



- Slide 1 Welcome! This presentation describes data management responsibilities for those with the role of District Test Coordinator. Those with the role of Building Test Coordinator will also be able to perform many of the tasks described.
- Slide 2 Data managers are commonly called District Test Coordinators, or DTCs, in the DLM system. A data manager at the building level is called a Building Test Coordinator, or BTC.
- Slide 3 For the Dynamic Learning Maps[®], or DLM[®], assessment, also known as the NYSAA, a DTC is responsible for gathering, editing, and uploading data in Kite[®] Educator Portal for users, which include educators, test administrators, and staff who need access to student data. A DTC is also responsible for enrolling students who take the DLM assessment and creating rosters, which connect students to educators for a subject.
- Slide 4 A variety of resources to assist you in completing your data management responsibilities are located on New York's page of the DLM website. The resources described in this training are listed on that page and can be filtered by role and resource type.
- Slide 5 To make your job easier, it is helpful to understand the information in and purpose of specific resources. The DATA MANAGEMENT MANUAL includes step-by-step directions for each task along with screenshots. The Educator Portal User Guide describes the purpose of the extracts in Educator Portal, which are used for monitoring purposes. When completing tasks, you will need to utilize the State Organizational Table spreadsheet for New York. The State Organizational Table contains school and district codes that must be used when adding users and enrolling students. Templates for uploading users, enrolling students, creating rosters, and exiting students are found here also, along with specific New York State guidance, such as the School Administrator's Guide, or SAM, which includes important guidance and reminders.



- Slide 6 Some prefer watching a how-to video. To meet this need, helplets have been created. Helplets are short, how-to videos. Many tasks described in this presentation have a corresponding helplet. The helplets listed on the screen are found on New York’s page of the DLM website under District Staff Video Resources.
- Slide 7 A link to Educator Portal is located in the header and footer of the DLM website.
- Slide 8 Now that general data manager responsibilities and resources have been covered, we will discuss the State Organizational Table. The New York State Organizational Table is found on New York’s page of the DLM website.
- Slide 9 You must use the New York Organizational Table and exact information when uploading or editing users, enrolling or editing students, and rostering students. Each entity has a parent organization. For public districts and schools, use the district BEDSCODE and school BEDSCODE. In the case of BOCES, charter schools and nonpublic schools are each their own parent. Use the school BEDSCODE for the school identifier. The district identifier is a capital D followed by the school BEDSCODE.
- Slide 10 So that the data process runs smoothly, it is important to add users first before enrolling and rostering students. Users may be added or inactivated throughout the year.
- Slide 11 The most common user roles in New York are District Superintendent, District Test Coordinator, District User, Building Test Coordinator, Building User, and Teacher. All teachers must have the educator identifier completed, and this can be the teacher’s email address if the educator identification number is unknown. A user’s email address is not case sensitive in Educator Portal.



- Slide 12 As you work with adding users, there is some important general information about users to keep in mind:
- Users with the role of District Test Coordinator must be uploaded by the state. Notify the state if a DTC leaves the district.
 - New users need to be added manually or through a file upload.
 - Educator Portal automatically sends an activation email to the new user with a link to create a password.
 - A user's email address is their username for the account.
 - Users may have more than one role in Educator Portal.
 - Users are rolled over from the year before.
 - Users can be deactivated and/or removed.
- Slide 13 To complete tasks in Educator Portal for users, select **Users** from the **Settings** drop-down menu.
- Slide 14 After selecting **Users** from the settings drop-down menu, select **Add User** to add users manually, or **Upload Users** with a Users Upload Template. When a user is added to Educator Portal, Educator Portal sends the user an email from kite-support@ku.edu to activate their account.
- Slide 15 Users may contact you saying they did not receive the email to activate their account or the link to activate does not work. There are several reasons a user may not receive the activation email. A user's activation email may have been sent to a spam folder, blocked by a firewall, deleted by the user thinking it was a phishing email, or the user's email address was entered into Educator Portal incorrectly. If the user does not activate their account within 20 days, the activation link will expire. You may re-send the activation email to the user from Educator Portal. Be proactive and let users know they will receive an email from kite-support@ku.edu, and that they need the email to activate their Educator Portal account for the DLM alternate assessment.



- Slide 16 User accounts can be edited to reflect changes. Common reasons to edit a user account are: a teacher moves from one school to another, a user has a name or email address change, or a user needs to have a role added or removed. These edits can be made manually or through an upload.
- Slide 17 When a user leaves the district or changes positions and no longer needs access to student data in Educator Portal, the user should be deactivated. Deactivated users are still included in data extracts but can be filtered as needed. If a user has retired from the district or is in a non-NYSAA role, the user can be removed. Users who are removed no longer appear in the data extracts. Sometimes a user who was deactivated will need to be reactivated. Reactivating a user can be done in Educator Portal, but only state-level users can reactivate a user who has been removed. Note: Removing users must be done manually, as an upload template for removing users is currently not provided.
- Slide 18 To resend the activation email, edit, activate, deactivate, or remove users, select the **View Users** tab and click **Search**. This populates a table with all users associated with the district, and a school in the district if selected. Select a user located on the table and select the task you wish to perform.
- Slide 19 After users have been added to the system, the next step is to enroll students.
- Slide 20 Like users, there is information about students that is helpful to know. All students must be enrolled every school year. A student who has been exited from the system cannot be enrolled manually. However, the student can be reactivated using the Find Student feature and can be enrolled using an upload. Students taking the New York State Alternate Assessment are assessed according to chronological ages aligned with grade levels. Use the Birthdate Chart, located on NY's page of the DLM website, to determine the grade in which a student should be enrolled for the DLM alternate assessment. All high school students taking the DLM assessment must be enrolled in Grade 9.



- Slide 21 Students can be enrolled for the DLM alternate assessment in two ways. New York State will upload students from the state data warehouse on November 18, 2024. For students to be included in the upload, NYSAA-eligible students need to be identified in the state data warehouse with the program service code 0220 by November 8, 2024. Districts may enroll students prior to or after the state upload.
- Slide 22 To complete data management tasks for students, select **Settings** and then choose **Students**.
- Slide 23 When there are only a few students to add, do so manually.
When there are more than a few students to add, do so with an upload.
- Slide 24 The process to add a student manually begins with entering the **State Student Identifier (i.e., NYSSIS ID number)**. Enrolling students using an upload will be discussed in detail later in this presentation. It is important that the student's NYSSIS ID is correct for each student. Contact the State NYSAA Test Manager for assistance.
- Slide 25 Educator Portal has a Find Student feature, which has multiple uses. For any of the uses described, the student's exact State Student Identifier, also known as NYSSIS ID, can be used, or the student's first and last name can be entered but the spelling of the student's first and last name must match exactly the spelling in the student's Educator Portal record. The Find Student feature can be used to determine if a student is currently enrolled in Educator Portal to take the DLM alternate assessment. A message will pop up if the student is enrolled in an organization in which you do not have rights. Contact CBT Support if the student should be enrolled in your organization. For a student who has been enrolled in the DLM assessment in previous years or enrolled and exited this year, that student can be enrolled for the current school year using this feature. Additionally, the feature can be used to edit a student's demographic information, school, or grade level.



- Slide 26 When the **Find Student** tab is selected, the fields to enter the State Student Identifier or the student's first and last name appear. After entering the information, select **Search**. As long as the student is in the system, and not currently enrolled in another organization, the student's information will populate.
- Slide 27 There are times that student demographic information needs to be edited. Common edits made for students include a change of school, grade, or corrections to demographic data. Edits can be made manually or through an upload in Educator Portal. A student upload does not impact students in the system that are not in the upload.
- Slide 28 When making edits to student information, click **View Students** and **Search**. A table will populate with all students in that organization. Select the student and make necessary edits.
- Slide 29 Changing a student's grade during the spring assessment window is an edit that can impact a student's testing if done after the student has started or completed testing. First, we will discuss how to make a grade change in the system and then what will occur if a grade change is made during the spring assessment window. Two ways to change a student's grade are through an upload or using the Find Student feature and then making the edit. If the grade change is made using the Find Student feature during the spring assessment window, the system will provide a warning message that all testing sessions completed by the student will be inactivated. A grade change during the spring assessment window will result in the system delivering the first testlet for the new grade based on information in the student's First Contact Survey. The student must start testing over because the assessment is grade specific. Remember to use the Birthdate Range guidance for students participating in the New York State Alternate Assessment, which is the DLM alternate assessment, when making a grade change.



- Slide 30 There are times a student who has been enrolled in Educator Portal needs to be exited. The most common reasons to exit a student are
- the student is leaving the state,
 - the student is leaving the district and it is unknown where the student is moving, or
 - the student is going to take an assessment for accountability other than the DLM assessment.
- Students may be exited manually if there are only one or two students or using the TEC upload if several students are to be exited.
- Slide 31 To exit a student manually, from the **Student** selection, go to **Settings** and click on the **Exit Student** tab to search for the student. Using the **Upload TEC** student exit option involves the upload of a template, which will be covered later in this presentation.
- Slide 32 A DTC can only transfer a student between schools in the same district. If you only have a few students to transfer, do so manually. If you have more than a few students to transfer, upload the TEC template to exit all students from the current school, and then use an enrollment upload to add students to the new schools. A student may be transferred at any time prior to the spring testing window closing. All student data, such as the First Contact Survey, Personal Needs and Preferences Profile, and completed testlets follow the student to the new school. When a student needs to be transferred between districts, contact CBT Support.
- Slide 33 To transfer a student manually to a different school in the district, select students from the **Settings** drop-down menu then click on **Transfer Students**. Select the student's current **School** and select **Search**. Follow the directions provided by the system to complete the student's transfer to another school in the district.
- Slide 34 Now that users and students are in the system, rosters can be created.



- Slide 35 Just like users and students, some general guidelines around rostering are helpful. Rosters are what connect a teacher and a student in a subject area. Teachers can only see student data for students rostered to them. Other important information to know about rosters is:
- Districts are responsible for creating rosters.
 - New students can be added to an existing roster.
 - The teacher on a roster can be changed.
 - When all students are removed from a roster, the roster will be removed from the system. There is no delete roster option.
- Slide 36 Within Educator Portal, rosters can be created manually or with an upload. Students must be rostered once in each subject in which they will be assessed. For example, a Grade 3 student will be on two rosters: one for ELA and one for mathematics; whereas a Grade 8 student would be on three rosters: one for ELA, one for mathematics, and one for science. The teacher may be the same or different on the rosters. From a data sorting perspective, it is helpful to have a standard naming convention for rosters, such as the teacher's last name, teacher first name, and the subject.
- Slide 37 Students can only be on one roster for a subject. When creating rosters manually, a warning message will appear if attempting to add a student to a roster who is already on a roster for the same subject. If the DTC confirms the decision, the student will be removed from the old roster and placed on the new roster.
- Slide 38 To complete data management tasks for rostering in Educator Portal, select **Settings** and then choose **Rosters**.
- Slide 39 After selecting **Rosters** from the **Settings** drop-down menu, select **Create Roster** to create rosters manually and **Upload Roster** to create a roster using an upload.



- Slide 40 When a student cannot be assessed or cannot complete all their testlets, a Special Circumstance code must be applied to one of the student’s testlets for each subject. This means the student must be rostered and must have testlets assigned. Special Circumstance codes are used to indicate why the student never started testing or why testing was discontinued. DTCs and BTCs enter Special Circumstance codes during the spring assessment window. Special Circumstance codes cannot be added after the window has closed. They are entered via the Test Management tab in Educator Portal. It is important to note, however, that assigning a Special Circumstance code to a student’s testlets does not prevent testing the student from starting or resuming testing should the circumstances change. It is also important to note that NY has specific parameters regarding what constitutes a special circumstance.
- Slide 41 Guidance and directions for entering Special Circumstance codes is provided in the NYSAA School Administrator’s Guide, which is linked on NY’s page of the DLM website. The codes NY uses and the directions for entering them are also linked on NY’s page of the DLM website. Using the data manager filter, these resources are listed as shown here.
- Slide 42 When completing data tasks for a large number of users, students, or rosters, uploads are more efficient than manually doing the work in the Educator Portal User interface.
- Slide 43 When adding users, enrolling, editing, and exiting students, or creating rosters, follow the instructions and use the field definitions in the DATA MANAGEMENT MANUAL for the specific upload. Upload templates can be found on NY’s page of the DLM website, or use the question mark icon that appears when the upload option is selected in Educator Portal.
- Slide 44 Here is the Educator Portal screen when using an upload to create rosters. For the template that must be used, click on the question mark icon next to **File**.



- Slide 45
- The upload process is the same for a user file, enrollment file, roster file, and TEC (Test, Exit, Clear) file.
 - To upload, all files must have a .csv file extension.
 - When uploading the files, the differences are
 - the template used and
 - the information required
 - If a file will not upload, the system will provide error messages. If you need more information about error messages, use the Troubleshooting CSV Upload Errors document found on the Kite Suite page of the DLM website under the Additional Kite Resources heading.
- Slide 46
- Next, we will discuss data extracts available in Educator Portal and how to use them for monitoring.
- Slide 47
- Educator Portal has many data extracts available to district-level, building-level users, and teachers. Extracts for district-level users will contain information for all users and students in the district. Extracts for building level users will contain information for all users and students in the school. Extracts for teachers will contain information about students rostered to the teacher. The extracts are in CSV format.
- Slide 48
- To pull extracts, click on **Reports** and then **Data Extracts** from the drop-down menu in Educator Portal.
- Slide 49
- The extracts are organized into tabbed categories. To pull a current extract, select the New File icon under actions. A new file replaces the old file, so be sure to download any file that needs to be saved before pulling a new file. Next, we will discuss the information contained in and the use of each extract.
- Slide 50
- The Current Enrollment extract under the Student Information tab lists all active students in the selected organization. Other information included for each student is the
- accountability district and school
 - attendance district and school
 - student name



- student grade and
- student demographic information

This extract can be used to ensure students that should be taking the DLM alternate assessment are enrolled and the student's grade is correct in relation to the Birthdate Chart.

- Slide 51 The First Contact Survey File under the Student Information tab lists all rostered students in the selected organization, responses for each student to questions on the survey, and the date and person's name who last modified the First Contact Survey for the student. This extract also indicates the status of completion for a student: not started, in progress (meaning some questions were answered), ready to submit (meaning all questions have been answered), and submitted (meaning that the system has the information needed to deliver the first testlet when the spring assessment window opens).
- Slide 52 The Personal Needs and Preferences, or PNP, Settings Count extract under the Student Information tab provides an aggregate count of the number of students in the organization for which a particular PNP feature has been selected. For example, ten students in the district have five times magnification selected.
- Slide 53 While the PNP Settings Count provides an aggregate count for the organization, the PNP Settings extract under the Student Information tab will list students individually in an organization for which PNP selections have been made, along with the date and name of the last person who modified selection settings for the student. Reviewing this extract will help you determine if a student has every setting selected, which is not desirable, or no settings selected. A student with no settings selected will not appear on the extract. Some students may not need any PNP Profile settings selected.
- Slide 54 The Student Roster and First Contact Survey Status extract under the Student Information tab provides testing readiness information in one extract and includes the grade, rostered subjects, and First Contact Survey status and completion date for each student. Note that this extract has a column for each subject that tells whether or not a student is rostered for



that subject. Therefore, this extract can be used to identify students who are not rostered because the Roster extract includes only students who have been rostered.

- Slide 55 As stated earlier in the training, each student needs to be on a roster for each subject in which they will be assessed. The Roster extract under the Student Information tab can be used to determine that a student is rostered to the required subjects for that grade. For example, a student in Grade 8 should be on three rosters: one for ELA, one for mathematics, and one for science. Students cannot be rostered for grades and subjects the state does not assess.
- Slide 56 The Student Login Usernames/Passwords extract provides each student's credentials for the Student Portal application. Note that teachers have access to this extract so that they can conveniently find the credentials for all students rostered to them. However, teachers can only access the extract once they have completed the DLM Required Test Administrator Training for the year. Student credentials are also provided in the test tickets associated with each testlet assigned for students.
- Slide 57 The DLM On-Demand Special Circumstance File under the Test Administration and Monitoring tab lists any student for whom a Special Circumstance code has been entered. The file includes the numerical code used for the student, the code's label, which specifies the special circumstance, and the Essential Element for which the code was applied.
- Slide 58 During the spring assessment window, the DLM Test Administration Monitoring extract under the Test Administration and Monitoring tab is used to track the completion of testing by a student for each subject. Next, we will discuss specific data in the extract, what it indicates, and how to use it for monitoring purposes.

The "End of Year Number of Testlets Not Started" column will always be a zero or a one. Why is this? Testlets are delivered one at a time, so if there is a number one in the "End of Year Number of Testlets Not



Started” column, then the student still has at least one testlet to complete. A zero means, in the best-case scenario, that the student has completed testing. On the other hand, a zero may mean that the student has not started testing. This is the case when a student’s First Contact Survey has not been submitted, which the system needs to determine the linkage level of the first testlet for the student.

The “End of Year Number of Testlets Completed” category is the number of testlets a student has completed in the series. The “End of Year Number of Testlets Required” is how many testlets in a subject area the student would need to complete. When “End of Year Number of Testlets Completed” is the same as “End of Year Number of Testlets Required,” then the student has completed the assessment for that subject area.

Note: A student who is not rostered to a subject will not appear on the DLM Test Administration Monitoring Extract.

Slide 59 The TIP access extract under the Test Administration and Monitoring tab provides details about when a Testlet Information Page for an assigned testlet was last accessed and by whom. It identifies the student’s name, the testlet identifier, the date the TIP was last accessed, and who accessed it. If no information is provided in the columns regarding when the TIP was last accessed and by whom, that means the TIP was not accessed at all. Recall that each TIP provides information to help the test administrator prepare to administer a specific testlet. Therefore, TIPs should be accessed before the testlet is administered to the student.

Slide 60 The Security Agreement Completion extract under the Data Management tab lists users and their security agreement status. Users who have accepted the security agreement standards will have a status of accepted. A user who has not accepted the security agreement standards will not have access to Educator Portal, and the status will be blank in the extract. All users must agree to the security standards each school year, and it appears automatically in Educator Portal when a user log in and it needs



to be completed. However, this extract will also indicate whether a user is active or inactive.

- Slide 61 The Training Status extract under the Data Management tab reports if users enrolled in the DLM Required Test Administrator Training have completed the training. Teachers must complete the training to access the assessment. The extract includes:
- the user's username and roles
 - the user's school and district
 - the type of training in which the user is enrolled (either the training for new test administrators or the one for returning test administrators) and
 - if the user has completed the training
- Slide 62 The Users extract under the Data Management tab lists Educator Portal users and their role(s) in a selected organization as well as their status: active, pending, or inactive.
- Active means the user has an activated account.
 - Pending means the user is in the system but has not activated their account.
 - Inactive means the user's rights have been deactivated.
- Slide 63 Data cleanup is the responsibility of all users. Teachers should verify student data even though they do not have rights to edit student or roster data in Educator Portal. Teachers will need to contact their DTC to have edits made to data.
- Slide 64 Data cleanup means asking the following questions:
- Is every student in the right district?
 - Is every student in the right building?
 - Is every student rostered to the right teacher?
 - Are there any students appearing who will not be taking the DLM alternate assessment?
 - Does the student have a valid NYSSIS ID number?
 - Is every student enrolled in the correct grade and subject? Again, use the Birthdate Chart located on NY's page of the DLM website to



determine the grade and subject in which a student should be enrolled for the DLM alternate assessment.

- Students in grades 3 through 9 should be rostered for ELA and mathematics.

Students in grades 5, 8, and 9 should also be rostered for science.

- Slide 65 The DLM Service Desk will be able to help you with the data management tasks covered in this presentation should you need it.
- Slide 66 When contacting the DLM Service Desk via email or live chat, do not send student personally identifiable information (PII), as this is a federal violation of the Family Education Rights and Privacy Act, or FERPA. Provide only the student's state identification number.
- Slide 67 You may contact the DLM Service Desk at 1-855-277-9751 (toll-free) Monday through Friday, between the hours of 8:00 AM and 6:00 PM Eastern Time. Service Desk hours are extended during the spring assessment window. You can also contact the Service Desk by email or via live chat in Educator Portal.
- Slide 68 New York also offers data support via email.
- Slide 69 Thank you for your attention to this training for DLM data management for DTCs.