

Guidance on Enrollment Transfer Requests in PearsonAccess Next (PAN)

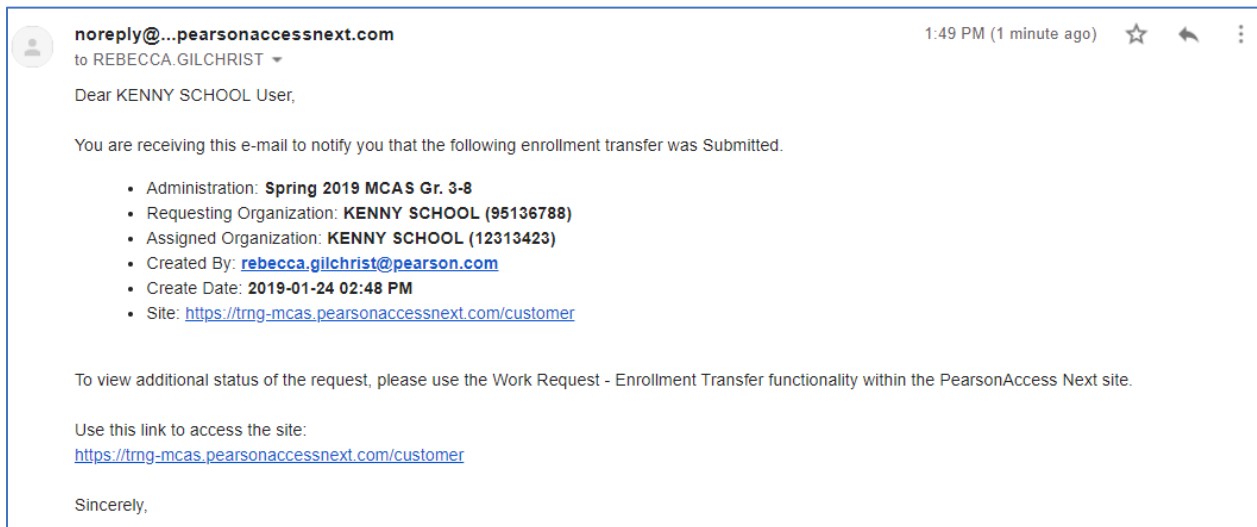
New for 2019, schools will use the enrollment transfer feature in PAN for students who transfer into or out of their school after the initial SR/PNP. When a student record is transferred in PAN, all student information and PNP information that had been entered for that student will also transfer. Once the transfer is approved by the original 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 test.

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

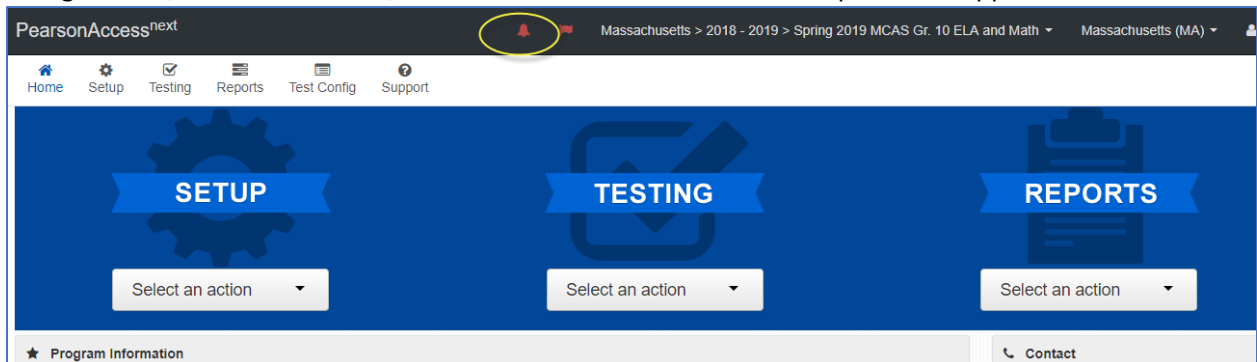
School principals/test coordinators and district test coordinators are given permission in PAN to manage enrollment transfers. More information about enrollment transfer permissions can be found in the user role matrix (<http://mcas.pearsonsupport.com/pearsonaccessnext/>).

Notification to Schools

When a student transfer request is made, a system email message is sent to the enrollment transfer coordinator(s) at the other school. (Note- the contact information for enrollment transfer notification is set up at the org level and can be updated on the organization information screen. A sample email is below:



Also when a transfer request is made, the notification bell on the PearsonAccess Next home page will change to red, and when clicked, current enrollment transfer work requests will appear.



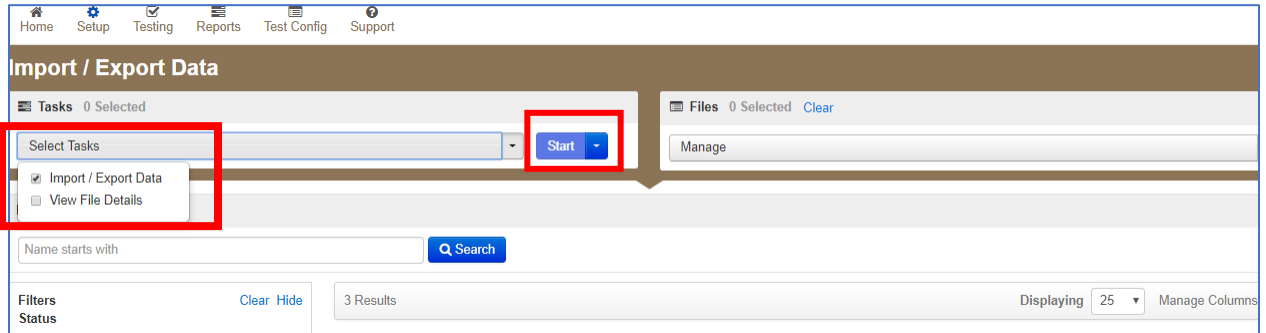
Enrollment Transfer for a Small Number of Students

Follow the steps in the [PearsonAccess Next Online Support](#) for a small number of requests.

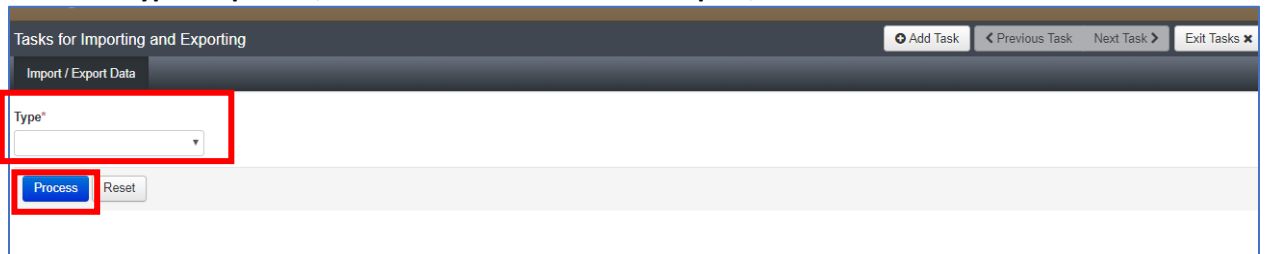
Enrollment Transfer for a Large Number of Students

Steps to approve a large number of requests in PAN are shown below (only district test coordinators have the ability to do the file import/export).

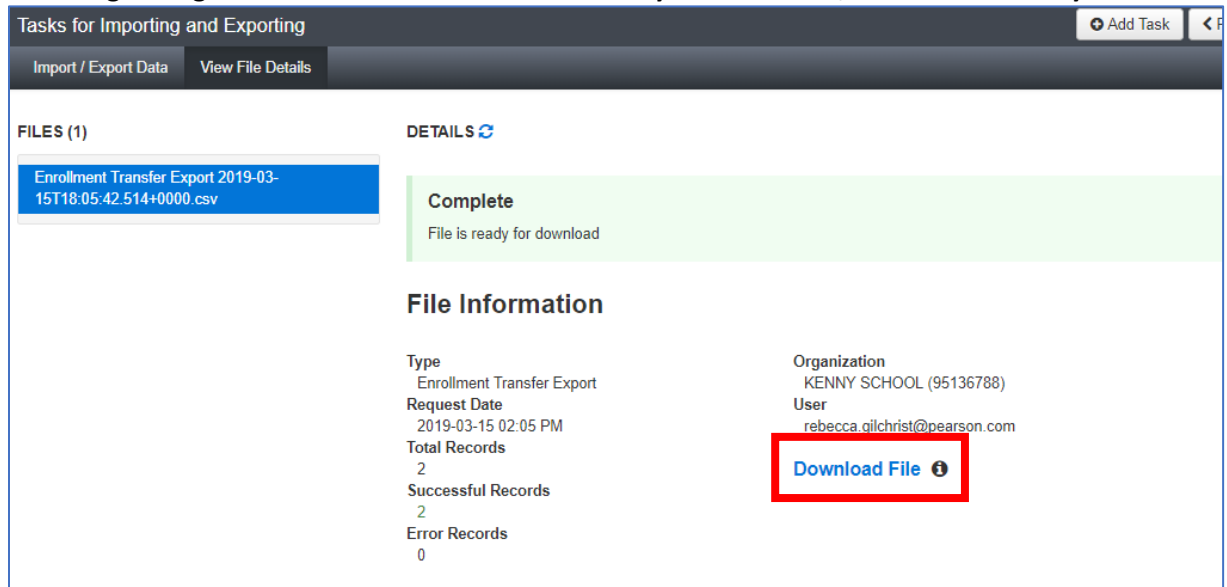
1. Setup > Import/Export Data > Select Tasks Import/Export Data > Start



2. In the file type dropdown, choose enrollment transfer export, and click "Process."



3. A message in a green banner will state the file is ready for download; download it locally.



- After clicking “Download File,” the file should open in Excel. Update column M: add an “A” to approve the request or an “R” to reject the request. If you reject a request, you also need to add the reason to column L. Save file in the CSV format. Below is a sample file with columns M and L updated.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	Student C	Student L	Student L	Student F	Student V	Student D	Student G	Transfer F	Transfer F	Transfer To Organi	Transfer To Organizatio	Reject Reason	Action			
2	1.16E+09	STUDENT	NEW		##### F		95136788	KENNY SC		12313423	KENNY SCHOOL		A			
3	3.65E+09	STUDENT	NEW		##### M		95136788	KENNY SC		12313423	KENNY SCHOOL	did not move	R			
4																
5																
6																
7																
8																
9																

- Follow step 1 again. In the file type dropdown, choose “Enrollment Transfer Import.” Click “Choose File” to select your saved file, and click “Process.” Note: There is no need to add additional emails or check “Ignore Error Threshold.”

Tasks for Importing and Exporting

Import / Export Data

Type*

Enrollment Transfer Import

Source File

Choose File Enrollment ...14+0000.csv

Additional e-mails

Enter a valid e-mail address

Ignore Error Threshold

Process Reset

6. Once the file has processed, review the information in the “File Information” section to confirm that all records processed as planned. Review any errors and re-import the file.

DETAILS 

Complete

Saved information for all records in the file.

File Information

Type

Enrollment Transfer Import

Name

Enrollment Transfer Export 2019-03-15T18_05_42.514+0000.csv

Request Date

2019-03-15 02:17 PM

Total Records

2

Successful Records

2

Error Records

0

Organization

KENNY SCHOOL (95136788)

User

rebecca.gilchrist@pearson.com

[Download File](#) ⓘ

[Download Students Created](#) ⓘ