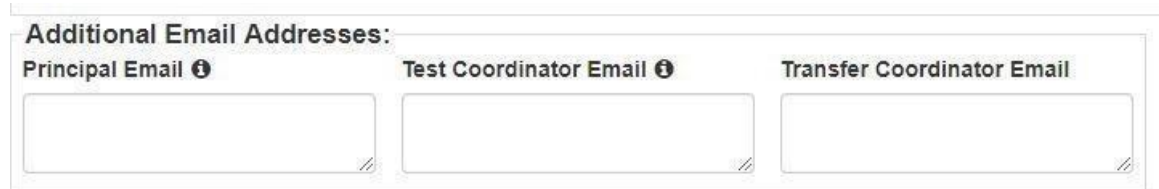


## Guidance on Enrollment Transfer Requests in PearsonAccess<sup>Next</sup> (PAN)

Schools will use the enrollment transfer feature in PAN for transfer students whose Student Registration/Personal Needs Profile (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. 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.”)

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** in PAN 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) and a small 'X' icon. The second field is labeled "Test Coordinator Email" with an information icon (i) and a small 'X' icon. The third field is labeled "Transfer Coordinator Email" with an information icon (i) and a small 'X' icon. All fields are currently empty.

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 request an enrollment transfer. This can be done through the user interface, which is recommended for a small number of students. 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 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. Further information can be found on the Request Enrollment Transfer page in the [PAN User Guide](#).

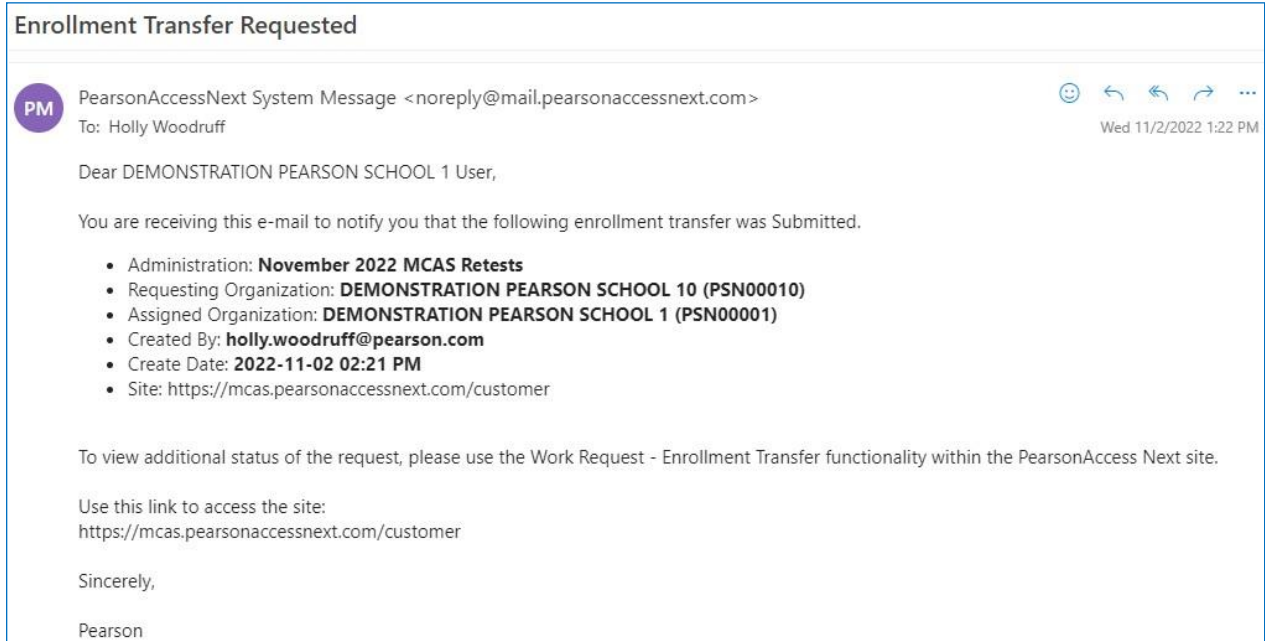
**Check the status of your Enrollment Transfer Work Request**

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.**

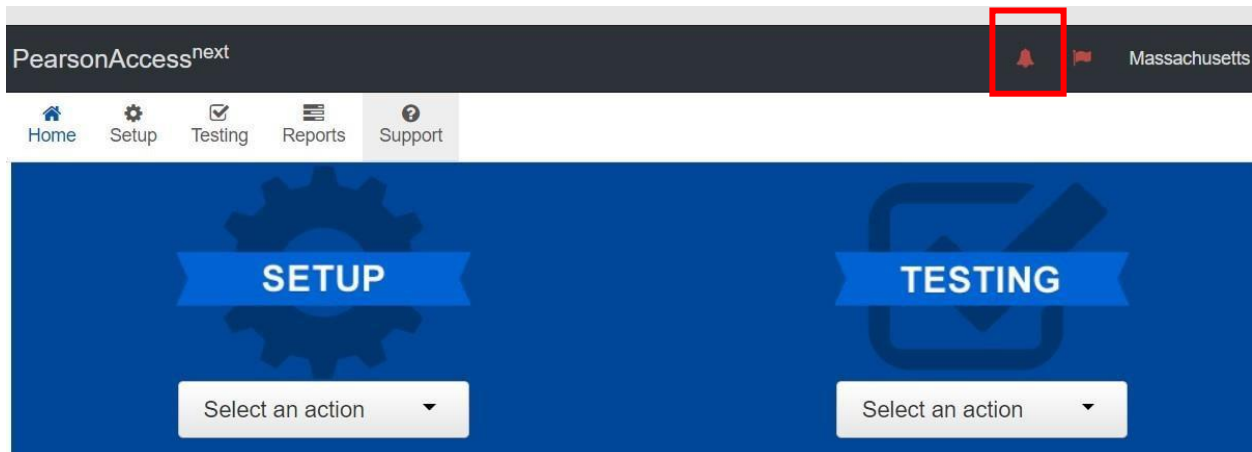
## Authorize Enrollment Transfer – A student transfers out of your school.

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 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

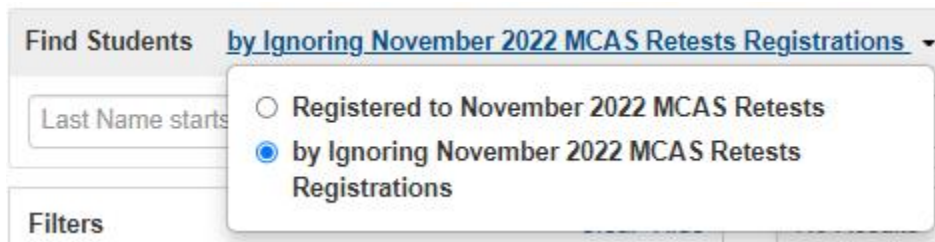
1. From **Setup**, select **Work Requests**.
2. Click the **Work Type** filter and select **Enrollment Transfer**.
3. Select an enrollment transfer request(s).
4. Click **Select Tasks**, select **Approve/Reject Enrollment Transfer**, and click **Start**.
5. Review the enrollment request and **Approve** or **Reject**.

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


### New School: Steps After 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.



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, 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. **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 students can sign in to TestNav.

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



- d. If the student has been automatically assigned to a Session, the PAN Sessions will be named “Transfer” followed by the grade and subject (for example, Transfer-Grade 3 Mathematics). If this is the case, follow the steps in the [Moving Students Between Sessions](#) training module for instructions on moving a student from one PAN Session to another. Do not follow steps 3 and 4 below.

- 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 accordingly.
4. Add the student to PAN Sessions. If applicable, be sure to 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.

**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<sup>next</sup>.
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.

<b>Enrollment Transfer File</b>	<b>SR/PNP File</b>
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 borne in common by members of a family.	Import/Export
D	Student First Name	N	100	The student's full legal first name that was given at birth, baptism, or through legal change.	Import/Export
E	Student Middle Name	N	100	A student's full legal middle name that was given at birth, baptism, or through legal change.	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

CSV Column	Field Name	Required	Field Length	Description	Rules Enter Values in the data file
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 <b>from</b> .	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 <b>from</b> .	Import/Export
J	Transfer to Organization Code	Y	100	The school code the student moved <b>to</b> that will be administering the test for the student.	Import/Export
K	Transfer To Organization Name	N	200	The school name the student moved <b>to</b> 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