DATA MANAGEMENT MANUAL 2024–2025

ELA, MATHEMATICS, AND SCIENCE

Publication Date: 08/09/2024

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

When this manual is updated, the Revision Date will also be updated. An alert will be posted on the Test Updates webpage. A summary of changes is included in the Appendix under Document History.

FINDING HELP: PRINT THIS PAGE AND KEEP IT HANDY!

If the information in this manual and resources from your state's Dynamic Learning Maps® (DLM®) webpage do not lead to solutions, these contacts can give additional support (Table 1).

Table 1
Additional Supports for Users

Local Technology Representative	State Education Agency	The DLM Service Desk 1-844-261-6481 (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 Educational Plan (IEP) requirements • Test window dates, extensions, requirements, etc. • Testlet resets (may take up to five business days)	• Data issues (rosters, enrollment, etc.) • Unlocking Student Portal

WHEN CONTACTING THE KITE SERVICE DESK:

- **Do not send any Personally Identifiable Information** (PII) for a student via email or Live Chat in Educator Portal. This is a federal violation of the Family Education Rights and Privacy Act (FERPA). PII includes information such as a student's name or state identification number. 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)
  - Your school and district name, if your state permits these in an email or chat that also contains student information

- o   Error messages (include the testlet number if applicable to the problem)
- o   Service Desk ticket number when following up on a previously submitted issue

For all concerns for which the Service Desk requires student-specific information, you must call using the listed phone numbers.

NOTE: All information in an email is taken into consideration when checking for PII violations. The electronic signature for the sender of an email may identify the district or school in which a student resides. This information, combined with other student identifying information, may constitute a PII violation for your state.

DATA MANAGEMENT MANUAL 2024–2025

CONTENTS

DOCUMENT INFORMATION

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).

Table 2

What's New

Topic	Starting Page
Upload template files: Solution to remove roles from multiple users at one time	17
Table 15 through Table 18: new format	42
Table 27: Accountability school field requirement configurable by state	101
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Edit a Student Record Manually: Ability to edit the Accountability District and Accountability School	108
Create a Roster Manually: Display students not rostered to a subject checkbox	146
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General edits throughout	N/A

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

IMPORTANT INFORMATION ABOUT NAMES, DATA, AND SCREENSHOTS

All example names and organizations used in this document are fictitious. No identification with actual persons (living or deceased), places, and organizations is intended or should be inferred. All data including scores and identification numbers are randomly generated.

Important: All screenshots in the DATA **M**ANAGEMENT **M**ANUAL **are from the view of a standard consortium District Test Coordinator (DTC) role, and all student data is fictional.**

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 where reports and extracts are retrieved. Users will access Educator Portal online using a supported browser. Information on working within Educator Portal is contained in this DATA MANAGEMENT MANUAL and the EDUCATOR PORTAL USER GUIDE on the DLM website.

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 to upload data files into Educator Portal.

PDF VIEWER

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

ACCESS ADDITIONAL RESOURCES

Additional resources for managing data and administering testlets are available on the DLM website (Table 3). Resources are provided by the DLM 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.
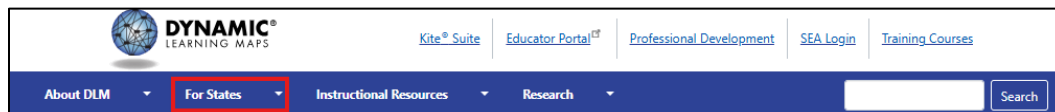
HINT: Bookmark the page or save it to your favorites for quick access later.

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
State Organizational Table (xlxs)	Contains all district names and numbers and all school names and numbers for organizations in the state; to be used when adding users and enrolling students

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 (e.g., 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 25 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. See the section, Access Additional Resources, on page 11 of this manual.
☐	3) Sign in to Educator Portal and agree to the annual security agreement.
☐	4) Review the district's information within 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. Remove a user who should not have an account again in Educator Portal (e.g., a user who retired or who is deceased).
☐	8) Ensure all users' email addresses are accurate. 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 for their account. If multiple accounts were created, those accounts can be consolidated by a DLM Service Desk agent.
☐	9) Manually update existing users. All fields in a user's account may be edited to ensure the account is current. Always make corrections to email addresses using the user interface instead of creating a new account. 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 sign in to Educator Portal using their new email address and continue with their same password.
☐	10) Upload new users to Educator Portal using either the User Upload Template file or add users using the user interface.
☐	11) Confirm that educators are linked to correct schools in the User Upload Template.
☐	12) Assign an additional role or roles to each user as needed. Go to page 60 of this manual to Edit a User's Account.
☐	13) Upload an Enrollment Upload Template file or enroll students using the user interface.
☐	14) Confirm students are enrolled in the correct schools in the Enrollment Upload Template.
☐	15) Upload a Roster Upload Template file or create rosters using the user interface.
☐	16) Confirm students are linked to the correct test administrator in the Roster Upload Template.
☐	17) Notify the applicable users when the data uploads are complete.
☐	18) Manage student moves as needed. Go to page 128 of this manual to Management of Student Moves and Transfers.

☑	Steps
☐	19) Manage data verification and revisions (changes to user, enrollment, and roster data) promptly.
☐	20) Access the Educator Portal User Guide for information about reports and data extracts.
☐	21) Unlock Educator Portal accounts as needed.

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®) 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.

HINT: Regardless of the organizational structure, this manual refers to assessment coordinators and data managers outside the state level user as local.

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 a resource specifically written for state-level users with the Educator Portal role of 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.

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 as well as the required and optional steps before beginning.

These procedures are completed in Educator Portal either through template upload files or manually in the user interface. When working with several hundred records (e.g., first enrollment for the school year in August), using a CSV file upload is much more efficient than manually adding data one at a time in the user interface. Depending on the situation, data managers can use the method that works best for them. For example, simply updating an educator's last name directly in the user interface versus uploading all the students in the district in August.

UPLOAD TEMPLATE FILES

Upload user, enrollment, and roster 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, to deactivate users who should no longer have access to Educator Portal information, and to remove roles from multiple users in one upload.

NOTE: 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 address 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 make it difficult to troubleshoot data errors. Uploading 100 records or fewer is recommended to expedite troubleshooting.

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.

The following sections include steps for uploading each type of file, along with 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. Also provided is information pertaining to saving the files as CSV files and retaining leading zeros.

SAVING AS A CSV FILE IN EXCEL

All files must be saved and uploaded as CSV (comma-delimited) files. Only the CSV files will result in successful uploads. All other file types will fail. The CSV format can be found in Microsoft Excel by going to **File | Save As | Save as type**. Figure 1 shows how to save a CSV file in Microsoft Excel.

Figure 1

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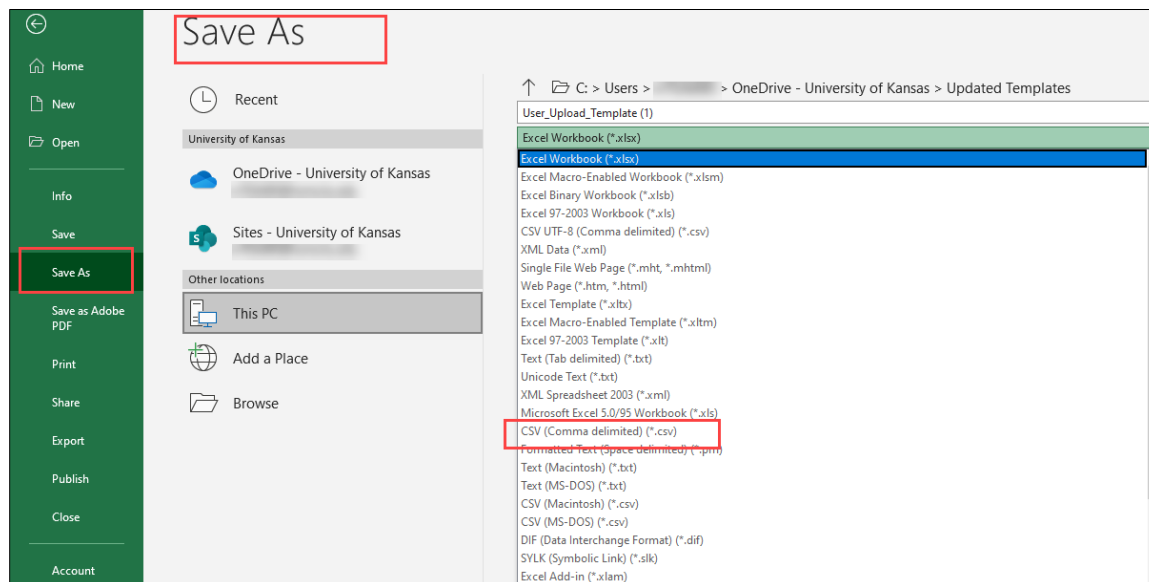
> HINT: Data managers may save the original file as an XLS file to preserve all the information for later use. However, prior to an upload, the file must be opened and saved as a CSV file, or it will not upload. This is true for all uploaded template files. Also, do not try to upload a file formatted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

Include Leading Zeros in an Upload File

Some states have leading zeros in the district, school, state student identifiers, and local student 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, the state student identifier, and local student identifier is a programmed number of digits, then leading zeros may need to be entered to satisfy the programmed number of digits.

In Figure 2, the number of digits is 10 in this state for the organization ID. 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 2

Leading Zeroes in Organization ID Column

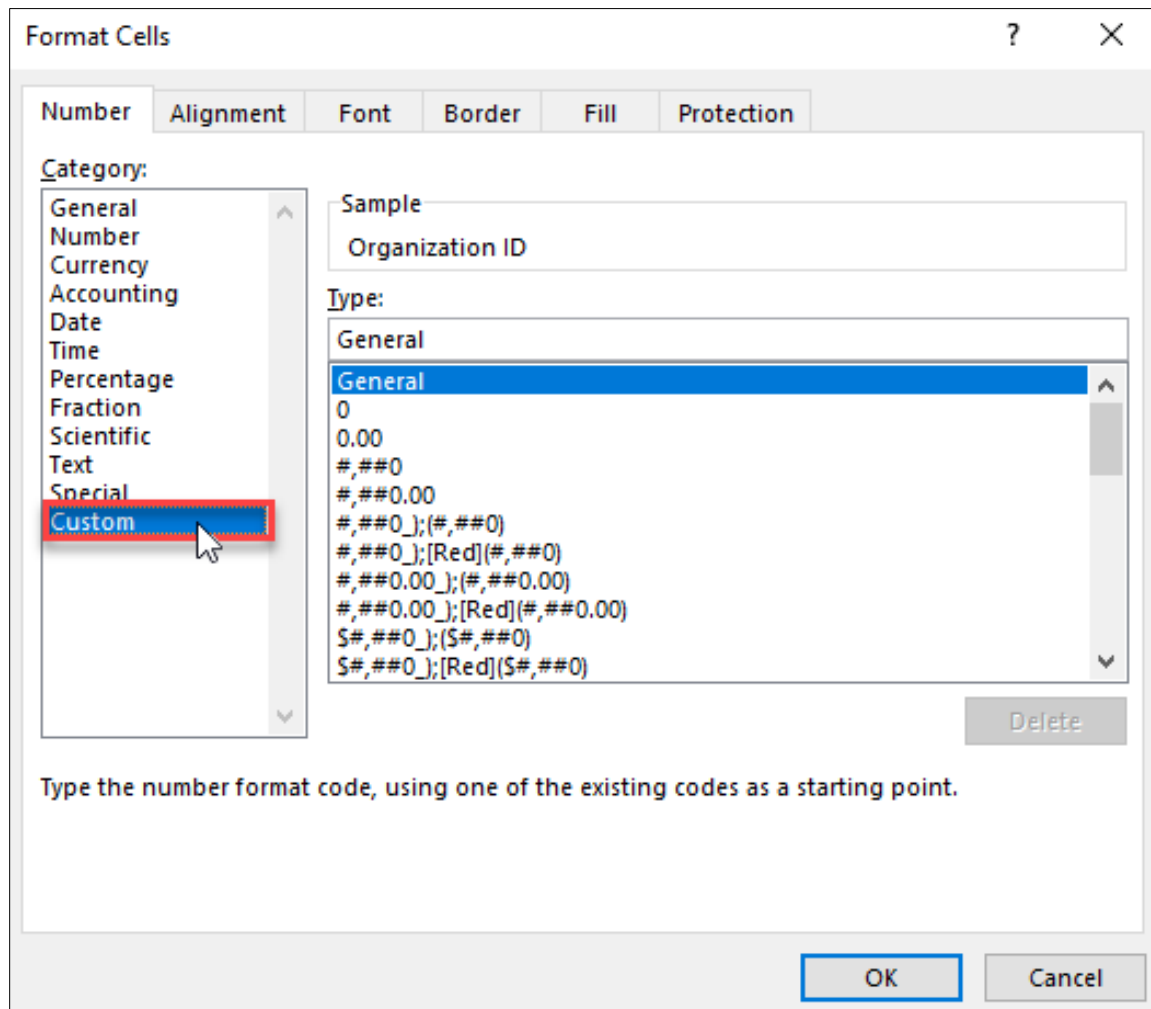|	A	B	C	D	E	F	
1	State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organiz
2	DLM QC State	DTC First name1	DTC Last Name1	126575	DTCemail1@gmail.com	320324	
3	DLM QC State	DTC First name2	DTC Last Name2	126561	DTCemail2@gmail.com	978320324	
4	DLM QC State	DTC First name3	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 as 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**.

	A	B	C	D	E	F	G
1	State	Legal First Name	Legal Last Name	Educator Identifier	Email	Orga	n Lev
2	DLM QC State	DTC First name1	DTC Last Name1	126575	DTCemail1@gmail.com		22/20
3	DLM QC State	DTC First name2	DTC Last Name2	126561	DTCemail2@gmail.com		
4	DLM QC State	DTC First name3	DTC Last Name3	126563	DTCemail3@gmail.com		
5	DLM QC State	DTC First name4	DTC Last Name4	126562	DTCemail4@gmail.com		
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							

Context menu:
- Cut
- Copy
- Paste Options:
- Paste Special...
- Insert
- Delete
- Clear Contents
- Format Cells...
- Column Width...
- Hide
- Unhide

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

4) Select **Custom**.

5) The following screenshot displays an example of a state requiring 10 digits. All numbers in the column display 10 digits because leading zeros were added to equal a 10-digit code or number.

	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) The template file can now be uploaded successfully because leading zeros were included.

USER INTERFACE (UI)

The user interface is a series of screens in Educator Portal where administrative tasks can be performed efficiently 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. Work in the user interface should follow the same order as template uploads: users first, enrollment second, and rostering last so that records and relationships are correctly linked.

Data in Educator Portal typically displays in grids, whether it is a list of users, students, rosters, etc. The grids may be customized to some degree for each user. For example, the user can select which columns they want displayed, which can help to lessen the amount of horizontal scrolling that is needed. The user can also select columns they want hidden from view; these columns can be accessed again when needed.

Additionally, the columns can be rearranged by selecting the column heading, right-clicking, and dragging the column to arrange them in a different order. Some columns also have a lock feature. Once the columns have been selected and ordered, they can be locked. The grids may also be exported to Microsoft Excel.

Filtering options are also available in Educator Portal. These options may be most useful in large districts that 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.

MANAGE USER DATA

OVERVIEW

The User Upload Template file is used to create new unique user accounts in Kite® 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 (i.e., 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 or removed, they will no longer automatically appear in Educator Portal. However, they will appear in a user extract where the User Status column will show the inactive users. Only Educator Portal users with the State Assessment Administrator (SAA) role can view removed users if they choose to include them.

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 flowchart in Figure 3 shows an overview of the steps required to upload and activate a user account in Educator Portal.

Figure 3

Steps to Upload and Activate a User Account in Educator Portal

See Data Management Manual and Educator Portal User Guide for specific procedures with matching titles.
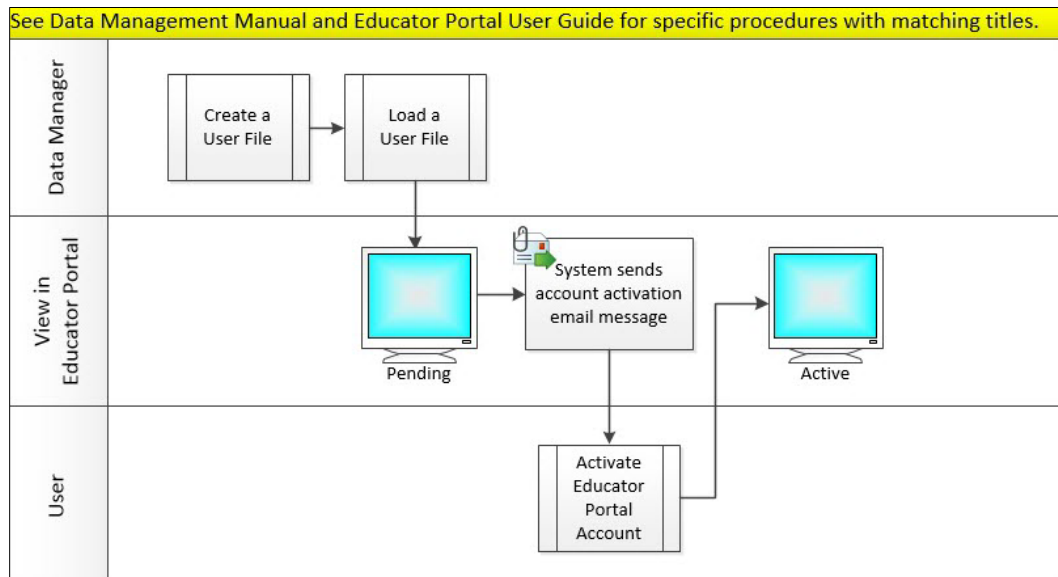
Information about the various roles in Educator Portal is provided on the next tables. Table 5 provides the name of the role with an overview of permissions. Table 6 through Table 14 show more detailed information about each role, such as the reports and extracts that are available to each role and the 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® (DLM®) 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, instructional, and assessment 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 SEA.
Regional Test Coordinator (RTC)	**Important: 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)	**Important: 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, instructional, and assessment 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, or 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, or 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, instructional, and assessment 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, or 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, or 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.

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).

Table 6

Permissions in Educator Portal for State Assessment Administrator Role

Educator Portal Actions	Files, Reports, and Permissions for SAA Role
Upload CSV template files	• User Template file • Enrollment Template file • Roster Template file • TEC Template file
Access files	• General Research File (GRF) • End-of-Year Special Circumstance File • OnDemand Special Circumstance File • End-of-Year Exited Student File • OnDemand Exited Student File • Incident File (if applicable)
Access reports	• Aggregate Reports • Student Report Archive • Individual Student Score Reports • Individual Student Score Reports (Bundled) • Blueprint Coverage Report (IE model state only) • Monitoring Summary Report • Student Progress Report** • Class Roster Report** • Parent Portal • Fall and Spring Performance Report**
Extracts	• Access
User Management in districts or schools across the state	• Activate inactive users or users that were removed • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account

Educator Portal Actions	Files, Reports, and Permissions for SAA Role
Rosters Management in districts or schools across the state	• Create • Edit
Student Management in districts or schools across the state	• Add • Edit • Exit • Find and activate • Transfer between districts or schools within the state • Edit/save PNP Profile • View First Contact Survey
Manage Tests | Instruction & Assessment Planner	• Access** • Apply/Edit/Delete Special Circumstances Codes • Cancel Testlet • Fall and Spring Performance Reports**
Manage Tests |Test Management	• Access • Apply/Edit/Delete Special Circumstances Codes

*Configurable by State

**No data for YE model states during spring assessment window

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).

Table 7

Permissions in Educator Portal for Regional Test Coordinator Role

Educator Portal Actions	Files, Reports, and Permissions for RTC Role
Upload CSV template files	• User Template file • Enrollment Template file • Roster Template file • TEC Template file
Access district reports	• Blueprint Coverage Report (IE model state only) • Monitoring Summary Report • Student Progress Report** • Class Roster Report**
Extracts	• Access
User Management in districts or schools across their region	• Activate inactive users • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in districts or schools across their region	• Create • Edit
Student Management in districts or schools across their region	• Add • Edit • Exit • Find and activate • Transfer between districts or schools within the region • View PNP Profile • View First Contact Survey
Manage Tests	• No Access

*Configurable by State

**No data in this report for YE model states during their spring assessment window

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).

Table 8

Permissions in Educator Portal for Regional User Role

Educator Portal Actions	Files, Reports, and Permissions for RUS Role
Upload CSV template files	• User Template file • Enrollment Template file • Roster Template file • TEC Template file
Access reports	• Blueprint Coverage Report (IE model state only) • Monitoring Summary Report • Student Progress Report** • Class Roster Report**
Extracts	• Access
User Management in districts or schools across their region	• Activate inactive users • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in districts or schools across their region	• Create • Edit
Student Management in districts or schools across their region	• Add • Edit • Exit • Find and activate • Transfer between districts or schools within the state • View PNP Profile • View First Contact Survey
Manage Tests	• No Access

*Configurable by State

**No data in this report for YE model states during their spring assessment window

Role: District Test Coordinator (DTC)

The DTC has access to and can perform the following functions in school buildings across their district (Table 9).

Table 9

Permissions in Educator Portal for District Test Coordinator Role

Educator Portal Actions	Files, Reports, and Permissions for DTC Role
Upload CSV template files	• User Template file • Enrollment Template file • Roster Template file • TEC Template file • Parent Template file
Access files	• General Research File (GRF)*** • OnDemand Special Circumstance File*
Access reports	• Aggregate Reports** • Student Report Archive** • Individual Student Score Reports** • Individual Student Score Reports (Bundled)** • Blueprint Coverage Report (IE model state only) • Monitoring Summary Report • Student Progress Report** • Class Roster Report** • Fall and Spring Performance Reports
Extracts	• Access
User Management in schools across the district	• Activate inactive users • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in schools across the district	• Create • Edit

Educator Portal Actions	Files, Reports, and Permissions for DTC Role
Student Management in schools across the district	• Add • Edit • Exit • Find and activate • Transfer within the district • Edit/save PNP Profile • Edit/Submit First Contact Survey
Manage Tests | Instruction & Assessment Planner	• Access** • Apply/Edit/Delete Special Circumstances Codes*** • Cancel Testlets • Fall and Spring Performance Report**
Manage Tests | Test Management	• Access • Apply/Edit/Delete Special Circumstances Codes***

*Configurable by State

**No data in this report for YE model states during their spring assessment window

***Has access if granted 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).

Table 10

Permissions in Educator Portal for District Superintendent Role

Educator Portal Actions	Files, Reports, and Permissions for SUP Role
Upload CSV template files	• User Template file • Enrollment Template file • Roster Template file • TEC Template file
Access reports	• Aggregate Reports*** • Student Report Archive*** • Individual Student Score Reports*** • Individual Student Score Reports (Bundled)*** • Blueprint Coverage Report (IE model state only) • Monitoring Summary Report • Student Progress Report** • Class Roster Report**
Extracts	• Access
User Management in schools across the district	• Activate inactive users • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in schools across the district	• Create • Edit
Student Management in schools across the district	• Add • Edit • Exit • Find and activate • Transfer within the district • View PNP Profile • View First Contact Survey
Manage Tests	• No Access

*Configurable by State

**No data in this report for YE model states during their spring assessment window

***Has access if granted by SAA

ROLE: DISTRICT USER (DUS)

The DUS has access to and can perform the following functions in school buildings across their district (Table 11).

Table 11

Permissions in Educator Portal for District User Role

Educator Portal Actions	Files, Reports, and Permissions for DUS Role
Upload CSV template files	• User Template file • Enrollment Template file • Roster Template file • TEC Template file
Access reports	• Aggregate Reports*** • Student Report Archive*** • Blueprint Coverage Report (IE model state only) • Monitoring Summary Report • Student Progress Report** • Class Roster Report**
Extracts	• Access
User Management in schools across the district	• Activate inactive users • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in schools across the district	• Create • Edit

Educator Portal Actions	Files, Reports, and Permissions for DUS Role
Student Management in schools across the district	- Add - Edit - Exit - Find and activate - Transfer within the district - View PNP Profile - View First Contact Survey
Manage Tests	No Access

*Configurable by State

**No data in this report for YE model states during their spring assessment window

***Has access if granted by SAA

ROLE: BUILDING TEST COORDINATOR (BTC)

The BTC has access to and can perform the following functions in their school building (Table 12).

Table 12

Permissions in Educator Portal for Building Test Coordinator Role

Educator Portal Actions	Files, Reports, and Permissions for BTC Role
Upload CSV template files	- User Template file - Enrollment Template file - Roster Template file - TEC Template file
Access reports in their building	- Aggregate Reports*** - Student Report Archive*** - Individual Student Score Reports*** - Individual Student Score Reports (Bundled)*** - Blueprint Coverage Report (IE model state only) - Monitoring Summary Report - Student Progress Report** - Class Roster Report** - Fall and Spring Performance Reports**
Extracts	Access

Educator Portal Actions	Files, Reports, and Permissions for BTC Role
User Management in their building	• Activate inactive users • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in their building	• Create • Edit
Student Management in their building	• Add • Edit • Exit • Find and activate • Edit/Save PNP Profile • Edit/Submit First Contact Survey
Manage Tests | Instruction & Assessment Planner	• Access** • Apply/Edit/Delete Special Circumstances Codes*** • Fall and Spring Performance Report**
Manage Tests | Test Management	• Access • Apply/Edit/Delete Special Circumstances Codes***

*Configurable by State

**No data in this report for YE model states during their spring assessment window

***Has access if granted by SAA

Role: Building User (BUS)

The BUS has access to and can perform the following functions in their school building (Table 13).

Table 13

Permissions in Educator Portal for Building User Role

Educator Portal Actions	Files, Reports, and Permissions for BUS Role
Upload CSV template files	• User Template file • Roster Template file
Access reports in their building	• Aggregate Reports*** • Student Report Archive*** • Blueprint Coverage Report (IE model state only) • Monitoring Summary Report • Student Progress Report** • Class Roster Report**
Extracts	• Access
User Management in their building	• Activate inactive users • Deactivate and remove users* • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in their building	• Create • Edit
Student Management in their building	• View PNP Profile • View First Contact Survey
Manage Tests	• No Access

*Configurable by State

**No data in this report for YE model states during their spring assessment window

***Has access if granted by SAA

ROLE: TEACHER (TEA)

The TEA has access to and can perform the following functions for students rostered to them (Table 14).

Table 14

Permissions in Educator Portal for Teacher Role

Educator Portal Actions	Files, Reports, and Permissions for TEA Role
Access reports in their building	• Student Report Archive*** • Blueprint Coverage Report (IE model state only) • Student Progress Report** • Class Roster Report** • Fall and Spring Performance Reports**
Extracts	• Access
Rosters Management	• View rosters
Student Management	• Edit/Save PNP Profile • Edit/Submit First Contact Survey • View student data
Manage Tests | Instruction & Assessment Planner	• Access** • Fall and Spring Performance Reports**
Manage Tests | Test Management	• Access

**No data in this report for YE model states during their spring assessment window

***Has access if granted by SAA

Table 15 through Table 18 list the extracts and reports that are available in Educator Portal for Year-End (YE) model states and for Instructionally Embedded (IE) model states. The Educator Portal roles that have access to each extract and report are also provided. Each role is listed by their abbreviation as found on Table 5 through Table 14.

NOTE: State-specific extracts are not indicated in Table 15 and Table 18.

Table 15

Alternate Assessment Extracts for Year-End (YE) 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, and the District of Columbia

Extracts and Files for YE Model States	BTC	BUS	DTC	DUS	RTC	RUS	SAA	SUP	TEA
Current Enrollment extract	X	X	X	X	X	X	X	X	X
DLM OnDemand Exited Student file							X		
DLM OnDemand Special Circumstances File	X*		X*				X		
DLM Test Administration Monitoring extract	X	X	X	X	X	X	X	X	X
First Contact Survey file	X	X	X	X	X	X	X	X	X
General Research File and other end-of-year files and extracts			X*				X		
Parents extract			X*				X		
Parent Portal Registration extract							X		
PNP Setting Count extract	X	X	X	X	X	X	X	X	X
PNP Settings extract	X	X	X	X	X	X	X	X	X
Roster extract	X	X	X	X	X	X	X	X	X
Security Agreement extract	X	X	X	X	X	X	X	X	
Student Login Usernames/Passwords extract	X		X		X		X		X*

Extracts and Files for YE Model States	BTC	BUS	DTC	DUS	RTC	RUS	SAA	SUP	TEA
Student Roster and First Contact Survey Status extract	X	X	X	X	X	X	X	X	X
TIP Access extract	X		X				X		
Training Status extract	X	X	X	X	X	X	X	X	
Users extract	X	X	X	X	X	X	X	X	

*Depending on the state

Table 16

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

Reports for YE Model States	BTC	BUS	DTC	DUS	RTC	RUS	SAA	SUP	TEA
Class Roster Report	X	X	X	X	X	X	X	X	X
End-of-Year Reports*							X		
Fall Performance Report	X	X	X	X	X	X	X	X	X
Monitoring Summary	X	X	X	X	X	X	X	X	
Student Progress Report	X	X	X	X	X	X	X	X	X

*Some roles have access if allowed by the SAA

Table 17

Alternate Assessment Extracts for Instructionally Embedded (IE) Model States by Educator Portal Role; Instructionally Embedded Model States Include AR, DE, IA, KS, MO, ND, and TN

Extracts and Files for IE Model States	BTC	BUS	DTC	DUS	RTC	RUS	SAA	SUP	TEA
Current Enrollment extract	X	X	X	X	X	X	X	X	X
DLM Blueprint Coverage Summary extract	X	X	X	X	X	X	X	X	X
DLM Instructionally Embedded Monitoring extract	X	X	X	X	X	X	X	X	X
DLM OnDemand Exited Students File							X		
DLM OnDemand Special Circumstances File	X*		X*				X		
First Contact Survey file	X	X	X	X	X	X	X	X	X
General Research File and other end-of-year files and extracts			X*				X		
Parents extract			X*				X		
Parent Portal Registration extract							X		
PNP Setting Count extract	X	X	X	X	X	X	X	X	X
PNP Settings extract	X	X	X	X	X	X	X	X	X
Roster extract	X	X	X	X	X	X	X	X	X
Security Agreement extract	X	X	X	X	X	X	X	X	
Student Login Usernames/Passwords extract	X		X		X		X		X**

Extracts and Files for IE Model States	BTC	BUS	DTC	DUS	RTC	RUS	SAA	SUP	TEA
Student Roster and First Contact Survey Status extract	X	X	X	X	X	X	X	X	X
TIP Access extract	X		X				X		
Training Status extract	X	X	X	X	X	X	X	X	
Users extract	X	X	X	X	X	X	X	X	

*Depending on the state

**A teacher role can only access this extract after they successfully passed Required Test Administrator Training.

Table 18

Alternate Assessment Reports for IE Model States by Educator Portal Role

| Reports for IE Model States	BTC	BUS	DTC	DUS	RTC	RUS	SAA	SUP	TEA
Blueprint Coverage Summary	X	X	X	X	X	X	X	X	X
Class Roster Report	X	X	X	X	X	X	X	X	X
End-of-Year Reports*							X		
Fall/Spring Performance Report	X	X	X	X	X	X	X	X	X
Monitoring Summary	X	X	X	X	X	X	X	X	
Student Progress Report	X	X	X	X	X	X	X	X	X

*Some roles have access if allowed by the SAA

CREATE A USER UPLOAD TEMPLATE FILE
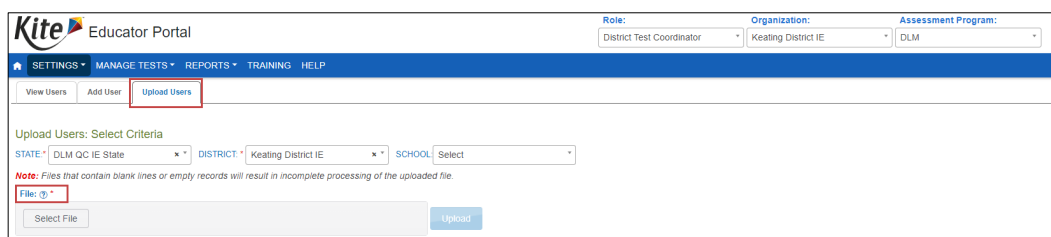
This is the most efficient procedure for uploading multiple **new** users to Educator Portal and for deactivating users who should no longer have accounts in Educator Portal. Users cannot be removed using a User Upload Template file. They must be removed manually.

NOTE: Data managers may also manually enter individual users using the user interface. Go to Add a User Manually in this manual on page 56.

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

1) Download the User Upload Template file from Educator Portal on the Upload Users screen or 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. The most current template is available to download by hovering the cursor over the question mark next to the word File.

2) Open the User Upload Template in a spreadsheet program (e.g., Microsoft Excel) 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. Complete all required fields.
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) 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.
7) Save the file as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions.

BEST PRACTICES

Here are some best practices for the fields in the User Upload Template file (Table 19).

- In Educator Portal, the **Legal First Name** and **Legal Last Name** display exactly as entered.
- Use mixed case (e.g., Sarah DuShagne), not all capitals (e.g., SARAH DUSHAGNE).
- Names and organizations that contain special characters (e.g., spaces, hyphenation, or accent marks) should have these entered. Most characters are accepted.
- The **Educator Identifier** is required and used in the Roster Template Upload file and in the user interface to connect a student's data to the test administrator (i.e., those with the Teacher role in Educator Portal).
- The **Educator Identifier** is case-insensitive.

The **Educator Identifier** must be unique within the state. Letters, numbers, and most characters are accepted. **Never use the social security number** for the Educator Identifier.

The **Organization** field identifies specific locations such as a district or school. Users will only have access to student data within the same organization. State organizational tables are available on your state's webpage.

The **Organization Level** identifies the specific level of the Organization, (e.g., school, district, etc.).

For test administrators with responsibilities in multiple schools or districts, add a row with a unique organization code for each location. Additional roles and organizations can be added through the user interface. Go to Add a User Manually on page 56 of this manual for more information.

User Upload Template File Field Definitions

Table 19

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 Required for the Teacher role 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 for 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 19 in this manual for instructions on how to Include Leading Zeros in an Upload File. NOTE: 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., a district test coordinator) and a role at the school level (e.g., teacher), a row must be entered for each role. An example is provided 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 54 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., TEA), a row must be entered for each role. 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).
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 teacher. Details about potential values are provided in the Codes for the Primary and Secondary Role Fields table on page 54 of this manual.

Field	Format; Length	Required	Description	Special Notes
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.
Remove_Role	Alpha	No	This field is only used when removing a role from a user.	Type TRUE (case-insensitive). Enter the role to be removed from the user for that organization in the Primary Role column.

NOTE: A user must have one role remaining. If all roles should be removed, deactivate the user by typing 'deactivate' in column J, or deactivate using the deactivate button on the View Users screen instead.

*If a user has a role at both the district level and school level, a row must be entered for each role. See Figure 4 for an example.

Figure 4

Entering a Row for Roles at Both District and School Level

Educator_Identifier	Legal_First_Name	Legal_Last_Name	Educator_Email_Address	Organization_ID	Organization_Level	Primary_Role	Secondary_Role	Primary_Assessment_Program	Deactivate_User
msmith@schools.state.gov	Mary	Smith	msmith@schools.state.gov	3810	DT	DTC		DLM	
msmith@schools.state.gov	Mary	Smith	msmith@schools.state.gov	381003124	SCH	TEA		DLM	

Role Code abbreviations must be used for the Primary_Role and Secondary_Role fields if needed (Table 20). 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 25 of this manual to determine which role would be most appropriate.

Table 20

Codes for the Primary and Secondary Role Fields

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

*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 56 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 users or fewer at one time or when editing a user's account.

1) Select **Settings**.

2) Select **Users** from the drop-down menu.
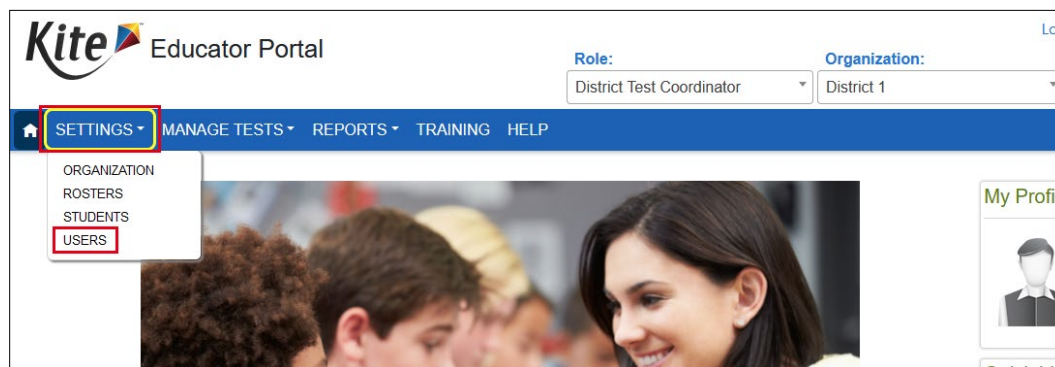
3) The View Users tab is the default. Select the **Upload Users** tab.
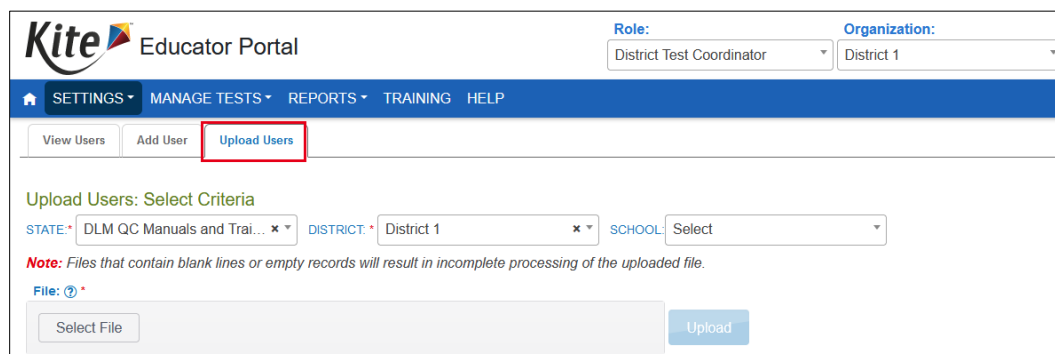
4) Apply filters in the Upload Users: Select **Criteria** fields to choose the correct levels. The fields will prepopulate entries according to the user's level of permissions.
5) Select the district/school from the drop-down menu.
6) Use the **Select File** button to open a browser window.
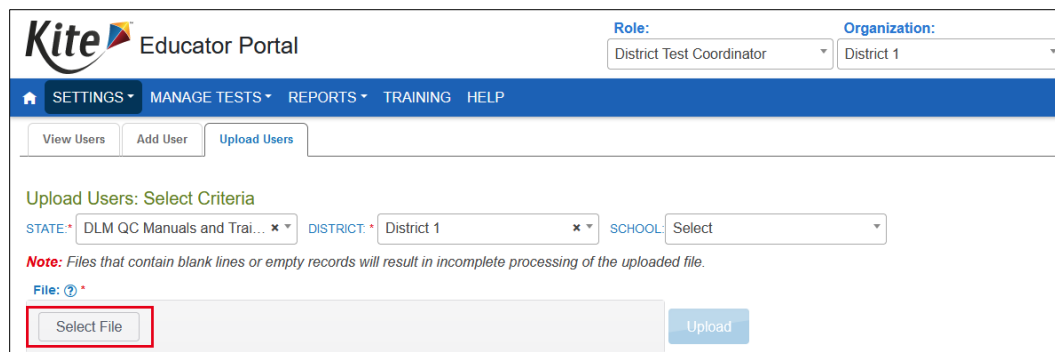
7) Locate the saved CSV file for upload.

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.

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 46 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.
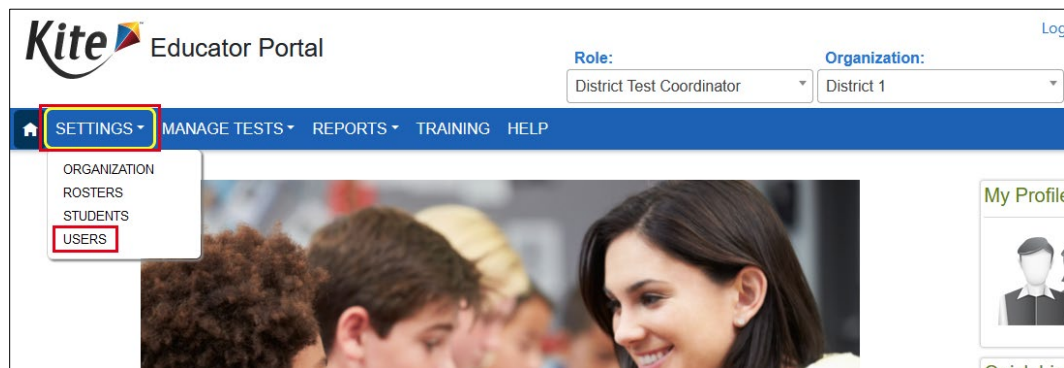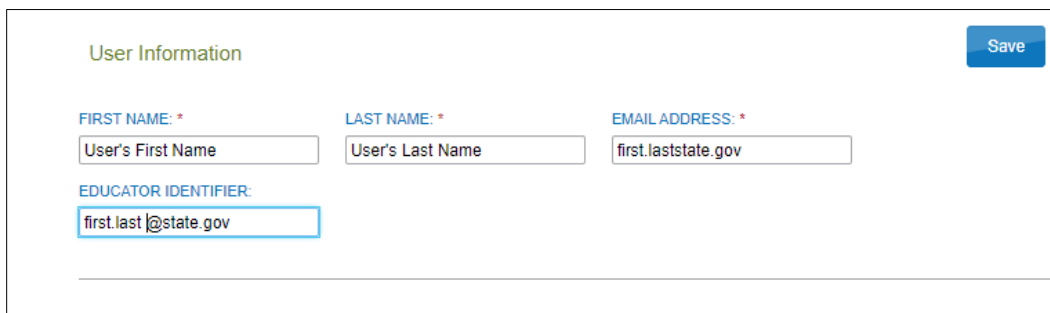
3) The View Users tab is the default. Select the **Add User** tab.
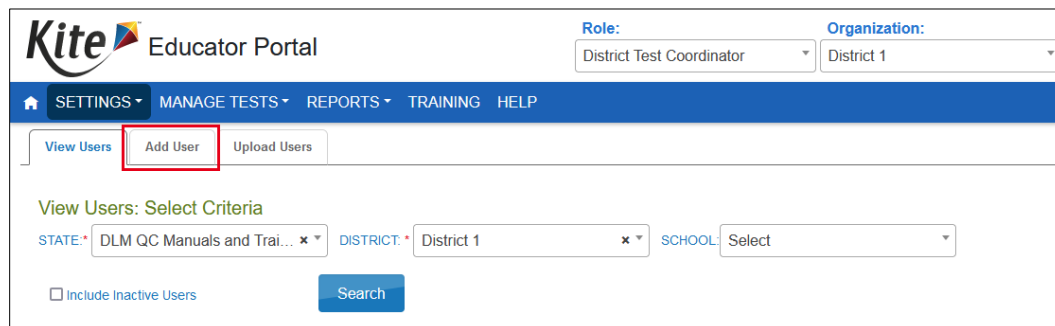
4) On the Add User screen, complete all User Information fields (fields marked with a red asterisk are required).

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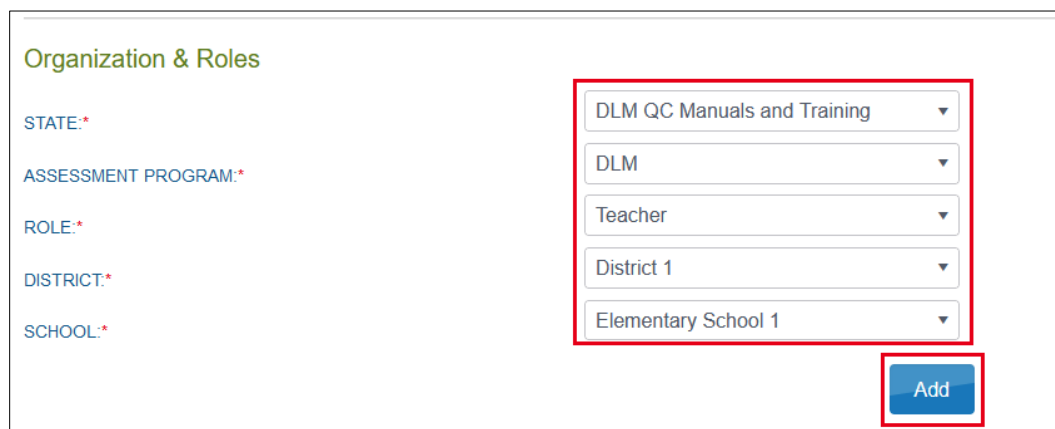
- Educator Identifier is required for users with the teacher role. The Educator Identifier links a teacher to their students when a roster is created. The Educator Identifier is case-insensitive.

5) Select a role and select **Save**.
6) If a user has multiple roles in a district or serves multiple schools in the same district, the district data manager should complete Step 5 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.
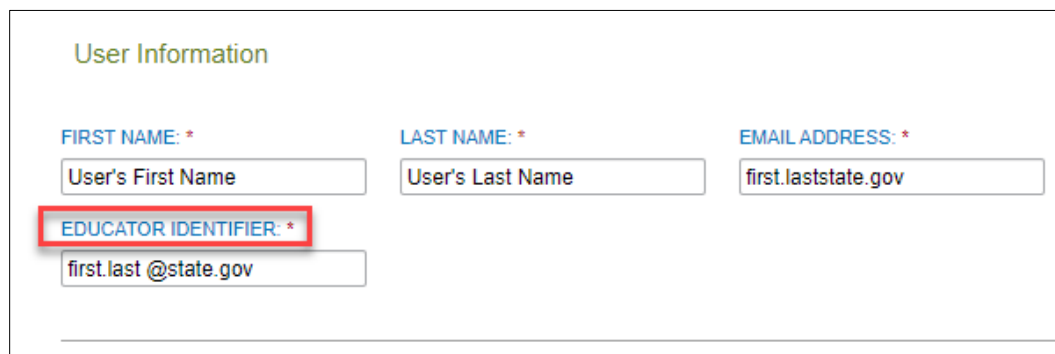
NOTE: After the Add button is selected, the red asterisk will appear above the Educator Identifier field for users with the teacher role, making it a required field. Include the Educator Identifier if not already entered.

HINT: 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) 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.

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

9) 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.

10) Sometimes after adding a new user, an error message may display indicating that a user with the same email or same educator identifier is already in the system.

11) 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.
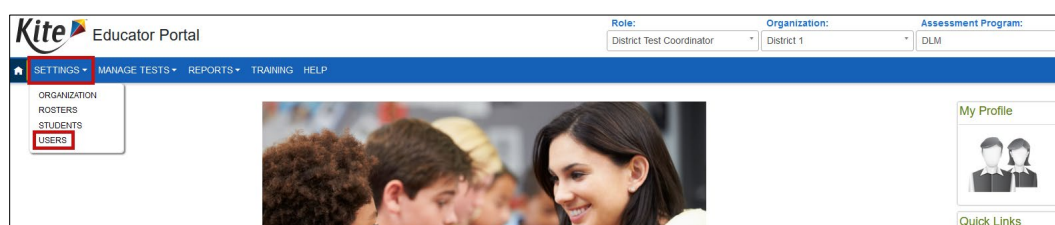
3) On the View Users: Select Criteria screen, the fields for state, district, and school will prepopulate according to the user's permissions in Educator Portal. If needed, apply filters. Use the drop-down arrow in the fields to choose a different organization from those that prepopulated.

4) Select **Search**.
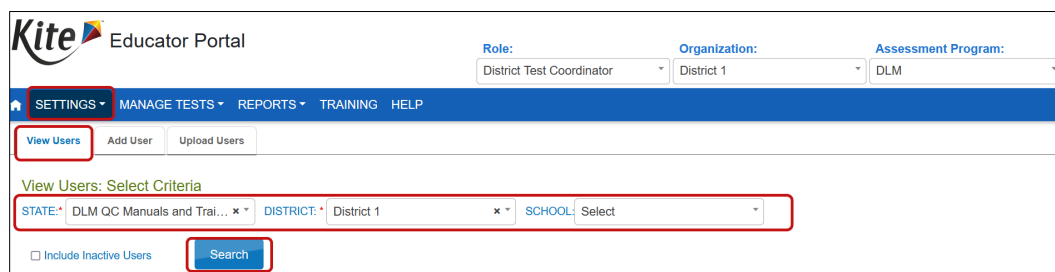
5) The list of all active or pending users for the applicable organization will appear.

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.

HINT: IMPORTANT MESSAGES ABOUT THE TEACHER ROLE

If the email address or 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.

NOTE: A user must have one role remaining. If all roles should be removed, instead, deactivate the user.

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 21 briefly explains where user account changes are made.

Table 21

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 to a user account	Under Organization & Roles, use drop-down menus to select appropriate organization.
Remove an organization from a user account	From 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 User 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 (e.g., 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, the system automatically generates a Kite activation email from kite-support@ku.edu within a few minutes. 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 if the user does not access the link within that time.

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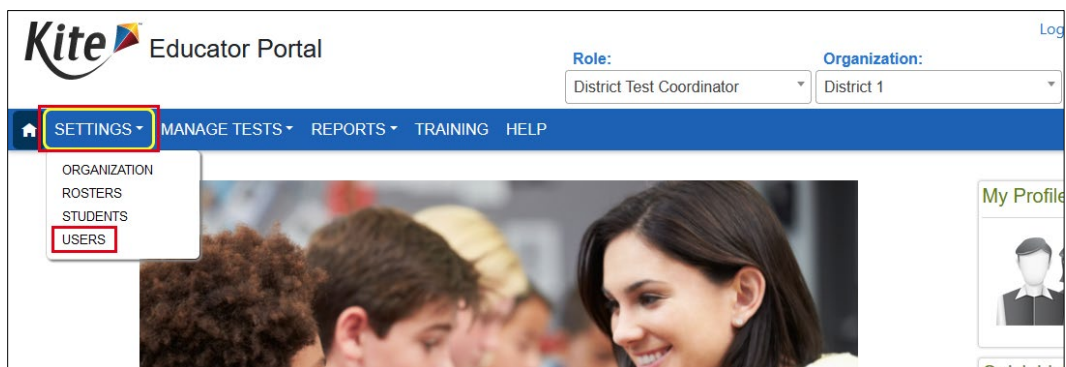
3) The View Users: Select Criteria screen will display.

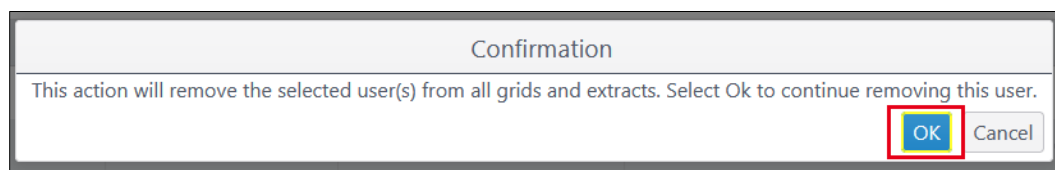4) On that screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu.
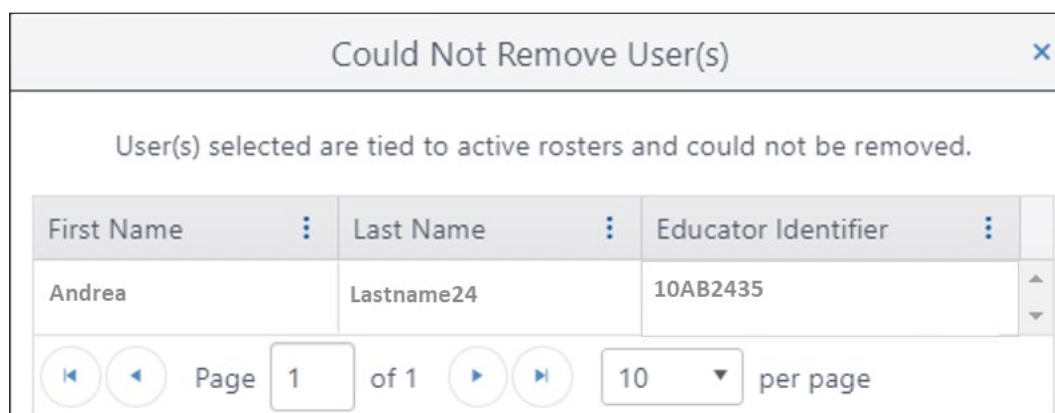
5) Select **Search**.

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

7) 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.
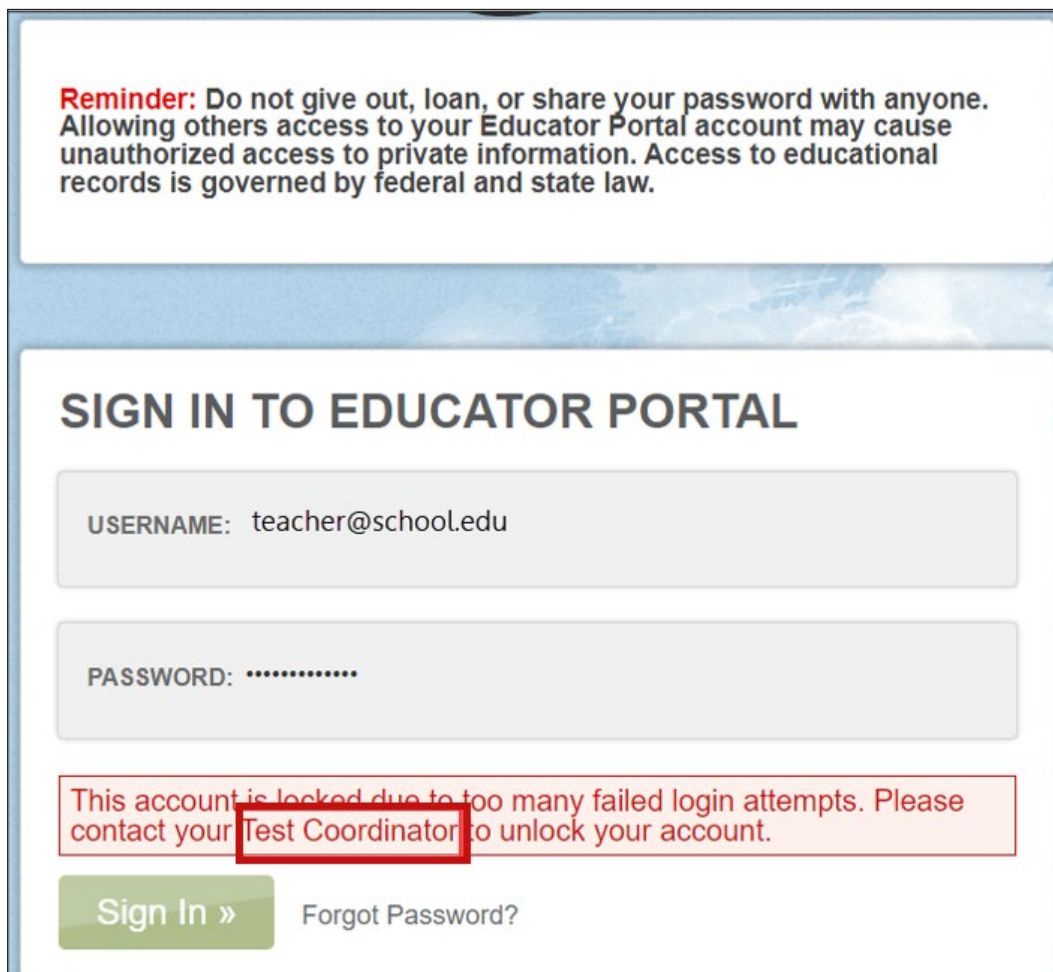
UNLOCK A USER ACCOUNT

After a user's fifth failed login attempt, the user's Educator Portal account will be locked. The user receives the message, "This account is locked due to too many failed login attempts. Please contact your Test Coordinator to unlock your account."

A user with permission to unlock an account will follow these steps.

1) Select Settings.
2) In the dropdown menu, select Users.
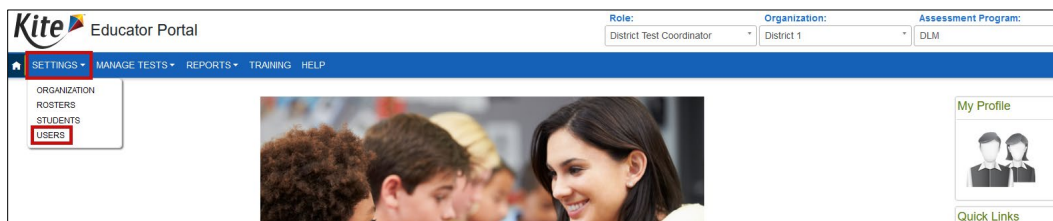
3) The View Users: Select Criteria screen will display. On that screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu. Select **Search**.

4) The list of all active or pending users for the applicable organization will appear. Locate the user (options to filter, sort, and search are available) and verify the user's account is locked using the Account Locked column. Select the checkbox to the left of the user's name that is locked. At the bottom of the screen, select the Unlock button.

5) A confirmation message will appear.

6) Select **OK** to unlock the user's account.

7) The system will provide a message that the user account has been unlocked.

8) The user's account is now unlocked. The user the Forgot Password link to reset their password.

ACTIVATE OR DEACTIVATE A USER

Sometimes users have been deactivated because they no longer needed an account in Educator Portal (e.g., they left the district). Their account in Educator Portal is now inactive. To activate an inactive user account (e.g., 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**.
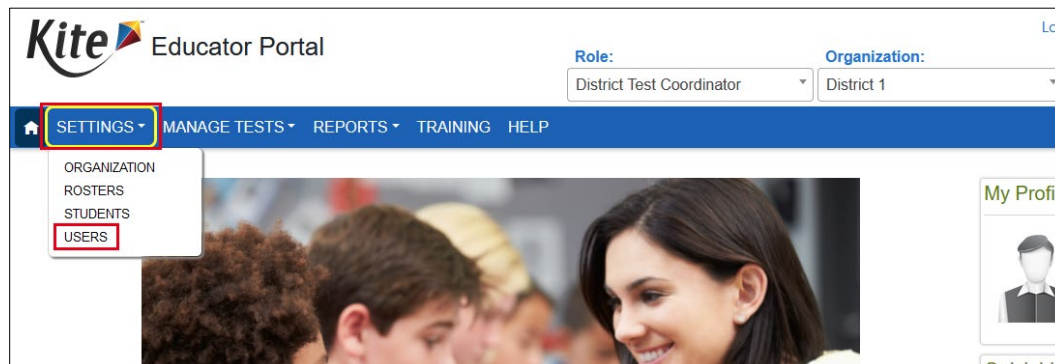
3) On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu. Check **Include Inactive Users** and select **Search**.
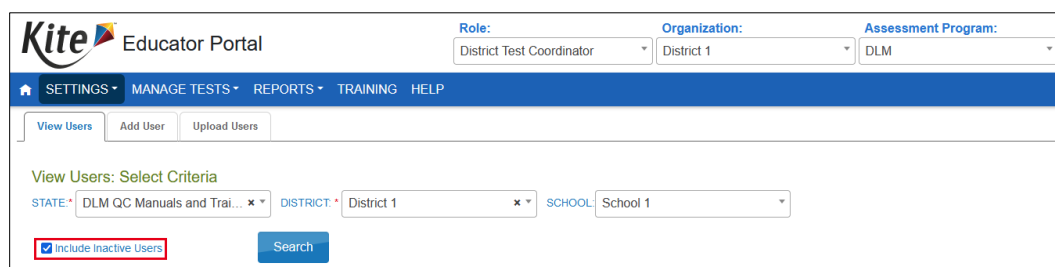
4) The list of all inactive, active, or pending users for the applicable organization will appear.
5) Find the inactive user and select the checkbox on the left in the row for the user.

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

7) 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. If multiple users need to be deactivated, the most efficient procedure is to use the User Upload Template.

> 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**.

2) In the dropdown menu, select **Users**. The View Users: Select Criteria screen will display.

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. Select **Search**.

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

5) Locate the user (options to filter, sort, and search are available) and select the checkbox to the left of the user's information. Select the **Deactivate** button (includes the stop icon) at the bottom of the screen to deactivate the user.

6) The deactivated user will not be visible in any organizations with which they were associated.

REMOVE USER

If a user has moved out of state, has retired, is deceased, or no longer needs Educator Portal access, the account can be removed. The removed user will not be visible in any organizations with which they were associated or in any extracts. The State Assessment Administrator (SAA) must be contacted to re-activate a removed user's account.

NOTE: Some states do not have the Remove User function.

1) Select **Settings**.

2) In the dropdown menu, select **Users**. The View Users: Select Criteria screen will display.

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. Select **Search**.
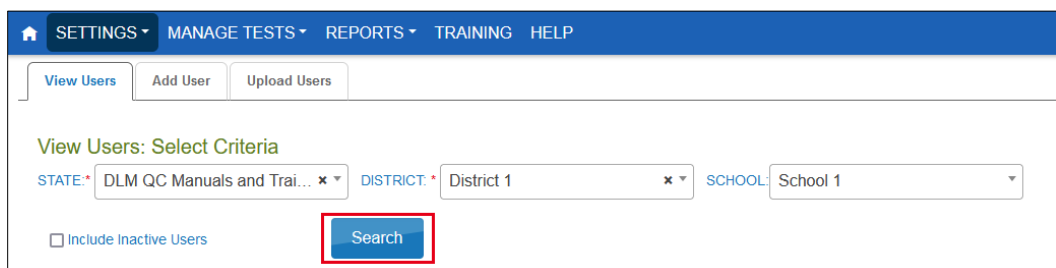
4) The list of all active or pending users for the applicable organization will appear. Locate the user (options to filter, sort, and search are available) and select the checkbox to the left of the user's information. Select the **Remove** button at the bottom left of the screen to remove the user.
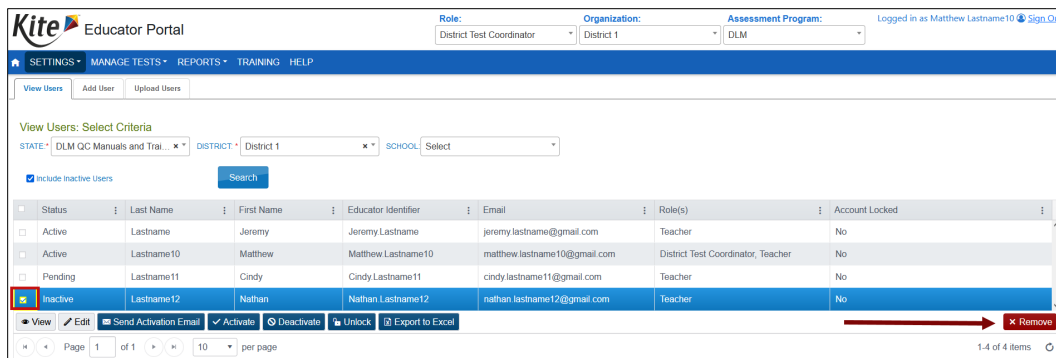
5) Select **OK** to remove user. The system will provide a message that the user has been removed successfully.

Confirmation	
This action will remove the selected user(s) from all grids and extracts. Select Ok to continue removing this user.	
	OK Cancel

6) If the user is on an active roster, they will not be removed. To remove a user, all students on that user's rosters must be moved to another teacher's roster.

Could Not Remove User(s)		✕
User(s) selected are tied to active rosters and could not be removed.		

First Name ⋮	Last Name ⋮	Educator Identifier ⋮	
Andrea	Lastname24	10AB2435	▲ ▼

|◀ ◀ Page 1 of 1 ▶ ▶| 10 ▼ per page

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 Users 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 (or 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, the Kite® system deactivates (i.e., removes from view) student records in Educator Portal. Beginning in early August, students can be enrolled again for the new school year.

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 for the upcoming school year.

The Enrollment Template File Upload **reactivates** student records from previous years or enrolls students who are new to Educator Portal. Students may also be enrolled using the user interface one at a time.

NOTE: Before attempting to enroll students locally, check with the State Assessment Administrator (SAA) 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 uploading or manually changing the student record if activating manually in the user interface. The student's grade level determines the appropriate testlets that become available for the student when the assessment window opens.

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 96, or Edit a Student Record Manually, beginning on page 108. If the student has already started testing, in most cases, the student will need to start testing over.

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

CREATE AN ENROLLMENT UPLOAD TEMPLATE FILE

This is the optimal procedure for uploading multiple students into Educator Portal. The main enrollment template file should be created and uploaded once per year after August 1st. 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.

To create an enrollment file, follow these steps:

1) Download the Enrollment Upload Template file from the state's Dynamic Learning Maps® (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 (comma-delimited) format (e.g., Microsoft Excel). After entering student data in the template, it must be uploaded as a CSV file. All other file formats will be rejected.

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

NOTE: On occasion, a student will be enrolled in one subject with one organization and in another subject with 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 file but **leave the file open** to preserve formatting (i.e., leading zeros.) File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File on page 18 for detailed instructions.

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 128 of this manual.

Use Table 22 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. Information from the 2024–2025 Current Enrollment extract, if previously saved, can be used to populate the template, as outlined in the section Using the Current Enrollment Extract to Update Enrollment Records.

ENROLLMENT FIELD DEFINITIONS

Table 22

Enrollment Field Definitions

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
A	Accountability_District_Identifier	Alphanumeric; 30	May be required. Check with your state agency.	The unique code (District Number) assigned to the district as listed in Column D of the state organizational table	Some states require the Accountability District Identifier (Column A) to be entered. If it is not required, the field is still 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 as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions. NOTE: Even for states that do not otherwise require the Accountability District Identifier, it will become a required field if the Accountability School Identifier was entered in column B.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
B	Accountability_ School_ Identifier	Alphanumeric; 30	May be required. Check with your state agency.	The unique code (School Number) assigned to the school as listed in column B of the state organizational table	Some states require the Accountability School Identifier (column B in the state organizational table) to be entered. If it is not required, the field is still 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 as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
C	Attendance_ District_ Identifier	Alphanumeric; 30	Yes	The unique code (District Number) assigned to the district where the student attends school and identifies the parent organization for a school (such as the school district)	Use the District Number provided in column D in the state organizational table. An entry in the template must be identical to a district number 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 as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
D	Attendance_ School_ Identifier	Alphanumeric; 10	Yes	The school code (school number) 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 Column B of 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 as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
E	School_ Year	YYYY; 4	Yes	The ending year of the current school year (e.g., for the 2024–2025 school year, enter 2025)	Use 2025.
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 as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections, Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions. The State Student Identifier may appear on the Individual Student Score Report, depending on state policy.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
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 as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions.
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 3 = Gender Not Listed Here 4 = Prefer Not to Say 5 = Other	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	Grade	Numeric; 2 3–12 Do NOT use leading zeros in single number grades (e.g., represent grade 3 as simply "3").	Yes	The grade 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. Refer to your state's DLM webpage. The grade entered will appear on the Individual Student Score Report.
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	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 re-enrolls, this date is to reflect the most recent enrollment date.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
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.
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	Two-digit month/two-digit day/four-digit year If unknown, this entry can be left blank. If the student leaves the state and then re-enrolls in school, this date is to reflect the most recent enrollment date.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
R	Comprehensive_ Race	Numeric; 1	Yes	General racial category (or categories) that most clearly reflects the individual's recognition of their racial background	Potential values are provided on page 89 in Table 23 in this manual. Hispanic is categorized as an ethnicity and not a race.
S	Primary_ Disability _ Code	Alphanumeric; 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). A list potential values is provided on page 89 in Table 24 in this manual.
T	Gifted_ Student	Alphanumeric; 5 TRUE or FALSE	No	Indicates whether the student has an active IEP for giftedness	**Must leave blank** for students taking the DLM assessments.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
U	Hispanic_ Ethnicity	Alphanumeric	Yes	The code that reflects the individual's recognition of their Hispanic ethnicity background (Yes or No)	
V	First_ Language	Alphanumeric; 1 or 2	No	The code for the primary language or dialect (not ethnicity) of the student	Potential values are provided on page 90 in Table 25 in this manual.
W	ESOL_ Participat ion_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). Potential values are provided on page 92 in Table 26 in this manual.

Column Letter in Enrollment File	Field	Format; Length	Required	Definition	Special Notes
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.**
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 19.

COMPREHENSIVE RACE

Comprehensive_Race (column R) is a required field and cannot be left blank. Enter the number from Table 23 that best aligns with the student's race.

For questions about comprehensive race, ask the assessment coordinator or state assessment administrator.

Table 23

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 code from Table 24 that best aligns to the student's primary disability.

Table 24

Primary Disability Codes

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

Entry	Definition
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 the number from Table 25 that best aligns to the student's first language.

Table 25

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

Entry	Definition
20	Farsi (Iranian)
21	Chuukese (e.g., Marshall Island, Micronesian)
22	Bosnian
23	Burmese
24	Hindi
25	Urdu
26	Swahili
27	Nepali
28	American Sign Language (ASL)
29	Serb
30	Croatian
31	Turkish
32	Karen languages (e.g., Burma, Myanmar)
33	Haitian/Haitian Creole
34	Gujarati
35	Punjabi
36	Pashto
37	Dari
38	Quiche
39	Mam
40	Ilokano
41	Visayan
42	Low German
43	Other signed language
44	English—with other language background
45	Native American languages
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 26 that best aligns to the program in which the student participates.

Table 26

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, (e.g., a child's parents or 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

USING THE CURRENT ENROLLMENT EXTRACT TO UPDATE ENROLLMENT RECORDS

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 2023–2024 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 2024-2025 school year.

Follow these steps to update the Current Enrollment extract from the previous year.

1) Delete the first five columns in the extract:
   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 heading names EXACTLY match the Enrollment Upload Template file.

3) Update any records as needed (e.g., correct any typos or incorrect information for a student).
4) Promote the students to the next grade as applicable.
5) Remove any students who will not be assessed or who have left the district or school.
6) Add any new students who will be assessed.
7) Save the file as a CSV (comma-delimited) file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions on page 18.
8) 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 their region. For more information about transferring students, go to the section Management of Student Moves and Transfers on page 128.

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.

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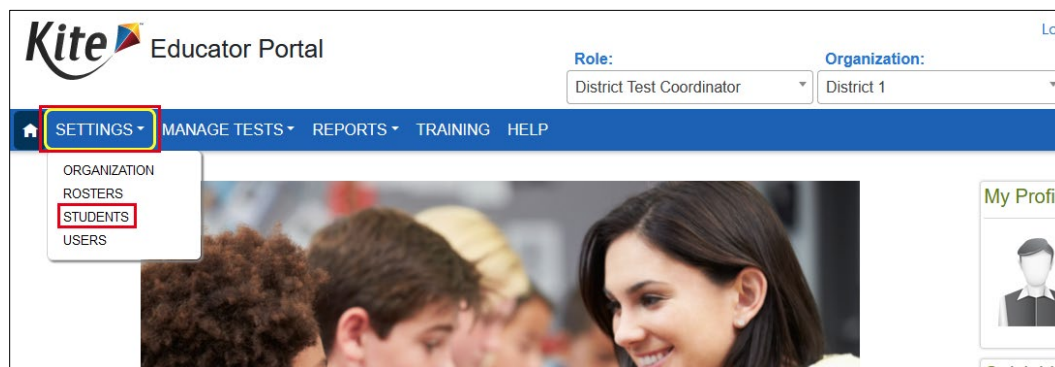
3) Select the **Upload Enrollment** tab.
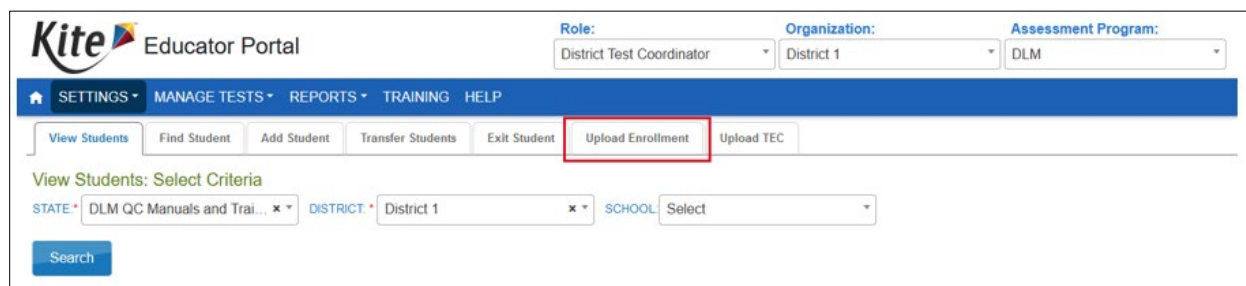
4) In the Select Criteria fields, if a state-level user is uploading for the entire state, the district/school are left blank. For a district- or building-level user, the fields will prepopulate according to the user's level of permissions. When needed, select the district/school from the drop-down menu.

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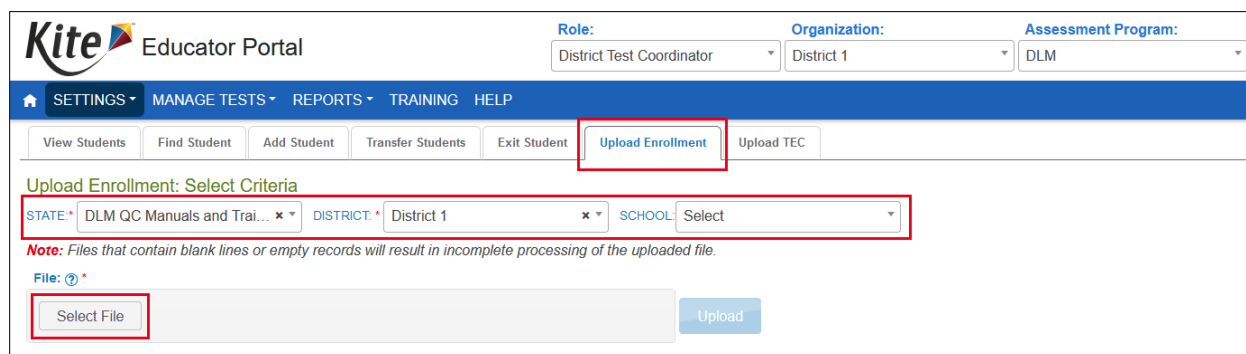
6) Locate the saved Enrollment Upload Template file that contains the updated student data for the new school year. Verify that the saved file has a CSV (comma-delimited) file extension. File names with extensions ending in XLS or XLSX will be rejected.

7) Select **Open**. The file name will then appear in the File field.
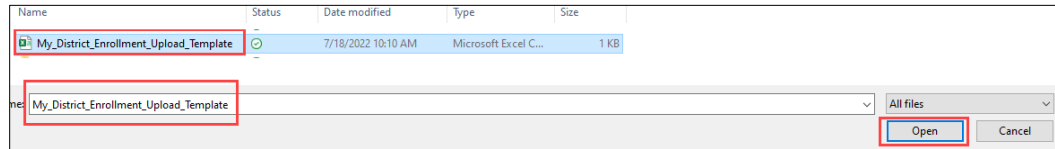
8) Select the **Upload** button.
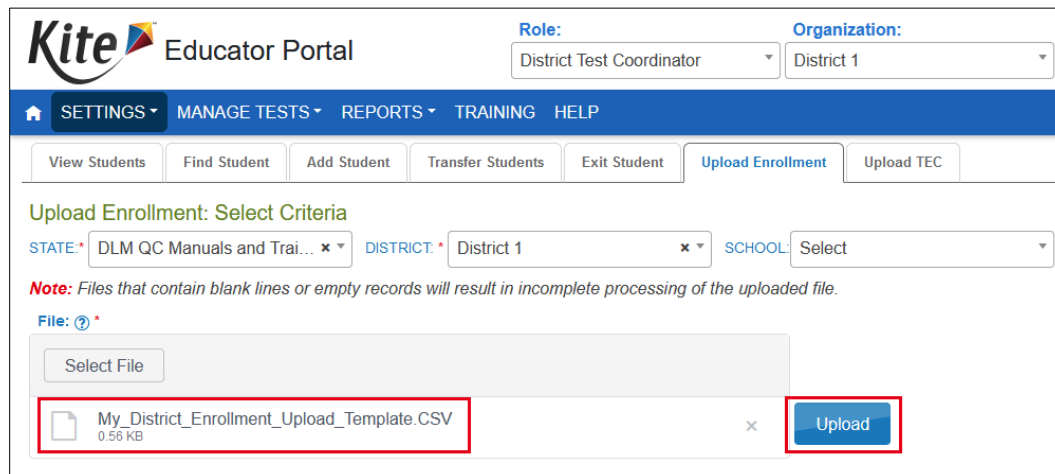
9) The confirmation message indicates the number of records uploaded and the number of records rejected, if applicable. In the following example, 15 records were uploaded (Completed/Updated) without an error.

10) The following information will display for each upload:

- Uploaded: Date and Time of the upload
- Status: Completed or Rejected
- Created/Updated: Number of records uploaded successfully
- Rejected: Number of records with errors
- Alerts: A message about a row in the file, (e.g., a student already exists for this record in the state using this State Student Identifier and a different date of birth.)

- File: A CSV icon will display if the file has errors. The following example shows a file that was rejected because of errors.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Monday, MM/DD/YYYY 10:32:16 AM	COMPLETED	14	1	0	📄

11) 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 if 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. 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.

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 115 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, contact the Service Desk to reconcile the two accounts 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 92. 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.

If a student changes grades after their initial enrollment, edit the student's grade as soon as possible using this procedure. The student record can also be changed manually using the procedure Edit a Student Record Manually, beginning on page 108.

The student must be enrolled in the correct grade for grade-appropriate testlets to be delivered in Student Portal. If a student was enrolled in the incorrect grade and has started testing, after the student's enrollment record is corrected, the student will need to begin testing over again. Previously completed testlets may no longer be available.

> 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 128.
> Contact the state assessment administrator to transfer a student from one district to another.

ADD A STUDENT RECORD MANUALLY

Students can be enrolled one at a time in the Educator Portal user interface. This process is most helpful when enrolling only a few students, typically five or fewer. The Add Student feature can be used if the student has not been enrolled since the 2015–2016 school year or if the student has never had an Educator Portal account.

> HINT: To reactivate a few students, use the The Find Student Feature described on page 111 of this manual. By using this feature, a search can be accomplished within a state using the state student identifier (SSID) or by using the student's first and last name. Some states allow the search only by state student identifier. In those states, the name option fields will not be displayed.
> Most users at the state, regional, district, and building level may access the Find Student feature.

ENROLLING STUDENTS MANUALLY

1) Select **Settings**.

2) Select **Students** from the drop-down menu.
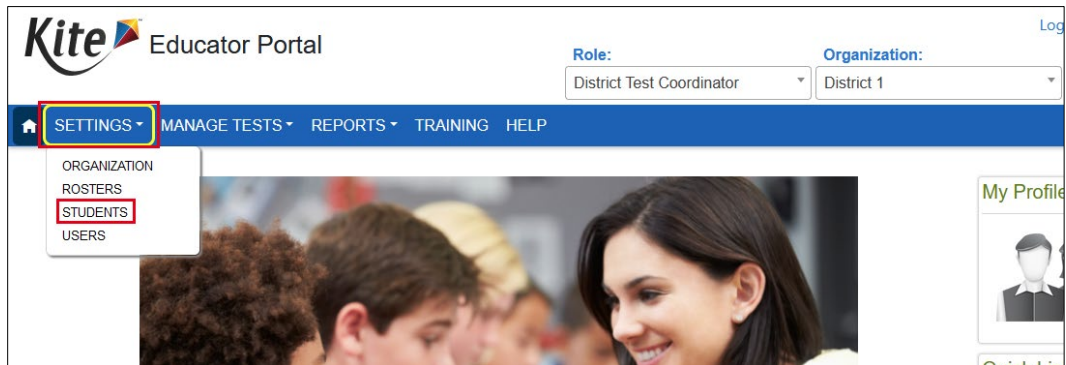
3) Select the **Add Student** tab.
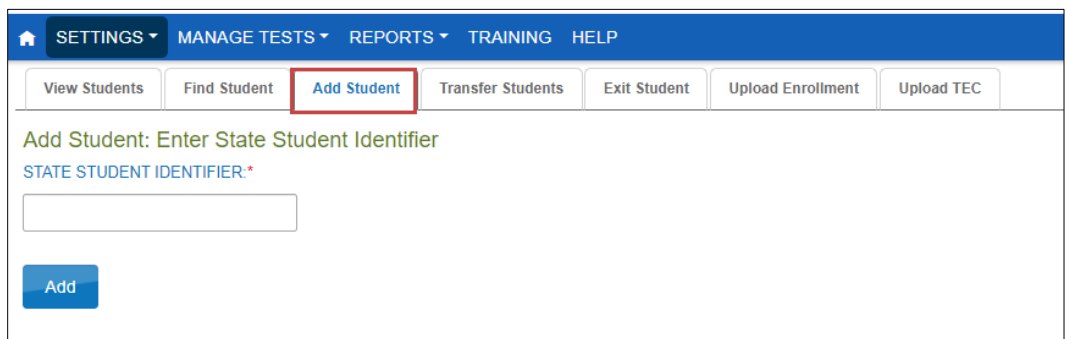
4) Enter the State Student Identifier and select **Add**.
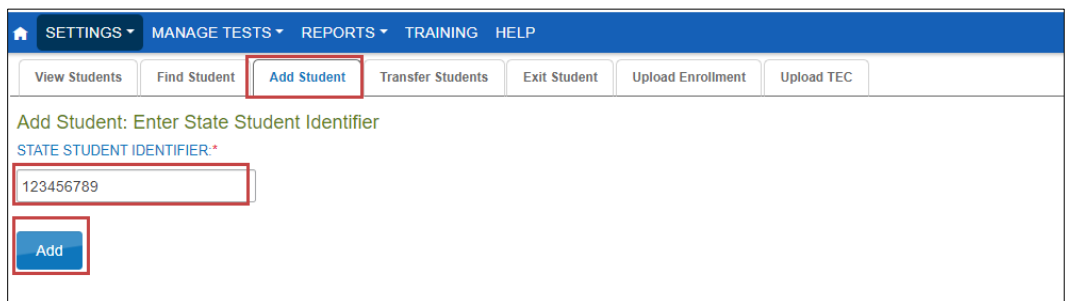
5) All fields with a red asterisk are required. Fill in as many optional fields as possible.
6) The Gifted field must be either left blank or enter "NO".

7) Select Save.

8) If each required field is not entered, a message in red will appear under any unfilled required field and must be filled to enroll the student.

9) Once all required fields are complete and **Save** is selected, a message will appear reading, "This student record was successfully saved."

HINT: System validations are applied to manual enrollments like they are to the batch enrollments. The State Student Identifier is validated first.

10) If another student is already in the system for the school year with the same identifier, a message will display informing the data manager that another student has the same identifier. The data manager will need to verify that the identifier entered is correct. If the identifier entered was not correct, edit the identifier and select the **Add** button again. If the identifier entered was correct, contact the State Assessment Administrator (SAA) to resolve error.

11) 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.

12) 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 Table 27 through Table 31 applies only when adding a student manually, one at a time, using the user interface. When uploading multiple students using an Enrollment Upload Template file, use the definition table(s) on page 77 of this manual.

Table 27

Student Upload Definitions for Manual Uploads (Field Name)

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.

Table 28

Student Upload Definitions for Manual Uploads (Student Name)

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.
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)	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.

Table 29

Student Upload Definitions for Manual Uploads (Demographic)

Demographic	Required	Definition	Special Notes
Gender	Yes	Female Male Nonbinary/Undesignated Gender Not Listed Here Prefer Not to Say Other	Required, cannot leave blank. Only the genders available for selection in your state will display.
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.

Table 30

Student Upload Definitions for Manual Uploads (Profile)

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
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.

Table 31

Student Upload Definitions for Manual Uploads (School Enrollment)

School Enrollment for 2024	Required	Definition	Special Notes
District	Yes	The unique alphanumeric code (district number) 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.
School	Yes	The unique alphanumeric code (school number) 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.

School Enrollment for 2024	Required	Definition	Special Notes
Grade	Yes	The grade level that is entered should be the grade in which the student receives services in a school or an educational institution during a given academic session.	Required, cannot leave blank. Some states provide a birthdate chart to help data managers align the student's birthdate with the grade to be assessed. Refer to your state's DLM webpage to access the birthdate chart so the correct grade can be entered.
Accountability District	May be required. Check with your state agency.	The unique alphanumeric code (district number) that has been assigned to a district as listed in each state's organizational table	Some states require the Accountability District Identifier be entered. If it is not required, the field is still available for state use, if desired. For states that do not otherwise require the Accountability District Identifier, the field will become a required field if the Accountability School Identifier was entered.
Accountability School	May be required. Check with your state agency.	The unique alphanumeric code (school number) assigned to a school as listed in each state's organizational table	Some states require the Accountability School Identifier. If it is not required, the field is still available for state use, if desired.

School Enrollment for 2024	Required	Definition	Special Notes
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 re-enrolls, this date is to reflect the most recent enrollment date.
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 re-enrolls, 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 re-enrolls, 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 128 of this manual.

1) Select **Settings**.

2) Select **Students** from the drop-down menu.
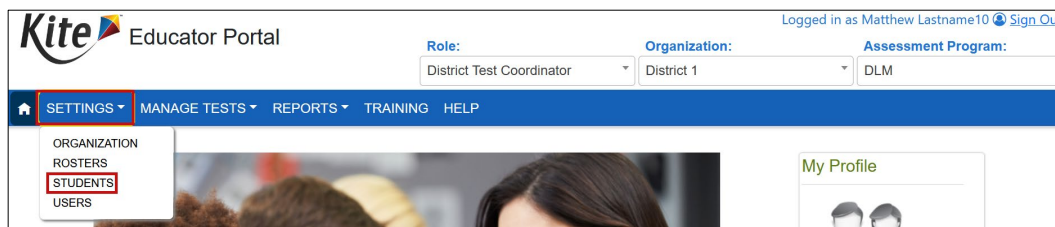
3) On the View Students tab under Select Criteria, the fields will prepopulate entries according to the user's level of permissions. Select the school from the drop-down menu. Select **Search**.
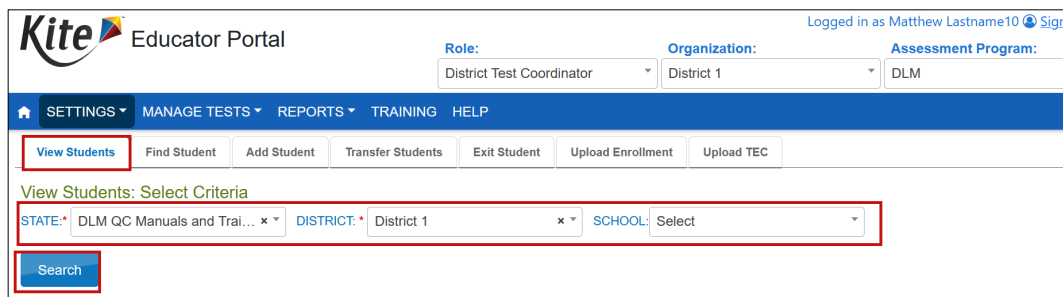
4) A list of students will become available for the selected organization. The following list of students is fictitious. To export the enrollment data to Excel, select the Export to Excel button.

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

6) 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 can view the student's record and should convey any necessary corrections to the appropriate district/building staff.

7) After making any necessary edits, scroll to the bottom of the screen to select the **Save** button. In the following screenshot, John Jacob's middle name was added. A message at the top of the window indicates that the student updated successfully.

8) 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. This feature can be used to activate or edit the student's record. 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)
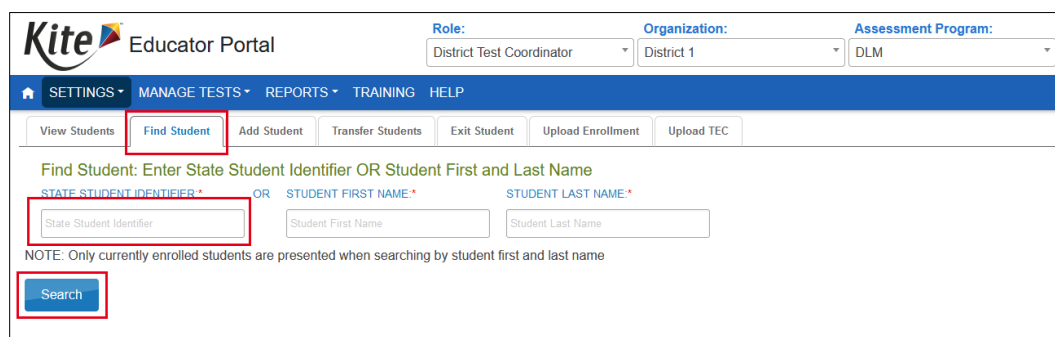
1) Select **Settings**.

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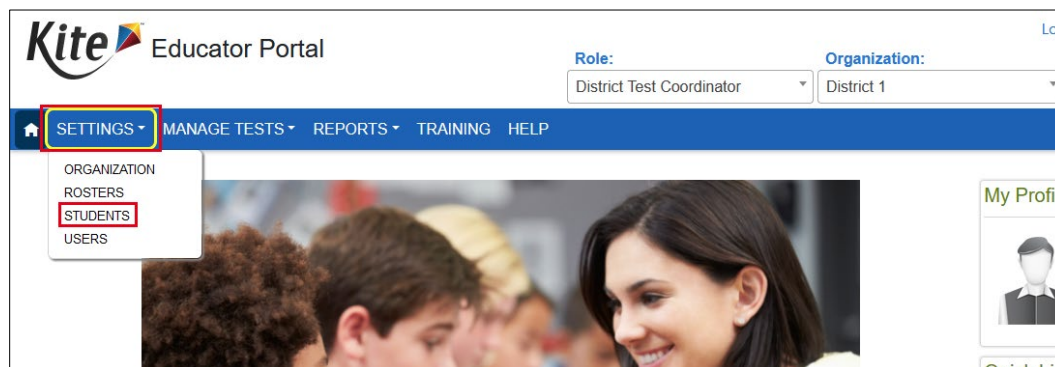
3) Select the **Find Student** tab.
4) Enter the State Student Identifier. The entry must EXACTLY match a student's SSID in the state or a matching record will not be found.
5) Select the blue **Search** button.

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:
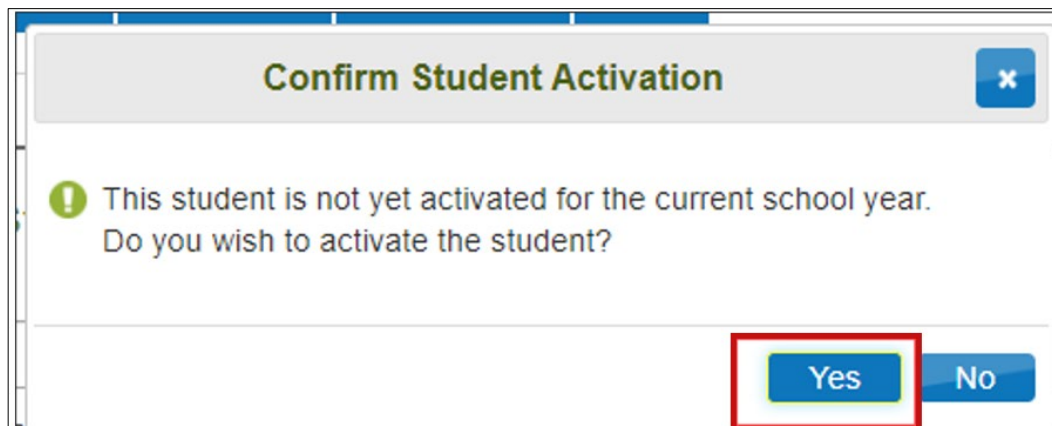
- If a matching SSID exists for an active enrollment in the user's organization, the system will automatically pull up the View Student Record screen with the student's name displayed at the top. The user should review the information for accuracy and make corrections if needed by selecting the word **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.
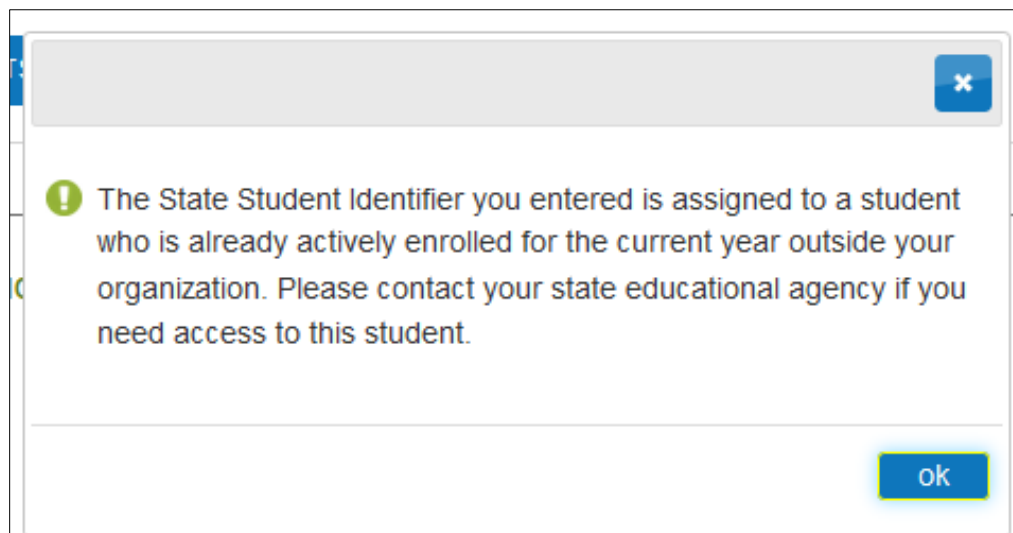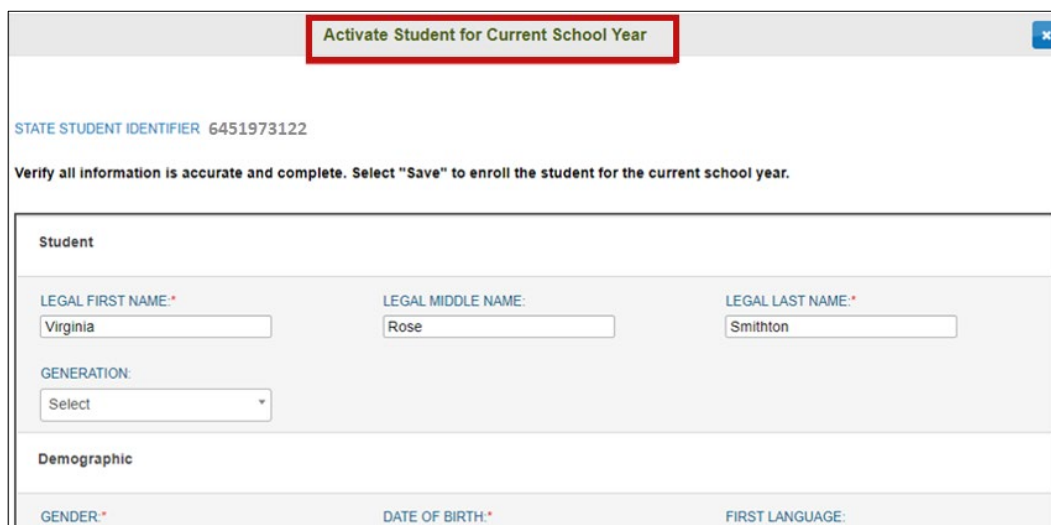
- If a matching SSID exists but the enrollment is inactive, the system displays a prompt asking if the user wants to activate the student.

- o 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 (e.g., a typo, the student's grade).

NOTE: If the state student identifier has an error, after the student is activated, go to the Edit Student screen. The state student identifier can be changed on that screen.

- o 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 exist." When no students are found with a matching SSID, the student can be enrolled by using the Add Student feature or by uploading an Enrollment Upload Template file.

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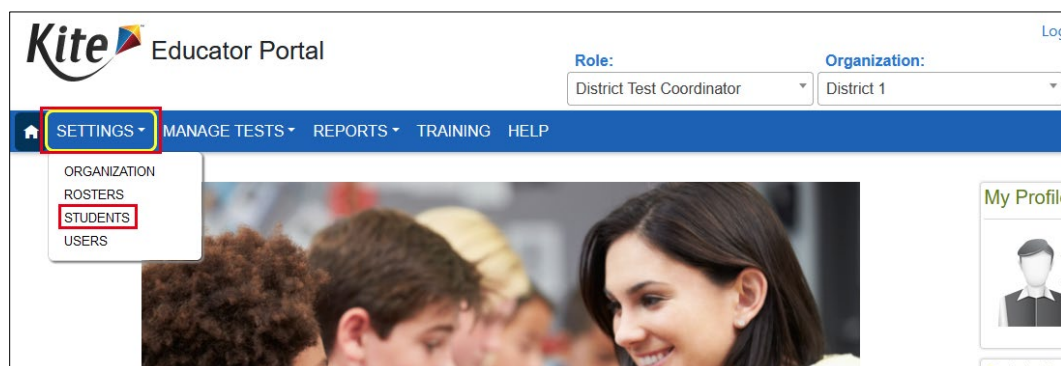
3) Select the **Find Student** tab.
4) Enter the student's first and last name (the field is case-insensitive). The entry must EXACTLY match a currently enrolled student's first and last name in the user's organization or a student record will not be found.

5) Select the Search button.

NOTE: The search using a student's first and last name will 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 exited from Educator Portal (e.g., 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.
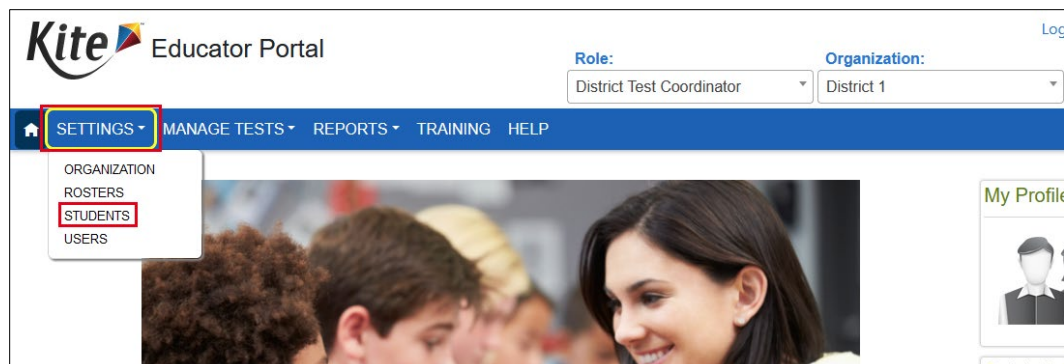
3) Select the **Exit Student** tab.
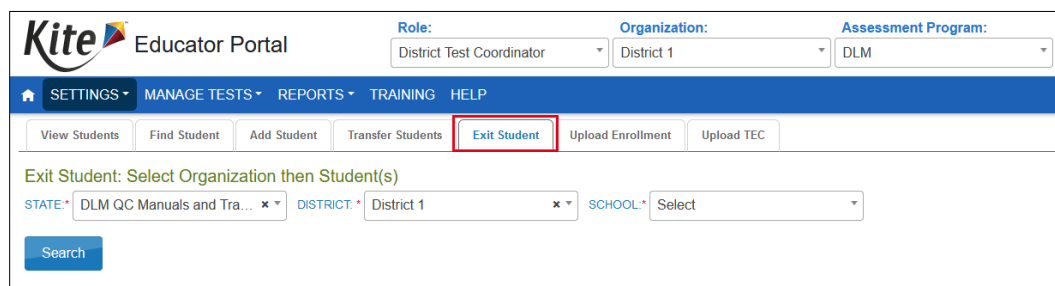
4) The state will always prepopulate. The other fields will prepopulate entries according to the user's level of permissions. Select the district and school if needed.
5) Select **Search**.

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

7) 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.

8) Select **Reason for Removing Student** (i.e., 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.

9) After an exit reason is chosen, the Exit Student button is enabled. Select the **Exit Student** button.
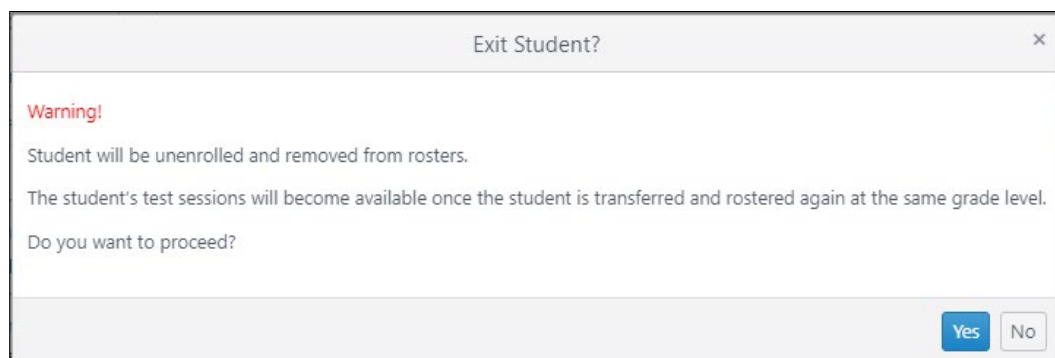
10) The Exit Student warning will appear with the question, "Do you want to proceed?" Answer the question, either **Yes** or **No**.

   a) Select **Yes** or **No**.
   b) 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) Go to **Settings**.

2) Select **Students** from the dropdown menu.
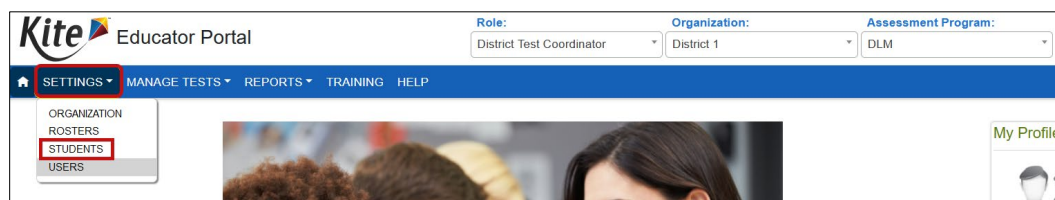
3) Select **Upload TEC**.
4) Download the Test, Exit, and Clear (TEC) Upload Template file from the state's DLM resources webpage or by using the question mark icon in Educator Portal.
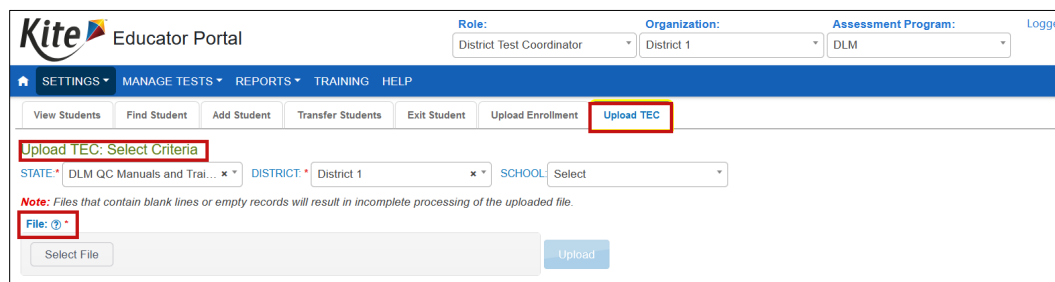
HINT: To ensure a current file is used, always start by downloading the template.

5) Open the **TEC 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.

6) Using a new row for each student, enter the information into the TEC Upload Template file (Table 32).

7) Complete all required fields except column F, Test Type, which **MUST be left blank**. Do not remove this column or heading.

8) Save the file as a CSV file but **leave the file open** to preserve formatting (i.e., leading zeros). File formatting may be lost if the file is closed. Go to sections Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions.

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 records or fewer at a time. Save the file in an easily accessible location.

TEST, EXIT, AND CLEAR FIELD DEFINITIONS

Table 32

Test, Exit, and Clear Field Definitions

Column Letter	Field	Format; Length	Required	Definition	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	Attendance_ School_ Identifier	Alphanumeric; 30	Yes	This identifier must match a School Number found in column B of the organizational table. 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.	The organizational table is found on your state DLM webpage.

Column Letter	Field	Format; Length	Required	Definition	Special Notes
C	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.*

Column Letter	Field	Format; Length	Required	Definition	Special Notes
D	Exit_Reason	Numeric; 2	Yes		Go to the Exit Reason Field table on page 124 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	N/A
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 2024.

* Go to page 19, Include Leading Zeros in an Upload File

EXIT REASON FIELD

Table 33 lists the values that are used in a Test, Exit, and Clear (TEC) Upload Template for the Exit Reason column. Enter a number exactly as it appears in Table 33. 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.

> 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.

Table 33

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)
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

Entry	Definition
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: Exited students will also be removed from all rosters.

To undo a previously submitted exit record for a student, data managers may submit another TEC 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 are also 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.

UPLOAD A TEC (TEST, EXIT, CLEAR) TEMPLATE FILE

To upload a TEC Upload Template, follow these steps.

1) Select **Settings**.

2) Select **Students** from the drop-down menu.
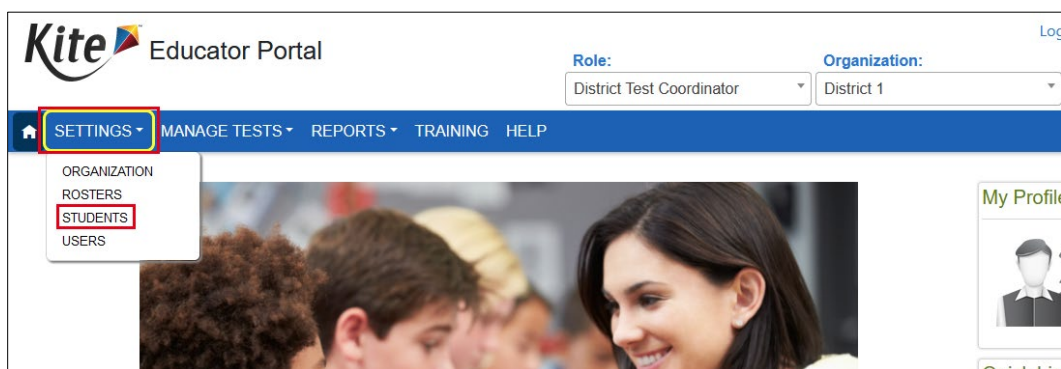
3) Select the **Upload TEC** tab.

4) Apply filters in the **Select Criteria** fields to choose the correct level. Select the school from the drop-down menu.
5) Locate the saved CSV file for upload.
6) Select the file name and **Open**.

7) The file name appears in the File field, and the blue Upload button becomes enabled.
8) Select **Upload**.

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

10) The following information will display for each upload:

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

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Monday, MM/DD/YYYY 10:32:16 AM	COMPLETED	6	1	0	CSV

11) 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 students.

HINT: Only a state or a regional user (in states divided into regions) or a Service Desk agent can transfer students between districts.

- 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.

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

This procedure allows the transfer of a few 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 (e.g., from district A/school A to district B/school A, B, or C).

The procedures to transfer many students at one time are covered in the section, Transfer Multiple Students Using CSV Upload Templates on page 132.

1) Select **Settings**.
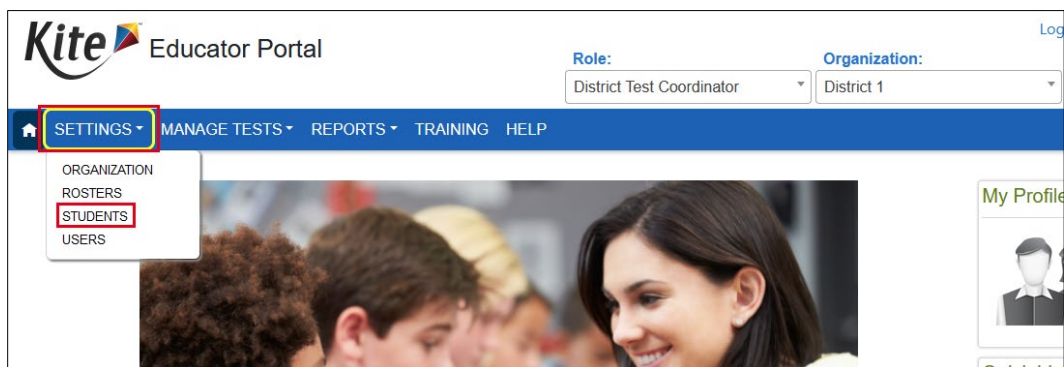
2) Select **Students**.

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

4) Complete all required fields in the Select Organization then Students fields. The fields will prepopulate entries according to the user's level of permissions. All organization fields are required fields.

5) Select **Search.**
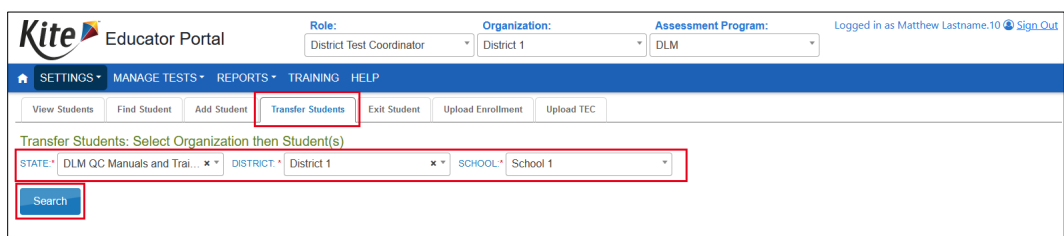
6) Select the student(s) to be transferred; then, select **Next**.
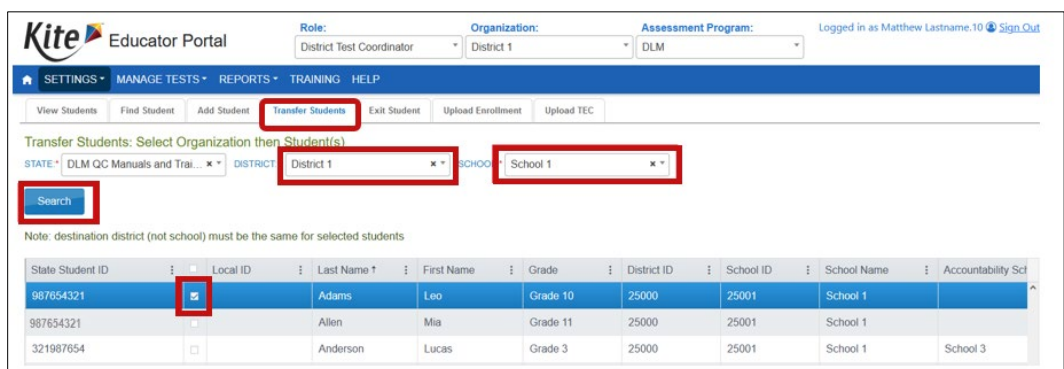
HINT: Under the District drop-down menu, a state user, regional user, and Service Desk agent will be able to select the destination attendance district that is different from the leaving attendance district. Selecting an accountability district is optional.

7) Read the directions on the screen to help with the transfer process.

8) Select the destination attendance district, if available. This field will populate for a district level user and cannot be changed.

9) Select an **Exit Reason** for each student using the drop-down menu.

HINT: Scroll to the right to view additional columns.

10) 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.
11) Select the **Next** button.

12) 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.
13) Select the **Next** button.
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) Select **Yes** or **No**.

> 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.

16) A warning screen will display before a student is transferred. This is the final decision the data manager makes before the transfer takes place.
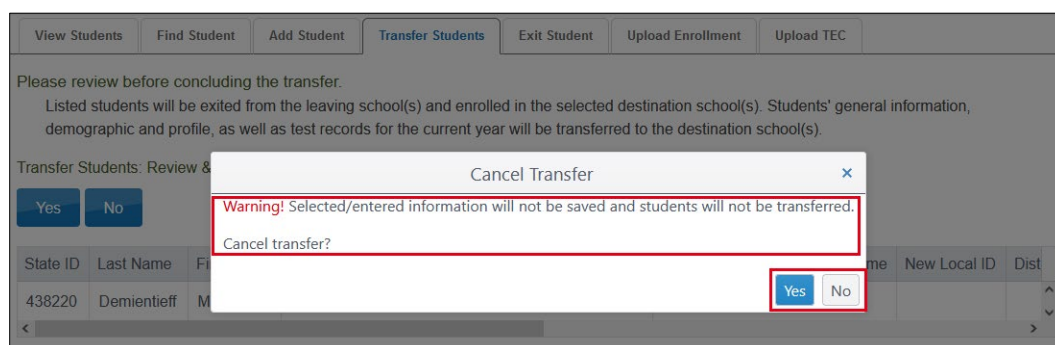
a) If the data manager selects **No**, a warning message will appear asking the data manager to confirm the cancellation of the transfer.
b) Selecting **Yes** means that the user is saying, "Yes, I want to cancel this transfer." Selecting **No** means that the user is saying, "I do not want to continue the cancellation of the transfer, but instead, I want to transfer the student. "

17) Immediately after selecting **No**, a message appears confirming that the student has been transferred successfully.
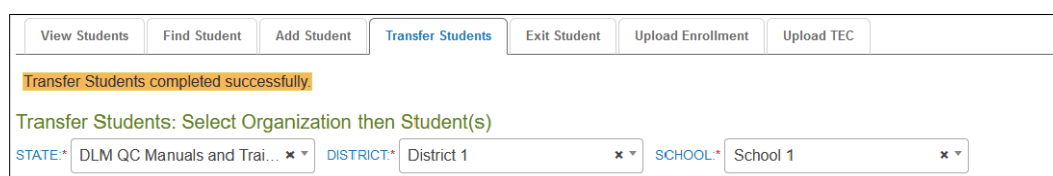
18) After students are transferred, they must be rostered to test administrators for each applicable subject in the destination school. After the students are transferred and rostered, any testlets they completed in the previous school will follow them to the new school.
19) Follow the steps outlined in Manage Roster Data on page 135 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 Within the Same District

NOTE: In states with regions, a user with a regional role can perform the entire transfer process for students within their region. A District Test Coordinator (DTC) or District User (DUS) may perform the entire transfer process for students within their district. A Building Test Coordinator (BTC) or Building User (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, the transfer process can be completed by following these steps in order.

1) The building-level user in the leaving school, School A, will exit the students, using exit code 1: Transfer to public school same district.

- For convenience, the TEC Upload Template File can be used when exiting more than five students. If exiting five students or fewer, the user interface can be used.

2) When the exit 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.

3) The building-level user in the new destination school, School B, enrolls the students in School B, using either an Enrollment Upload Template File or the user interface.

- For convenience, use the Enrollment Upload Template when five or more students need to be enrolled. If enrolling five students or fewer, the Find Student feature in the user interface may be more convenient.

4) Once the enrollment process is completed, the newly transferred students must be rostered to test administrators in School B for each subject appropriate for the students' grade. Any already completed testlets will follow the students once they are enrolled and rostered in School B.

5) The School B test administrator should review the First Contact Survey and the Personal Needs and Preferences (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 111 of this manual.

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

Only a state assessment administrator or Dynamic Learning Maps® (DLM®) Service Desk agent may transfer a student from one district to 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 cannot transfer students from one district to another using the user interface. However, the transfer process can be completed by following these steps in order. 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.

• Depending on the number of students being exited, use either the Exit feature in the user interface or the TEC Upload Template File.

2) The district-level user in the new destination district, District B, enrolls the students in District B, using an Enrollment Upload Template or the User Interface.

3) Depending on the number of students being enrolled, use either the Find Student feature in the user interface or the Enrollment Template Upload file. 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) should review the First Contact Survey and 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: Previously enrolled students cannot be manually enrolled with the Add Student feature in the user interface. However, they can be enrolled using either the Enrollment Upload Template or the Find Student feature described on page 111 of this manual.

If a student has completed any testlets, the testlets will follow the student to the new district/school once the student is enrolled and rostered.

MANAGE ROSTER DATA

For a student to be assessed at the opening of an assessment window, at least 24 hours before the window opens, the student must be rostered to one teacher, per school, per grade, and per subject, and the student must also have a submitted First Contact Survey.

Rosters can be created in two ways: through a Roster Upload Template file or with the user interface.

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 or courses offered in the state.

While up to 5,000 rosters can be created with a single upload, the upload processing will take more time, and troubleshooting will likely be complex. 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 Dynamic Learning Maps® (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 (e.g., 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 rosters or fewer can be created manually with the user interface. Go to Create a Roster Manually on page 146 of this manual.

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 (Figure 5).

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

Example:

Teacher last name and subject:

- Barnett ELA
- Barnett Math
- Barnett Science

Figure 5

Roster Names

CREATE A ROSTER UPLOAD TEMPLATE FILE

Use either the modified Roster extract as described in the next section 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 state's webpage or Educator Portal.

To access the current Roster Upload Template file on the 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.

To access the current Roster Upload Template file from Educator Portal, follow these steps:

1) Select **Settings**.
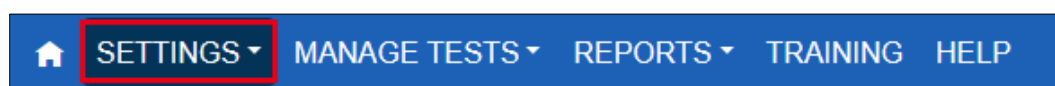
2) Select **Rosters** from the drop-down menu.
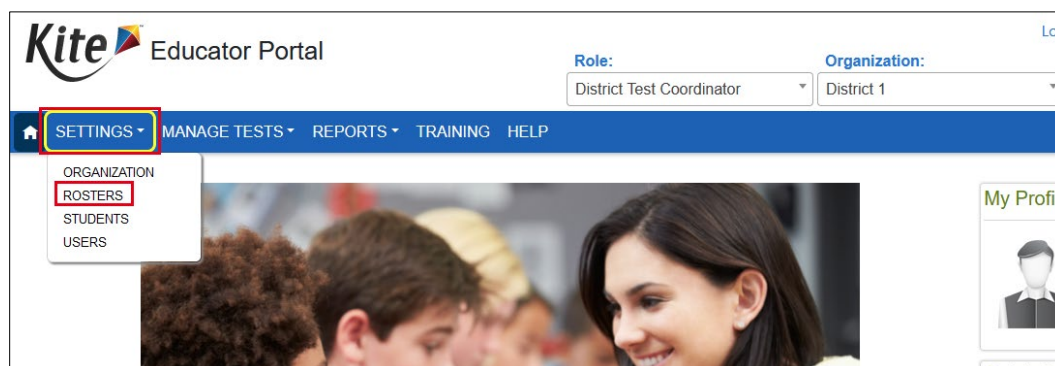
3) Select the **Upload Roster** tab.
4) Apply filters in the Select Criteria fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu.
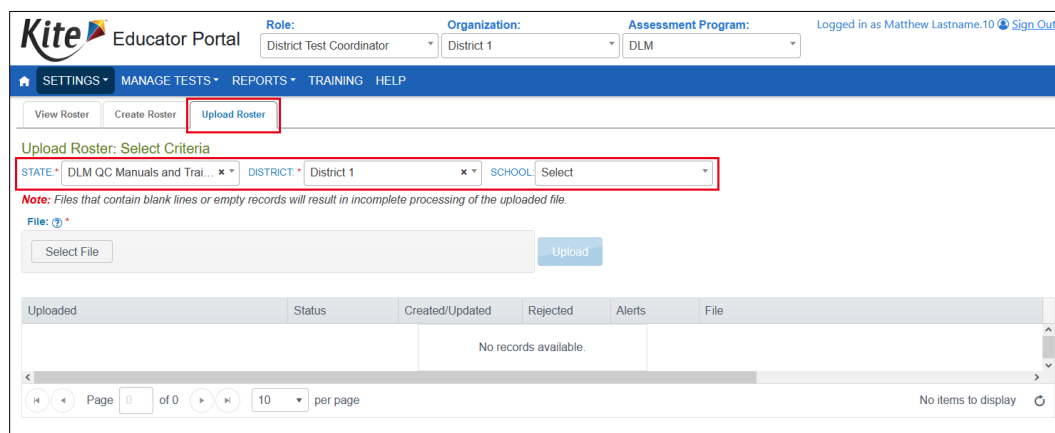
5) Select the question mark symbol next to the word **File** to open the current Roster Upload Template file.

6) A small pop-up window will display the most 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 (Table 34). 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 file but **leave the file open** to preserve formatting (e.g., leading zeros). File formatting may be lost if the file is closed. Go to sections, Saving as a CSV File in Excel and Include Leading Zeros in an Upload File for detailed instructions.

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

Table 34

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 136 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	States assessing end-of-instruction biology in high school must enter BIO in the course field. Only include biology if it 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 2024–2025 school year, enter 2025)

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
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.*
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.*

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
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 the educator's user account in Educator Portal. If the two do not match exactly, the record will fail to upload.
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.

CSV Column	Column Heading	Data Required	Format or Valid Entries	Definition
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: Removing all students from a roster removes the roster.

*Go to page 19, Include Leading Zeros in an Upload File.

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.

USING THE 2023–2024 ROSTER EXTRACT TO UPDATE ROSTER RECORDS FOR 2024–2025

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 11 columns in the extract, then ensure the heading titles **exactly** match the 2024–2025 Roster Upload Template file. Save the file as a CSV (comma-delimited) file. Follow the steps outlined in a Roster Upload Template File on page 144 in this manual.

The first 11 columns are:

1) Extract_State
2) Extract_District
3) Extract_School
4) Extract_Last_Modified_Time
5) Extract_Last_Modified_By
6) Extract_Assessment_Program_1
7) Extract_Assessment_Program_2
8) Extract_Assessment_Program_3
9) Extract_Assessment_Program_4
10) Extract_Student_Grade
11) Extract_Educator_Email_Address

UPLOAD A ROSTER UPLOAD TEMPLATE FILE

1) Select **Settings**.

2) Select **Rosters** from the drop-down menu.
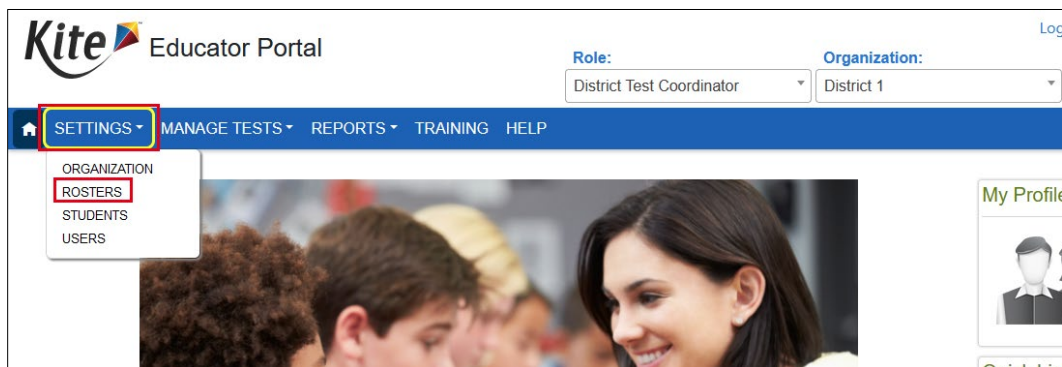
3) Select the **Upload Roster.**
4) Complete the criteria fields if needed.
5) Select the **Select File** button.

6) Find the saved, ready-to-upload Roster Upload Template file. Select **Open**.

7) The file name appears in the file field. Select the **Upload** button.

8) A message will display showing the number of records that were created/updated, how many were rejected, and if any records have alerts that must be read. Each line in the CSV file is one record.

9) 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.
Fix the line(s) in the file that had errors, remove the lines that uploaded successfully, and follow the previous steps to upload again.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Wednesday, MM,DD,YYYY 2:45:55 PM	COMPLETED	32	1	0	
Wednesday, MM,DD,YYYY 3:01:20 PM	COMPLETED	33	0	0	

10) 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 rosters or fewer. Follow this procedure to manually create a roster.

1) Select **Settings**.

2) Select **Rosters** from the drop-down menu.
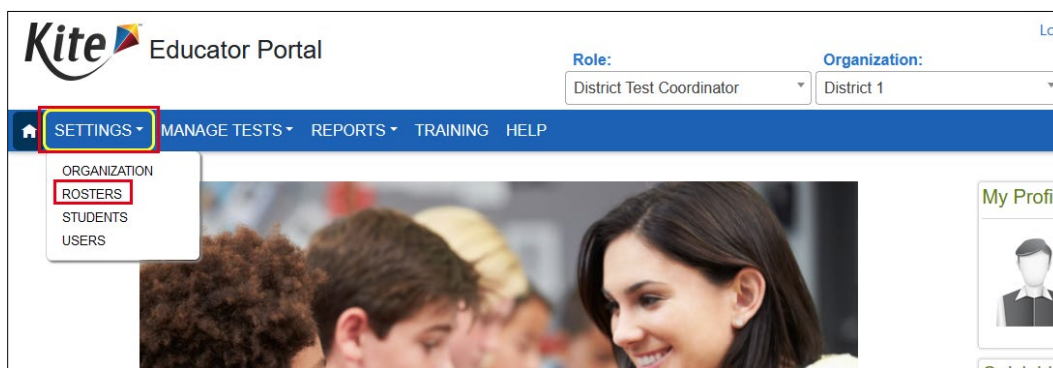
3) The View Rosters tab will open. The Select Criteria fields will be available.

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 136 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 end of instruction 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 **Search** button.

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

12) If desired, select the checkbox to show only the students who are NOT already rostered to this subject.

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

14) If multiple students are available to roster, use the arrows at the bottom of the screen to move between pages; multiple students can be selected.

HINT: After selecting the appropriate students, select the **Save** button.

15) If the data manager did NOT select the check box so that only students who are not rostered to the subject are displayed, 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.

16) 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.

1) Select **Settings**.

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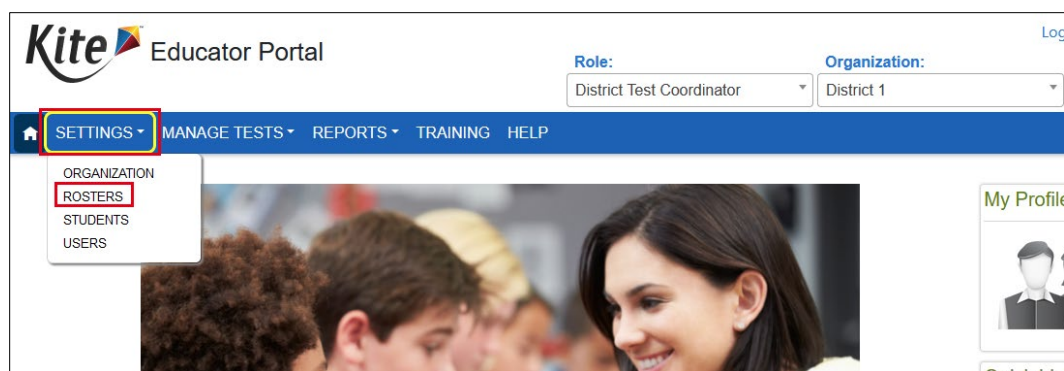
3) Apply filters in the **Select Criteria** fields to choose the correct level. The fields will prepopulate entries according to the user's level of permissions. Select the district/school from the drop-down menu. All required fields must be completed.

4) Select **Search**.

5) All previously created rosters will display.

6) Select the desired roster to edit/remove.

7) The **View/Edit Roster** screen will automatically display. In the following screenshot, the student highlighted in blue is currently rostered to Mathematics. 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.

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

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 Personal Needs and Preferences (PNP) Profile should be reviewed and saved so that all students who participate in the Dynamic Learning Maps® (DLM®) alternate assessments have accurate records and receive testlets that best match their needs and abilities.

Most student data entered in Educator Portal directly affects 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.
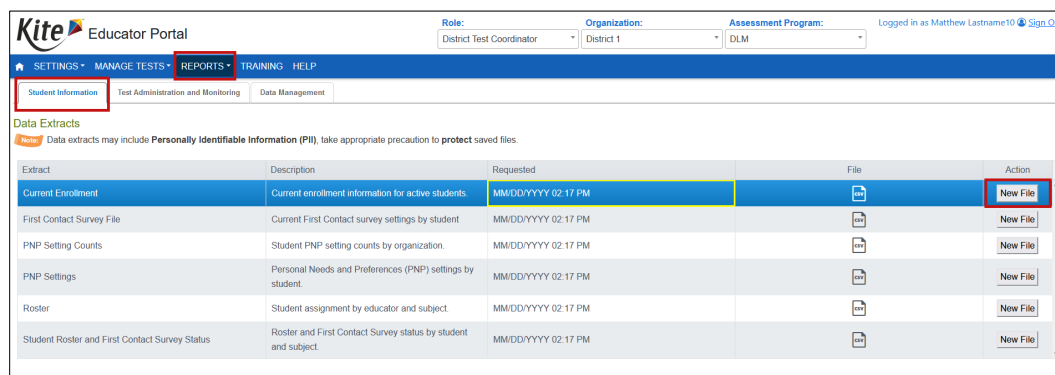
WHEN TO CONDUCT DATA VERIFICATION AND REVISIONS

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

1) Download the data extracts from Educator Portal to view current data. Any of the extracts may be downloaded and saved by selecting the CSV icon. To have the most current extract, always select **New File** as shown in Figure 6. The most current data will populate on the month, day, year, and time that the new file was accessed.

Figure 6

The Current Enrollment Extract with the New File Button

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 92. For exiting a student, go to the section Exit a Student from Educator Portal on page 115.
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 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. Refer to Table 35 for the available data manager actions.

Table 35

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. • Deactivate user records where needed. • Remove users as needed, if allowed in your state. • Update roles for users when roles have changed. • Upload the User Upload Template file.	Manage User Data, beginning on page 23 of this 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 2023–2024 Enrollment extract for a 2024–2025 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. • Promote the student's grade as needed. • Upload the file.* • Exit enrolled students from the system if needed using the Exit a Student process. Note: Simply deleting a line of student data in the enrollment extract does **not** exit the student from Educator Portal.	Manage Enrollment Data, beginning on page 74 of this manual.

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 2023–2024 Roster extract to upload rosters for 2024–2025, delete the first 11 specified columns previously described to prepare the extract for use as a roster file. • Ensure the column headings **EXACTLY** match the 2024–2025 Roster Upload Template file. • Upload the file. *	Manage Roster Data, beginning on page 135 of this manual.

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

USE THE DATA EXTRACTS FOR DATA CLEANUP

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

- Are the correct students enrolled?
- Are the students enrolled in the correct grades?
- Are the students enrolled in the correct school? If not, go to Management of Student Moves and Transfers on page 128 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 2 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.

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 (Table 36).

Table 36

DLM Glossary

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, deactivate users, and have access to all student reports and extracts.
State Education Agency (SEA)	A state department of education.

STATE APPENDICES

DOCUMENT HISTORY

NOTE: Page numbers are valid only for the date and version noted. They may change in future versions (Table 37).

Table 37

Document History of Changes

Topic	Starting Page
Upload template files: Solution to remove roles from multiple users at one time	17
Table 15 through Table 18: new format	42
Table 27: Accountability school field requirement configurable by state	101
Table 27: Update of column name from "Current Grade Level" to "Grade"	101
Edit a Student Record Manually: Ability to edit the Accountability District and Accountability School	108
Create a Roster Manually: Display students not rostered to a subject checkbox	146
Table 32: Renaming and reordering of columns in the Test, Exit, and Clear fields	121
General edits throughout	N/A