Guidance on Enrollment Transfer Requests in PearsonAccess^{next} (PAN)

Schools will use the enrollment transfer feature in PAN for transfer students who need to be registered for testing at their new school but are still "assigned" to their previous school in PAN. The enrollment transfer process allows the new school to "request" a transfer and the former school to "approve" the transfer. When a student record is transferred in PAN, all student information and any PNP information that the former school entered will also transfer.

The new school must also ask their district SIMS contact to update the student enrollment and demographic data in the Department's Student Information Management System (SIMS). (To find the district SIMS contact, go online to School and District Profiles, select "SIMS Contact" from the Function menu, and click "Get Results.")

PAN Users with the role of principal/school test coordinator or district test coordinator have permissions in PAN to manage enrollment transfers. More information about enrollment transfer permissions can be found in the User Role Matrix.

One person per organization can be assigned to receive enrollment transfer notifications via email. To do this, go to **Setup > Organizations > Create/Edit Organizations** and fill in the field labeled **Transfer Coordinator Email**. The screenshot below shows the relevant section of the Create/Edit Organizations page.

Questions may be directed to the MCAS Service Center at 800-737-5103.

Request Enrollment Transfer – A new student transfers into your school

When a student transfers into a new school after the initial SR/PNP process, the new school will need to search for the student record and, if necessary, request an enrollment transfer. For one student or a small number of students, use the PAN user interface. If you need to request a large number of enrollment transfers, please see the instructions for using an Enrollment Transfer File, which begin on page 5 of this document.

Requesting an Enrollment Transfer through the PAN User Interface

First, the new school will need to search for the student record in PAN, following step 1 below. The results of this search will determine whether they need to request an enrollment transfer (in both steps 1 and 2 below).

Step 1: Search for the student record:

1. Log in to PAN and select the appropriate test administration.
2. Go to **Setup** and then **Students**.
3. Click **Select Tasks.**
4. Check **Create/Edit Students, Register Students, Manage Student Tests, Manage Enrollments**, and then click **Start**.
5. On the "Create/Edit Students" screen, enter the student's demographic information. Enter all of the requested information, including the SASID. This information must match the information in SIMS.
6. Click **Create.**

If a green "Success" banner appears, you do <u>not</u> need to complete an enrollment transfer request. You can move on to registering, enrolling, and assigning tests for the student. Do not move on to step 2 below.

If the student record matches an existing record in PAN, the following banner will appear: "Error: The student is currently enrolled to another organization. To enroll this student in your organization please create an Enrollment Transfer Work Request." **If this error banner appears, you will need to create an enrollment transfer request. Move on to step 2 below.**

Step 2: If necessary, create an enrollment transfer request:

1. From **Setup**, select **Work Requests**.
2. Click **Select Tasks**, select **Request/Delete Enrollment Transfer**, and click **Start**.
3. Type and select the student details to search for a student to transfer and click **Search**. Fill in the required fields with the exact information that the student file contains.
4. Under **Change Enrollment To**, select the organization to which you want to transfer the student.
5. Click **Send Request**.

The student will be transferred into your school in PAN after the request is approved by the student's former school**.** Further information can be found on the Request Enrollment Transfer page in the [PAN User Guide](#).

Check the status of your Enrollment Transfer Work Request

Go to **Setup > Work Request** and use the Status filters found on the left side of the screen to view the status of your Enrollment Transfer Work Request.

If your enrollment transfer request is not approved within 24 hours, please contact the MCAS Service Center at 800-737-5103 for assistance.

Former School: Authorize Enrollment Transfer – A student transfers <u>out of</u> your school.

When a student transfers <u>out of</u> a school, that school will need to authorize the enrollment transfer. A system email is sent to the person listed in the "Transfer Coordinator Email" field in PAN. A sample email is below:
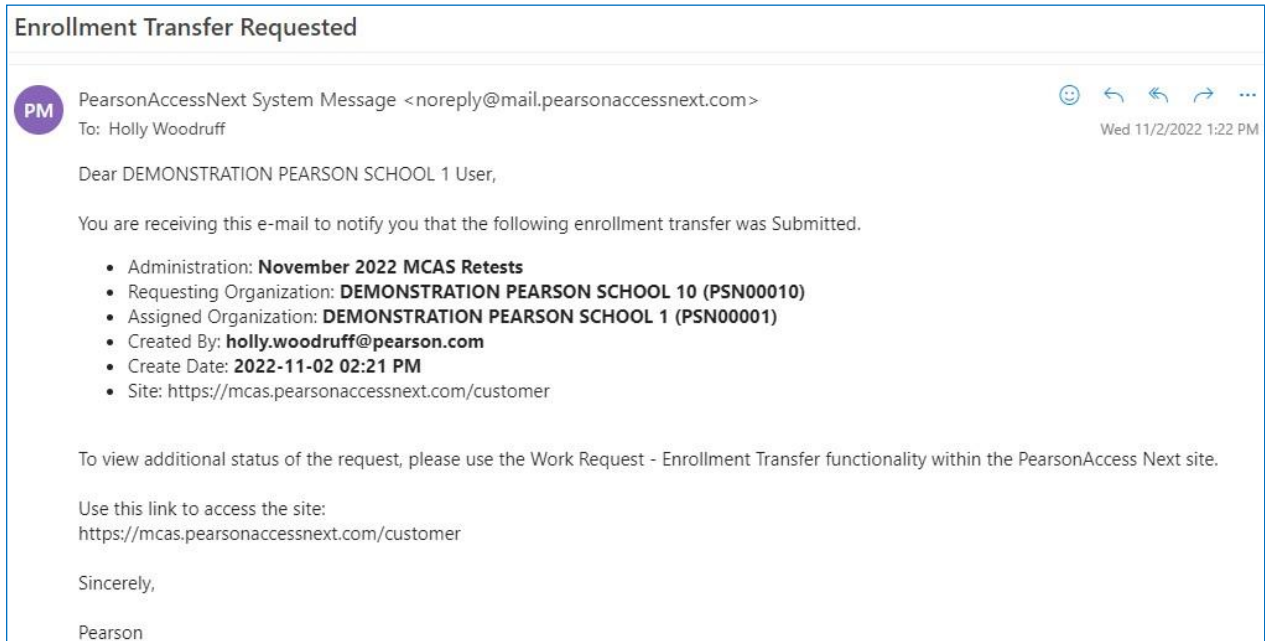
When the new school creates the enrollment transfer request, all school and district test coordinators for the former school will also see the color of the notification bell on the PAN home page change to red.

When they click this bell, PAN will display the current enrollment transfer requests.
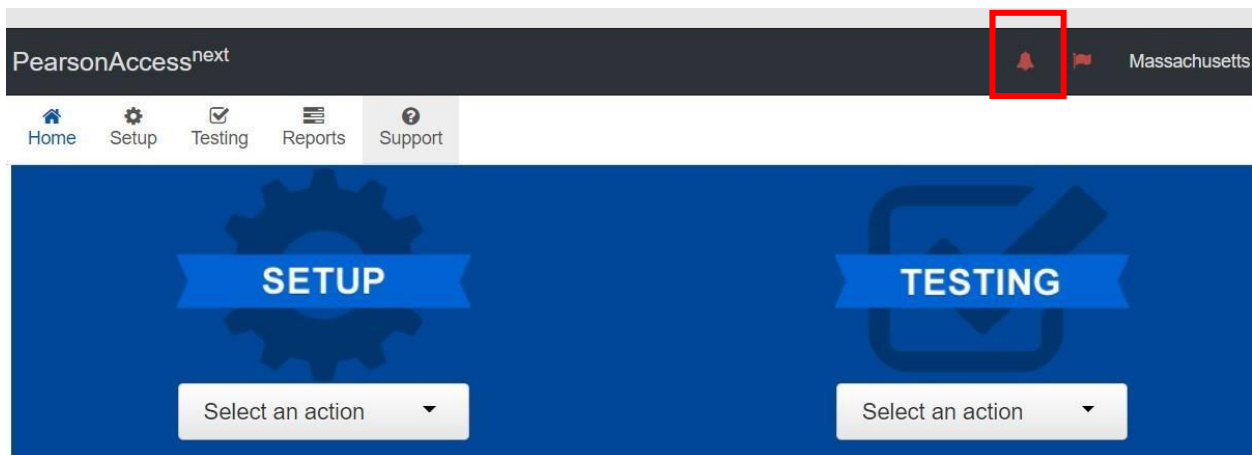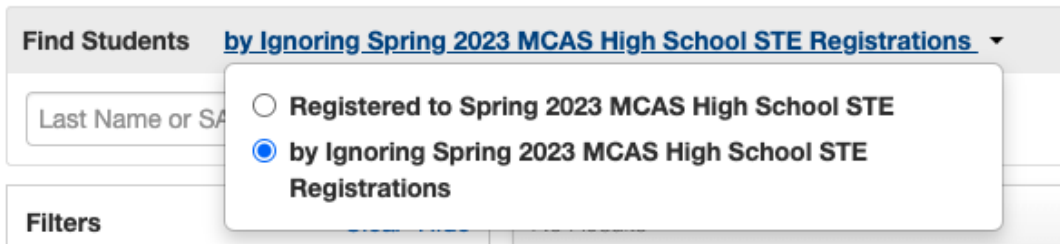
Approve/Reject Enrollment Transfers
1. From **Setup**, select **Work Requests**.
2. Click the **Work Type** filter and select **Enrollment Transfer**.
3. Select an enrollment transfer request(s).
4. Click **Select Tasks**, select **Approve/Reject Enrollment Transfer**, and click **Start**.
5. Review the enrollment request and **Approve** or **Reject**.

Note: Further information can be found on the Authorize Enrollment Transfer page in the [PAN User Guide](#).

New School: Steps After an Enrollment Transfer into your School is Approved

Refer to this section for steps the **new school** should take once an enrollment transfer request is approved:
1. Click on **Setup** and then **Students.**
2. Search for and select the student record.
   a. If you are unable to locate the student, switch to the "by ignoring the admin" option.

Find Students **by Ignoring Spring 2023 MCAS High School STE Registrations** ▾

○ Registered to Spring 2023 MCAS High School STE
● by Ignoring Spring 2023 MCAS High School STE Registrations

   Once you have located and selected the student record, you will need to check whether the student has already been assigned to a Transfer PAN Session. If the student was assigned to a PAN Session by their previous school, the student will automatically be assigned to a Transfer PAN Session in your school. **Please note that Transfer Sessions in PAN cannot be prepared or started.** Student records must be moved from the Transfer Session to another PAN Session before the student can sign in to TestNav.

   b. Click on the information icon next to the student name. 🛈
   c. Click on **Sessions**.

   Details | Organization Enrollments | Test Administration Registration | Student Tests | **Sessions**

   d. If the student has been automatically assigned to a PAN Session, it will be named "Transfer" followed by the grade and subject (e.g., Transfer-Grade 3 Mathematics). If this is the case, follow the steps in the [Moving Students Between Sessions](#) training module to move the student from one PAN Session to another.
   e. If the student has not been automatically assigned to any PAN Sessions, follow the directions in steps 3 and 4.
3. Register and assign tests to the student. Remember to assign the student any necessary accommodations. Go to **Select Tasks** > select **Register Students** and **Manage Student Tests > Start.** Fill out the appropriate fields on these tabs.
4. Add the student to PAN Sessions. If applicable, assign the student to PAN Sessions that

correspond with their accommodations (e.g., human read aloud).

Notes:
- If the student's testing mode has changed from CBT (computer-based testing) at the former school to PBT (paper-based testing) at the new school, the student will need to be removed from the Transfer Session before the test mode can be updated on the **Manage Student Tests** screen.

- If the student's testing mode was PBT at the former school and is now CBT at the new school, the Transfer Session will **not** be created. Go to the **Manage Student Tests** page for the student, update the testing mode to CBT, and place the student in a PAN Session.

New School: Instructions for Managing a Large Number of Transfer Students – Using the Enrollment Transfer File Import

If your organization needs to submit Enrollment Transfer Requests for a large number of students, it is recommended to import an Enrollment Transfer file instead of submitting requests through the user interface.

First, you will need to export the Enrollment Transfer File Template and fill in the required information.

1. Choose the administration from the drop-down in the top banner of PearsonAccess^next.
2. Go to **Setup > Import/Export Data**.
3. Under **Select Tasks**, choose **Import/Export Data**. Select **Start**.
4. In the **Type** drop-down, select **Enrollment Transfer Export**.
5. Select **Process**. Click **Refresh** until you are able to download the file.
6. Once you have downloaded the file, populate the **Enrollment Transfer File** using the **Enrollment Transfer File Field Definitions**, beginning on page 6 of this document. Save the file to your computer as a .CSV.
   a. For **Column M: Action**, fill in "C" to create the enrollment transfer requests.
   Note: If you received the error "The student can only be enrolled in 1 organization" while importing the SR/PNP file, you can use the SR/PNP file to assist in filling in the Enrollment Transfer File Template. Use the following table as a field crosswalk to compare the Enrollment Transfer File data to the SR/PNP file.

Enrollment Transfer File	SR/PNP File
Column A - Student Code	Column C – SASID
Column C - Student Last Name	Column E – Last Name
Column D - Student First Name	Column F – First Name
Column F - Student Date of Birth	Column I – Date of Birth
Column J - Transfer to Organization Code	Column B – School Code

Once you have edited and saved your Enrollment Transfer File, you will import the updated file into PAN.
1. Go to **Setup > Import/Export Data.**
2. Select **Import/Export Data** under the **Select Tasks** drop-down and click **Start**.
3. Under **Type**, select **Enrollment Transfer Import**.
4. Click **Choose File** and select the .CSV file that you just edited and saved.
5. Click **Process**.

Note: The students will be transferred after the requests are approved by the previous schools. No updates to student data are made from the Enrollment Transfer Import file.

Enrollment Transfer File Field Definitions

CSV Column	Field Name	Required	Field Length	Description	Rules Enter Values in the data file
A	Student Code	N	50	A unique numeric code given to each Massachusetts publicly funded student	Import/Export
B	Student Local Code	N	50	A unique number or alphanumeric code assigned to a student by a school system or any other entity.	Import/Export
C	Student Last Name	N	100	The student's full legal last name as it appears in SIMS.	Import/Export
D	Student First Name	N	100	The student's full legal first name as it appears in SIMS.	Import/Export
E	Student Middle Name	N	100	A student's full legal middle name as it appears in SIMS.	Import/Export
F	Student Date of Birth	N	50	The year, month, and day on which the student was born. (YYYY-MM-DD)	Import/Export
G	Student Gender	N	1	The gender of the student. F = Female M = Male N = Non-Binary	Import/Export
H	Transfer from Organization Code	Y	100	The school code the student moved **from**.	Import/Export Field is optional as long as student is only enrolled in one organization. If student is enrolled in one organization and this organization is blank, that organization will be used. If this field is not populated and student is enrolled in more than one organization an error will result
I	Transfer from Organization Name	N	200	The school name the student moved **from**.	Import/Export

CSV Column	Field Name	Required	Field Length	Description	Rules Enter Values in the data file
J	Transfer to Organization Code	Y	100	The school code the student moved **to** that will be administering the test for the student.	Import/Export
K	Transfer To Organization Name	N	200	The school name the student moved **to** that will be administering the test for the student.	Import/Export
L	Reject Reason	N	3000	Only Required if Action field is "R"	Import Only
M	Action	Y	1	This field will be blank on Export	Import Only C= Create A = Approve P = Preapproved R = Reject D = Delete