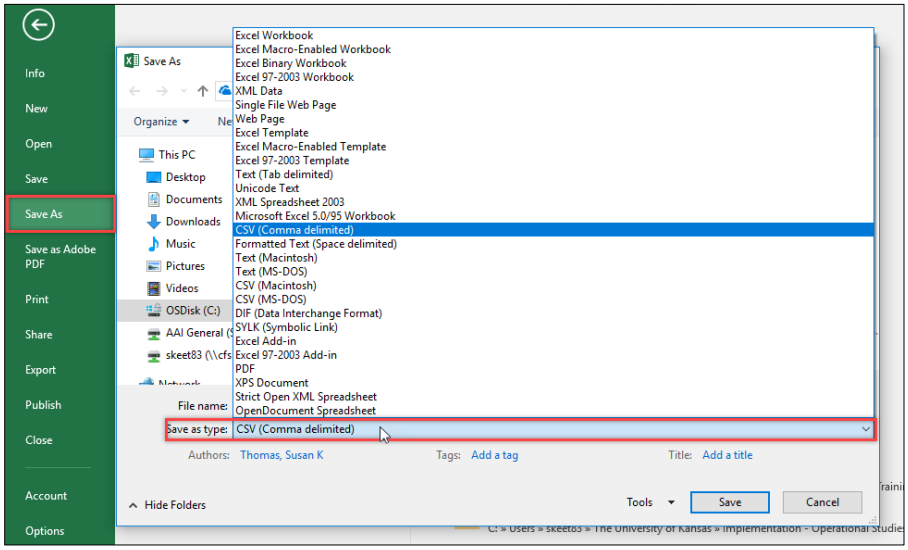
> Hint: Column M (Remove from Roster) is only used to remove students from a roster. Otherwise, **leave column M blank**.

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

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

Figure 8

Saving as CSV in Excel



10. Go to page 36, Include Leading Zeros in an Upload File.
11. Check that the leading zeros are retained after each save but continue to 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 138 of this manual)
B	Subject	Yes	Alphanumeric	Use only the following subject abbreviations. No other abbreviations will be accepted. Use only the entries for subjects assessed in your state. The file upload will be rejected if any subject is added that is not tested in your state. M = Mathematics ELA = English language arts SCI = Science SS = Social Studies
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). Only include if a course is assessed in your state or the file upload will be rejected.

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
D	Attendance_ School_Identifier	Yes	Alphanumeric up to 10	Identification codes assigned by the state (or other organization) that indicate where the student attends school. The School Identifier code entered in the Roster Upload Template file must match **exactly** a School Identifier code (Column B) in the state organizational table located on your state's DLM webpage. If the codes do not match exactly, the upload will fail. Ensure leading zeros are entered where appropriate. Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format.*
E	School_Year	Yes	YYYY	The four-digit year that concludes the current school year (e.g., for the 2022-2023 school year, enter 2023)
F	State_Student_ Identifier	Yes	Numeric up to 10	A State Student Identifier in the Roster Upload Template file must match **exactly** 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. Ensure leading zeros are entered where appropriate. Excel has several CSV format choices. DLM users must choose CSV (comma-delimited) format.*

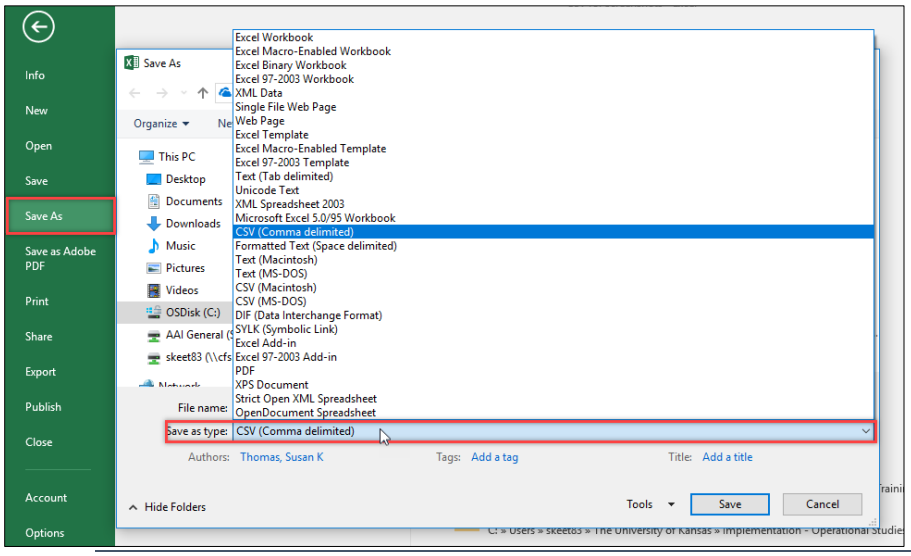
CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
G	Local_Student_ Identifier	No	Numeric up to 10	This is not a required field and can be left blank. However, if entered, a Local Student Identifier in the Roster Upload Template file must match **exactly** a Local Student Identifier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

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
K	Educator_Legal_ First_Name	Yes	Alphanumeric	The educator's first name entered in the Roster Upload Template file must match **exactly** 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_Legal_ Last_Name	Yes	Alphanumeric	The educator's last name entered in the Roster Upload Template file must match **exactly** 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	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. NOTE: A roster can also be removed manually using the user interface.

* 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 state assessment coordinator or the district test coordinator about subjects and grades tested in your state before attempting to upload a Roster Template Upload file.

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.

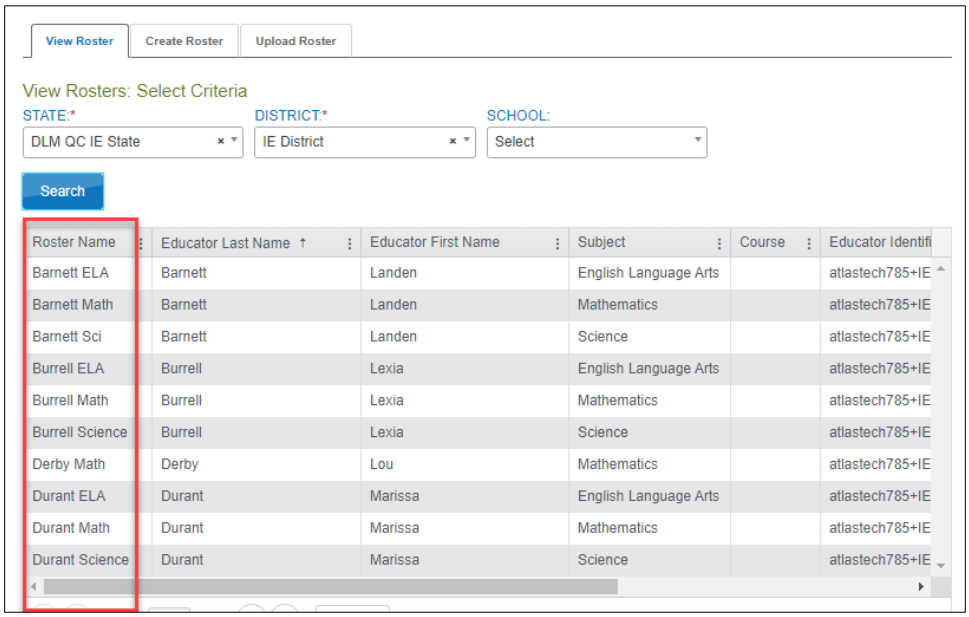
Example

Teacher Last Name Subject

- Barnett ELA
- Barnett Math
- Barnett Science

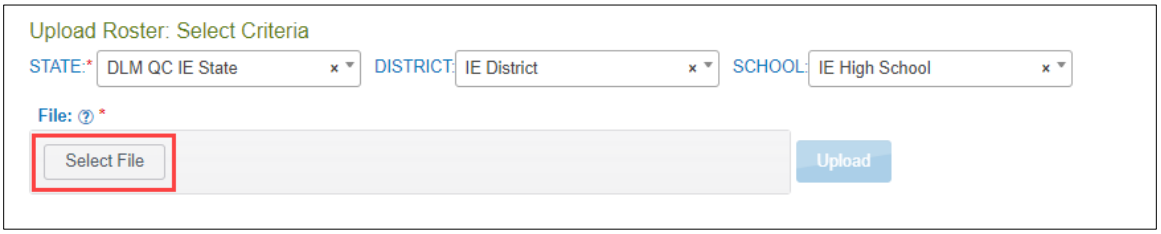
Figure 10

Roster Names

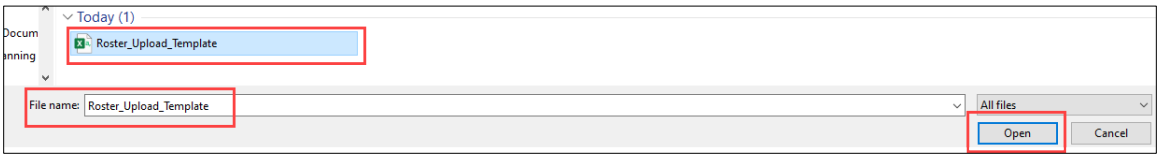


Upload a Roster Upload Template File

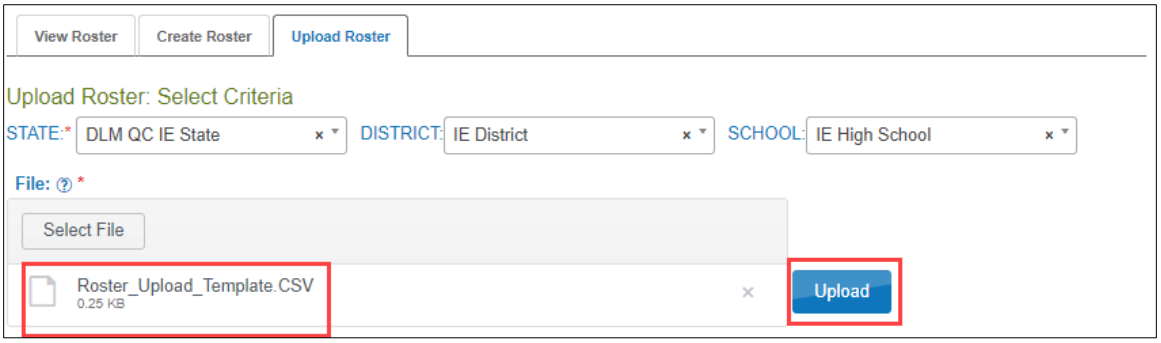
1. Select the **Select File** button**.**



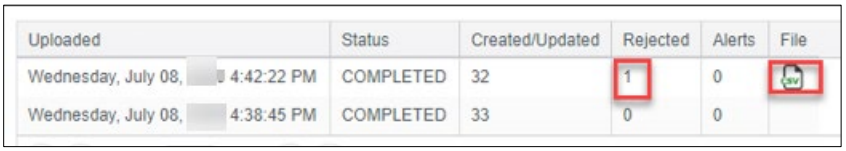
2. Find the saved ready-to-upload Roster Upload Template file. Select **Open**.



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



4. A message will display showing the number of records that were created/updated or were rejected or records that may have alerts that must be read. Each line in the CSV file is one record.
5. 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 read the error messages related to the upload. 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, 4:42:22 PM	COMPLETED	32	1	0	
Wednesday, July 08, 4:38:45 PM	COMPLETED	33	0	0	

6. Fix the lines in the file that had errors, remove the lines that uploaded successfully, and follow the previous steps to upload again. The following is an example of the message when all 33 rosters are successfully created.

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

Page 1 of 1

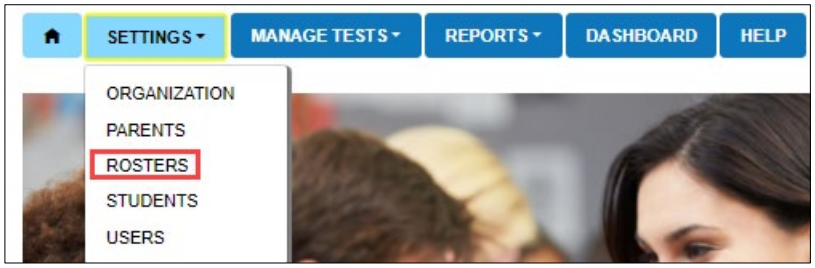
7. If a student is incorrectly rostered for a subject in a state that does not test the grade in which the student is enrolled, an error message will convey that information. Correct the roster and upload again.

Create a Roster Manually

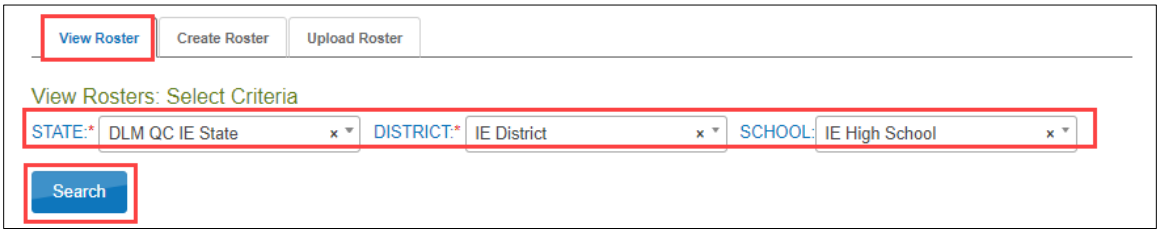
The user interface is an efficient tool for creating five or fewer rosters. Follow this procedure to manually create a roster.

1. Select **Settings**.

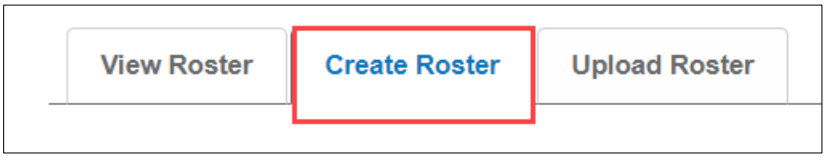
2. Select **Rosters** from the drop-down menu.



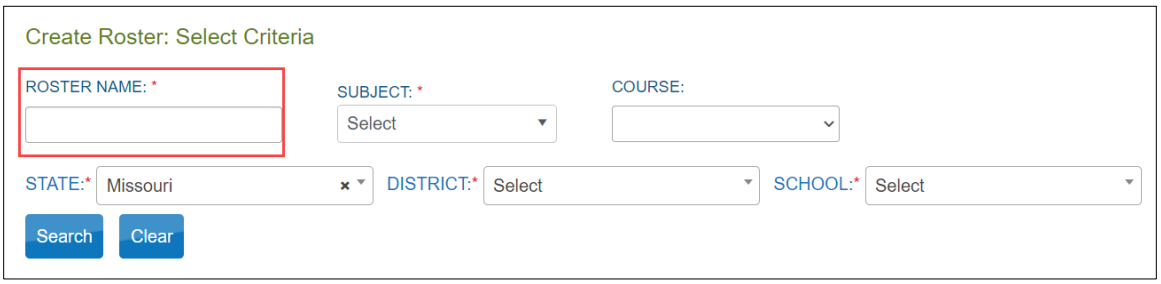
3. The View Rosters tab will be open. The Select Criteria fields will be available.
4. View all rosters that have been created for an organization by applying filters in the Select Criteria fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu. Select **Search**.



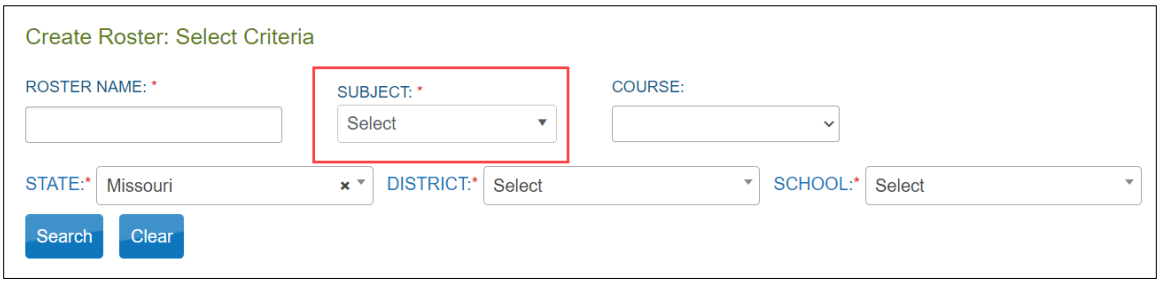
5. If a roster has not been previously created, select **Create Rosters**.



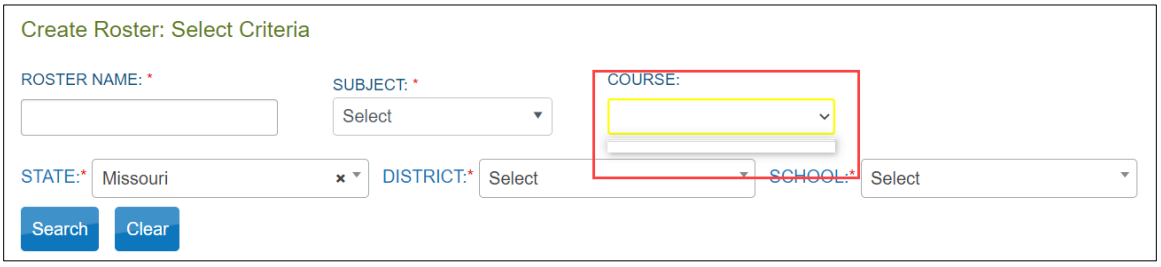
6. Complete all fields on the Create Rosters: Select Criteria screen. Create the roster name using the naming conventions suggested in Best Practices for Naming Rosters on page 138 of this manual.



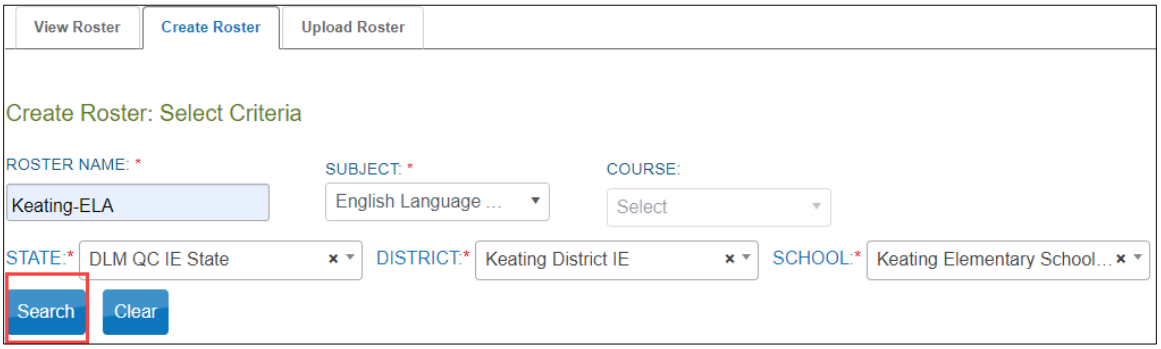
7. Choose the subject for this roster from the drop-down menu. Only the subjects tested in your state will display.



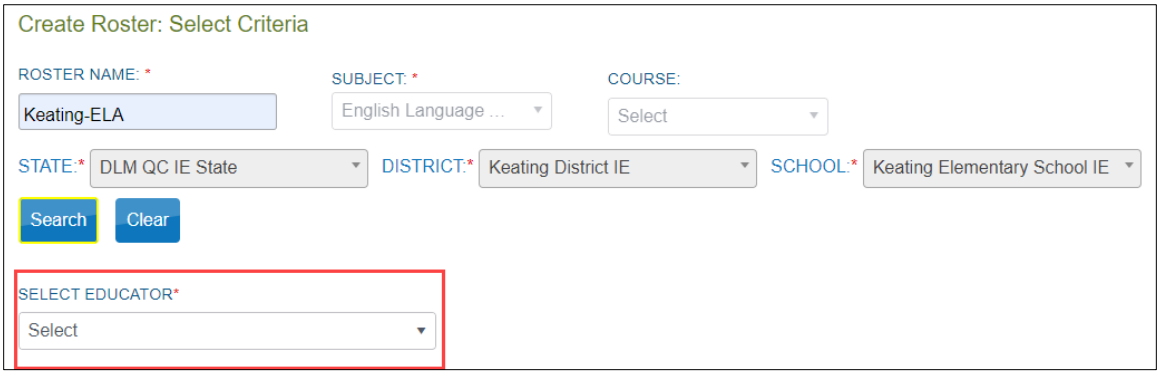
8. The Course field will be blank for most states. However, in states testing high school biology, select **Science** for the subject, and Biology will populate in the Course field. Select **Biology**.



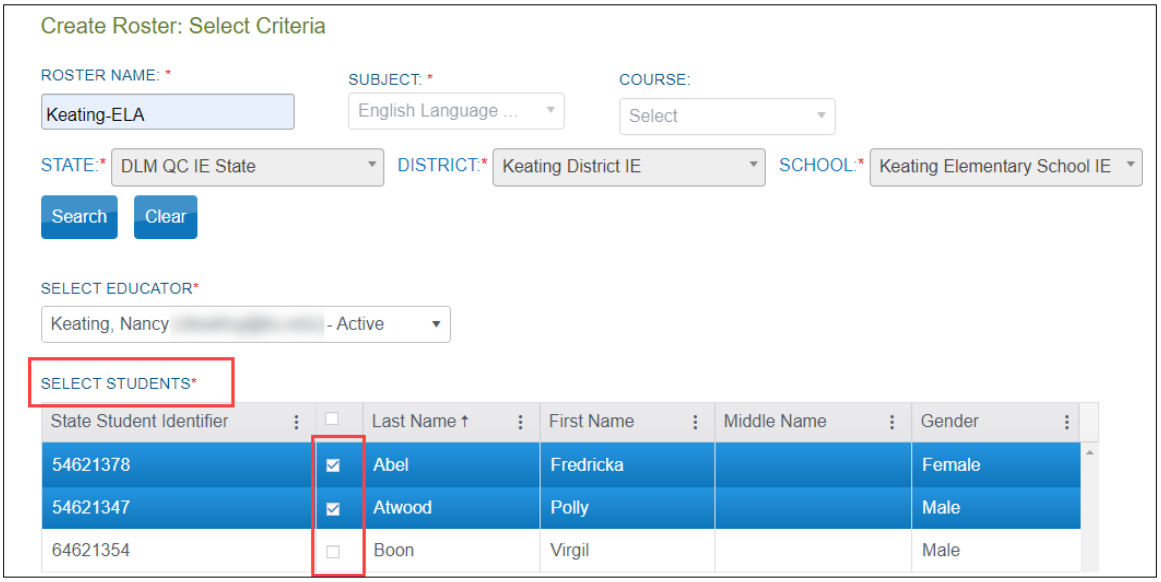
9. Apply filters to choose the correct organizations. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu. These are all required fields.
10. Select the blue **Search** button.



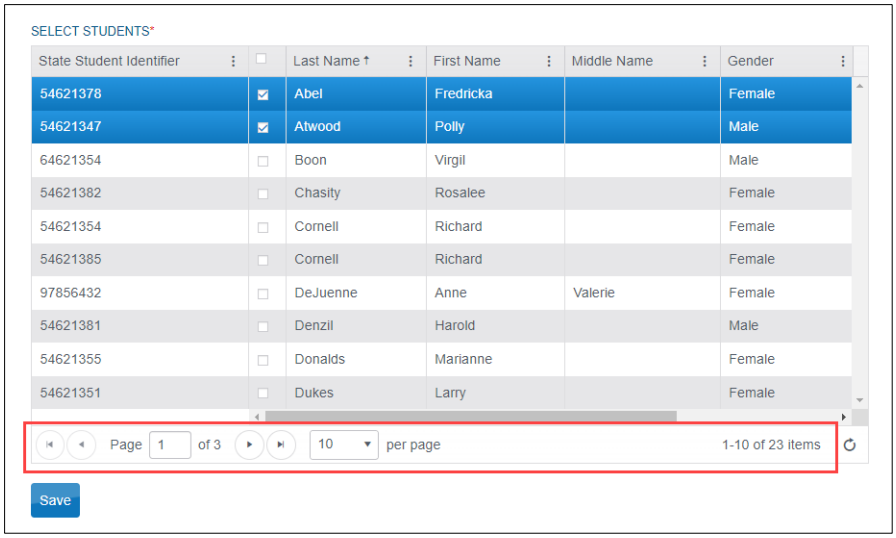
11. Choose the educator from the Select Educator drop-down menu.



12. Choose the students to roster by selecting the checkbox to the right of their last name in the Select Student grid.



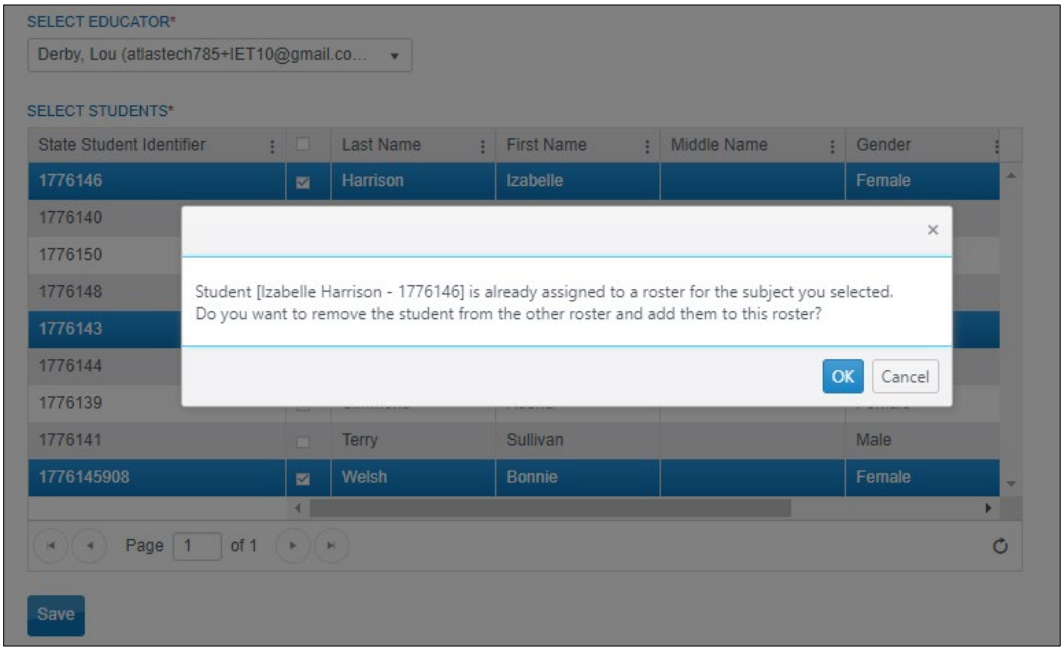
HINT: Use the arrows at the bottom of the screen to move between pages when multiple students are listed. In this screenshot, 10 students are available for selection out of 23 overall. Scroll through the pages to see other students; multiple students can be selected.



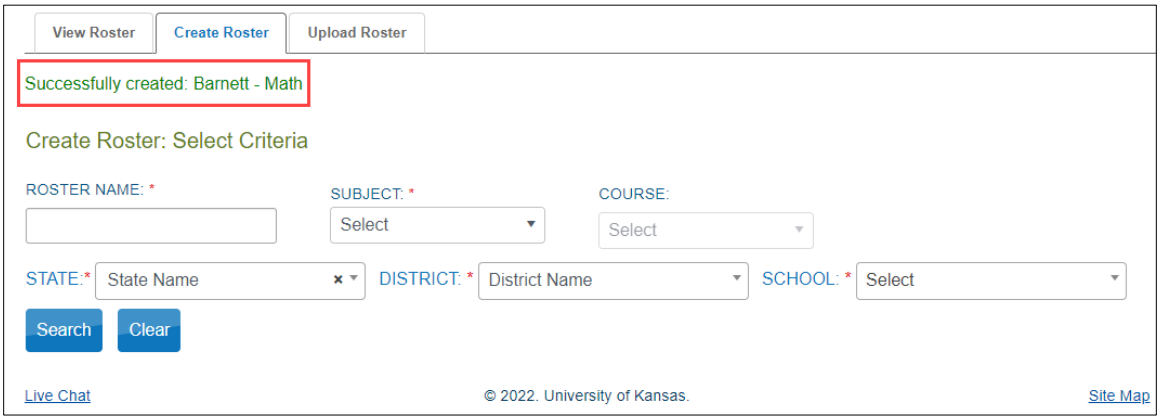
NOTE: All students displayed in screenshots throughout this manual are fictitious.

13. After selecting the appropriate students, select the **Save** button.

14. 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. Select the blue **OK** button to continue or the **Cancel** button to return to the list of students.



15. 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.



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.

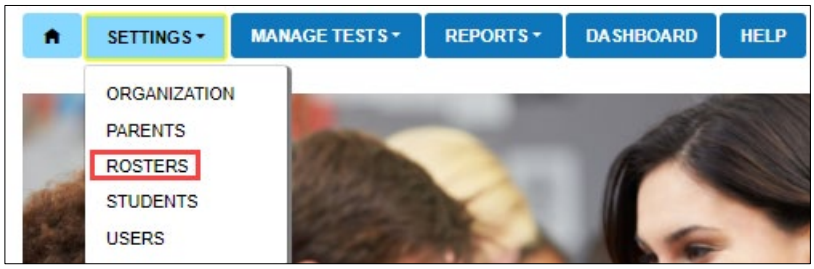
Change Roster Data or Remove a Roster

> HINT: To remove/delete an incorrect roster, move all students from the incorrect roster to a new correct one. The incorrect roster will automatically be deleted.

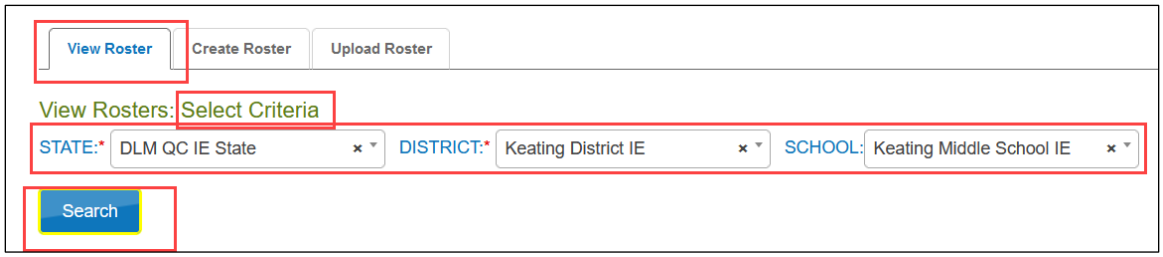
Follow this procedure to change roster data or to remove a roster. To change roster data, follow these steps.

1. Select **Settings**.

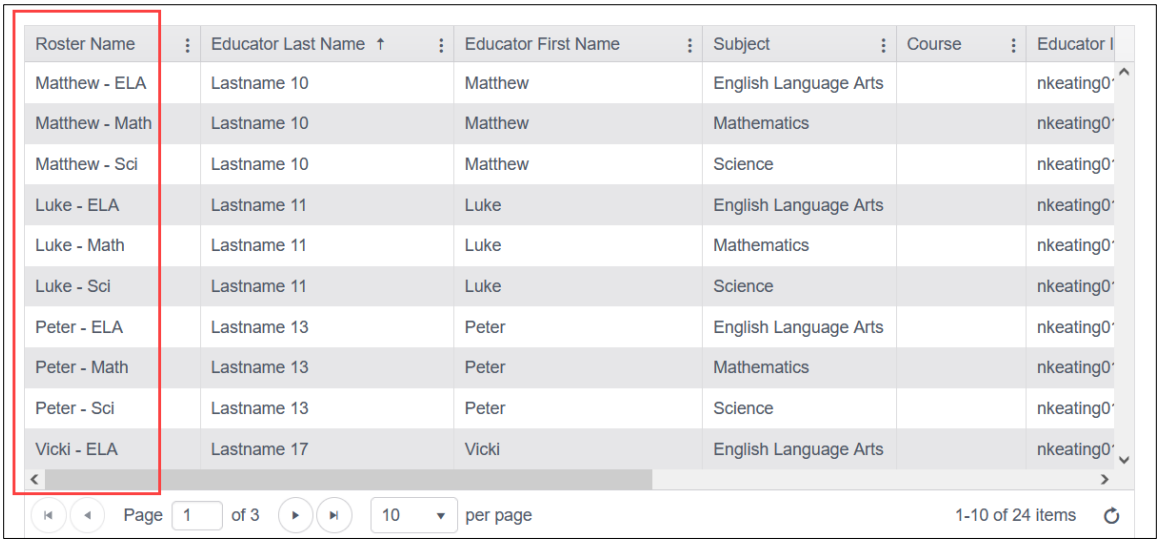
2. Select **Rosters** from the drop-down menu. The View Roster: Select Criteria screen opens.



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. All required fields must be completed.
4. Select **Search**.



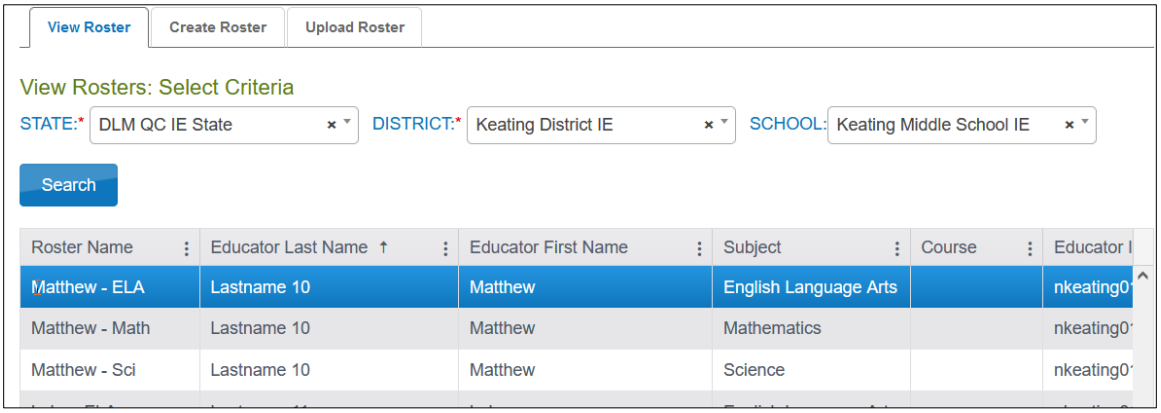
5. All previously created rosters will display.



Roster Name	Educator Last Name	Educator First Name	Subject	Course	Educator I
Matthew - ELA	Lastname 10	Matthew	English Language Arts		nkeating0
Matthew - Math	Lastname 10	Matthew	Mathematics		nkeating0
Matthew - Sci	Lastname 10	Matthew	Science		nkeating0
Luke - ELA	Lastname 11	Luke	English Language Arts		nkeating0
Luke - Math	Lastname 11	Luke	Mathematics		nkeating0
Luke - Sci	Lastname 11	Luke	Science		nkeating0
Peter - ELA	Lastname 13	Peter	English Language Arts		nkeating0
Peter - Math	Lastname 13	Peter	Mathematics		nkeating0
Peter - Sci	Lastname 13	Peter	Science		nkeating0
Vicki - ELA	Lastname 17	Vicki	English Language Arts		nkeating0

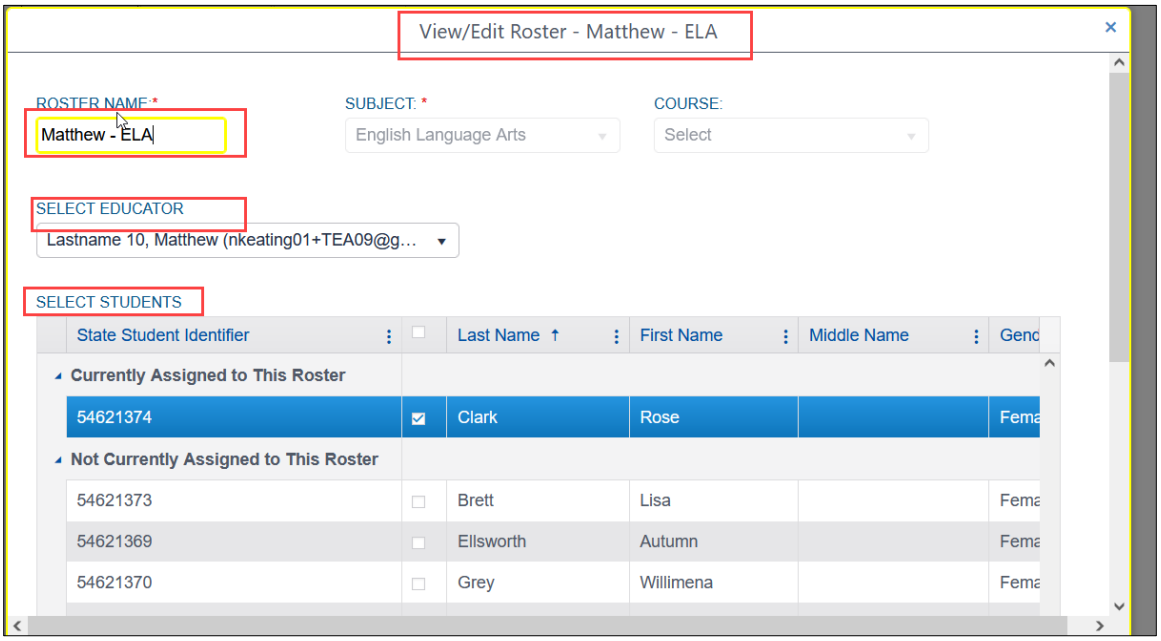
Page 1 of 3 10 per page 1-10 of 24 items

6. Select the desired roster to edit/delete.



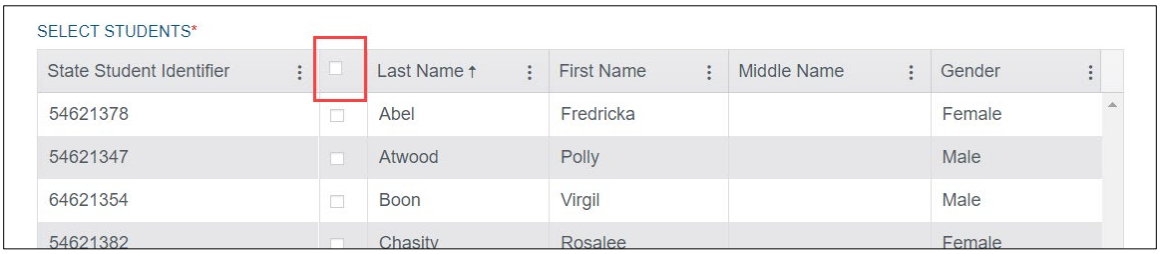
7. The **View/Edit Roster** screen will automatically display. In the following screenshot, the three students highlighted in blue are currently rostered to Matthew. The following edits can be made to a roster.

- 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.

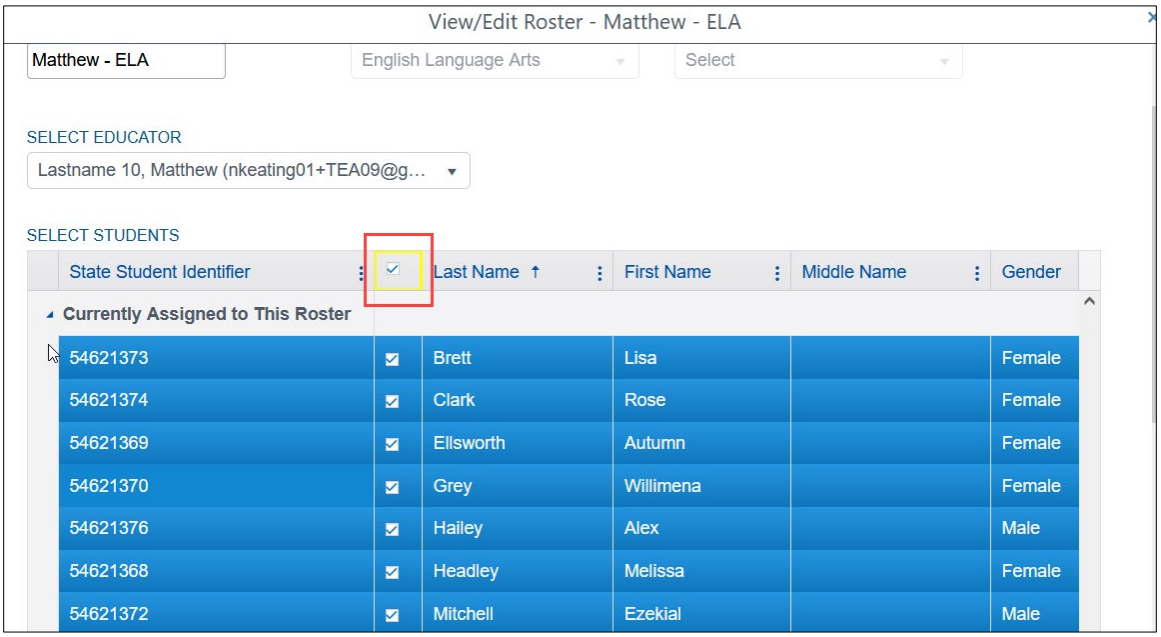


8. Once all desired edits from the available choices are made, scroll to the bottom of the screen, and select the blue **Save** button.
9. The subject and course fields are not editable. If either of these fields must change, a new roster must be created for the correct subject and course. Select the new teacher and the students. This 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.



11. All students on the roster will be highlighted and can be moved to the new roster quickly.



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

Using the 2021–2022 Roster Extract to Update Roster Records for 2022–2023

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 via a web service like OneRoster. If an extract was downloaded and saved before the last week in July from the previous year, this extract can be used as an upload for roster records for the current year. Delete the first 10 columns in the extract, then ensure the heading titles **exactly** match the 2022–2023 Roster Upload Template file. Save the file as a CSV (comma-delimited) file. Follow the steps outlined in Upload a Roster Upload Template File on page 139 in this manual.

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 one 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 student's 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

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

1. Download the data extracts from Educator Portal to view current data.
2. In Educator Portal, edit the data against state or district data.
3. Look for duplicate student records across different schools in the district.
4. Exit or transfer students from schools or districts in which they are no longer enrolled by following the procedure to update enrollment records, page 89. For

exiting a student, go to the section Exit a Student from Educator Portal on page 109.

5. 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 like OneRoster. The Enrollment Extract is a valuable resource for reviewing, editing, and then using the extract for uploads.

> 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.

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.

- 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.
- 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

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

Table 32

Data Manager Actions

Data Manager Actions	Procedure Title in the Manual
User • View the user extract. • Compare the extract data against district or state data. • Correct data where needed. • Ensure educators with the role of Teacher have an Educator Identifier associated with their account. • Inactivate user records where needed. • Upload the User Upload Template file.	Manage User Data, beginning on page 15 of this manual 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. Filtering options are available. These options may be most useful in large districts which have multiple pages of data to display. Note: Grid customization is not permanent. When the user logs out of Educator Portal, the grids will return to their original order.

Data Manager Actions	Procedure Title in the Manual
Enrollment • View the current enrollment extract. • Compare the extract data against state or district data. • Keep rows of information that require correction. • Delete rows of information that do not require correction. • If using the 2021–2022 Enrollment extract for a 2022–2023 Enrollment Upload Template file, delete the first five specified columns previously described to prepare the extract for use as an enrollment file. Ensure the column headings and column order **EXACTLY** match the current Enrollment Upload Template file. • Upload the file.* • Exit students from the system if needed. Note: Simply deleting a line of student data in the enrollment extract does **not** exit the student from Educator Portal. The Exit a Student process must be used.	Manage Enrollment Data, beginning on page 67 of this manual Enrollment Field Validations Change Enrollment Data Previously Uploaded 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. 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.

Data Manager Actions	Procedure Title in the Manual
Roster • View the Roster extract. • Compare the extract data against state or district data. • Keep rows of information that require correction. • Delete rows of information that do not require correction. • If using the 2021–2022 Roster extract to upload rosters for 2022–2023, delete the first 10 specified columns previously described to prepare the extract for use as a roster file. • Ensure the column headings **EXACTLY** match the 2022–2023 Roster Upload Template file. • Upload the file.*	Manage Roster Data, beginning on page 129 of this manual

*Some information may be edited manually using the user interface.

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 such as OneRoster. The Enrollment Extract is a valuable resource for reviewing, editing, and then using 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.

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.

- Are the correct students enrolled?
- Are the students enrolled in the correct grades?
- Are the students are enrolled in the correct school? If not, go to Management of Student Moves and Transfers on page 122 of this manual to make the corrections.

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 where needed.

- 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 was 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).
- Use VLOOKUP to search for a value and return a value from a related cell.

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 3 of this manual for additional assistance.

HINT: Do not send by email or chat any student Personally Identifiable Information (PII). Each state has their own PII requirements.

TROUBLESHOOTING

Common Issues

Common questions and problems can be diagnosed and solved using the Additional Kite Resources on the Kite Suite website. Scroll towards the bottom of the screen. If your questions are not answered with these resources, contact the Service Desk using the number in the footer of this manual.

GLOSSARY

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

Term	Definition
Educator Portal	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 or tracking results. Users can access Educator Portal using any supported browser via https://educator.kiteaai.org/. For information on working within Educator Portal, access the DATA MANAGEMENT MANUAL and the EDUCATOR PORTAL USER GUIDE on the DLM website.
Personal Learning Profile	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.
State Assessment Administrator (SAA)	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.
state education agency (SEA)	A state department of education.

STATE APPENDIX

DOCUMENT HISTORY

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

Date	Section Name/Summary of Changes	Starting Page
8/2/2022	Timeframe for testlet resets updated to five business days	3
8/2/2022	New Find Student feature	103
8/2/2022	New User, Enrollment, and Roster Template Upload Files	Throughout
8/2/2022	New instructions for using an extract for file uploads	Throughout
8/2/2022	New restrictions in rostering to only those subjects and grades that count towards accountability per state	Throughout

2022-23 New York State Alternate Assessment (NYSAA): Dates to Remember

Important Dates to Remember

08/31/2022	Kite Student Portal Update to Kite Student Portal for 2022-23.
09/12/2022	ELA, Math, & Science Instructionally Embedded Assessment opens. • 09/12/2022-02/22/2023 • 12/22/2022-01/02/2023 window closed
10/03/2022	Moodle Training opens.
10/31/2022	Printed manuals sent to schools.
10/03-11/11/2022	NYSAA-DLM Virtual Training • Virtual Training Window 10/04/2022-11/18/2022 • Prior registration required Live Q&A sessions: • 10/20/2022 12-1 pm • 11/17/2022 3-4 pm More information to follow. Virtual Training must be viewed prior to participation in a live Q&A session.
10/21/2022	Recommended deadline to complete review of user information in Educator Portal. Make corrections, add new users and delete users no longer needing accounts.
11/12/2022	NYSAA-eligible students need to be identified in the state data warehouse with the program service code **0220** to be included in the NYSED enrollment pull. Districts/Schools utilizing the Instructionally Embedded Window must comply with this deadline.

11/14/2022	NYSED pull of students identified as NYSAA-eligible for loading of enrollment file to Educator Portal.
11/16/2022	NYSED loads enrollment file to Educator Portal.*
11/23/2022	Rostering of students begins for entities relying on NYSED load of enrollment data.
11/30/2022	Recommended deadline to complete First Contact survey (FCS) and Personal Needs Profile (PNP) for participation in spring assessment to utilize the Instructionally Embedded Window**.**
01/30/2023	Parent Brochures sent to schools.
02/13/2023	Final date for Braille marked in PNP Profile.
02/20/2023	Recommended deadline to complete PNP and FCS for participation in spring assessment.
02/22/2023	ELA, Math and Science Instructionally Embedded Window closes.
03/10/2023	Shipment of Braille forms or embossing paper to school.
03/13/2023	Spring assessment window opens.
06/09/2023	Spring assessment window closes.
07/23/2023	Last day to download and save all Data Extracts in Educator Portal pertinent to district needs.

*Districts/schools can enroll and subsequently roster students prior to the NYSED load of enrollment data; they do not have to wait for NYSED to load the enrollment file.

THE STATE EDUCATION DEPARTMENT / THE UNIVERSITY OF THE STATE OF NEW YORK / ALBANY, NY 12234

Zachary Warner
Director
Office of State Assessment

June 2022

TO: District Superintendents
Superintendents of Schools
Special Education Directors
Chairpersons of Committees on Special Education
Project Managers for the Level I Data Repositories

FROM: Zachary Warner

SUBJECT: Birthdate Ranges for Students with Disabilities Participating in the 2022-23 New York State Alternate Assessment (NYSAA)

Students with disabilities participating in the New York State Alternate Assessment (NYSAA) are assessed according to chronological ages aligned with grade levels. The chart below provides information on the age ranges for students with disabilities participating in the 2022-23 NYSAA. Students should be tested based on their birthdate in the content areas indicated for each grade level.

Please contact the Office of State Assessment at 518-474-5900 if you have any questions regarding the birthdate ranges for students participating in the NYSAA.

Birthdate	NYSAA Grade and Component	Reaches this Age Between September 1, 2022 and August 31, 2023
September 1, 2013–August 31, 2014	Grade 3 ELA and Math	9
September 1, 2012–August 31, 2013	Grade 4 ELA and Math*	10
September 1, 2011–August 31, 2012	Grade 5 ELA and Math	11
September 1, 2010–August 31, 2011	Grade 6 ELA and Math	12
September 1, 2009–August 31, 2010	Grade 7 ELA and Math	13
September 1, 2008–August 31, 2009	Grade 8 ELA, Math, and Science	14
September 1, 2004–August 31, 2005	Secondary-Level ELA, Math, and Science**	18

*NYSAA-eligible students who meet the age criteria for 4th grade will not be tested in science in the 2022-23 school year. Instead, these students will be tested in grade 5 the following year (spring 2024). Do not roster students to 4th grade Science for spring 2023 NYSAA.

**NYSAA-eligible students who do not meet the age criteria above for the secondary level and will be exiting school before they reach their eighteenth birthday must take the secondary-level NYSAA before they leave school (i.e., when they are 17 years old). NYSAA-eligible secondary-level students who were expected to participate in the spring 2020, spring 2021, or spring 2022 NYSAA administration but could not do so are not expected to take the NYSAA before they exit school.

Reminder: all NYSAA-eligible students noted in the secondary-level age range above are assigned to the Grade 9 cohort in Educator Portal, regardless of the actual grade that the student is enrolled in at school. The grade must be 9 in the Educator Portal system.

THE STATE EDUCATION DEPARTMENT / THE UNIVERSITY OF THE STATE OF NEW YORK / ALBANY, NY 12234

DIRECTOR, OFFICE OF STATE ASSESSMENT
89 Washington Avenue, Room 775 EBA
Albany, New York 12234

ASSISTANT COMMISSIONER, OFFICE OF SPECIAL EDUCATION
89 Washington Avenue, Room 301M EB
Albany, New York 12234

May 2022

To: District Superintendents
Superintendents of Schools
Principals of Public, Religious, and Independent Schools
Charter School Leaders
Special Education Teachers

From: Zachary Warner
Director, Office of State Assessment

Christopher Suriano
Assistant Commissioner, Office of Special Education

Subject: Administration of the New York State Alternate Assessment in the 2022-23 School Year

This memorandum provides important information about the administration of the New York State Alternate Assessment (NYSAA) beginning with the 2022-23 school year. Students eligible to participate in the NYSAA are assessed in English language arts (ELA), mathematics, and science using the Dynamic Learning Maps (DLM) Alternate Assessment System. The NYSAA is part of the State testing program that measures student knowledge on Essential Elements, which are alternate achievement standards that are reduced in depth and breadth from the learning standards.

NYSAA in Science

In December 2016, the Board of Regents adopted the new P-12 Science Learning Standards which are based on the Framework for K-12 Science Education developed by the Research Council and the Next Generation Science Standards. The DLM Essential Elements in science are specific statements of knowledge and skills that are linked to the grade-level expectations in the Framework for K-12 Science Education.

Students participating in the NYSAA in science are assessed once each at the elementary, middle, and high school levels. Beginning with the 2023-24 school year and thereafter, NYSAA eligible students will be tested in science in grade 5, grade 8, and one time in high school. As the Board of Regents and the Department work to implement the science learning standards, **students eligible to participate in the grade 4 NYSAA in science will not be tested in the 2022-23 school year**. Instead, these students will be tested in grade 5 the following year (spring 2024). This is consistent with the implementation of the Elementary- and Intermediate-level Science Assessments.

NYSAA in English Language Arts and Mathematics

Students will continue to take the NYSAA English language arts and mathematics tests in grades 3-8 and once in high school. As in past years, these tests will measure the DLM Essential Elements in ELA and math. The Department and DLM Consortium staff are currently working together on alignment studies to link the New York State Next Generation Learning Standards with the DLM Essential Elements. However, these linkages will not impact the student experience or how teachers prepare students for the assessment. The Essential Elements in these subject areas remain unchanged.

The Department and the DLM Consortium will continue to work cooperatively to ensure that students, teachers, and administrators have the necessary supports for successful assessment. If you have questions about the alternate assessment, please contact the Office of State Assessment by phone at (518) 474-5902 or by email at emscassessinfo@nysed.gov. Questions about special education should be directed to the Office of Special Education by phone at (518) 473-4818 or by email at speced@nysed.gov.

THE UNIVERSITY OF THE STATE OF NEW YORK / ALBANY, NY 12234
THE STATE EDUCATION DEPARTMENT

Assistant Commissioner
Office of State Assessment

January 2022

TO: District Superintendents
Superintendents of Public Schools
Principals of Public, Religious, and Independent Schools
Leaders of Charter Schools

FROM: Steven E. Katz

SUBJECT: 2022–23 Elementary- and Intermediate-level Testing Schedule

2022–23 School Year

Operational Test		Administration Dates	Make-up Dates	Scoring Dates	Final Dates to Submit Answer Sheets to Scanning Centers
NYSAA English Language Arts, Mathematics, and Science		Monday, March 13 – Friday, June 9	Make-ups must be given within the testing window	N/A	N/A
Grades 3-8 English Language Arts	**Paper -based**	Wednesday, April 19 – Friday, April 21*	Monday, April 24 – Friday, April 28	Monday, April 24 – Thursday, May 4	Thursday, May 4
	Computer -based	Wednesday, April 19 – Wednesday, April 26	Monday, April 24 – Friday, April 28	Monday, April 24 – Thursday, May 4	N/A
Grades 3-8 Mathematics	**Paper -based**	Tuesday, May 2 – Thursday, May 4	Friday, May 5 – Thursday, May 11	Friday, May 5 – Wednesday, May 17	Wednesday, May 17
	Computer -based	Tuesday, May 2 – Tuesday, May 9	Friday, May 5 – Thursday, May 11	Friday, May 5 – Wednesday, May 17	N/A
NYSESLAT Speaking		Monday, April 17 – Friday, May, 26	Make-ups must be given within the testing window	Speaking is usually scored as it is administered.	TBD
NYSESLAT Listening, Reading, Writing		Monday, May 15– Friday, May 26	Make-ups must be given within the testing window	TBD	TBD
Grade 8 Science Performance Test		Tuesday, May 23 – Friday, June 2	Make-ups must be given within the testing window	Scoring may start immediately following administration.	Thursday, June 15
Grade 8 Science Written		Monday, June 5	Tuesday, June 6 – Friday, June 9	Following make-up dates, but no later than Thursday, June 15	Thursday, June 15

*In Spring 2023, some schools may be closed on Friday, April 21st in recognition of Eid al-Fitr. Schools that are closed on Friday, April 21st may use Monday, April 24th as an administration date for these exams.

In Spring 2023, there will not be an administration of the Grade 4 Science Test. This is to support the transition to the new Grade 5 Elementary-level Science Test measuring the new NYS P-12 Science Learning Standards, which commences in Spring 2024.

2022-23 New York State Alternate Assessment (NYSAA): New York State Student Identification System (NYSSIS ID #)

What is a NYSSIS ID?

NYSSIS (NYS Student Identification System) provides **unique statewide identification numbers to all students** participating in the NYS PreK - 12 Student Information Repository System (SIRS), also called the statewide (Level 2) student data warehouse (https://www.p12.nysed.gov/irs/sirs/). The SIRS provides a single source of standardized individual student records for analysis at the local, regional, and State levels to improve student performance and to meet State and federal reporting and accountability requirements. NYSSIS IDs are a unique 10-digit number assigned to each NY student and used to provide continuity for a student's records (including State testing) over their time in the NY. (https://www.p12.nysed.gov/irs/sirs/).

How do I access the NYSSIS ID?

You need an account created and entitled to the NYSSIS application through the SEDDAS application located in the NYSED application business portal (https://portal.nysed.gov). In a nonpublic or charter school, the principal must entitle access; in a public school, contact the district superintendent; for BOCES, the BOCES superintendent at the main location entitles access; and for BOCES RIC, contact your director.

What if I am new or there are changes in my district/school?

A nightly automated process runs to create accounts and entitle/un-entitle accounts to the NYSSIS web application for the CEO position of a public district, BOCES district, charter school, non-public school and BOCES RIC **based on the existing data submitted to SEDREF (https://www.oms.nysed.gov/sedref/) from your institutional school building location or district building location**. This process handles a staff change in the CEO position of an institutional location. All account entitlements of the previous CEO will be transferred to the new CEO of the same institutional location.

What if I cannot locate the NYSSIS ID #?

Contact the Office of State Assessment at EMSCASSESSINFO@nysed.gov or Computer Based Testing at CBTSupport@nysed.gov for more assistance in obtaining the NYSSIS ID # for a student.

Moreover, the LEA (school/district) may need to work with their contracted Level 1 data center to submit their student data to get a NYSSIS ID if the student record(s) have not been submitted to the NYSSIS system yet. (Turnaround time can be less than an hour).

THE STATE EDUCATION DEPARTMENT / THE UNIVERSITY OF THE STATE OF NEW YORK / ALBANY, NY 12234

Steven E. Katz
Assistant Commissioner
Office of State Assessment

TO: NYSAA District Test Coordinators (DTC)
NYSAA Building Test Coordinators (BTC)
Directors of Special Education
Directors of Pupil Personnel Services

FROM: Steven E. Katz

DATE: May 2018

SUBJECT: Process to Medically Excuse a Student with a Severe Cognitive Disability from Participation in the New York State Alternate Assessment (NYSAA)

This is to remind schools of the process to medically excuse students with significant cognitive disabilities from participation in NYSAA.

Under certain circumstances, a school administrator may grant a medical excuse from the NYSAA (DLM) testing requirement for a student with a significant cognitive disability. The State Education Department allows NYSAA-eligible students with significant disabilities to be medically excused when the student is too incapacitated to be tested because of an illness or injury resulting from a significant medical emergency, as documented by a medical practitioner. The medically excused option is reviewed by a school district administrator on an individual student basis. School administrators should work with parents to obtain documentation from a medical practitioner.

The following process needs to be followed for medically excusing a student: Students must be added to KITE: Educator Portal, then rostered to a teacher and the first contact survey completed. This results in testlets being generated. Once testlets are generated, they should not be opened. Instead, the teacher would notify the District or Building Test Coordinator (DTC/BTC) that a special circumstance code needs to be applied. The BTC/DTC would enter the special circumstance code one time per content area. Special circumstance codes can then be entered by the BTC/DTC under the Test Management Tab on the table where the TIP is retrieved. Documentation from a medical practitioner and of the special circumstance must be kept on file by the school district.

If you have questions, please contact the Office of State Assessment at 518-474-5900.

Quick DLM Reference and Resource Guide

A quick reference and resource guide to direct educators and test administrators to frequently accessed DLM test administration information.

TEACHERS, EDUCATORS, AND TEST ADMINISTRATORS				STUDENTS
NY's Page of the DLM® Website dynamiclearningmaps.org/newyork		**Kite® Educator Portal educator.kiteaai.org**	**Moodle training.dymaniclearningmaps.org**	**Kite® Student Portal**
TEST ADMINISTRATION MANUAL	ACCESSIBILITY MANUAL	DLM Security Agreement	Facilitator Guide for Required Test Administrator Training includes Moodle login information	Tech personnel download to student testing device
Blueprints	Educator Portal User Guide	Student Rosters	Guide to DLM Required Test Administrator Training includes Moodle login information	Use Student Usernames and Passwords
Essential Elements	Guide to Practice Activities & Released Testlets	Personal Needs and Preferences Profile & First Contact Survey	Test Administrator Training Modules	Students' Testlets
Professional Development Modules	Educator Resource Pages: ELA, Math, and Science	Testlet Information Pages (TIPs)	Test Administrator Module Post-Tests	Use Practice Testlets – using demo student profiles (e.g., demo.sue29, etc.)
Instructional Activities	Link to Moodle	Retrieval of Students' Usernames and Passwords		

2022-23 New York State Alternate Assessment (NYSAA): Individual Student Score Reports

The NYSAA measures student knowledge of the Essential Elements in the academic areas of English Language Arts (ELA), mathematics, and/or science. The Essential Elements are alternate achievement standards that are reduced in depth, breadth, and complexity from the State's grade-level academic achievement standards. They have been adopted by the State for students with the most severe cognitive disabilities.

Individual Student Score Reports consist of two parts: a Performance Profile, which summarizes skill mastery for related content (e.g., a specific conceptual area or domain) and for the subject overall, and a Learning Profile, which describes the skills, as they relate to each Essential Element, that were included in the assessment and how the student's mastery of these skills compares to alternate achievement grade-level expectations. A student-specific score report is available for each subject a student was assessed on.

Individual Student Score Reports are now available for students in your school who participated in one or more testlets of the New York State Alternate Assessment (NYSAA) in English Language Arts (ELA), mathematics, and/or science. These are for teacher use only.

Performance Profile

The Performance Profile provides a report of the student's overall performance in a subject. Please note that there is no exact correlation between mastering a particular linkage level on a specific Essential Element and the overall performance level in the subject.

The bar graphs on the Performance Profile demonstrate the student's mastery of skills for groups of related Essential Elements (e.g., conceptual areas).

Hints for Interpreting the Learning and Performance Profiles

- Remember that the judgment of skill mastery is based on what the student demonstrated on the DLM assessments at the time the assessment was administered. A student may have demonstrated a similar skill during instruction but not demonstrated the skill during a DLM assessment.
- The assessment measures where students are with regard to the grade-level target. Not all students will perform at the Target level, and that is to be expected.
- The number of skills mastered does not mean that a student answered a certain percent of items correctly.

- The amount of white space on the Learning Profile does not necessarily reflect a lack of instruction. The DLM assessment is adaptive and is designed so students are assessed at a linkage level that is an appropriate level of challenge for them.
- Students with the most significant cognitive disabilities have a variety of educational goals. Academics are one part of their educational program. Teachers provide instruction beyond what is reflected in the student's Learning Profile, including additional academics, functional skills, and other priorities identified in the Individualized Education Program (IEP).
- Reports include only valid student records as determined by state-level review of results. If a student record was invalidated during the state's two-week review window, the student will not have an Individual Student Score Report.

You may use these results to support teachers by

- helping them consider how the results can be used and the limitations of the data
- identifying areas of needed professional development to strengthen instruction
- identifying areas of academic skills where instruction may be focused
- reflecting on how a student's overall performance informs the IEP

Learning Profile

A Student Learning Profile Report describes the student's mastery of certain skill levels for each assessed Essential Element.

For every Essential Element in English Language Arts and mathematics, there are skills at five linkage levels: Initial Precursor, Distal Precursor, Proximal Precursor, Target, and Successor. For every Essential Element in science, there are skills at three linkage levels: Initial, Precursor and Target. These levels are shown in columns on the Learning Profile. The Target level represents the grade-level expectation for students with the most significant cognitive disabilities. Each student is assessed on one linkage level for all Essential Elements on the blueprint, with the exception of Writing. Students are typically not assessed at every linkage level and may not be assessed on every Essential Element.

A Student Learning Profile Report provides one piece of evidence to help inform instruction of NYSAA students and helps to build a bridge between the alternate achievement standards, the State assessment, and teaching.

Class and School Level Results

The Class Results report provides a summary of results for all students who were rostered to the teacher. The report lists individual students, the number of Essential Elements tested, number of skills mastered, and their final achievement level.

Each school receives Class Results reports for every teacher with students enrolled in the DLM alternate assessment. The students are arranged alphabetically by grade level. All subjects are included on the report.

REPORT DATE: 06-10-2022

End of Year Report
Class Results 2021-22

DYNAMIC™ LEARNING MAPS

TEACHER NAME: Janice Walker
DISTRICT: DLM District
SCHOOL: DLM School

DISTRICT ID: 1234
STATE: DLM State

Student Name	Grade	Subject	EEs Tested	EEs at or above Target	Skills Mastered	Achievement Level
Sigler, Alice	6	ELA	16	12	47	At Target
		Math	11	5	37	Approaching Target
		Science	9	3	9	Approaching Target
Sims, John	6	ELA	16	14	70	Advanced
		Math	11	8	30	At Target
		Science	9	7	21	Advanced
Daly, Joy	8	ELA	17	4	42	Emerging
		Math	15	2	33	Emerging

Achievement Levels

The student demonstrates ***emerging*** understanding of and ability to apply content knowledge and skills represented by the Essential Elements.

The student's understanding of and ability to apply targeted content knowledge and skills represented by the Essential Elements is ***approaching the target***.

The student's understanding of and ability to apply content knowledge and skills represented by the Essential Elements is ***at target***.

The student demonstrates ***advanced*** understanding of and ability to apply targeted content knowledge and skills represented by the Essential Elements.

The School Results reflected above are not New York specific and shown only as an example.

The School Results report contains the same information as the Class Results report along with the teacher for each student added in an additional column. Records for the entire school are organized by grade and then by teacher and student in alphabetical order.

Hints for Interpreting the Class and School Results

- Students appear in the School Results based on the roster and school where they were assessed. This may not be the same school where they are counted for accountability purposes.
- If a student was enrolled in DLM assessments but did not complete a single item in any testlet in any subject of the assessment, the student is included, but with dashes in place of results.

- Reports include only valid student records as determined by state-level review of results. If a student record was invalidated during the state's two-week review window, the student is not included in these results.
- Remember that total skills mastered is based on what the student demonstrated on the DLM assessments. A student may have demonstrated similar skills during instruction but not demonstrated the skill during a DLM assessment.
- The assessment measures where students are with regard to the grade-level target. Not all students perform at the at Target level, and that is to be expected.
- These results provide a summary of overall performance in the grade/subject at the class and school level. More useful information for instructional planning is located in each student's Individual Student Score Report.

District- and State- Level Results

The District Results report provides one table of results. Each row shows the number of students assessed at that grade and subject and the number of students who achieved at each performance level. The last column indicates the percent of students at the *at target* or *advanced* levels. The State Results report has the same formatting and provides the same type of information for all student records in the state.

Hints for Interpreting Final District and State Results

- Student results are reported for the district where they were assessed. This may not be the same district where they are counted for accountability purposes.
- If a student was enrolled in DLM assessments but did not complete any items in any testlet in any subject, the student is not included in these results.
- Reports include only valid student records as determined by state-level review of results.
- These reports provide a high-level summary of all students at the district or state level. More useful information for instructional planning is located in each student's Individual Student Score Report.
- The assessment measures where students are with regard to the grade-level target. Not all students perform at the at target level, and that is to be expected.

How Reports Are Distributed

Individual Student Score Reports are available through the Dynamic Learning Maps (DLM) Educator Portal platform. The reports will only contain information pertaining to the testlets that the student completed. The Performance Profile would indicate the student has a zero on performance or no levels mastered for Essential Elements not assessed and the Learning Profile would indicate a student was not assessed on these Essential Elements.

An Educator Portal user with the role of District Superintendent, District Test Coordinator (DTC), Building Test Coordinator (BTC) or Teacher will have access to Individual

Student Score Reports (Learning and Performance Profile Reports) for students who were assessed the previous spring. To access the reports, the authorized user logs into Educator Portal.

Educator Portal users with the role of District Superintendent, DTC or BTC will select Alternate Assessment from the Reports dropdown menu. Next the authorized user selects the End-of-Year tab and Student (Individual) or Students (Bundled).

Educator Portal users with the role of Teacher will have access to Student Learning Profile Reports for students who are rostered to them for the current school year's assessment. Teachers will have access to the reports by logging into the Educator Portal platform and selecting the Student Report Archive from the Reports tab dropdown.

Questions regarding the Individual Student Score Reports may be directed to the Office of State Assessment at emscassessinfo@nysed.gov.

2022-23 New York State Alternate Assessment (NYSAA): Special Circumstance Codes

Directions: Students must first be enrolled in Kite Educator Portal and rostered to a teacher, then the first contact survey must be completed. This results in a testlet being generated. Once the testlet is generated, do **NOT** open it, rather the teacher should notify the District that a special circumstance code needs to be applied. The District Test Coordinator/Building Test Coordinator (DTC/BTC) should enter the special circumstance code one time **per** content area **before** the test window closes. Special circumstance codes can then be entered by the DTC/BTC under the Test Management Tab on the table where the Testlet Information Page (TIP) is retrieved. Documentation of the special circumstance must be kept on file by the LEA as per their policy.

NYSAA Not-Tested Category	NYSAA Not-Tested Description	DLM Special Circumstance Code in Kite Educator Portal
Absent	The student was in attendance for fewer than 30 school days as a NYSAA-eligible student between March 13-June 9, 2023 (ELA, Mathematics, and Science) and it was determined that there was not enough time to assess the student.	Chronic Absences (13813)
Arrived After Cutoff Date for Test Administration	The student arrived in the district too late for the district to enter the student into the Kite Educator Portal and complete the assessment. The cutoff date is generally 3 weeks prior to the closing of the test window.	Other (9999)
Medically Excused	The student was too incapacitated to be tested because of an illness or injury resulting from a significant medical emergency, as documented by a medical practitioner. The medically excused option is reviewed by a school district administrator on an individual student basis. Students taking the NYSAA are not considered medically excused from testing because of their disability.	Medical Waiver (3454)
Took Another Assessment to Fulfill Testing Requirement	The student took another approved assessment (i.e., a New York State general assessment, (or approved alternative), Regents Examination (or approved alternative)) to fulfill the testing requirement in a particular content area.	Other Reason for Non-Participation (13831)
Parent Refusal	The student was not administered the NYSAA based on a parent refusal of the NYSAA assessment. This does NOT include students who were unable to engage in the assessment at the time of the testing for whom a valid score of zero is appropriate.	Parent Refusal (13820)

Misadministration/ Reporting Irregularities	The building principal is responsible for all aspects of the school's test administration and must report testing irregularities and misconduct by students and staff—in writing, on school letterhead, and signed by the principal—to OSA via fax to 518-474-1989 or by e-mail to emscassessinfo@nysed.gov. Examples of misadministration's, include but are not limited to: • All test administrator infractions regarding the violation of the KITE Security Agreement, including reproducing the assessment or sharing log-in credentials. • All instances of test administrators providing students with unauthorized testing accommodations. For more information on the definition of Misadministration/Testing Irregularity, visit http://www.nysed.gov/state-assessment/test-administration-resources	State Use 1 (10001)
	DO NOT USE	State Use 2 (10002)

Please note: In some situations, it may be more appropriate to exit or transfer a student rather than enter Special Circumstance Codes. If a student moves to a new district or school, the sending school can exit the student from Educator Portal or contact the NYSED to transfer the student to the new district. For a full list of possible exit reasons, please visit the DLM Data Management Manual.

SPECIAL CIRCUMSTANCE CODES FOR YEAR-END MODEL AND SCIENCE ONLY STATES

This resource is available at http://secure.dynamiclearningmaps.org/content/shared-resources. It can also be posted to a state's public Dynamic Learning Maps® (DLM®) webpage upon state request. The procedure applies to Year-End model and Science-Only states.

- Special circumstance codes are specific to the required spring assessment window.
- If applying a special circumstance code, it must be applied to one testlet in each rostered subject. Even if more test sessions were administered in the subject, the code does not have to be added to any additional testlets.
- State policy determines which roles may enter, edit, or delete Special Circumstance Codes:
  - State Assessment Administrator (SAA)
  - District Test Coordinator (DTC)
  - Building Test Coordinator roles

REASONS FOR NOT TESTING

If a student cannot participate in a testlet that generates a performance level used for federal and state accountability, a DLM special circumstance code can be entered in Educator Portal to provide explanation why the student was not tested. Each state education agency (SEA) selects a list of codes to use for students in their state. These codes may be available on the state's DLM webpage.

Special circumstance codes are specific to test sessions in the spring assessment window only. The codes are descriptive words (e.g., Medical Waiver or Parental Refusal). A special circumstance code can be applied to, edited, or removed from a test session in a subject at any time during the state's spring assessment window, but the action must be performed before the window closes.

The code must be entered for the test session for each applicable subject. In other words, if a student is not testing in any subjects, a code must be applied to a testlet in each subject to which the student is rostered. If later the code must be edited or removed for all subjects, the action must be performed for code that was entered. The actions must be taken before the close of the spring assessment window.

NOTE: *Entering a special circumstance code does not prevent further testing.*

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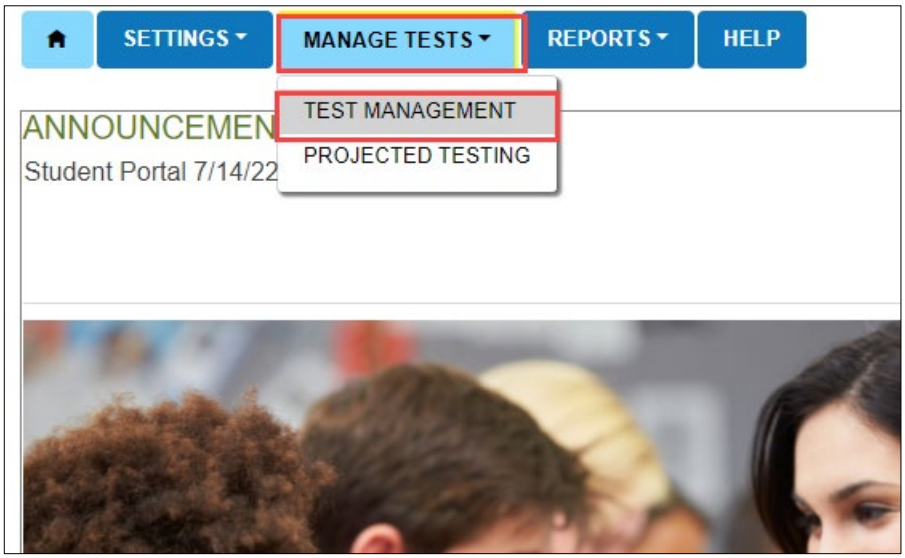
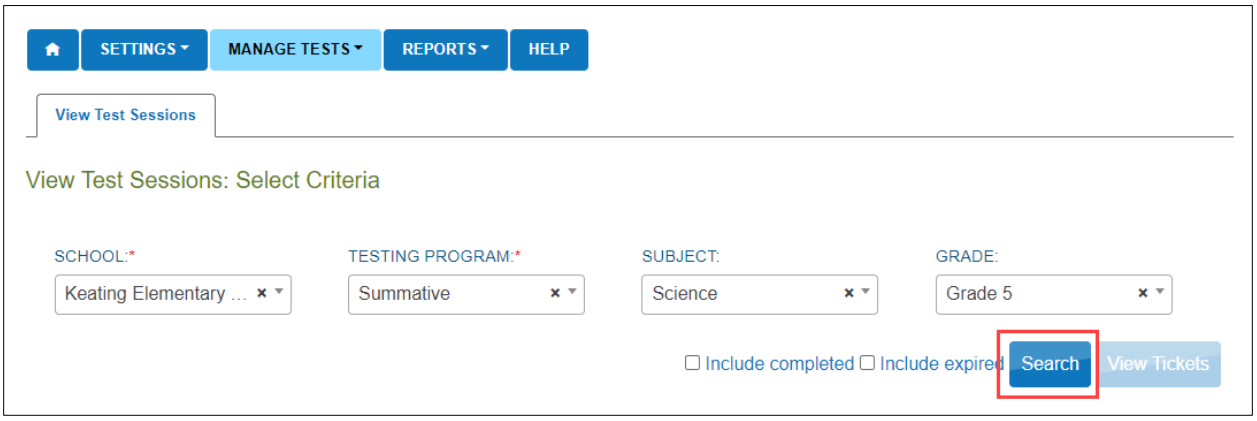
ENTERING A SPECIAL CIRCUMSTANCE CODE

Follow these steps to enter the special circumstance code for a student in the spring assessment window.

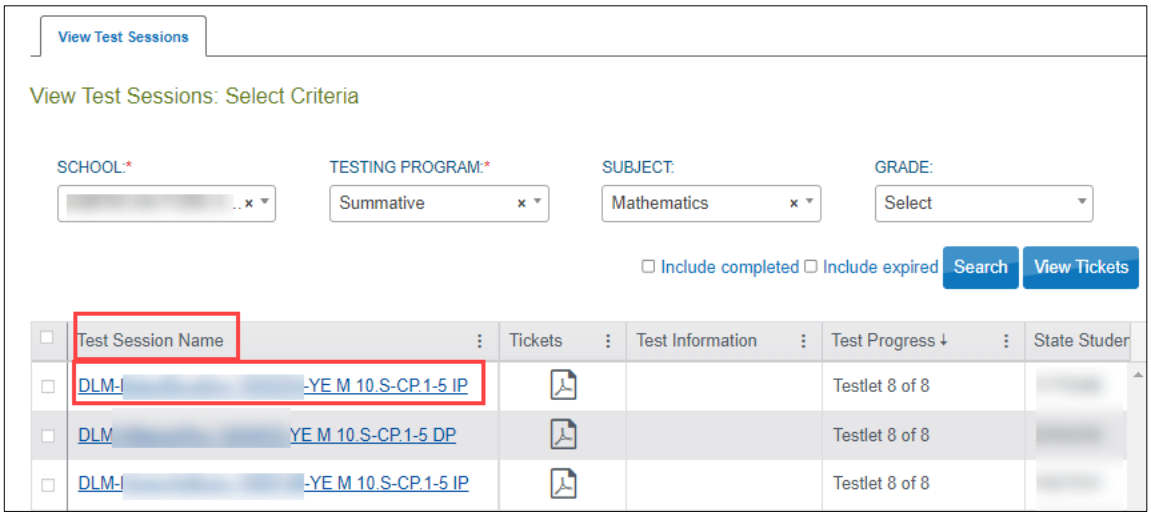
1. Select **Manage Tests** and then **Test Management.**



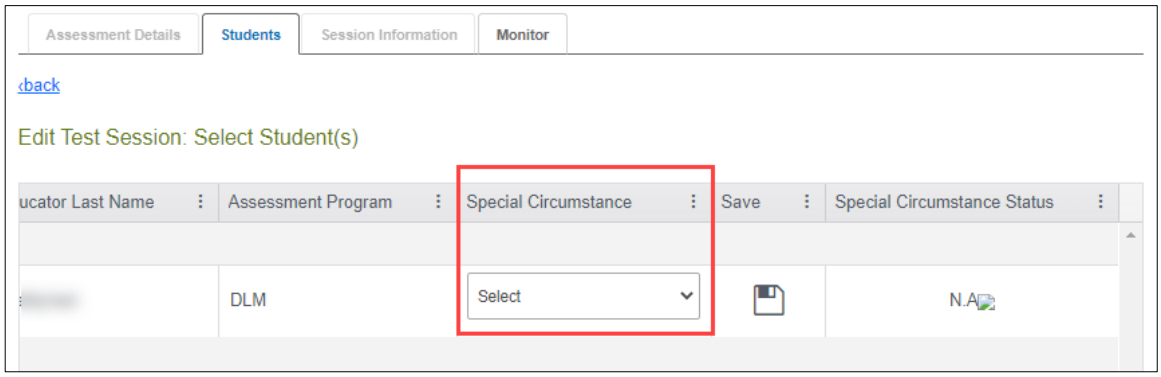
2. Select the following options in these fields:
   - **School:** the appropriate school
   - **Testing Program:** Summative
   - **Subject**
   - **Grade**



3. Select **Search.**
4. In the **Test Session Name** column, double click the testlet code where a Special Circumstance code is needed. The code includes the student's name. **Remember, a code must be entered for each subject.**

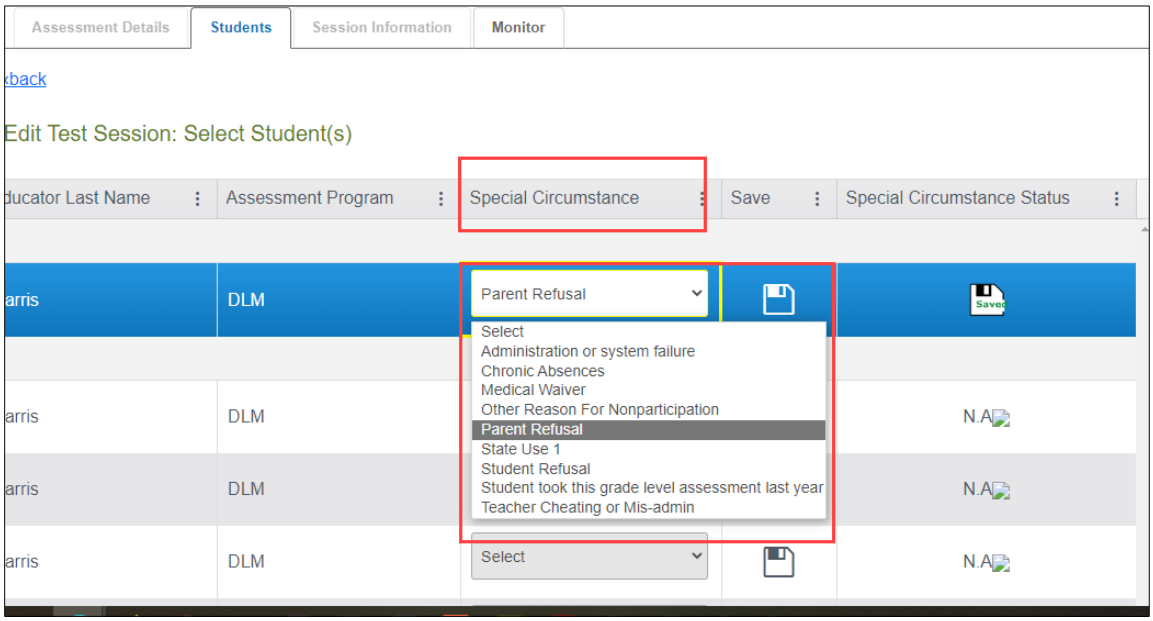


5. The user is automatically taken to the **End Test Session: Select Student** screen. Select the **student** and scroll to the far right.



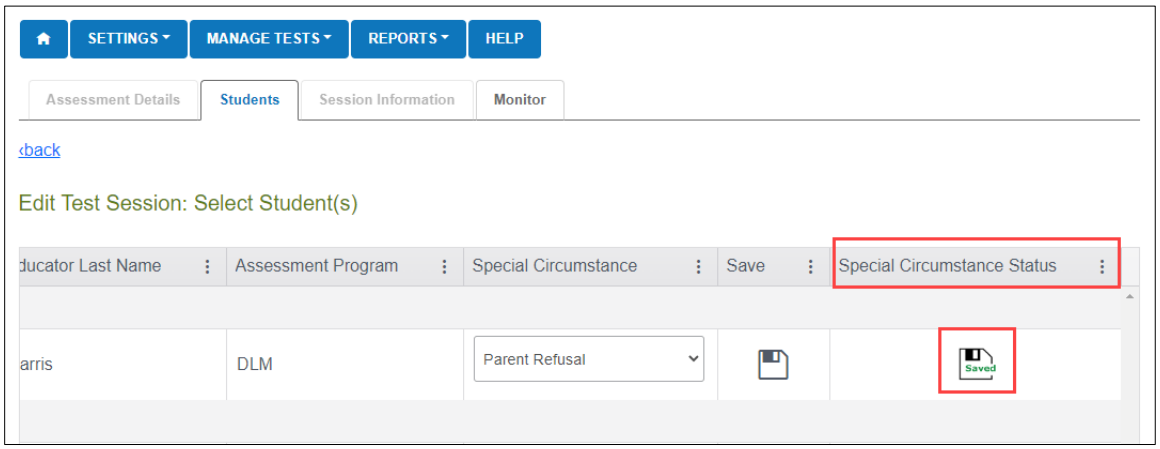
NOTE: Roles that do not have permission to apply special circumstance codes will not have the Special Circumstance column.

6. Select the arrow in the dropdown menu and select the applicable special circumstance code. The sample user chose Parent Refusal.



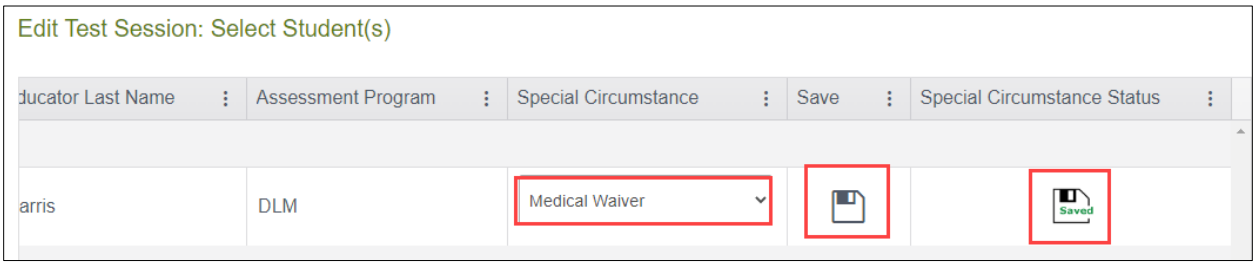
7. Select **Save**.

8. The test session and subject are updated as indicated by the icon with the word **SAVED** displayed in the Special Circumstances Status column.

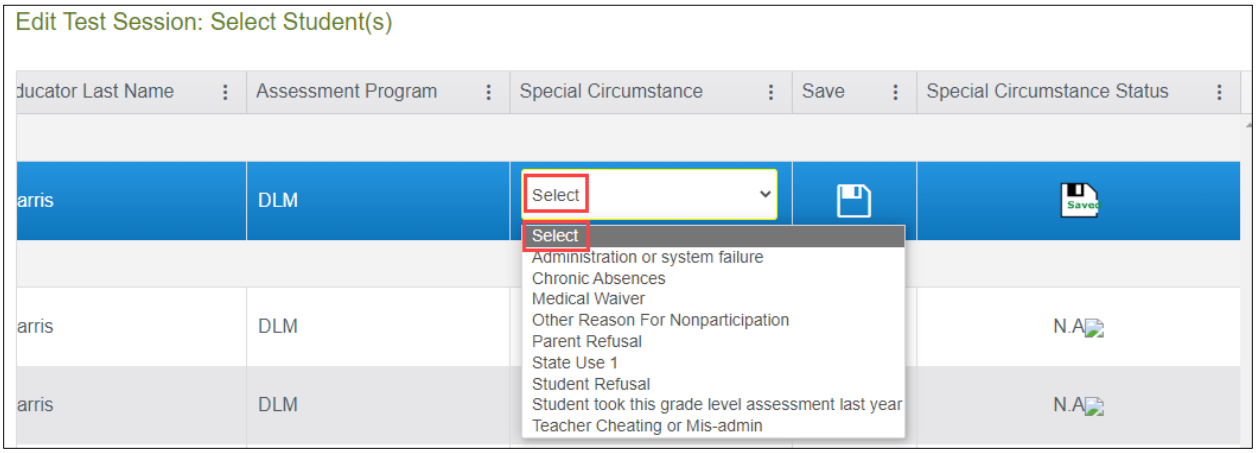


9. To edit an applied code, follow the same steps used to enter a code:
   - Go to the Special Circumstance dropdown menu.
   - Choose a different code. (In the following screenshot, the user changed from Parent Refusal to Medical Waiver.)
   - Select the save icon.

- Observe the icon with the word, “Saved” that displays in the Special Circumstance Status Column.



10. To delete an applied code,
    - Scroll to the dropdown list of Special Circumstance codes.
    - At the top of the list, choose the word, “Select”.
    - Select the save icon.
    - Observe the word, “Saved” that displays in the Special Circumstance Status column.

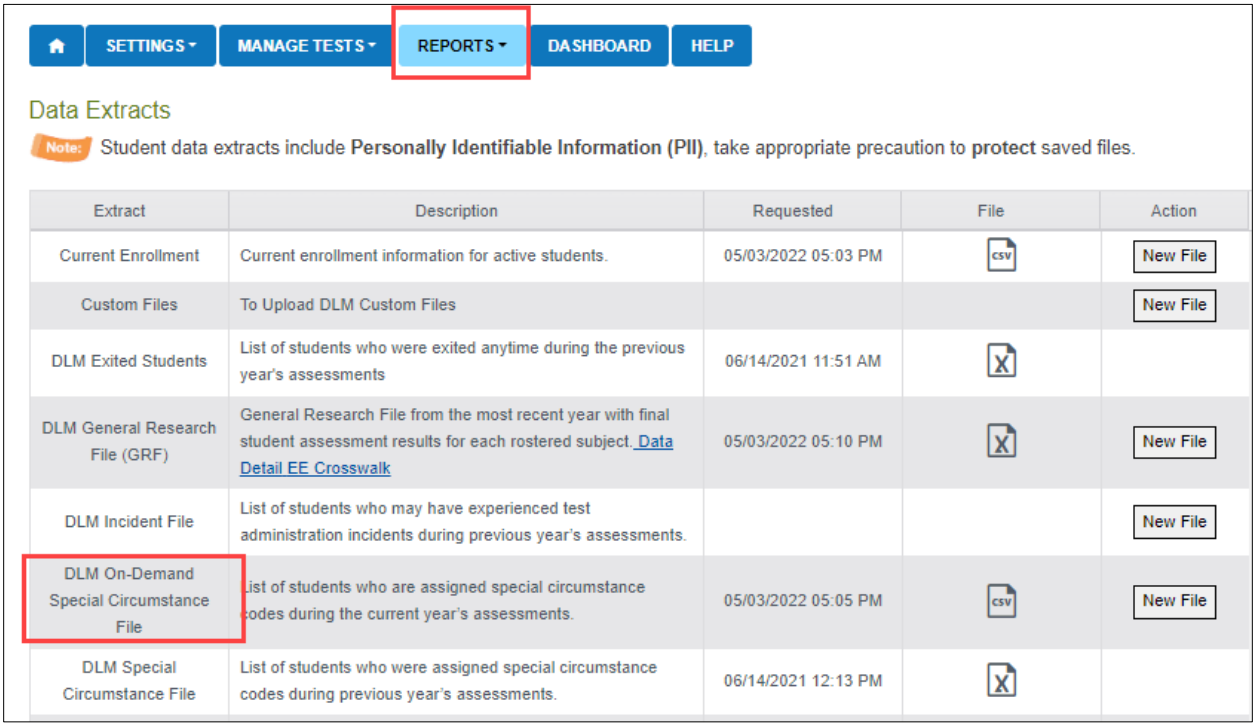


NOTE: A Special Circumstance Code must be entered, edited, or deleted before the close of Spring Assessment Window.

ON-DEMAND SPECIAL CIRCUMSTANCE CODE EXTRACT

For states that allow the use of Special Circumstance Codes during their spring assessment window, the DLM On-Demand Special Circumstance extract is available for monitoring the codes that are added during the window (Figure 1). The extract is available to the same roles that have permission to add the codes. To learn how to access this extract, go to the EDUCATOR PORTAL USER GUIDE > Access Reports and Extracts.

Figure 1. *Screenshot of the DLM On-Demand Special Circumstance File in the list of extracts.*



END-OF-YEAR REPORTS AND EXTRACTS

At the end of the year, in states that use DLM special circumstance codes, the state assessment administrator will receive a Special Circumstance Code file with the list of students who had a special circumstance code added to a testlet during the spring assessment window (Figure 2). The SAA should review the file when reviewing their GRF and make decisions about invalidations.

Even if a special circumstance code is added to a test session during the spring assessment window, the student will still receive an end-of-year Individual Student Score Report, unless the state chooses to invalidate the student's record in the General Research File (GRF) during the state's two-week review window.

The DLM On-Demand Special Circumstance File is available to the SAA, DTC, and the BTC roles depending on state policy. The DLM Special Circumstance File is the end-of-year file for the SAA role only.

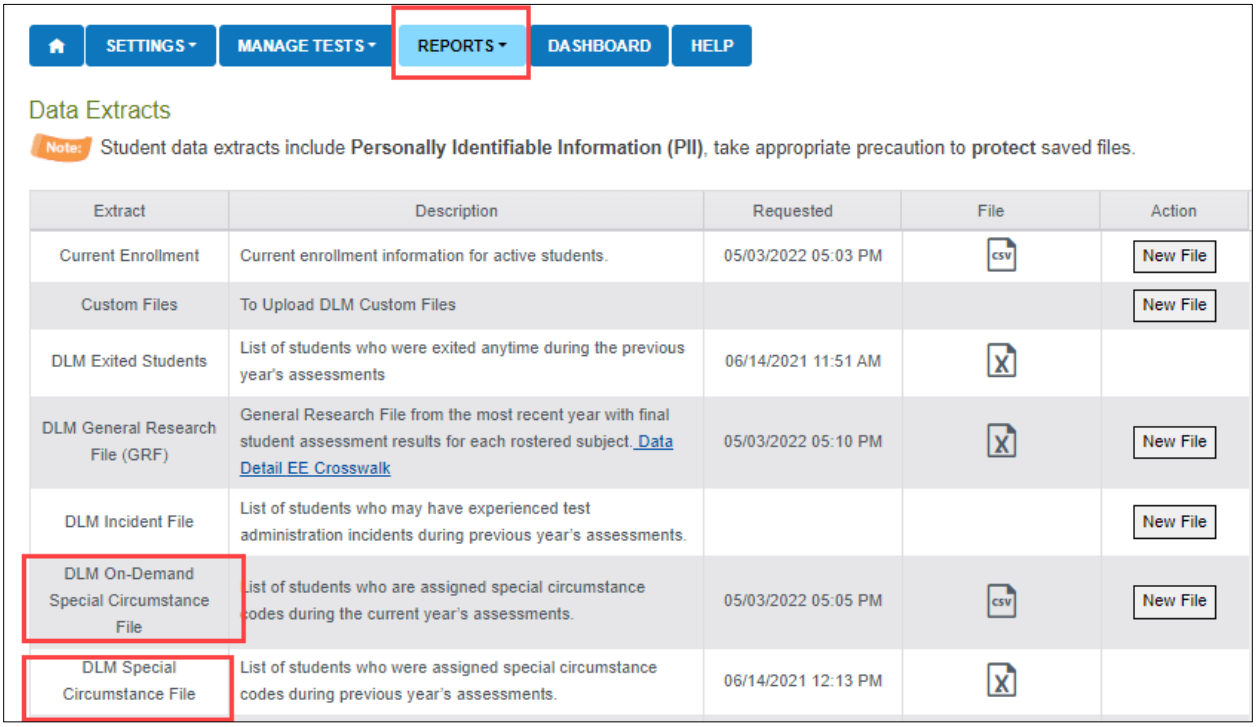



Figure 2. *Screenshot showing the two special circumstance files.*