Data Management Step 1: Updating DLM Users

Purpose: Assessment Coordinators (ACs)/District Test Coordinators (DTCs) must ensure that uploads are completed for:
1. Users
2. Students
3. Rosters

This instructional guide offers Pennsylvania-specific directions for updating *Users* in the DLM Educator Portal.

Context:

Users in Kite Educator Portal carry over from one year to the next. The AC/DTC must ensure that individuals who are active in the system are still employed by the school/district and still need access to Educator Portal. Roles should be confirmed to ensure that individuals have the appropriate level of access. In addition, new users should be added to allow them to access Educator Portal and to gain access to required test administrator training.

Audience:
- Assessment Coordinators/District Test Coordinators
- Building Test Coordinators
- Data management personnel

Training:

ACs/DTCs should take part in the following recorded trainings prior to engaging in data management tasks:

- 2021-22 PASA Getting Ready: Annual PASA Updates and 1% Compliance for LEAs

- PASA DLM Data Management 101: Users Module 1

Timeline:

Begin modifying/uploading users on December 3rd. All other uploads must not occur until January 5th. Log into Educator Portal to upload/update data:
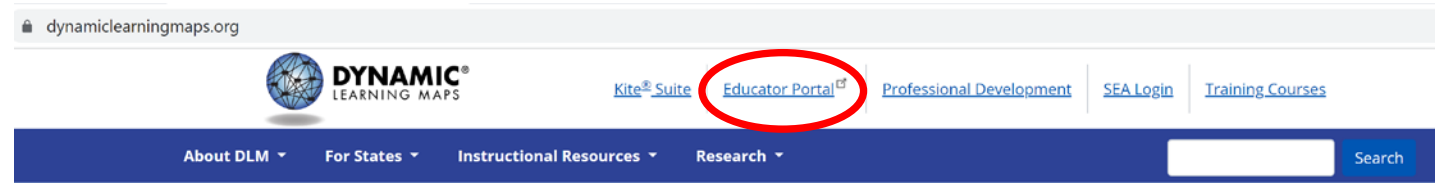
Questions: Contact alternateassessment@pattankop.net

Additional Information: Click **PaTTAN PASA webpage** for general information and correspondence regarding the PASA DLM Assessment.

Kite

Role: State Assessment Administra... ▼

Organization: Pennsylvania ▼

Assessment Program: DLM ▼

1) Click on the 'Reports' menu.

🏠 | SETTINGS ▼ | MANAGE TESTS ▼ | REPORTS ▼ | DASHBOARD | HELP

DATA EXTRACTS
ALTERNATE ASSESSMENT
STATE SPECIFIC FILES
STUDENT REPORT ARCHIVE

2) Click 'Data Extracts'.

Data Extracts

Note: Student data extracts include Pers... ...PII), take appropriate precaution to **protect** saved files.

Extract		Requested	File	Action
Current Enrollment	Current enrollment information for active students.	12/23/2020 10:31 AM	csv	New File
DLM Test Administration Monitoring	Testlets assigned, in progress, and completed by subject, and student.			New File
First Contact Survey File	Current First Contact survey settings by student			New File
PNP Setting Counts	Student PNP setting counts by organization.	01/04/2021 12:49 PM	csv	New File
PNP Settings	Personal Needs and Preferences (PNP) settings by student.	01/04/2021 12:43 PM	csv	New File
Roster	Student assignment by educator and subject.	01/04/2021 12:30 PM	csv	New File
Security Agreement Completion	Security Agreement status by organization	01/04/2021 12:01 PM	csv	New File
Student Roster and First Contact Survey Status	Roster and First Contact Survey status by student and subject.	01/06/2021 12:53 PM	csv	New File
Training Status	List of DLM users by organization and their training completion status	12/23/2020 09:50 AM	csv	New File
Users	Educator Portal users and their associated role(s).	01/06/2021 09:44 AM	csv	New File

3) Locate 'Users' extract.

4) Click 'New File' under the action column.

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Create Extract ✖

Filters

Assessment Program:* DLM×

District: District 1 ▼

School: Select ▼

Ok Cancel

5) A 'Create Extract' pop up window will appear. Be sure that only the district name appears under 'District'. 'School' must remain unselected to see all users. Click 'OK' to create new Extract.

Create Extract Confirmation

The existing report request and file will be deleted. Do you want to proceed?

Yes | No

6) If the extract was run previously, a prompt will verify that the older file will be overwritten. Click 'Yes'.

As report processes, the status under the file column will say 'In Queue'.

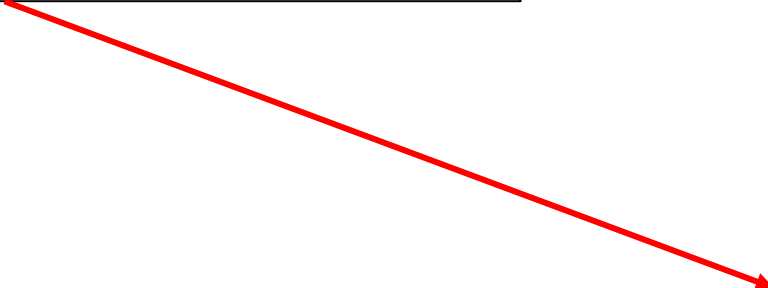| Requested	File	Action
01/06/2021 01:12 PM	In Queue	New File

7) When completed, the file column will have a CSV icon which contains the report. Click on the CSV icon to download. Save as an Excel file.

Requested	File	Action
01/06/2021 01:12 PM	CSV	New File

8) The downloaded extract will show the status for every user currently associated with the district/school.

State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organization Level	Organization Name	District Organization ID	User Status	Create date	Dynamic Learning Maps	Building Test Coordinator	Building User	District Superintendent	District Test Coordinator	District User	Global System Administrator	Proctor	Program Administrator	QC Administrator	State Assessment Administrator	State System Administrator	Teacher
Pennsylvania	Marlow	Amanda	8844383	amarlow@district1.org	4595	SCH	School 1	111222333	Pending	11/17/20	0 X													X
Pennsylvania	Ellen	Druck	5687970	edruck@district1.org	8546	SCH	School 2	111222333	Pending	11/05/20	0 X													X
Pennsylvania	Janice	Crystel	5793125	jcrystel@district1.org	111222333	DT	District 1	111222333	Active	09/23/20	0 X				X									
Pennsylvania	Ann	Jenson	4799953	ajenson@district1.org	4595	SCH	School 1	111222333	Inactive	11/05/20	0 X													X
Pennsylvania	Mabel	Patton	2896999	mpatton@district1.org	4595	SCH	School 1	111222333	Active	11/08/20	0 X													X
Pennsylvania	Casey	Stargel	1025697	cstargel@district1.org	8546	SCH	School 2	111222333	Active	10/05/20	0 X													X

9) Examine the user status column. The status 'Active' will appear for those who have activated accounts in Educator Portal. 'Inactive' status indicates that an individual was associated with the school at one time, but their access to Educator Portal has been turned off. The status 'Pending' means that the person was entered as a user and an activation email was sent, but the individual did not activate their account.

State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organization Level	Organization Name	District Organization ID	User Status
Pennsylvania	Marlow	Amanda	8844383	amarlow@district1.org	4595	SCH	School 1	111222333	Pending
Pennsylvania	Ellen	Druck	5687970	edruck@district1.org	8546	SCH	School 2	111222333	Pending
Pennsylvania	Janice	Crystel	5793125	jcrystel@district1.org	111222333	DT	District 1	111222333	Active
Pennsylvania	Ann	Jenson	4799953	ajenson@district1.org	4595	SCH	School 1	111222333	Inactive
Pennsylvania	Mabel	Patton	2896999	mpatton@district1.org	4595	SCH	School 1	111222333	Active
Pennsylvania	Casey	Stargel	1025697	cstargel@district1.org	8546	SCH	School 2	111222333	Active

![Kite logo]

Role:

Organization:

Assessment Program:

| 🏠 | SETTINGS ▾ | MANAGE TESTS ▾ | REPORTS ▾ | DASHBOARD | HELP |

ORGANIZATION
ROSTERS
STUDENTS
USERS

1) If a User's status should be changed, go to the Settings menu and click 'Users' in Educator Portal.

2) Click 'View Users'. Ensure that the district name is selected under 'District', but that 'School' remains unselected. Be sure to click the checkbox for 'Include Inactive Users'. Click the 'Search' button.

| 🏠 | SETTINGS ▾ | MANAGE TESTS ▾ | REPORTS ▾ | DASHBOARD | HELP |

| **View Users** | Add User | Upload Users |

View Users: Select Criteria

STATE:* Pennsylvania ✕ ▾   DISTRICT: District 1 ▾   SCHOOL: Select ▾

☑ Include Inactive Users   Search

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🏠 | **SETTINGS ▾** | **MANAGE TESTS ▾** | **REPORTS ▾** | **DASHBOARD** | **HELP**

| **View Users** | Add User | Upload Users |

View Users: Select Criteria

STATE:* [Pennsylvania   ✕ ▾]   DISTRICT: [District 1   ▾]   SCHOOL: [Select   ▾]

☑ Include Inactive Users   [Search]

☐	Status ⋮	Last Name ↑ ⋮	First Name ⋮	Educator Identifier ⋮	Email ⋮	Assessmer
☐	Pending	Amanda	Marlow	8844383	amarlow@district1.org	
☐	Pending	Druck	Ellen	5687970	edruck@district1.org	
☐	Active	Crystel	Janice	5793125	jcrystel@district1.org	
☐	Inactive	Jenson	Ann	4799953	ajenson@district1.org	
☑	Active	Patton	Mabel	2896999	mpatton@district1.org	
☐	Active	Stargel	Casey	1025697	cstargel@district1.org	

✉ Send Activation Email | 👁 View | ✏ Edit | ✓ Activate | ⊘ Deactivate

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3) To change an individual's status, click the checkbox next to the name.

4) If a person has a status of 'Active' or 'Pending' and no longer works at the district/school, the individual must be deactivated by clicking the 'Deactivate' button.

5) If an individual has a status of 'Pending' but will need access to Educator Portal this year, select the checkbox next to the name and click 'Send Activation Email'. Notify the individual to click on the link in the email from Kite-support@ku.edu to activate the account. After 20 days, the link will expire.

SETTINGS ▾   MANAGE TESTS ▾   REPORTS ▾   DASHBOARD   HELP

View Users | Add User | Upload Users

View Users: Select Criteria

STATE:* Pennsylvania ✕ ▾   DISTRICT: Select ▾   SCHOOL: Select ▾

☑ Include Inactive Users   Search

	Status	Last Name ↑	First Name	Educator Identifier	Email	Assessme
☐	Pending	Amanda	Marlow	8844383	amarlow@district1.org	
☐	Pending	Druck	Ellen	5687970	edruck@district1.org	
☐	Active	Crystel	Janice	5793125	jcrystel@district1.org	
☑	Inactive	Jenson	Ann	4799953	ajenson@district1.org	
☐	Active	Patton	Mabel	2896999	mpatton@district1.org	
☐	Active	Stargel	Casey	1025697	cstargel@district1.org	

✉ Send Activation Email   👁 View   ✎ Edit   ✓ Activate   ⊘ Deactivate

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6) If an individual has a status of 'Inactive' but will need access to Educator Portal this year, select the checkbox next to the name and click 'Activate'. This will send the activation email and the status will change to 'Pending'. After 20 days, the activation link will expire.

State	Legal First Name	Legal Last Name	Educator Identifier	Email	Organization ID	Organization Level	Organization Name	District Organization ID	User Status
Pennsylvania	Marlow	Amanda	8844383	amarlow@district1.org	4595	SCH	School 1	111222333	Pending
Pennsylvania	Ellen	Druck	5687970	edruck@district1.org	8546	SCH	School 2	111222333	Pending
Pennsylvania	Janice	Crystel	5793125	jcrystel@district1.org	111222333	DT	District 1	111222333	Active
Pennsylvania	Ann	Jenson	4799953	ajenson@district1.org	4595	SCH	School 1	111222333	Inactive
Pennsylvania	Mabel	Patton	2896999	mpatton@district1.org	4595	SCH	School 1	111222333	Active
Pennsylvania	Casey	Stargel	1025697	cstargel@district1.org	8546	SCH	School 2	111222333	Active

1) Verify the accuracy of each person's name and Educator Identifier. The Educator Identifier must be a teacher's PPID. **Email addresses cannot be updated without assistance from the PA Alternate Assessment help desk (alternateassessment@pattankop.net)**. Doing so will corrupt the Training Courses login.

2) To update names or Educator Identifier (PPID), click on the checkbox next to the name and click 'Edit'. In this example, the first and last names are reversed. (Clicking 'View' allows you to see the record but not edit it.)

Verifying Accuracy of Data

Edit User : Enter User Information   ✕

User Information

FIRST NAME: *

Amanda

LAST NAME: *

Marlow

EMAIL ADDRESS: *

amarlow@district1.org

EDUCATOR IDENTIFIER:

8844383

3) Type in the correct names.

Organization & Roles

STATE:*

Pennsylvania ▼

ASSESSMENT PROGRAM:*

Select ▼

ROLE:*

Select ▼

Add

🗑	Default ⋮	State ⋮	Assessment Program ⋮	Role ⋮	District ⋮	School
🗑	◉	Pennsylvania	DLM	Teacher	District 1	School 3

◀

|◀ ◀ Page 1 of 1 ▶ ▶| 1-1 of 1

Save   Cancel

4) Click 'Save'.

State	Legal First Name	Legal Last Name	Educator Identifier	Organization Name	District Organization ID	Building Test Coordinator	Building User	District Superintendent	District Test Coordinator	District User	Global System Administrator	Proctor	Program Administrator	QC Administrator	State Assessment Administrator	State System Administrator	Teacher
Pennsylvania	Marlow	Amanda	8844383	School 1	111222333												X
Pennsylvania	Ellen	Druck	5687970	School 2	111222333												X
Pennsylvania	Janice	Crystel	5793125	District 1	111222333				X								
Pennsylvania	Ann	Jenson	4799953	School 1	111222333												X
Pennsylvania	Mabel	Patton	2896999	School 1	111222333												X
Pennsylvania	Casey	Stargel	1025697	School 2	111222333												X

1) Review each person's role within the system. Different roles have different levels of access to the data. Individuals who will administer the assessment must have the role of 'Teacher'. A person may have multiple roles.

Details about user roles appear in Table 5 beginning on Page 17 in the Data Management Manual located at:

https://dynamiclearningmaps.org/sites/default/files/documents/Manuals_Blueprints/Data_Management_Manual_Pennsylvania.pdf

🏠 | SETTINGS ▾ | MANAGE TESTS ▾ | REPORTS ▾ | DASHBOARD | HELP

View Users | Add User | Upload Users

View Users: Select Criteria

STATE:* Pennsylvania ✕ ▾   DISTRICT: Select ▾   SCHOOL: Select ▾

☑ Include Inactive Users   [Search]

	Status	Last Name ↑	First Name	Educator Identifier	Email	Assessme
☐	Pending	Amanda	Marlow	8844383	amarlow@district1.org	
☐	Pending	Druck	Ellen	5687970	edruck@district1.org	
☑	Active	Crystel	Janice	5793125	jcrystel@district1.org	
☐	Inactive	Jenson	Ann	4799953	ajenson@district1.org	
☐	Active	Patton	Mabel	2896999	mpatton@district1.org	
☐	Active	Stargel	Casey	1025697	cstargel@district1.org	

✉ Send Activation Email   👁 View   ✏ Edit   ✓ Activate   ⊘ Deactivate

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2) To add or change a role, click on the checkbox next to the name and click the 'Edit' button. (Clicking 'View' allows you to see the record but not edit it.)

Edit User : Enter User Information ✕

User Information

FIRST NAME: *
Janice

LAST NAME: *
Crystel

EMAIL ADDRESS: *
jcrystel@district1.org

EDUCATOR IDENTIFIER:
5793125

Organization & Roles

STATE:*
Pennsylvania ▾

ASSESSMENT PROGRAM:*
DLM ▾

ROLE:*
Teacher ▾

DISTRICT:*
District 1 ▾

SCHOOL:*
School 3 ▾

Add

🗑	Default	⋮	State	⋮	Assessment Program	⋮	Role	⋮	District	⋮	School
🗑	⦿		Pennsylvania		DLM		District Test Coordinator		District 1		

Save Cancel

3) To add or change a role, select:
- State: Pennsylvania (default)
- Assessment Program: DLM
- Role
- District
- School

Click 'Add'

Click 'Save'

Organization & Roles

STATE:* Pennsylvania ▼

ASSESSMENT PROGRAM:* Select ▼

ROLE:* Select ▼

[Add]

Each level of access will now be listed under Role.

🗑	Default	:	State	:	Assessment Program	:	Role	:	District	:	School
🗑	●		Pennsylvania		DLM		District Test Coordinator		District 1		
🗑	○		Pennsylvania		DLM		Teacher		District 1		School

◀ | Page 1 of 1 ▶ ▶| | 1-2 of 2

[Save] [Cancel]

4) Roles can be deleted if there is more than one listed and the role is no longer relevant. If the role of Teacher was to be deleted, make sure it is not selected as the Default role. Click on the Delete Icon. A confirmation pop up will appear. Click 'OK'. Click 'Save'.

Confirmation

Are you sure you want to delete this row?

[OK] [Cancel]

New users can be added manually using the online interface or by uploading a template.
- The online interface is easy to use if there are only a few new users.
    - See page 17-18 of this document for 'Adding New Users Manually'.
- The template upload is convenient when several new users are to be added.
    - See page 19 of this document for 'Adding New Users Using Template'.
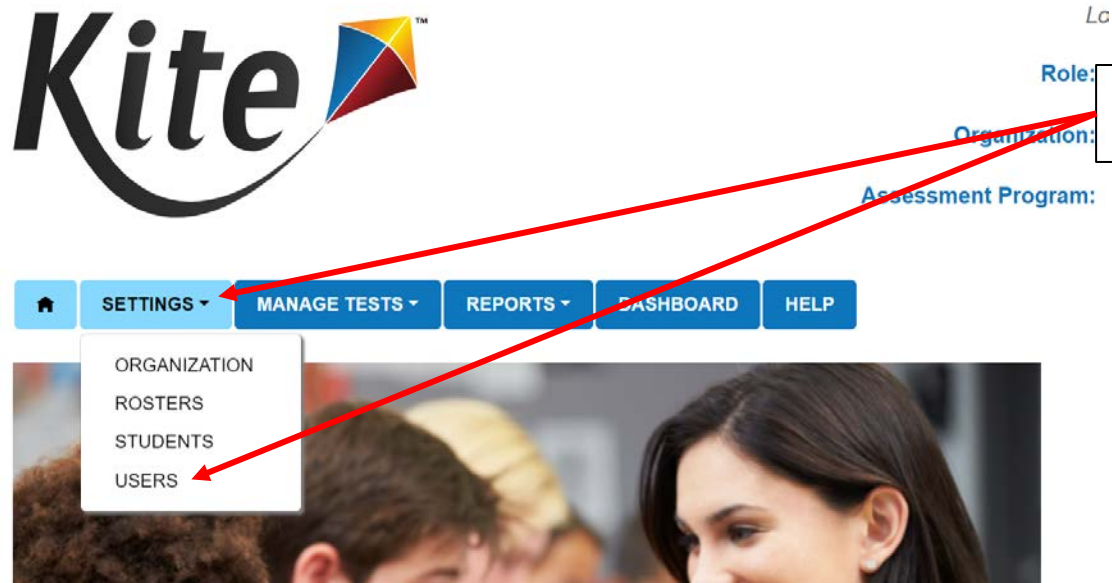
1) To add new users manually, go to Settings and click 'Users'.

🏠 | SETTINGS ▾ | MANAGE TESTS ▾ | REPORTS ▾ | DASHBOARD | HELP

View Users | **Add User** | Upload Users

Save

User Information

FIRST NAME: *

LAST NAME: *

EMAIL ADDRESS: *

EDUCATOR IDENTIFIER:

2) Click on the menu for 'Add User'. Fill in Name, Email and Educator Identifier (PPID).

Under Organizations and Roles, select:
- State: Pennsylvania (default)
- Assessment Program: DLM
- Role
- District
- School

Click 'Add'

Click 'Save'

The activation email will be sent automatically from kite-support@ku.edu

Organization & Roles

STATE:* Pennsylvania ▾

ASSESSMENT PROGRAM:* DLM ▾

ROLE:* Select ▾

DISTRICT:* Select ▾

SCHOOL:* Select ▾

Add

🗑. Default	⋮	State	⋮	Assessment Progr...	⋮	Role	⋮	District	⋮	School
				No records available.						

Adding New Users Using Template

1) To enter new users using the template, download the blank User Template from the DLM Pennsylvania page: https://dynamiclearningmaps.org/sites/default/files/documents/Templates/User_Upload_Template.csv

2) Complete columns A through I. Column H, Secondary Role, can be left blank.

Legal_First_Name	Legal_Last_Name	Educator_Identifier	Email	Organization	Organization_Level	Primary_Role	Secondary_Role	Primary_Assessment_Program
Lois	Abbott	5319086	labbott@district1.org	7216	SCH	TEA		DLM
Matt	Aguilar	4814645	maguilar@district1.org	7216	SCH	TEA		DLM
Ricardo	Allison	4880554	rallison@district1.org	9023	SCH	TEA		DLM

Enter the PPID as the Educator Identifier

Verify the accuracy of the email address to ensure the training courses will be activated properly.

Locate the School Number* on the State Organization Table for Pennsylvania, which is located on the PA page of Dynamic Learning Maps https://dynamiclearningmaps.org/pennsylvania

* If district-level access is being granted (e.g., District Superintendent, District User) use the District Number

Enter SCH for the Organization Level. **

** If district-level access is being granted, use the code DT

Enter the code associated with the role. Adding teachers (TEA) is most common. The full list of codes appears in Table 5 beginning on page 17 of the Data Management Manual.

Enter DLM as the Primary Assessment Program.

School Name: Not used in data upload. Name of the school. Associated with the number in column B.	School Number: Matches *Organization* in User file. Matches *Attendance_School_Program_Identifier* in Enrollment, Roster, and TEC files. Matches *AYP_School_Identifier* in Enrollment file.	District Name: Not used in data upload. Name of the district that the school is assigned to. Associated with the number in column D.	District Number: matches *Attendance_District_Identifier* in the Enrollment and Roster files.
School 1	4595	District 1	111222333
School 2	8546	District 1	111222333
School 3	7216	District 1	111222333
School 4	9023	District 1	111222333

Files must be saved in CSV comma delimited format in order to upload the template into Educator Portal.

Uploading Templates to DLM

Detailed instructions for uploading the template appear on page 47 of the Data Management Manual for PA:

https://dynamiclearningmaps.org/sites/default/files/documents/Manuals_Blueprints/Data_Management_Manual_Pennsylvania.pdf

In addition, a brief video demonstrating how to upload templates can be viewed at:

https://dynamiclearningmaps.org/uploading-templates

The process for uploading the User Template is also demonstrated in Module 1: Updating DLM users.

Note: Several resources mentioned in these instructions can be accessed directly through https://dynamiclearningmaps.org/pennsylvania

Note: Kite Educator Portal will not be available to upload Student templates until January 5th. Any templates uploaded prior to January 5th will be deleted within the system when the data rolls over on January 3rd. User templates may be uploaded beginning on December 3rd.