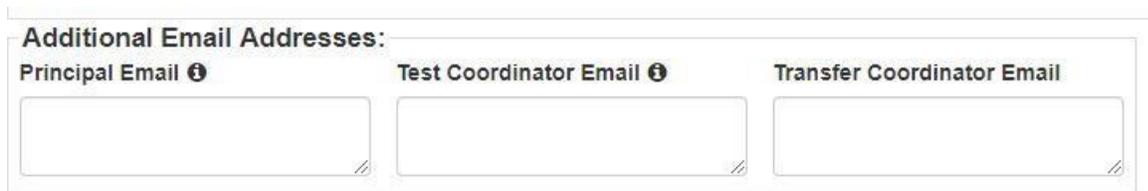


## Guidance on Enrollment Transfer Requests in PearsonAccess Next (PAN)

Schools will use the enrollment transfer feature in PAN for transfer students whose SR/PNP data reflects their former school, and the new school needs to register them for testing. The enrollment transfer process allows the new school to "request" a transfer and the former school to "approve" the transfer. As a reminder, the new school must ensure that their district updates students' enrollment and demographic data in the Student Information Management System (SIMS).

When a student record is transferred in PAN, all student information and any PNP information that the former school entered will also transfer. Once the transfer is approved by the former school, the student's test is placed in a new transfer PAN Session for the new school, which then needs to be moved into another PAN Session so that the student can complete testing.

School principals/test coordinators and district test coordinators are given permission in PAN to manage enrollment transfers. More information about enrollment transfer permissions can be found in the [User Role Matrix](#). Although anyone assigned to these roles can handle enrollment transfers, users can go to **Setup > Organizations > Create / Edit Organizations** to initially assign a person via email address to receive enrollment transfer notifications for a school. The screenshot below shows the relevant section of the Create / Edit Organizations page.



The screenshot shows a section titled "Additional Email Addresses:" with three input fields. The first field is labeled "Principal Email" with an information icon (i) to its right. The second field is labeled "Test Coordinator Email" with an information icon (i) to its right. The third field is labeled "Transfer Coordinator Email" with an information icon (i) to its right. Each field is a rectangular box with a small diagonal line in the bottom right corner, indicating it is a text input field.

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 first search for the student record in PearsonAccess Next, 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 information that is requested, including the SASID. This information must match the information in SIMS.
6. Click **Create**.

If a green "Success" banner appears, you do not need to complete an enrollment transfer request. You can move on to registering, enrolling, and assigning tests for the student.

If the student record is matched to 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.**

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

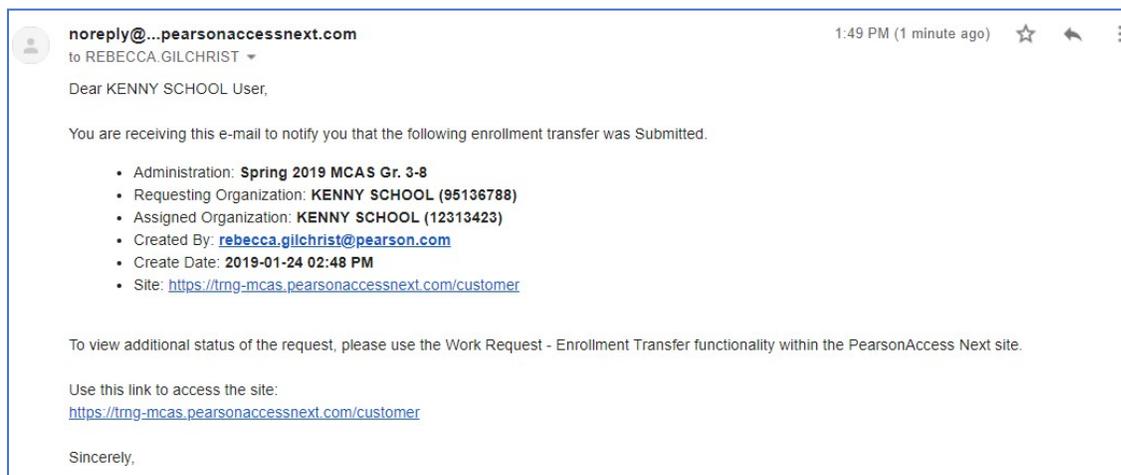
1. From **Setup**, select **Work Requests**.
2. Click **Select Tasks**, select **Request/Delete Enrollment Transfer**, and click **Start**.
3. Type and select the student details to search for a student to transfer, and click **Search**. Fill in the required fields with the exact information that the 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. If your enrollment transfer request is not approved within 24 hours, please contact the MCAS Service Center at 800-737-5103.

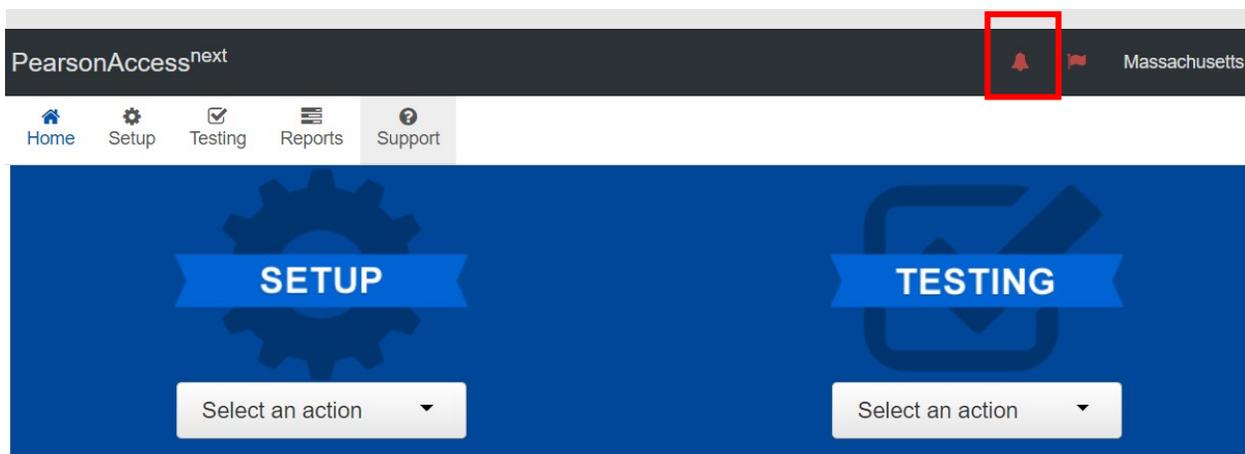
Further information can be found under Request Enrollment Transfer in the [PAN User Guide](#).

## **Authorize Enrollment Transfer – A student transfers out of your school**

When a student transfers **out of** 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 notification bell on the PearsonAccess Next home page change to red. When they click this bell, current enrollment transfer requests will appear.



### 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**.

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

### New School: Steps After Enrollment Transfer 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, because the other school may have removed test assignments and registrations but left the student enrolled in their administration.



- b. If you're then able to locate the student, you will need to register and assign tests to the student record. Remember to assign the student any necessary accommodations. Go to **Select Tasks > Register Students > Manage Student Tests > Start**. Fill out the appropriate fields on these tabs accordingly.

3. Add the student to PAN Sessions. If applicable, be sure to assign the student to Sessions that correspond with their accommodations (e.g., human read aloud). If the student was already assigned to PAN Sessions in their previous school, then further steps are required:
  - a. If the student was assigned to a PAN Session by their previous school, then a new PAN Session will automatically be created in the new school, and student test assignments will be automatically assigned to these PAN Sessions.
  - b. **The PAN Sessions for the new school will be named “Transfer”** followed by the grade and subject (for example, Transfer-Grade 3 Mathematics).
  - c. **Please note that Transfer Sessions in PAN cannot be prepared or started.** Students will need to be moved from the Transfer Session to another PAN Session to be able to take a test.
  - d. Refer to the [Moving Students Between Sessions](#) training module for instructions on moving a student from one PAN Session to another.

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.