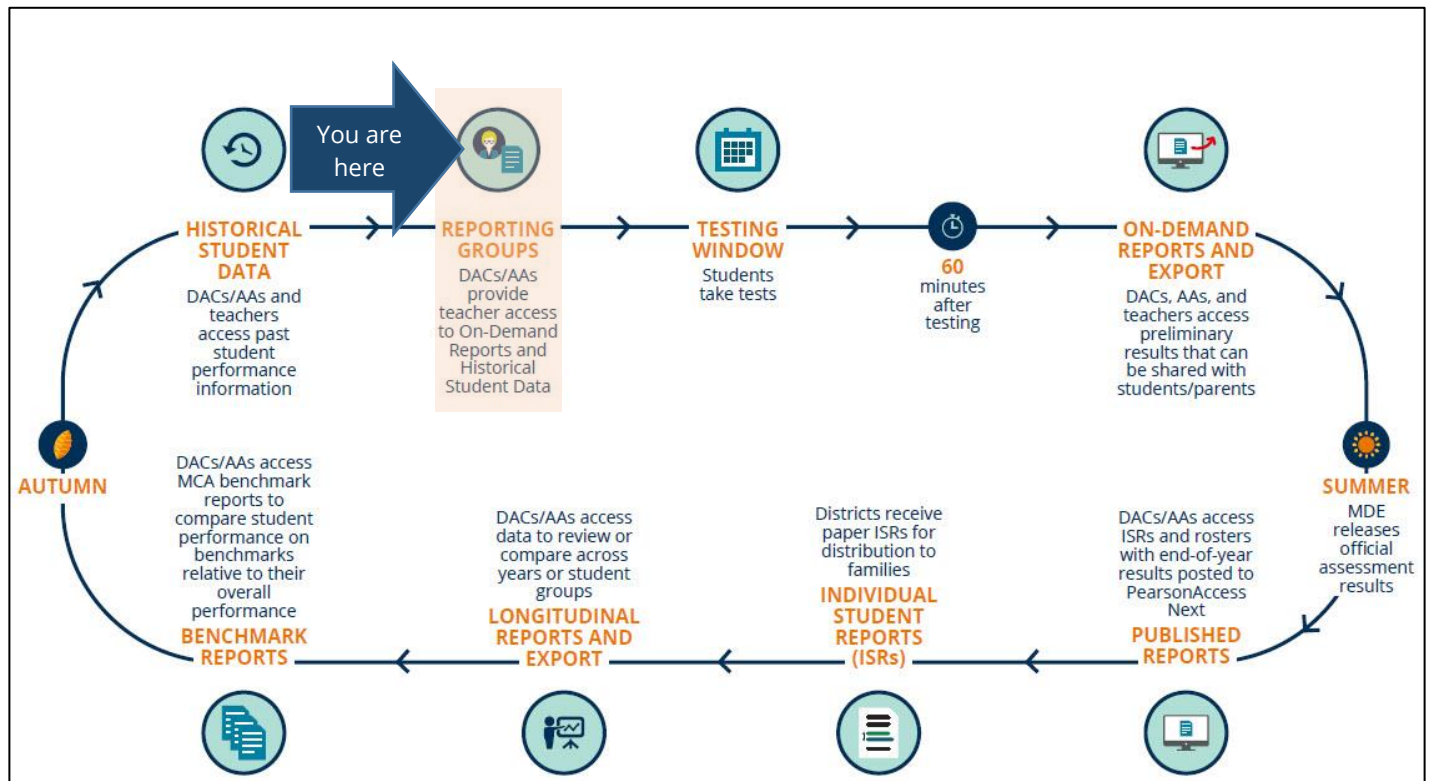


Reporting Groups User Guide

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This guide provides instructions for creating reporting groups manually or by importing files to PearsonAccess Next.



Overview

Reporting groups are created in PearsonAccess Next specifically for teachers (i.e. users with the Test Monitor/Data Entry or MTAS Score Entry role in PearsonAccess Next) to access their students' results within a test administration for On-Demand Reports and Historical Student Data. **Teachers must be assigned to reporting groups for a test administration in order to access student results.**

Users with District Assessment Coordinator (DAC) or Assessment Administrator (AA) user roles can begin creating reporting groups for MCA and MTAS 2019 in PearsonAccess Next on Jan. 28, 2019. Reporting groups can be created and updated throughout the test administration. Reporting groups are removed from PearsonAccess Next when final student results are made available in late August.

Note: Some changes (e.g., grade, school, test assigned) to the student's information in Pretest Editing in Test WES may remove the student from a reporting group(s) and they will need to be re-assigned to reporting group(s) using one of the methods outlined below.

Note: Changes to a student's organization (district or school) will automatically remove that student from a reporting group(s). Students will need to be re-assigned to reporting group(s) in their current organization using one of the methods outlined below.

User Roles

Whether the user needs to be assigned to a reporting group depends on the user role:

- Test Monitor/Data Entry or MTAS Score Entry user roles: These users must be assigned to reporting groups to access reports. Users with the DAC or AA user roles create and assign reporting groups.
- DAC and AA user roles: Reporting groups should not be assigned to these users as they have access to all reports for their assigned organization.

Test Monitor/Data Entry or MTAS Score Entry users must also be assigned to the organization (school or district) where the Reporting Groups are created. DACs and AA should verify that Test Monitor/Data Entry or MTAS Score Entry users are assigned to the correct organization for that Reporting Group.

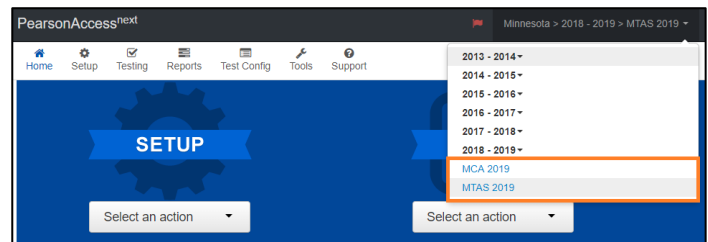
Note: When a DAC or AA updates a user's organization, any reporting groups associated with the old organization will be removed; if the user is deleted, the reporting groups will be removed as well.

Report Access by User Role

	Longitudinal Reports and Export	Historical Student Data	On-Demand Reports	Published Reports
District Assessment Coordinator (DAC)	Yes			
Assessment Administrator (AA)	Yes			
Test Monitor/Data Entry or MTAS Score Entry	No	Yes, if assigned to a Reporting Group	Yes, if assigned to a Reporting Group	No

Verify Test Administration

Once you have signed into PearsonAccess Next, verify the test administration you want to create reporting groups for is selected. To change the test administration, select the current test administration in the black bar at the top of the page, select the applicable year dropdown, as needed, and then select the test administration.



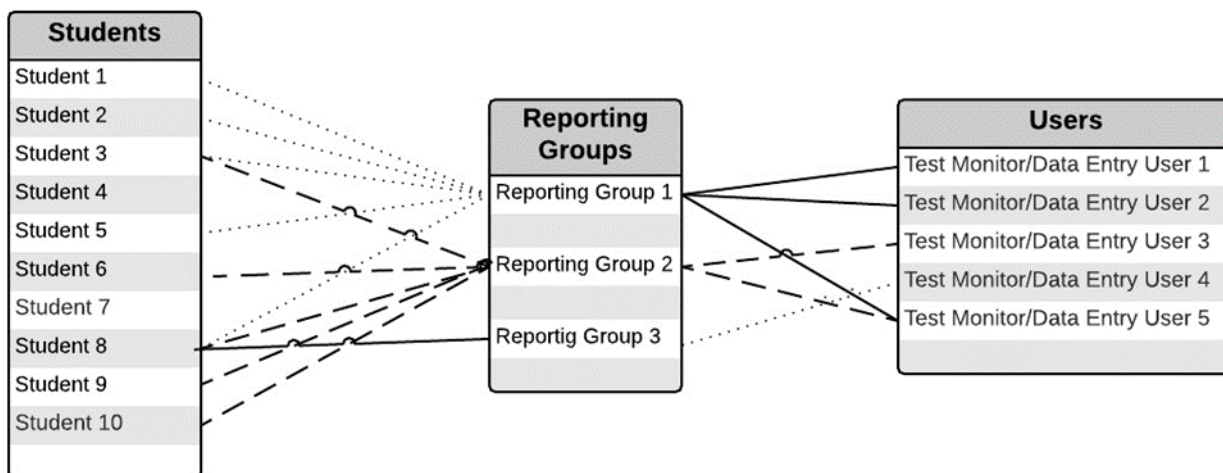
Create a Reporting Group

There are two ways DACs or AAs can create reporting groups in PearsonAccess Next:

- 1) by manually creating in PearsonAccess Next
 - Create a reporting group
 - Add student(s) to or remove student(s) from a reporting group
 - Assign or remove a user(s) from a reporting group
 - Delete a reporting group
- 2) by importing a file to PearsonAccess Next
 - Create a reporting group
 - Add and delete a student(s) to a reporting group
 - Assign a user(s) to a reporting group*

*Users cannot be removed from reporting groups by importing a file; users must be removed from reporting groups manually.

Note: Both students and teachers (users) can be assigned to multiple reporting groups.



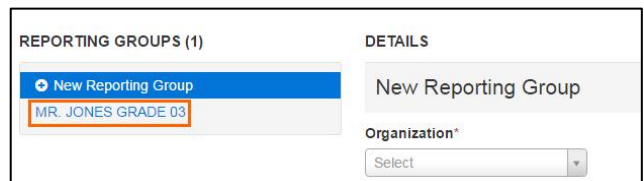
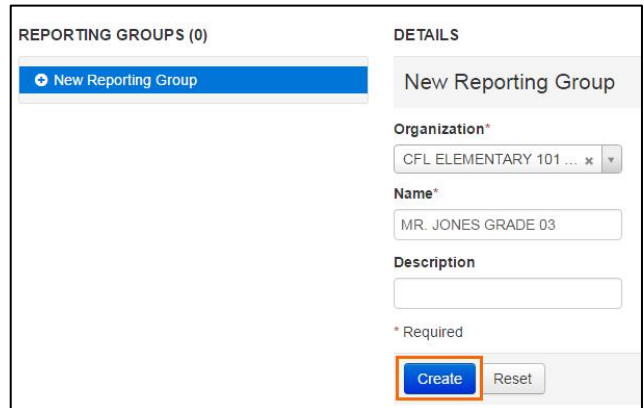
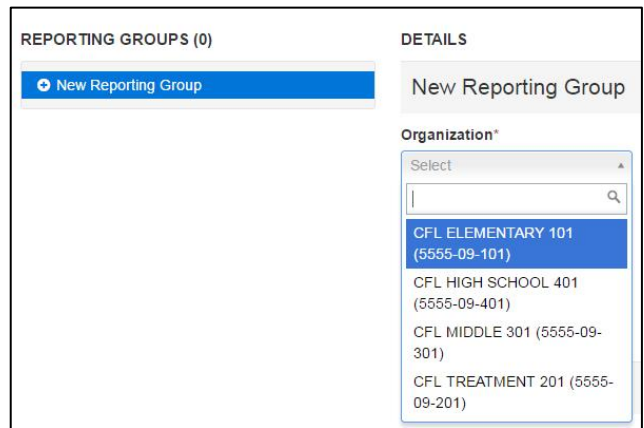
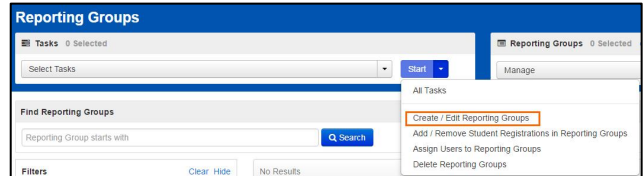
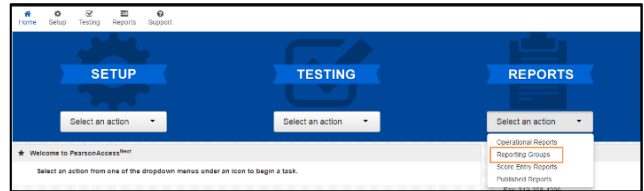
If only a few reporting groups need to be created or updated, it is recommended to complete manually in PearsonAccess Next; if there are many reporting groups that need to be created or updated, it is recommended to import a file to PearsonAccess Next. See the applicable sections below for detailed instructions.

Tip: To quickly find students not assigned to a reporting group, run the Reporting Group Export, following the instructions from the *Request a Student Reporting Groups Export File for Use as a Template* section. The Reporting Group column will be blank for students not assigned to a reporting group. Filter this column for blanks to find all students not assigned to a reporting group.

Manually Create a Reporting Group

1. From the Home page, under **Reports**, select **Reporting Groups**.
2. Select the dropdown menu to the right of the **Start** button and select **Create / Edit Reporting Groups**.
3. From the Organization dropdown menu, select your school.
4. In the Name field, enter a name for the reporting group.
 - (Optional) In the Description field, enter a description for the group.
 - Select **Create**.
5. The reporting group will appear on the panel on the left under Reporting Groups.

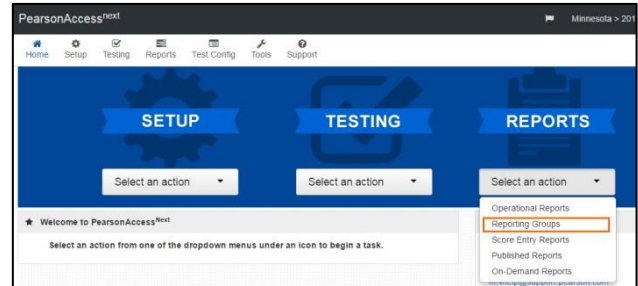
To create additional groups, follow the same steps.



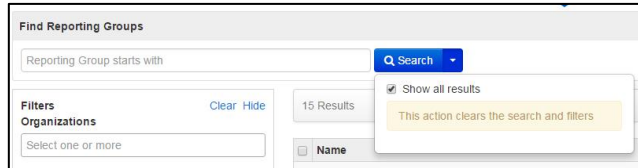
Manually Add Students to a Reporting Group

Note: Students can be assigned to multiple reporting groups.

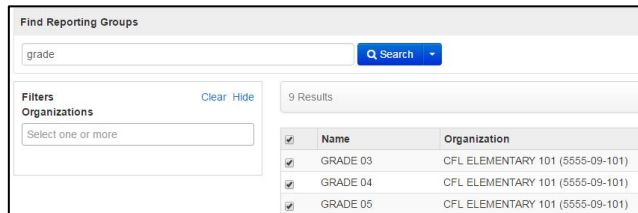
1. From the Home page, under **Reports**, select **Reporting Groups**.



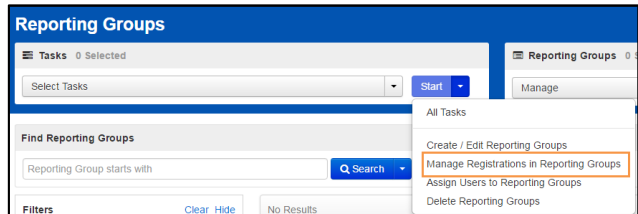
2. Find the reporting group(s) within your organization using one of the methods below.
 - To view all reporting groups in your organization, select the dropdown menu next to **Search** and select **Show all results**.
 - To find individual reporting groups, under the **Find Reporting Groups** field, enter a partial or full name of the reporting group.
 - If you are at a district, to view all reporting groups in a school, under **Filters, Organizations**, select an organization.



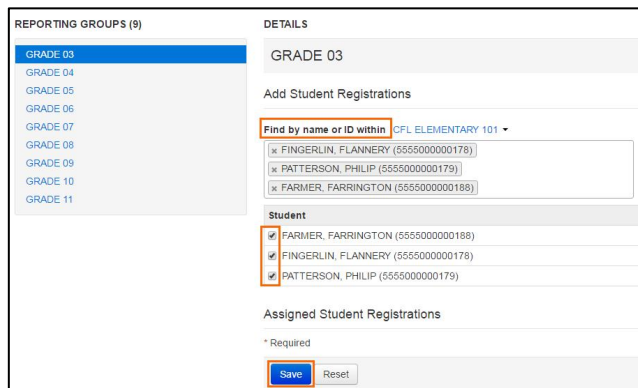
3. Select the box(es) to the left of the group(s) from which you wish to add or remove students. To select all boxes, check the box left of "Name" in the header.



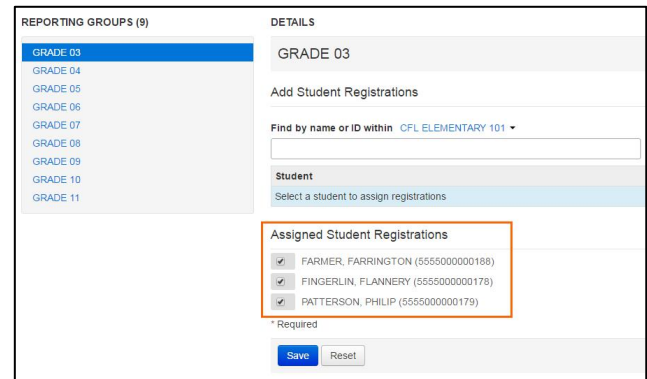
4. Select the dropdown menu to the right of the **Start** button and select **Manage Registrations in Reporting Groups**.



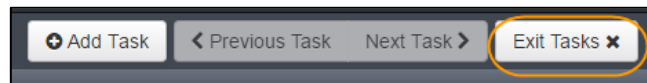
5. Search for the students to add to the reporting group. The selected reporting group(s) are displayed on the panel on the left. If you have multiple reporting groups displayed, select the group you want to edit (it will be highlighted in blue).
 - In the **Find by name or ID within** field, search for students by entering the name or MARSS/SSID number and select the student.
 - Repeat this step, as needed, to add multiple students before moving on to the next step.



- Select the box(es) to the left of each student name to add to selected reporting groups. Select **Save**. The students will display under Assigned Student Registrations.



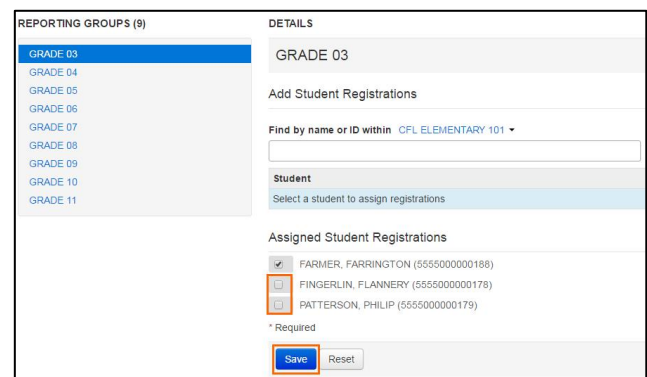
- Select **Exit Tasks** at the top right to return to the Reporting Groups screen.



Manually Remove or Change Students Assigned to a Reporting Group

- To remove students from a reporting group, follow steps 1–4 above under the *Manually Add Students to a Reporting Group* section.
- Under **Assigned Students Registrations**, deselect the box(es) to the left of the student name(s). Select **Save**.

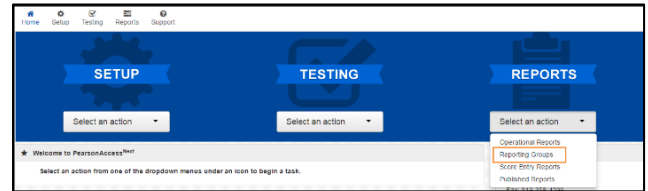
After selecting **Save**, students will be removed from the Assigned Student Registrations section and taken out of the selected reporting group.



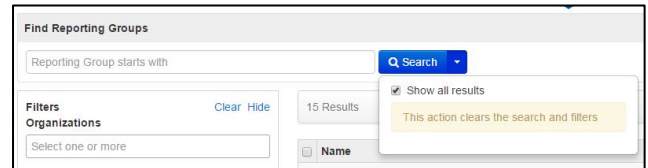
Manually Assign a User to a Reporting Group

Note: Test Monitor/Data Entry and MTAS Score Entry users can be assigned to multiple reporting groups.

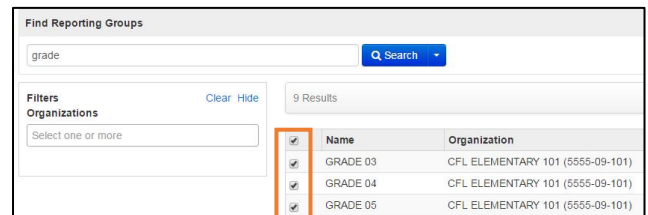
1. From the Home page, under **Reports**, select **Reporting Groups**.



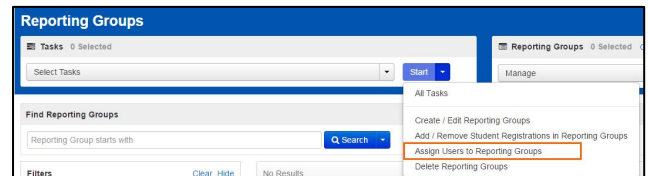
2. Find the reporting group(s) within your organization using one of the methods below.
 - To view all reporting groups in your organization, select the dropdown menu to the right of **Search** and select **Show all results**.
 - To find individual reporting groups, under the **Find Reporting Groups** field, enter a partial or full name of the reporting group.
 - If you are at a district, to view all reporting groups in a school, under **Filters, Organizations**, select an organization.



3. Select the box(es) to the left of the reporting group(s) for which users need to be assigned.



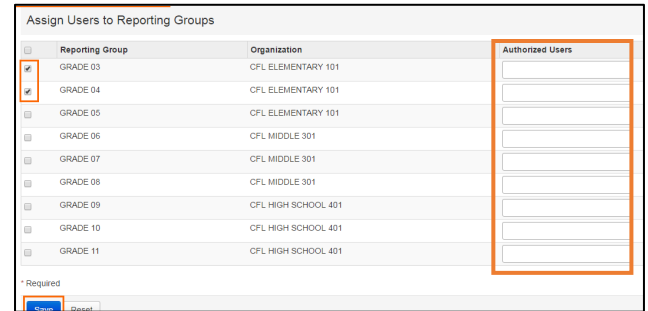
4. Select the dropdown menu to the right of the **Start** button and select **Assign Users to Reporting Groups**.



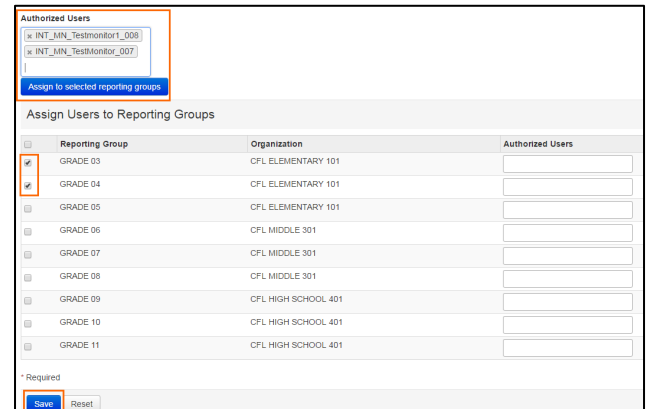
5. Assign teachers to reporting groups
 - To assign by individual reporting group:
 - Under the Authorized Users column on the right for each reporting group, begin entering the teacher's PearsonAccess Next username. Select the teacher's username from the list.
 - Then select **Save**.
 - To assign to multiple selected reporting groups:
 - Select the box(es) to the left of the reporting group name(s) or the top left checkbox to select all groups for which you wish to assign a teacher.
 - Under the Authorized Users field on the top left, begin entering the teacher's PearsonAccess Next username. Select the teacher's username from the list and select **Assign to selected reporting groups**.
 - The teacher's username will then display in the Authorized Users column on the right for the selected reporting groups. Then select **Save**.

After the selections are saved, the username remains displayed in the Authorized Users column on the right. This indicates the user is assigned to the reporting group(s).

6. Select **Exit Tasks** to return to the Reporting Groups screen.



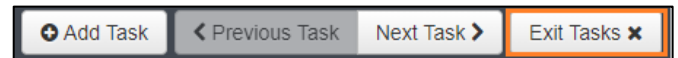
Reporting Group	Organization	Authorized Users
<input type="checkbox"/> GRADE 03	CFL ELEMENTARY 101	
<input type="checkbox"/> GRADE 04	CFL ELEMENTARY 101	
<input type="checkbox"/> GRADE 05	CFL ELEMENTARY 101	
<input type="checkbox"/> GRADE 06	CFL MIDDLE 301	
<input type="checkbox"/> GRADE 07	CFL MIDDLE 301	
<input type="checkbox"/> GRADE 08	CFL MIDDLE 301	
<input type="checkbox"/> GRADE 09	CFL HIGH SCHOOL 401	
<input type="checkbox"/> GRADE 10	CFL HIGH SCHOOL 401	
<input type="checkbox"/> GRADE 11	CFL HIGH SCHOOL 401	



Authorized Users

Assign to selected reporting groups

Reporting Group	Organization	Authorized Users
<input checked="" type="checkbox"/> GRADE 03	CFL ELEMENTARY 101	
<input checked="" type="checkbox"/> GRADE 04	CFL ELEMENTARY 101	
<input type="checkbox"/> GRADE 05	CFL ELEMENTARY 101	
<input type="checkbox"/> GRADE 06	CFL MIDDLE 301	
<input type="checkbox"/> GRADE 07	CFL MIDDLE 301	
<input type="checkbox"/> GRADE 08	CFL MIDDLE 301	
<input type="checkbox"/> GRADE 09	CFL HIGH SCHOOL 401	
<input type="checkbox"/> GRADE 10	CFL HIGH SCHOOL 401	
<input type="checkbox"/> GRADE 11	CFL HIGH SCHOOL 401	

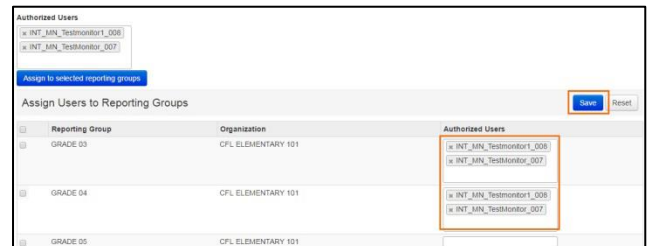


Exit Tasks

Manually Remove or Change a User Assigned to a Reporting Group

1. To remove or change a user assigned to a reporting group, follow steps 1-4 above under the *Manually Assign a User to a Reporting Group* section.
2. Under the Authorized User column on the right, find the user to remove by selecting the X to the left of the username for each user you want to remove from the reporting groups. Select **Save**.

To assign a different user, follow steps 1-5 above under the *Manually Assign a User to a Reporting Group* section.



Authorized Users

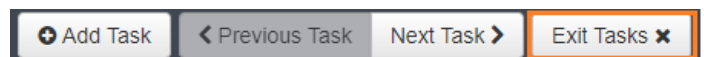
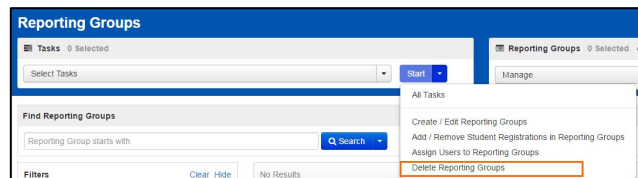
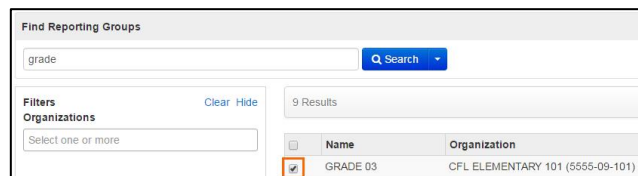
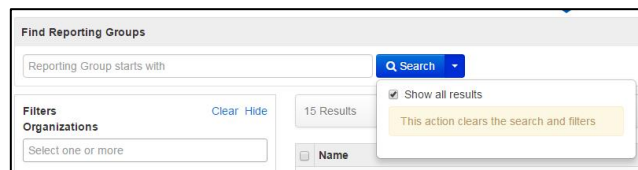
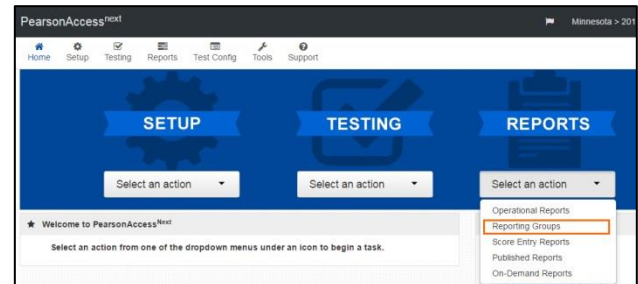
Assign to selected reporting groups

Reporting Group	Organization	Authorized Users
<input type="checkbox"/> GRADE 03	CFL ELEMENTARY 101	<input type="text" value="INT_MN_TestMonitor1_008"/> <input type="text" value="INT_MN_TestMonitor_007"/>
<input type="checkbox"/> GRADE 04	CFL ELEMENTARY 101	<input type="text" value="INT_MN_TestMonitor1_008"/> <input type="text" value="INT_MN_TestMonitor_007"/>
<input type="checkbox"/> GRADE 05	CFL ELEMENTARY 101	

Manually Delete a Reporting Group

A reporting group cannot be deleted if students are assigned to it. In order to delete a group, remove the assigned student registrations using the instructions from the *Manually Remove Students or Change Students Assigned to a Reporting Group* section.

1. From the Home page, under **Reports**, select **Reporting Groups**.
2. Find the reporting group(s) within your organization.
3. Select the group(s) you wish to delete.
4. Select the dropdown menu to the right of the **Start** button and select **Delete Reporting Groups**.
5. Select the box(es) to the left of the reporting group and select **Delete**.
6. Select **Exit Tasks** to return to the Reporting Groups screen.



Create Reporting Groups by Importing a File to PearsonAccess Next

The first step to create a reporting group, or add students to a reporting group, via import, is to request a *Student Reporting Groups Export* file through PearsonAccess Next to use as a template. With this template, you can create a file in order to create or update reporting groups. After reporting groups are created, you can request a *User Reporting Group Export* file as a template in order to assign users to a reporting group.

Example Student Reporting Group file layout:

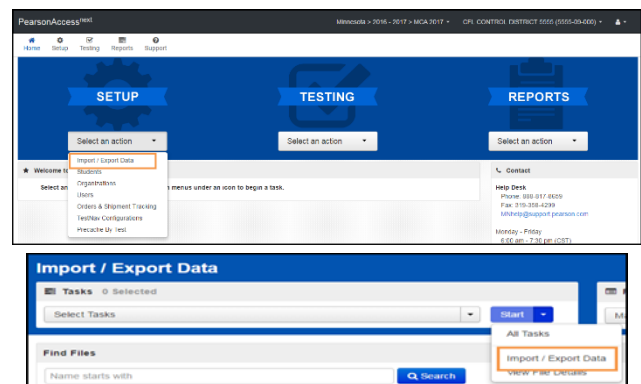
MARSS/SSID	Organization Code	Reporting Group Name	Student First Name	Student Last Name
555503333332	5555-09-101	Mr. Smith Grade 8 Math	Sarah	Student
555503333332	5555-09-101	Ms. Connor Grade 8 Reading	Sarah	Student
555503333332	5555-09-101	Ms. Johns Grade 8 Science	Sarah	Student
555503333334	5555-09-101	Mr. Smith Grade 7 Math	Samuel	Student
555503333334	5555-09-101	Ms. Connor Grade 7 Reading	Samuel	Student

Note: Both students and teachers (users) can be assigned to multiple reporting groups.

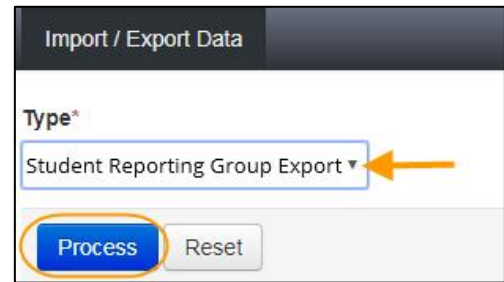
Tip: Instead of using the export file as a template, districts may consider creating their own file from their student information systems as only three fields are required: MARSS/SSID, Organization Code, and Reporting Group. These fields must be formatted to match the Student Reporting Group file as outlined in the table in the *Create a Student Reporting Group File to Import* section below. Then follow the steps in the *Import the Student Reporting Group File* section below to import the file.

Request a Student Reporting Groups Export File for Use as a Template

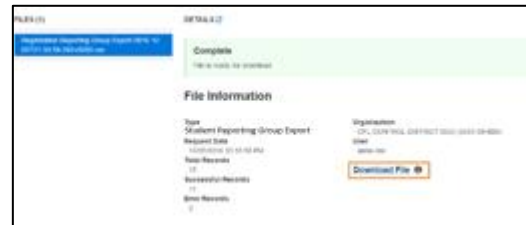
- From the Home page, under **Setup**, select **Import / Export Data**.
- Select the dropdown menu to the right of the **Start** button and select **Import / Export Data**.



- From the Type dropdown menu, select **Student Reporting Groups Export** and select **Process**.



- After you select the Process button, you will be directed to the View File Details page where you can see file information updates. You will receive a Status Notification email when the file has completed processing.
- When the file is complete, select **Download File**. The file will download to your computer as a .csv file and should be used as a template.



An exported file will include reporting group information **ONLY** if students were previously assigned to reporting groups during the current test administration(s).

Create a Student Reporting Group File to Import

Users will create one reporting group per student record in the *Student Reporting Group* file. If the student has multiple records, the user will enter separate reporting groups for each student record. Previously, users entered multiple reporting groups into a single student record separated by a colon. Giving users the ability to create one reporting group per student record more closely matches data districts extracts from their student information systems (SIS).

1. Make updates in the Student Reporting Groups Export file template. The table below provides details on the file columns.

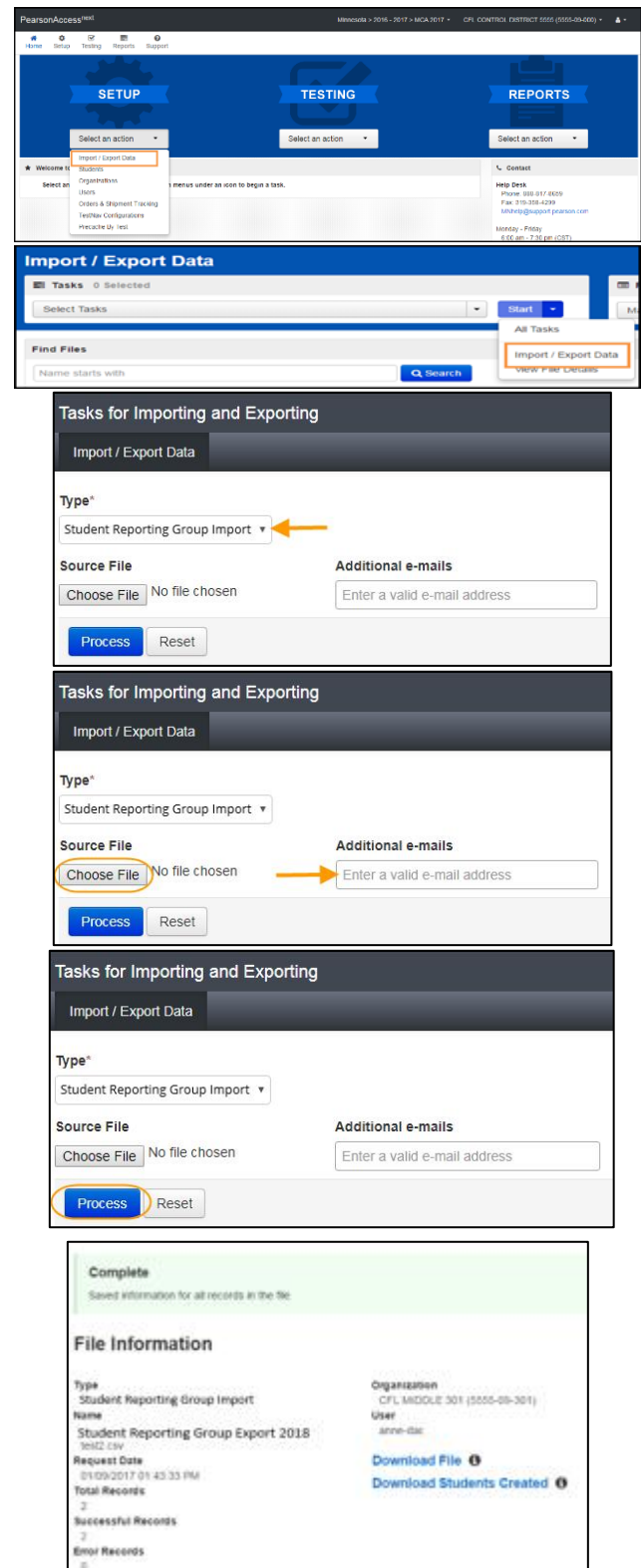
CSV File Column	Column Heading	Field Description	Field Notes
A	MARSS/SSID	Student's MARSS/SSID number.	Required. The MARSS/SSID number must be formatted into a 13 digit number before the file can be imported. To format the number, right-click on the MARSS/SSID column and select "Format Cells." Under category, select "Custom." In the "Type" text box enter thirteen zeros (e.g. 0000000000000). Select "OK."
B	Organization Code	School code where the student is being reported.	Required. Organization codes are pre-populated and are 9 digits comprised of District Number (4 digits), District Type (2 digits), School Number (3 digits), in DDDD-TT-SSS format (e.g. 5555-01-301). Include leading zeros.
C	Reporting Group Name	Reporting Group(s) names to assign the student(s) to a reporting group(s).	Required. A new group will be created if it does not already exist in PearsonAccess Next. Add one reporting group per student record. If the student will be assigned to multiple reporting groups, enter each reporting group on a separate row. Reporting group names entered must be an exact match.
D to J	Student Information (Student First, Last, Middle Name, Date of Birth, Gender,	First Name, Last Name, Middle Name, Date of Birth, Gender, Local Use Code, Registration Grade	Optional. Informational only. Do not change these fields (if changes are made, they will not be updated in PearsonAccess Next). Note: Fields marked as optional must still be included in the file; leave the field blank if not including a value.

	Local Use Code, Registration Grade)		
K	Teacher User Name	UserName	Optional. User (teacher) to be assigned to this student's reporting group. Note: Users need to be added only once per Reporting Group, not once per student record. Multiple users must be separated with a colon but no spaces between user names (e.g. john.smith@district.org:alex.roberts@district.org:jane.williams@district.org)
L	Delete Indicator	Delete	Optional. Enter "D" to indicate that the student should be removed from the reporting group.

2. Save the file to your computer in .csv format. The file must include the column header row.
-

Import the Student Reporting Group File

1. From the Home page, under **Setup**, select **Import / Export Data**.
2. Select the dropdown menu to the right of the **Start** button and select **Import / Export Data**.
3. From the Type dropdown menu, select **Student Reporting Group Import**.
4. Select the **Choose File** button and select the file from your computer to import.
 - If you would like someone else to receive an email notice when the file has completed processing, under Additional emails, enter an email address.
5. Select the **Process** button.
 - After you import the file, you will be directed to the View File Details page where you can see file information updates. The file status displays under Details at the top of the page. You will receive a Status Notification email when the file has completed processing.
 - A **Complete** message will appear when the file has finished processing. The message will include information on the total number of records, successful records and error records.



Tasks for Importing and Exporting

Import / Export Data

Type*
Student Reporting Group Import

Source File
Choose File No file chosen

Additional e-mails
Enter a valid e-mail address

Process Reset

Complete
Saved information for all records in the file.

File Information

Type	Student Reporting Group Import	Organization	CFL MIDDLE 301 (5555-09-301)
Name	Student Reporting Group Export 2018	User	anne-dav
Request Date	01/09/2017 01:45:33 PM	Download File	Download File
Total Records	3	Download Students Created	Download Students Created
Successful Records	3		
Error Records	0		

- See the table below for a list of status and explanations.

Status	Explanation
Pending	File is queued for processing.
Complete	Saved information for all records in the file.
Complete with issues	Some records were not saved, see the error list for details.

- If the file completes with issues, see the table below for common errors.

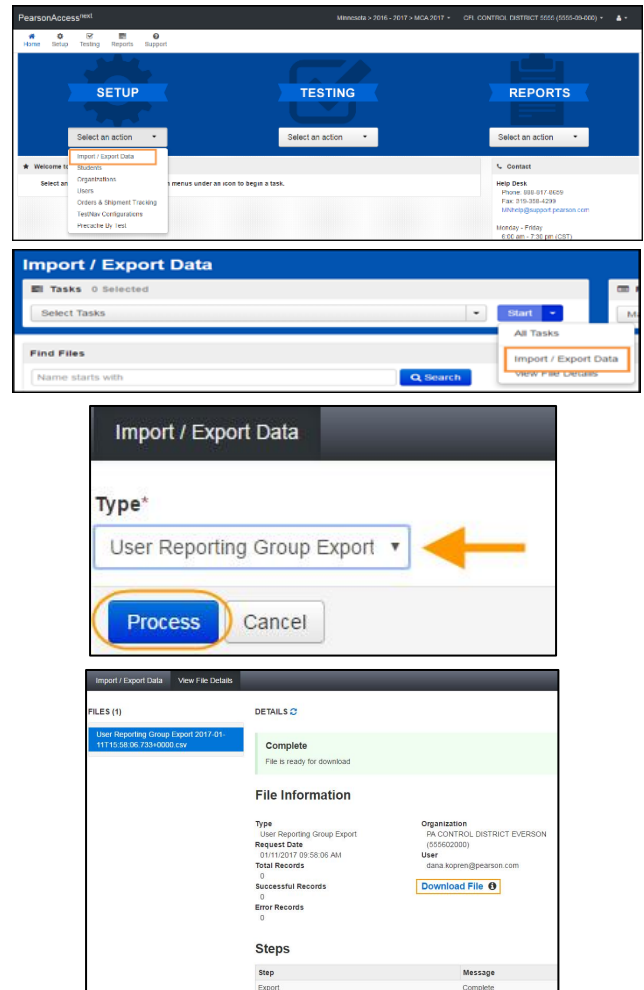
CSV File Column	Column Heading	Common Error
A	MARSS/SSID	Verify the MARSS/SSID has been formatted into a 13 digit number and the number has not been removed or edited.
B	Organization Code	Verify the code has not been removed or edited. The code must be entered in the valid format (e.g. 5555-01-301).
C	Reporting Group Name	Verify the reporting group names are identical. Adding or removing spaces will result in a second reporting group with different name (e.g. 'Nina's Math G3' without spaces creates additional reporting group 'Nina'sMathG3').

Assign Users to Reporting Groups by Importing a File Directly to PearsonAccess Next

If you did not include user information in the Student Reporting Group file, after reporting groups are created, you can request a *User Reporting Group Export* file as a template in order to assign users to a reporting group.

Request a User Reporting Group Export File for Use as a Template

1. From the Home page, under **Setup**, select **Import / Export Data**.
2. Select the dropdown menu to the right of the **Start** button and select **Import / Export Data**.
3. From the Type dropdown menu, select **User Reporting Group Export** and select **Process**.
4. After you select the Process button, you will be directed to the View File Details page where you can see file information details. You will receive a Status Notification email when the file has completed processing.
5. When the file is complete, select **Download File**. The file will download to your computer as a .csv file and should be used as a template.



An exported file will include reporting group information ONLY if users were previously assigned to reporting groups during the current test administration.

Create a User Reporting Group File to Import

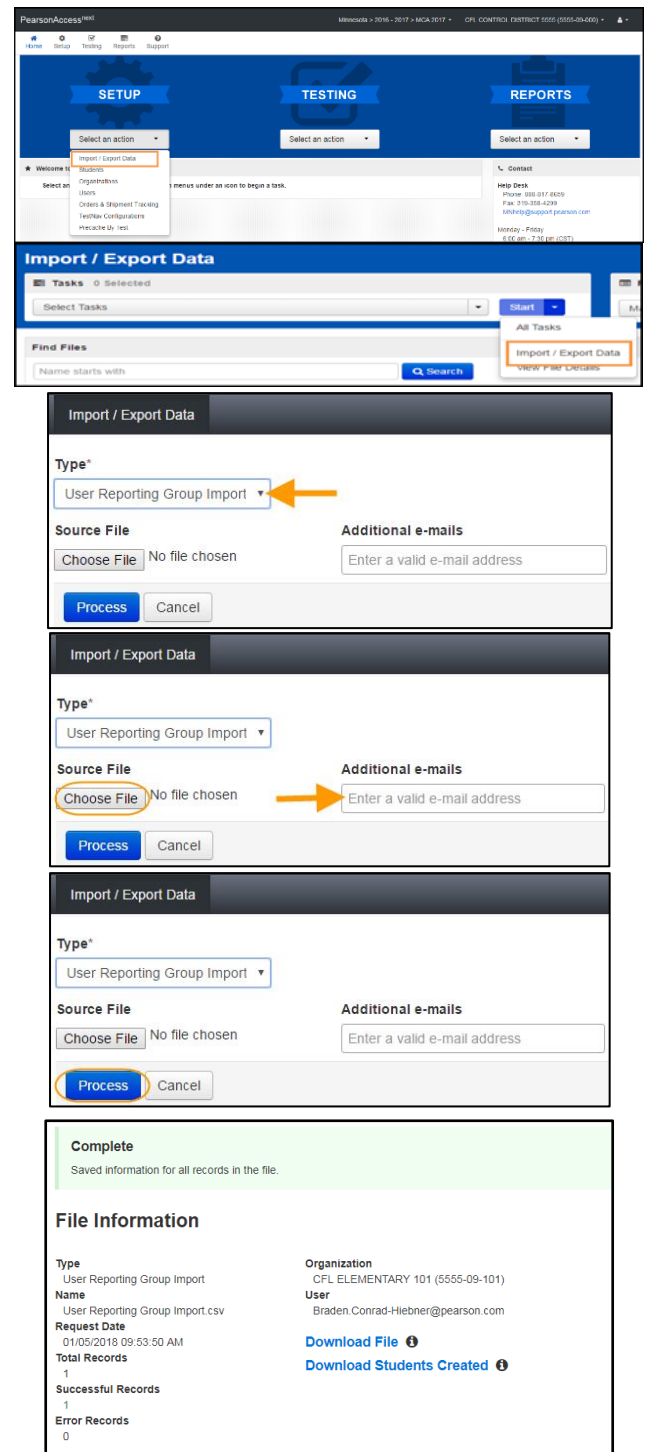
1. Make updates in the User Reporting Groups Export file template. The table below provides details on the file columns.

CSV File Column	Column Heading	Field Description	Field Notes
A	Reporting Organization Code	School Code where the user account exists	<p>Required.</p> <p>The user must have an account at this organization.</p> <p>Organization codes are 9 digits comprised of District Number (4 digits), District Type (2 digits), School Number (3 digits), in DDDD-TT-SSS format (e.g. 5555-01-301). Include leading zeros.</p>
B	Reporting Group	Reporting Group name to assign the user to a reporting group.	<p>Required.</p> <p>The reporting group must already exist prior to adding users to it.</p> <p>Reporting group names entered must have identical spacing and be an exact match.</p> <p>A separate row must be entered for each reporting group assignment. This is different than how students are assigned to groups.</p>
C	Username	Enter the username of the user's PearsonAccess Next account.	<p>Required.</p> <p>The username must already exist prior to adding it to a reporting group.</p> <p>If needed, to find a username, you can use the Users with Role Access operational report (Home page > Reports > Operational Reports > Users > Users With Role Access). From the Role dropdown menu, select Test Monitor/Data Entry or MTAS Score Entry. From the Disabled and Deleted filter dropdown menu, select Exclude Disabled and Deleted. Select Refresh Report. Once the report is available, select Download Report. The report contains the username and the first and last name that can be populated into columns C-E.</p> <p>Note: Users with the DAC or AA role do not need to be assigned to a reporting group.</p>
D	User First Name	Enter the user's first name.	Optional. Informational only.
E	User Last Name	Enter the user's last name.	Optional. Informational only.

2. Save the file to your computer in .csv format. File must include the column header row.

Import the User Reporting Group File

1. From the Home page, under **Setup**, select **Import / Export Data**.
2. Select the dropdown menu to the right of the **Start** button and select **Import/Export Data**.
3. From the Type dropdown menu, select **User Reporting Group Import**.
4. Select the **Choose File** button and select the file from your computer to import.
 - If you would like someone else to receive an email notice when the file has completed processing, under Additional e-mails, enter an email address.
5. Select the **Process** button.
 - After you import the file, you will be directed to the View File Details page where you can see file information updates. The file status displays under Details at the top of the page. You will receive a Status Notification email when the file has completed processing.
 - A **Complete** message will appear when the file has finished processing. The message will include information on the total number of records, successful records and error records.



The screenshot shows the PearsonAccess interface for importing data. The top navigation bar includes SETUP, TESTING, and REPORTS. The 'Import / Export Data' section shows a 'Start' button with a dropdown menu. The 'Type' dropdown is set to 'User Reporting Group Import'. The 'Source File' section has a 'Choose File' button. The 'Additional e-mails' section has a text input field. The 'Process' button is highlighted. Below the form, a 'Complete' message is displayed, followed by 'File Information' including Type, Name, Request Date, Total Records, Successful Records, and Error Records.

- See the table below for a list of statuses and explanations.

Status	Explanation or error
Pending	File is queued for processing.
Complete	Saved information for all records in the file.
Complete with issues	Some records were not saved, see the error list for details.