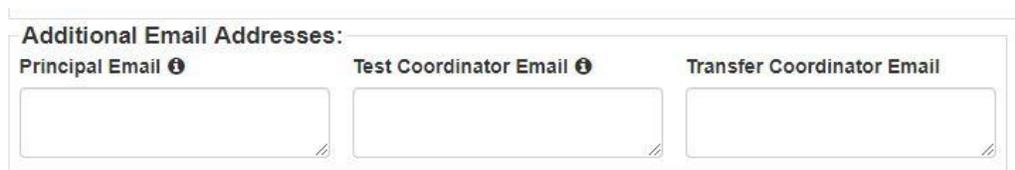


Guidance on Enrollment Transfer Requests in PearsonAccess Next (PAN)

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 (see the "What to Do After a Transfer is Approved" section below for details).

Questions may be directed to the RICAS Service Center at 855-222-8936.

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://ricas.pearsonsupport.com/pearsonaccessnext/>). 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 requests 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. The second field is labeled "Test Coordinator Email" with an information icon. The third field is labeled "Transfer Coordinator Email" with an information icon. Each field is empty and has a small icon in the bottom right corner.

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 PAN. The results of this search will determine whether they need to request an enrollment transfer.

Step 1: Search for the student record:

1. Log into 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 the eRIDE enrollment census.
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 an error banner appears, the student record already exists in PAN in another school, and you will need to create an enrollment transfer request using Step 2 below.

Step 2: Create an enrollment transfer request:

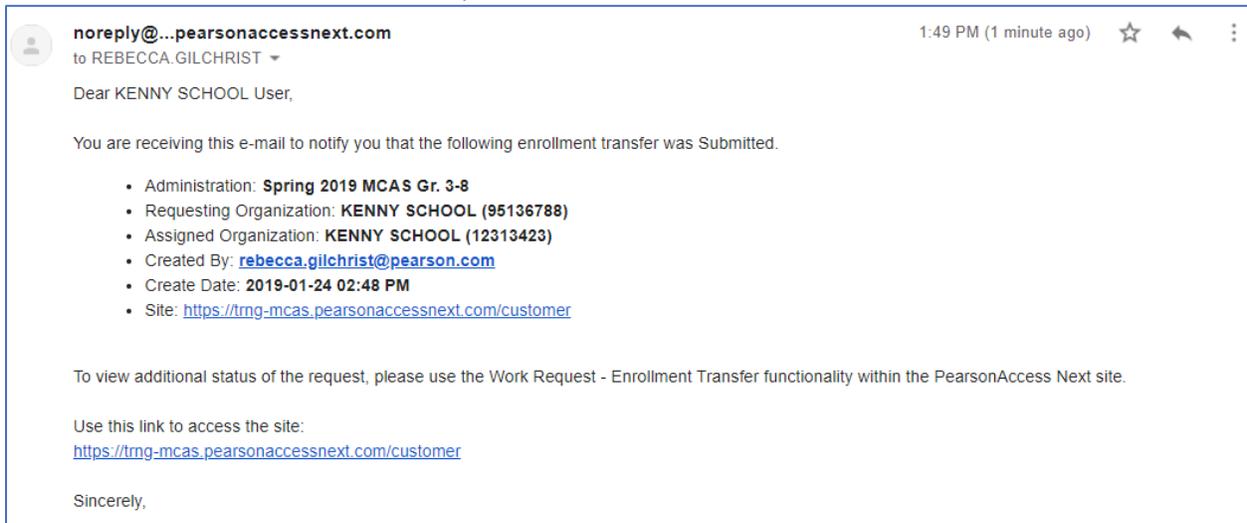
1. From **Setup**, select **Work Requests**.
2. Click **Select Tasks**, select **Request / Delete Enrollment Transfer**, and click **Start**.
3. Type and select the student details to search for a student to transfer, and click **Search**. Fill in the required fields with the exact information that the 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 previous school (see the next section). If your enrollment transfer request is not approved within 24 hours, please contact the RICAS Service Center at 855-222-8936.

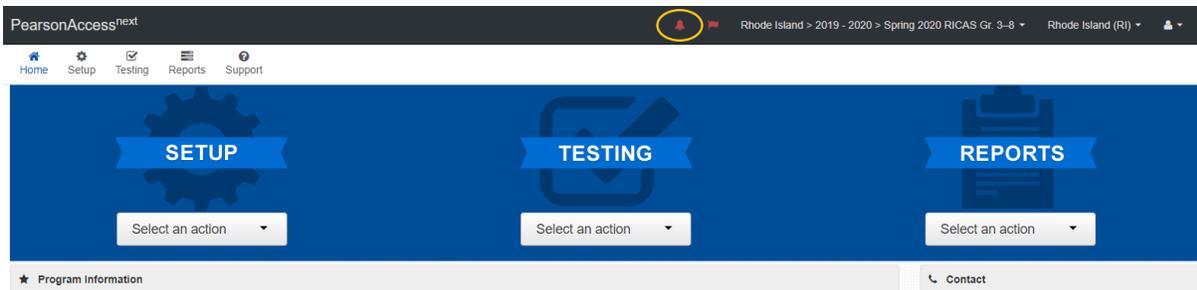
Further information can be found under Request Enrollment Transfer in the [PAN User Guide](#).

Notification to Schools

When a student transfer request is made, a system email is sent to the person listed in the "Transfer Coordinator Email" field in PAN. A sample email is below:



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



There are two ways to authorize enrollment transfers. For a small number of students, manually authorizing the requests in PAN is best. For a large number of students, a district may want to use the import/export feature. Both ways are covered in the next sections.

Authorizing Enrollment Transfers for a Small Number of Students

Follow the steps below to authorize a small number of requests:

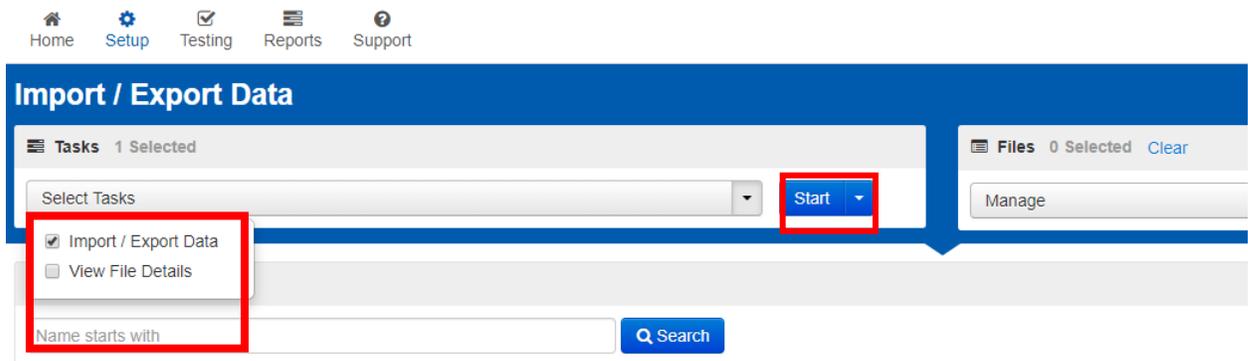
1. From **Setup**, select **Work Requests**.
2. Click the **Work Type** filter and select **Enrollment Transfer**.
3. Select an enrollment transfer request(s).
4. Click **Select Tasks**, select **Approve / Reject Enrollment Transfer**, and click **Start**.
5. Review the enrollment request and **Approve**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

These steps are also provided in this PAN Online Support [module](#).

Authorizing Enrollment Transfers 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).

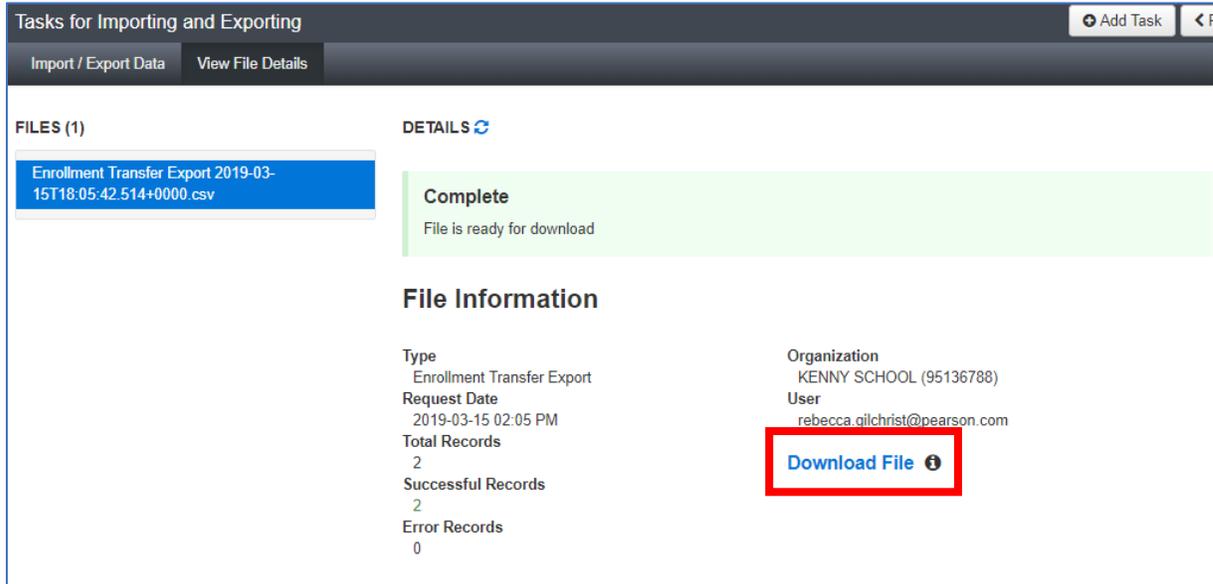
1. Setup > Import / Export Data > Select Tasks Import / Export Data > Start



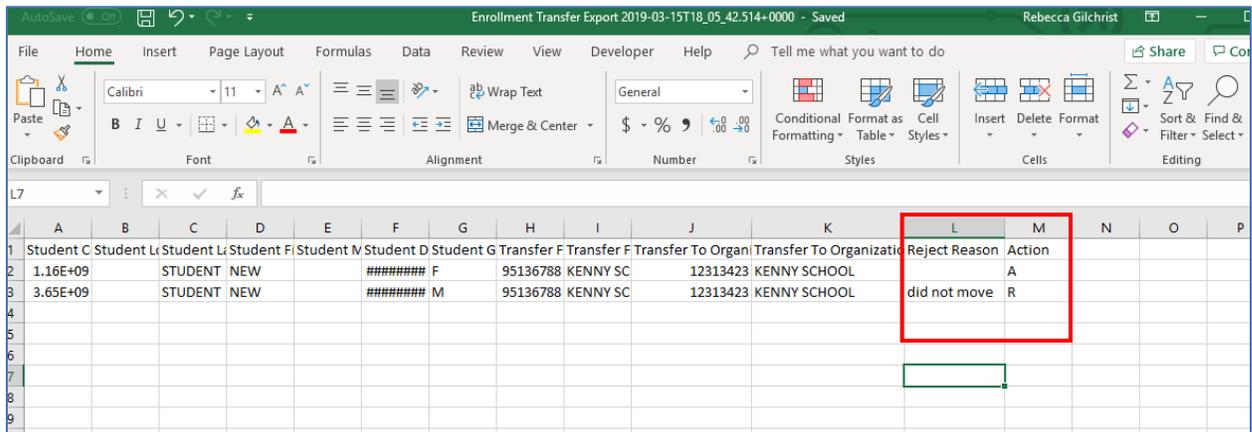
2. In the file type dropdown, choose enrollment transfer export, and click "Process."



- 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.



5. 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](#)

What to do After a Transfer is Approved

Refer to this section for details on what to do at the new school 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, the transfer was still needed but you will need to register and assign tests to the student record. Go to **Select Tasks > Register Students > Manage Student Tests > Start**.
3. In addition, if the student was scheduled for online testing, he or she will need to be moved to a new session in PAN.
 - 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 original 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 original 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.