Set up Automated Roster with Clever

The Automated Roster with Clever® is an alternative to the standard MAP® roster. With the Automated Roster, your data will sync automatically between your student information system (SIS) and the MAP site so you do not have to prepare and import data.

The Automated Roster integrates with Clever and performs nightly updates to capture the changes you have made in the SIS to students, teachers, and classes.

Main setup tasks:

- Preparing for Automated Roster with Clever on page 1
- Comparing Your District Names on page 4
- Clearing Duplicates from MAP Data on page 8
- Determining Which Clever Identifiers to Use on page 10
- Syncing programs to MAP using Clever on page 12
- Resolving Roster Sync Errors

Preparing for Automated Roster with Clever

NWEA will activate the Automated Roster for your district when you contact your account representative. However, make sure you can accept the stipulations described in this section.

Match on ID Rule

The main stipulation you'll need to accept is a strict rule called **Match on ID**. Under this rule, every student and teacher must have a unique identifier (ID). If there are any duplicate records sharing the same ID, a conflict could result during the sync between the Clever and MAP repositories.

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When conflicts occur, you will **not** have an opportunity to confirm which record is correct. In some cases, conflicts could overwrite existing student or teacher data. If this occurs, you may be unable to access historic test results for the student or teacher.

> **Note:** In contrast, the standard MAP roster process can show you potential conflicts so you can choose the correct match or create a new profile. A related feature, Potential Duplicate report, is also limited to the standard MAP roster.

With Match on ID, you must verify that:

- Students and teachers have unique IDs that remain with them indefinitely.
- When a student or teacher leaves the district, their ID must not be reassigned to anyone else.
- If a student or teacher subsequently returns to your district, you must assign them the same ID they had before they left.

Data cleanup

Your roster of students and teachers may contain duplicate profiles. Before NWEA can enable the Automated Roster, you'll need to find and resolve any duplicates and other conflicts. This effort can involve considerable time, especially if you have existing MAP information.

For detailed instructions, see Clearing Duplicates from MAP Data on page 8.

Email Address as User Name

Teachers should use their email addresses as user names for MAP login. As part of the transition to the Automated Roster, NWEA will automatically convert existing MAP teacher user names to their teacher emails. If teacher user names are updated, their password for MAP Growth will not be changed.

You will need to inform existing teachers about this change. After Clever enables the Automated Roster, when teachers are added they will receive an automated email with their MAP login information.

Considerations for Ethnic Group Names

Some of your MAP Custom Names for Ethnic Groups may be overlooked by the Automated Roster in the following situations:

- If your MAP preferences have multiple MAP Custom Name values mapped to the NWEA Standard Name values, then only one name will be used in the Automated Roster. For example:

Clever Race Value	NWEA Standard Name Values	MAP Custom Name Values	Rostered Value in MAP
American Indian	American Indian or Alaska Native	◦ Alaska Native ◦ American Indian (Both assigned to MAP Standard Name "American Indian or Alaska Native")	Student assigned "Alaska Native" because that name comes before "American Indian" alphabetically

- If a student has the Hispanic ethnicity set to Yes (Y) in Clever, then the student receives the Hispanic or Latino NWEA Standard Name value, regardless of other values. For example:

Clever Hispanic Ethnicity	Clever Race Value	NWEA Standard Name Values	MAP Custom Name Values	Rostered Value in MAP
Y	Caucasian	Hispanic or Latino	White/Hispanic	Student assigned "Hispanic or Latino"
Y	Hispanic		Hispanic	

If your rosters are impacted by these considerations, a representative from NWEA will help you resolve any issues during your setup. If you have concerns about the Automated Roster, please contact NWEA Partner Support for assistance with data clean-up.

Example with student ethnicity = Hispanic

Clever Race Value	Clever Ethnicity Value	MAP Standard Name	MAP Custom Name	Student Ethnicity on Reports
Caucasian	N	White	White	White
Caucasian	Y	Hispanic or Latino	White/Hispanic	Hispanic
Hispanic	Y	Hispanic or Latino	Hispanic	Hispanic

Optional: Assign Students to Programs

If you need MAP reports that show aggregated results by programs, such as English Language Learner, then you can use any of the following methods:

- You can prepare your program data for the Automated Roster to sync using Clever. See Syncing programs to MAP using Clever on page 12.
- You can use the standard roster import to create a full roster for the assigned students, together with a programs file. See Setting Up Student Programs in Reports.
- You can assign students to programs using the bulk update feature, provided the students share something in common, such as grade or class. See Manage Students.

Additional staff and MAP roles

To add non-teaching staff in bulk, you can use the standard roster import and the template called Additional Users. Once you assign roles, those individuals keep the roles. See Add Staff and Roles in Roster Import.

Comparing Your District Names

In this task, you will compare the MAP Custom Name values for schools, grades, and ethnic groups (called “Race” in Clever), and then make any needed adjustments to the MAP Custom Name values in the MAP preferences.

Prerequisite: You should have already connected your student information system (SIS) with Clever, and have completed a sync with the data.

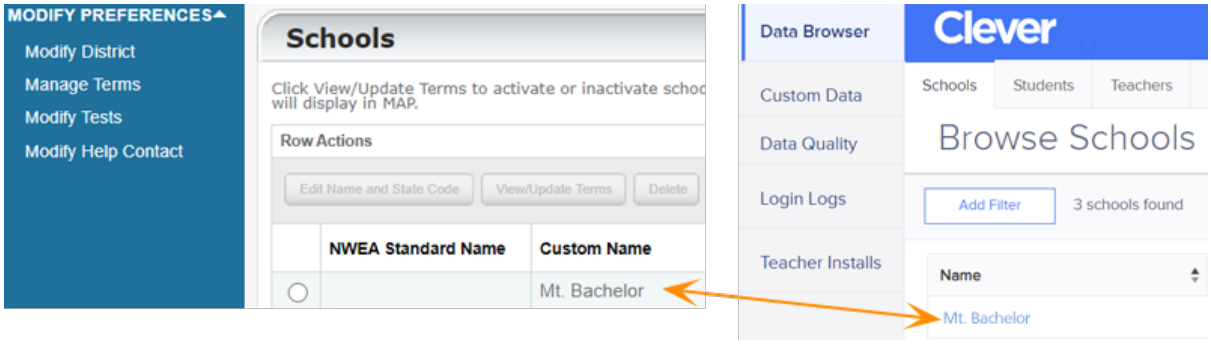
Open MAP and Clever Settings

1. Log in to MAP at start.mapnwea.org.
2. Select **Modify Preferences** in the header (only available to users with MAP role of System Administrator or District Assessment Coordinator).
3. Select **Modify MAP District**.
4. In a new browser window, log in to clever.com.

   Ideally, you should arrange your desktop so you can see both windows beside each other.
5. In the side navigation, choose **Support Tools > Data Browser**.
6. Keep both sites open, and continue with the next steps.

Compare and Adjust Names

1. Starting with school names, compare the MAP **Custom Name** values in the MAP preferences with the Clever School values shown under the **Schools** tab.



2. For any values that do not match, make changes in the MAP preferences:
   - To edit a name, select the existing name and click **Edit Name and State Code** from the buttons appearing above the list.
   - To add a name, click **Add School**.
3. Keep the MAP preferences open for the next steps.

Grades

NWEA and Clever have automatic table mapping in place for Grade values that do not require you to edit name values in MAP to match Clever. See Table 1 below.

Table 1. Clever values and corresponding NWEA Standard Name values for Grade

Clever Value	NWEA Standard Name Value
Prekindergarten	PK
Kindergarten	K
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10

Clever Value	NWEA Standard Name Value
11	11
12	12
Other	OT

We will then roster to the NWEA Custom Name value associated with the NWEA Standard Name value that Clever matches on based on Table 1 above.

Note:

- MAP has a two-digit limitation on Grades.
- If multiple Custom Name values exist for one NWEA Standard Name value in MAP, then Clever will roster to the first Custom Name in the list for that Grade. For example, see Table 2 below.

Table 2. Example of an NWEA Standard Name value with multiple MAP Custom Name values and the resulting rostered value for Grade

NWEA Standard Name Value	MAP Custom Name Value	Rostered Value in MAP
K	K	K
	KG	

Ethnic Groups

NWEA and Clever have automatic table mapping in place for Ethnic Group values that do not require you to edit MAP Custom Name values to match Clever. See Table 3 below.

Table 3. Clever values and corresponding Standard Name values for Ethnic Group

Clever Value	NWEA Standard Name Value
Asian	Asian
Black or African-American	Black or African American
American Indian	American Indian or Alaska Native
Two or more races	Multi-ethnic
Hawaiian or other Pacific Islander	Native Hawaiian or Other Pacific Islander
Caucasian	White
Unknown	Not Specified or Other

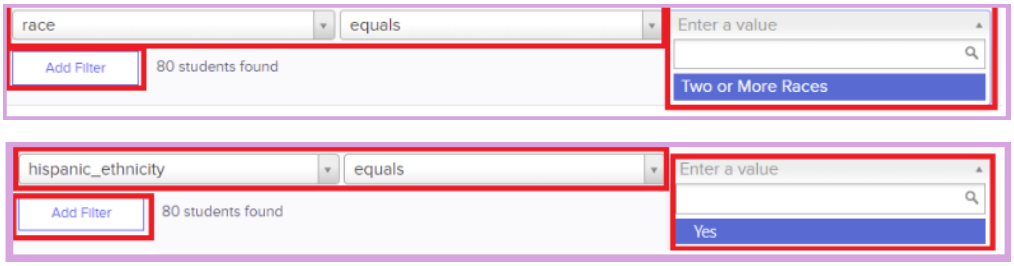
We will then roster to the MAP Custom Name value associated to the NWEA Standard Name value that Clever matches based on the table above.

Note: If multiple Custom Name values exist for one NWEA Standard Name in MAP, then Clever will roster to the first Custom Name in the list for that Ethnic Group. For example, see Table 4 below.

Table 4. Example of an NWEA Standard Name value with multiple MAP Custom Name values and the resulting rostered value for Ethnic Group

NWEA Standard Name Value	Custom Name	Rostered Value in MAP
Not Specified or Other	Not Specified	Not Specified
	Other	

- Hispanic or Latino Ethnic Group is rostered in MAP when a value of "Yes" is listed in the Hispanic Ethnicity field in Clever.
    - To view Race and/or Hispanic Ethnicity values in Clever, select **Support Tools** > **Data Browser** (left panel of your dashboard), and then select the **Students** tab. From here use the **Add Filter** button to add a Race or Hispanic Ethnicity filter to see a complete list of the values in the third drop-down menu:



Clearing Duplicates from MAP Data

If you have existing student and teacher information in the MAP site, you need to ensure there are no duplicate records. For example, a District Proctor could have added a student without realizing a profile already existed.

If you do not have existing MAP information, continue to Determining Which Clever Identifiers to Use on page 10.

Find Potential Duplicates

There are two operational reports you can use to find duplicate student or teacher profiles. Run each report twice—once for students and again for teachers (choose the User profile).

Report Name	Format	Recommendations
Profiles with Shared IDs	Spreadsheet (CSV)	Start with this report because it only checks for individuals using the same ID or having no ID. However, avoid this report if your schools have re-used student IDs because all re-used IDs will appear as duplicates.
Potential Duplicate Profiles	PDF	Generate this report after you have fixed issues found in the first report. (This report checks several characteristics for similarities, not just ID.) Allow a few hours for the report to process.

Note: After NWEA enables the Automated Roster, you will no longer have access to Potential Duplicate Profiles report, because it is not compatible with the Match on ID rule. However, you will still have access to the Profiles with Shared IDs report.

Fix Duplicate Student Profiles

For duplicate student profiles, you will use the merge feature.

1. In the left navigation pane, select **Manage Students**.
2. Enter search criteria for the student profiles you want to merge, and then click **Search**.
3. For each student profile you want to merge, use the **View/Update** button to examine their information.
4. Ask yourself: Which student profile has the most correct information?

   You will make this profile the master profile.

5. Ask yourself: For the student profile you want to designate as master, do the terms that appear match the terms of the other profile or profiles? If not:
    a. Add the missing terms (using the **Add Term** button). Also include applicable reporting attributes, like class. You need to do this so that test events appear as expected on reports.
    b. *Example*: If the other profile you want merged has test events for last fall, then that same fall term must also apply to the master profile. If not, then those test events last fall will not appear on reports after the merge because the master profile was not associated with that fall term.
6. Return to the student search results, and select the profiles you want to merge.

    Note: Some profiles may have already been merged and designated a master profile, as indicated under the Master column. You can merge another profile with it, but you cannot merge multiple master profiles.
7. Select **Merge**.
8. Select the profile you want to designate as the master profile.

    Or, if a profile already appears as the Master Designate, make sure it is the correct one.
9. Choose **Designate as Master**.

    The selected profile will move to the Master Designate table.
10. Select **Submit**.

    A confirmation message will appear.
11. If needed, also update your student information system to eliminate duplicate profiles.

Fix Duplicate Teacher Profiles

For duplicate teacher profiles (users with the Instructor role), you will need to choose the best profile and delete any others. However, you cannot delete an Instructor that has existing class assignments. In those situations, consider contacting NWEA Support for help. You can also refer to guidance under the NWEA community site: How to correct duplicate users.

Determining Which Clever Identifiers to Use

This task is a *critical* part of your implementation.

NWEA needs specific details about the way data appears in the Clever platform. You will provide this information when you complete the setup form described in your implementation email.

Prerequisite: You should have already connected your SIS with Clever, and have completed a sync with the data.

Checking Student Data

You need to spot-check your students' data to see which Clever identifiers contain valid information for students.

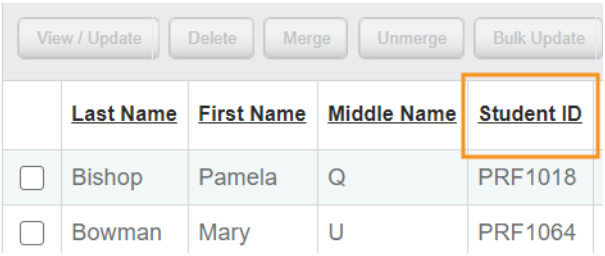
If applicable: check the MAP site

Complete these steps if you have existing students in the MAP site, so you can compare with Clever data. Otherwise, skip to the next section.

1. Log in to MAP at start.mapnwea.org.
2. Choose **Rostering** from the main menu. Then select **Manage Students** (requires MAP role of Data Administrator, School Assessment Coordinator, or District Proctor).
3. Search for existing students.

   You can use the wildcard character (*) in your search. For example, type B* to see students whose names begin with "B."

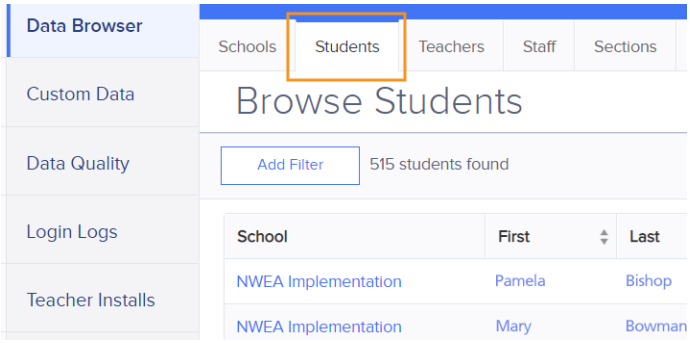
   To limit the search results, select a specific grade or school.
4. In the search results, look for the **Student ID** column.



5. Keep the search results open and continue.

Check the Clever site

1. Log in to clever.com.
2. In the side navigation, choose **Support Tools > Data Browser**.
3. Click the **Students** tab.



4. If you found students in the MAP site, look for those same students here (you can sort by clicking the column heading).
5. Click the name of a student, and look for the following pieces of data in the pop-up window (you will need to scroll down):
    - sis_id
    - state_id
    - student_number
6. Check another 2 or 3 students and notice any trends in their IDs:
    - Which IDs have values?
    - Do the values differ?
    - Which Clever ID matches the MAP **Student ID** when you compare the same students in the MAP site?

Determine the Clever identifier for students

You can now choose which student ID in Clever is most valid. The ID should:

- uniquely identify each individual for years into the future
- match the MAP Student ID values for existing MAP students

Checking Teacher Data

Repeat the previous steps, except for teachers. Again, check the MAP site if you have existing records; otherwise, you only need to check Clever.

MAP Site	Clever Site

• Open **Manage Users**.
• In your search, set **User Role** to **Instructor**.
• Look for values under the **Instructor/Educator ID** column.
	• In the Data Browser, click the **Teachers** tab.
	• Click the names of 2 or 3 teachers, and look for the following IDs:
	  ◦ sis_id
	  ◦ teacher_number

Provide IDs to NWEA

Provide your chosen identifiers for student and teacher using the form that is linked from the implementation email you received from NWEA.

NWEA will use your chosen identifiers for the sync with Clever.

Syncing programs to MAP using Clever

Syncing Clever with your MAP system will enable data to transfer accurately between the two systems and enable you to analyze MAP assessment data associated with students in specific programs.

By default, Clever supports several fields that NWEA will import to MAP as programs: ell_status, frl_status, and iep_status. To sync other programs, you can create custom fields (also known as “extension” fields) in Clever that you can then share to MAP.

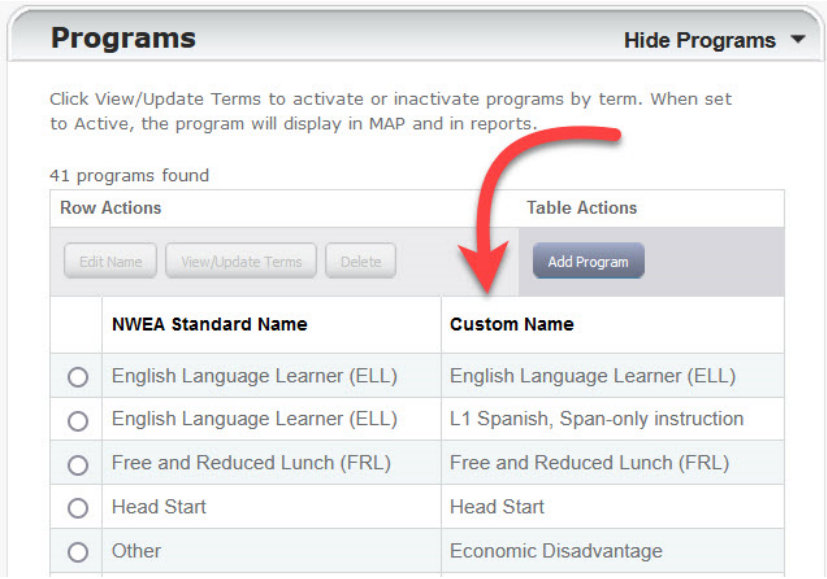
These instructions will walk you through the process of setting up your Clever program data to import correctly into MAP.

Step 1: Find the MAP Custom Names for the programs you will sync

When Clever sends program data to MAP (e.g., if a student is an English Language Learner [ELL]), the MAP system will attempt to import the data using the MAP Custom Names for the programs you’ve defined. Therefore, a good first step is to identify the MAP Custom Names that are already entered the MAP system (if any).

To find the MAP Custom Names for the programs in your district:

1. Log in to MAP at start.mapnwea.org.
2. Select **Modify Preferences** in the header (only available to users with MAP role of System Administrator or District Assessment Coordinator).
3. Select **Modify MAP District**.
4. Scroll down to the **Programs** section. A list of programs showing the **NWEA Standard Name** and MAP **Custom Name** appears.
5. Note the Custom Names for programs you want to sync using Clever.
    - The MAP Standard Name is not used to match program data from Clever.
    - The MAP Custom Name is the name that shows on MAP Growth reports.
    - It is possible for multiple MAP Custom Names to have the same MAP Standard Name, and it is also possible for the Custom Name to be identical to the MAP Standard Name.
    - Individualized Education Plan (IEP) is not a default value in the MAP System and, therefore, will need to be added if you want this program data to sync. These steps include:
        a. On the start page, select **Modify Preferences** in the header. Then select **Modify MAP District** (requires MAP role of System Administrator or District Assessment Coordinator).
        b. Select the **Add Program** button, then select "**Other**" as the Standard Name and paste "Individualized Education Plan (IEP)" into the Custom Name text field.



NWEA standard program names and corresponding MAP custom names.

        c. Finally, select **Submit** to save.

Step 2: Learn about Clever Standard Fields

Clever has 3 standard fields that are pre-populated in the Clever system.

1. ell_status
2. frl_status
3. iep_status

These 3 Clever standard fields, if shared with the MAP System, will automatically link up with the following MAP Custom Names if the MAP Custom Names are present in your MAP system (refer to the table below).

Table 1. Clever Standard Fields to MAP Custom Name Cross-Walk

Clever Field Name	Clever Accepted Values	MAP Standard Name	Corresponding MAP Custom Name
ell_status	Y/N or empty	English Language Learner (ELL)	English Language Learner (ELL)
iep_status	Y/N or empty	Other - or - Special Education (SPED)	Individualized Education Plan (IEP)
frl_status	Free, Paid, or Reduced	Free and Reduced Lunch (FRL)	Free and Reduced Lunch (FRL)

Table 1 provides an overview of values in Clever and what you would see in the MAP System under **Modify Preferences** > **Modify District**.

For additional programs or if your programs have different MAP Custom Names than listed in Table 1, continue to the next step.

Step 3: Identify if you need to modify or create new extension fields in Clever

Now that you understand that Clever has 3 default fields that align with a small handful of common school programs, you can determine if you need to add or modify extension fields in Clever in order to identify additional programs in your school (e.g., Talented and Gifted, After School Classes, etc.). The easiest way to do this is to compare the extension fields in Clever to the list of MAP Custom names.

- If the extension fields in Clever perfectly match (including spelling and punctuation) the list of MAP Custom names, then no action is needed and your data should transfer accurately.
- If you have extension fields in Clever (e.g., Talented and Gifted) that are not on the list of MAP Custom names, you will need to create new MAP Custom names to match these

extension fields.

- If you have MAP Custom Names (e.g., After School Classes) that do not have a matching Clever extension field, you will need to create new (or modify a current) extension field to match the MAP Custom Name.

Important Note: The MAP Custom Name must exactly match (spelling and punctuation) the Clever extension field for the two systems to communicate accurately.

Step 4: Creating new extension fields in Clever

You can create new extension fields in Clever by uploading a custom CSV file called "students_ext.csv" to your Clever system. For step-by-step instructions on how to create your CSV file, please review Clever's web page.

The following figure is an example of what the CSV file should look once you're done.

sis_id	ext.head_start	ext.section_504	ext.special_education	ext.talented_gifted	ext.title1	ext.other
S7-1	Head Start					Volleyball, Economically Disadvantaged
S7-4						Individualized Education Plan (IEP)
S7-6		Section 504				
S7-11					Title 1	
S7-12			Special Education (SPED)			
S7-15				Talented and Gifted (TAG)		

Example CSV File

- Across the top of the CSV file, you can see that the column headings are the Clever extension field names.
- The first column of information contains the Student Information System (SIS) ID for each student. You will need to enter this information in your CSV file. To find this information, log in to Clever and follow these steps:
    - First, select **Data browser** (left panel)
    - Next, navigate to the **Students** tab
    - Choose a **Student** and then select **Details**

      Tip: From the data browser, and on the **Students** tab, you can download all student records in a CSV file which would then display Student ID field sis_id.
- The data inserted into the rest of the cells helps identify which students are in which school programs. For example, the student with ID "S7-1" is in the Head Start program. The student with ID "S7-12" is in the Special Education (SPED) program. You will need to enter this information in your CSV file.

- The last column of information contains programs (also known as Custom Names) that do not have a corresponding extension field and, therefore, should be listed under ext.other field. Note that for this column, you can assign students to multiple programs by including a comma (,) after each program (for reference, see the figure, depicting how your CSV file should be set up). When NWEA imports this data from Clever into MAP, the student will be assigned to both programs, as long as the Custom Names on your CSV file and on MAP System match exactly.

The names of the Clever extension fields that the MAP system accepts are listed in the MAP Custom Name column in the table below. The data you will enter in the CSV file to assign a particular student to a program will be the exact Custom Name of the program you have listed in the MAP system.

Table 2. Clever Extension Fields Accepted in the MAP System

Clever Extension Field Name (Column headings in CSV file)	Clever Accepted Values	MAP Standard Name	MAP Custom Name (Clever Accepted Values) (Value listed as the Custom Name in MAP)
ext.head_start	Custom Name listed in MAP	Head Start	Head Start or Custom Value of your choosing
ext.section_504	Custom Name listed in MAP	Section 504	Section 504 or Custom Value of your choosing
ext.special_education	Custom Name listed in MAP	Special Education (SPED)	Special Education (SPED) or Custom Value of your choosing
ext.talented_gifted	Custom Name listed in MAP	Talented and Gifted (TAG)	Talented and Gifted (TAG) or Custom Value of your choosing
ext.title1	Custom Name listed in MAP	Title 1	Title 1 or Custom Value of your choosing
ext.frl	Custom Name listed in MAP	Free and Reduced Lunch (FRL)	Custom Value of your choosing
ext.ell	Custom Name listed in MAP	English Language Learner (ELL)	Custom Value of your choosing
ext.iep	Custom Name listed in MAP	Other	Custom Value of your choosing
ext.other	Custom Name listed in MAP	Other	Custom Value(s) of your choosing *use commas to separate multiple values

What if I have multiple “other” programs?

NWEA will assign programs based on the Custom Name of the program. For example, a district might have a program with a Custom Name in MAP called “Volleyball” and another program with a Custom Name called “Economically Disadvantaged”. Refer to the figure below, which depicts the NWEA Standard Names and their corresponding Custom Names, in the MAP System.

	NWEA Standard Name	Custom Name
○	English Language Learner (ELL)	English Language Learner (ELL)
○	Free and Reduced Lunch (FRL)	Free and Reduced Lunch (FRL)
○	Head Start	Head Start
○	Other	Economically Disadvantaged
○	Other	Individualized Education Plan (IEP)
○	Other	Other
○	Other	Volleyball
○	Section 504	Section 504
○	Special Education (SPED)	Special Education (SPED)
○	Talented and Gifted (TAG)	Talented and Gifted (TAG)
○	Title 1	Title 1

NWEA standard name to custom name

What if I have multiple programs that might match a different custom field name (such as ELL)?

If no students will ever be assigned to both programs (for example, a district might have “ELL Spanish” and “ELL Arabic” programs and students can only ever be assigned to 1 of these), then you can use the same custom field in Clever for both. The student assigned to, for example, ELL Spanish, should have “ELL Spanish” as the value for the ext.ell field, while the student assigned to ELL Arabic will have “ELL Arabic” in that field.

The only field that NWEA will accept multiple values for the same student is ext.other. So, if there is a chance that a student could be assigned to multiple programs with the same custom field name in Clever, you should use another field, such as the ext.other field for these programs instead. The ext.other field will accept comma-separated values.

Step 5: Sync data to Clever

For instructions on how to add custom fields and assign values to students in Clever, follow the steps in this Clever help article: For District Admins: Syncing custom (i.e., extension) fields to Clever. The linked article describes:

- How to upload custom data (using the students_ext file) manually to Clever
- How to upload custom data via your district’s SFTP and SIS-managed auto-sync with Clever
- How to view and manage the custom field data in Clever

If you need help syncing the data from your SIS into Clever in the correct format, contact Clever technical support.

See the table below for an example students_ext file where multiple students are assigned to different programs.

Table 3. Student Extension File With Multiple Assigned to Different Programs

sis_id	ext.other	ext.section_504	ext.talented_gifted
123	Remote Learning		Gifted and Talented
456	Remote Learning	Section 504	
789	Remote Learning Economically Disadvantaged		

In the above table, notice that:

- Student 123 will be assigned to 2 programs in MAP: the Remote Learning program and the Gifted and Talented program.
- Student 456 will also be assigned to the Remote Learning program as well as the Section 504 program.
- Student 789 is assigned to both the “Remote Learning” and “Economically Disadvantaged” programs.

Note that all of these programs are matched based on the Custom Name in MAP. The NWEA Standard Name field is not considered.

Step 6: Share data with NWEA

Now that the data is synced to Clever, you can share the data with NWEA. The instructions for sharing custom fields in Clever with an application partner are at the bottom of the For District Admins: Syncing custom (i.e., extension) fields to Clever on Clever’s Help center site. Look for the **Sharing custom fields with apps** section. If you are sharing sensitive fields, refer to For District Admins: Syncing Sensitive Fields (i.e., ELL status, IEP status, FRL status).

Since these fields are considered sensitive, you must provide special permission for Clever to share these fields with MAP. Refer to For District Admins: Syncing Sensitive Fields (i.e., ELL status, IEP status, FRL status) for instructions.