

STUDENTS/STAFF MANAGEMENT GUIDE

This *Students/Staff Management Guide* is written for leaders at schools or the district who:

- Prepare and upload a roster of students and staff
- Add and edit staff users individually
- Add and edit students individually

All tasks require you to have the Data Administrator role in the Comprehensive Assessment Platform (CAP).

Contents:

- [Staff Access](#) on page 3
 - [Roles and Responsibilities for CAP](#) on page 5
 - [Creating a User Profile](#) on page 7
 - [Add Staff and Roles in Roster Import](#) on page 8
 - [Inactivating or Activating a User Profile](#) on page 12
 - [Deleting a User Profile](#) on page 13
 - [Resetting a User Password](#) on page 14
- [Roster for Students and Staff](#) on page 15
 - [Prepare Your Roster](#) on page 16
 - [Import Your Roster](#) on page 18
 - [Import Errors Guidance](#) on page 20

- [Manage Students](#) on page 26
 - [Creating a Student Profile](#) on page 26
 - [Edit Student Account Profile](#) on page 27

Staff Access

In general, your district is solely responsible for keeping staff and student data secure, in compliance with the Family Educational Rights and Privacy Act (FERPA).

You control access by assigning roles to each person’s user profile. A role defines what each person can do and see on the staff site (called the Comprehensive Assessment Platform):

<https://teach.mapnwea.org>

To begin, review [Steps to Add Users and Roles](#) on page 3 as well as [Roles and Responsibilities for CAP](#) on page 5.

For maintenance of roles and related settings, see [Manage Users](#).

Steps to Add Users and Roles

Here are the typical actions your team would follow when adding the user profiles and roles:

Goal	Action	Details
Determine access	Decide how to control access by assigning CAP roles.	Roles and Responsibilities for CAP on page 5
Add leadership team	Use Manage Users in the CAP site to add individuals.	Creating a User Profile

As needed for bulk upload:

Add other staff and MAP roles	Import non-teaching staff in bulk through the roster process (requires Data Administrator role).	Add Staff and Roles in Roster Import on page 8
Verify staff receives log-in email	If you included email address with the staff import, they will receive an automated email with login information, but you should verify it is received. Note: A Technology Coordinator may need to clear spam filters to allow email from *@nwea.org.	—
Staff checks log-in	Ask staff or a technology coordinator to configure their browser and device to meet requirements.	

At least 1 week before every testing term:

Add teachers, students, and classes	Complete and import NWEA roster template (requires Data Administrator role in the MAP site).	Roster for Students and Staff on page 15
Add Proctor role	For new teachers who must administer tests, add the Proctor role through the roster process.	Add Staff and Roles in Roster Import

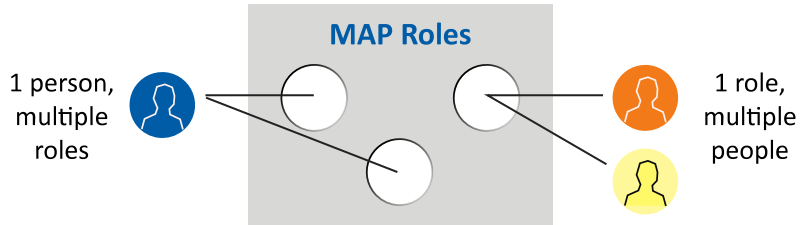
Security policies for staff

For optimal protection of your data, set security policies. In particular, ask staff to memorize their passwords and never share their login credentials. If someone forgets their password, which each person creates during initial login, then that person can choose to reset it from the login page. (Or, if needed, you can assist by [Resetting a User Password](#).)

Your policy could also recommend against browser features that automatically save passwords. Your Technical Coordinator can force this rule in staff browser settings.

Roles and Responsibilities for CAP

Every person who uses the Comprehensive Assessment Platform must have one or more roles assigned to control what that person can do and see. You can fill the roles with any combination of people needed. One person can hold multiple roles, and multiple people can hold the same role to serve as a backup.

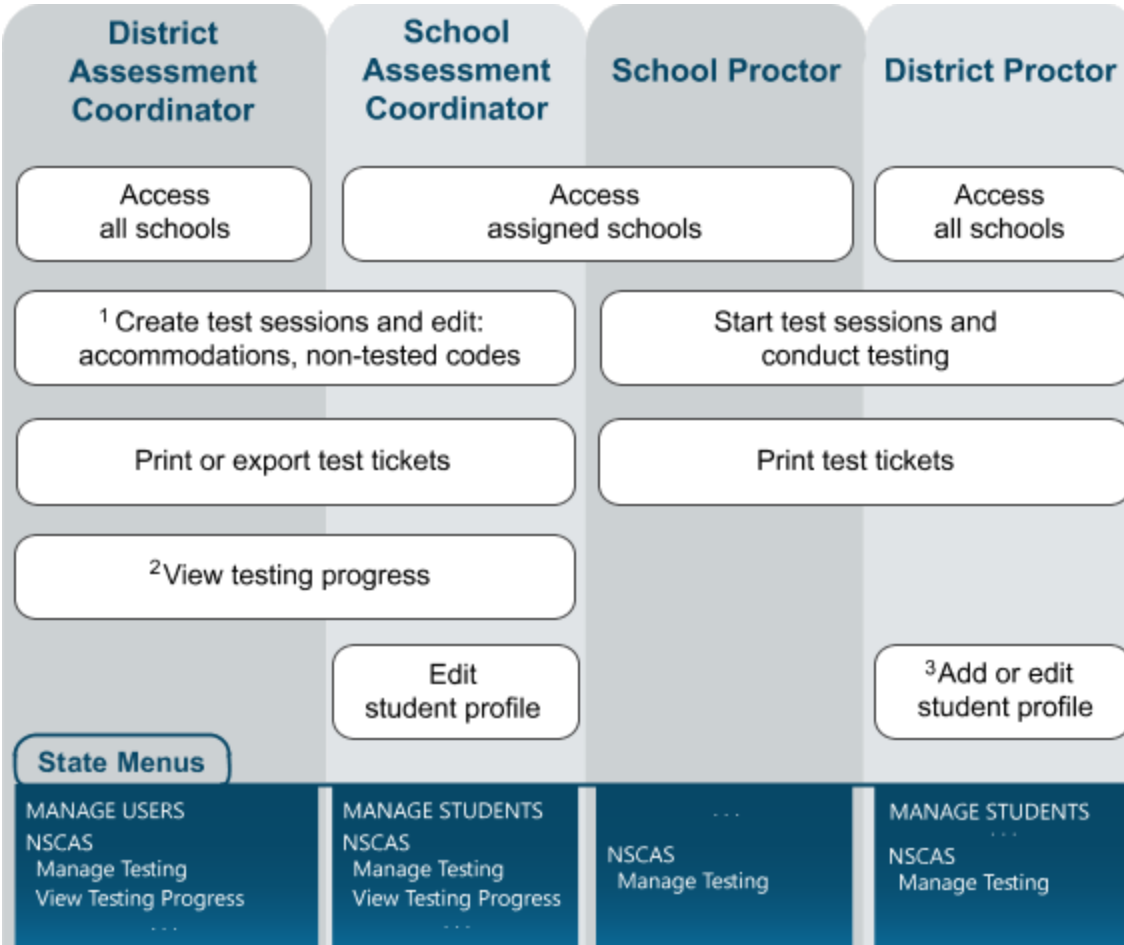


With the following roles, you can perform the listed capabilities.

Roles for Platform Setup

System Administrator	District Assessment Coordinator	Data Administrator
Assign any role for any user, including oneself	Assign roles for other users, except System Administrator	Assign roles for other users, except System Administrator or District Assessment Coordinator
Add or edit users + Reset user passwords (follows same exceptions as role assignments, above)		+ Also for Data Admin: Add or edit students
Modify preferences for the organization		Import student/staff roster
View operational reports		
State Menus		
MANAGE USERS NSCAS Manage Paper Pencil View Testing Progress ...	MANAGE USERS NSCAS Manage Testing View Testing Progress ...	IMPORT PROFILES MANAGE USERS MANAGE STUDENTS NSCAS Manage Testing View Testing Progress ...

Roles for Testing Students



1: Also available to Data Administrator role (both state and district level)

2: Also available to Data Administrator (both state and district level), System Administrator, and Administrator roles

3: Ability for District Proctor to add or edit students depends on a district setting

Creating a User Profile

User profiles require at least one role. The role controls the permissions for the user.

Required role: **District Assessment Coordinator** or **Data Administrator** or **System Administrator**

1. In the left navigation pane, select **Manage Users**.
2. Search to make sure the profile doesn't already exist.
Tip: Select **Include Inactive Users** to make your search as broad as possible.
3. Click **Create User** (near the top) if the search does not return an existing profile for the user.
4. Enter the requested information under **All Roles**.
5. In the User Role section, under Available Roles, select a role that you want to assign this user, then click **Add**.
 - a. Repeat this process for all the roles you want to assign to this user.
 - b. To remove a role, select it in the Roles to Assign list, and then click **Remove**.
6. Click **Continue**.
7. If prompted, specify which schools to assign to this user. You can search for the school name if you type at least three letters.
8. Click **Submit**.

Important: With any change, be sure to click **Submit** as needed—possibly on multiple pages—to complete the action. The process is complete and the change is saved only when you see a message such as "User profile has been updated successfully."

If you specified an email address for this user, the system automatically sends a user name and temporary password to that address.

If you did not specify an email address for this user, the screen displays the user name and temporary password.

Important: Make sure to write down the user name and temporary password before you leave the confirmation page. You will need to provide them to the user directly.

Add Staff and Roles in Roster Import

You can add staff in bulk using the NWEA[®] roster spreadsheet template called *Additional Users*. You can also use it to assign CAP[®] roles.

For example, you can assign the Proctor role to your teachers or other staff, including people already added into the CAP site. Once they have roles assigned, they will keep those roles, unless you make changes.

Check Before You Begin

- Ask your technical staff if email spam filters will allow automated emails from nwea.org. The automated email provides login information to your staff.
- Choose the CAP roles you want to assign. See [Roles and Responsibilities for CAP](#) on page 5.
- To get a list of your existing users and their current roles, access the User Roles Report (under View Reports > Operational Reports).

Complete Additional Users Template

Required role: **Data Administrator**

1. Download the roster spreadsheet template from the CAP site (teach.mapnwea.org):



The screenshot shows the 'Information Center' page with three columns of links. The 'Administrator Setup' section is highlighted with an orange box, and the 'Download Roster File Template' link is highlighted with a blue box.

Information Center		
Help and Support <ul style="list-style-type: none">• Partner Support• Help Center• Quick References	Student Resources <ul style="list-style-type: none">• Practice Tests• K-2 Test Introduction Video• 2+ Test Introduction Video	NWEA Secure Browser App <ul style="list-style-type: none">• PC (Download)• Mac (Download)• iPad (Setup Directions)• Chromebook (Setup Directions)• System Requirements
Getting Started <ul style="list-style-type: none">• Proctor Quick Start• Video Tutorials	Administrator Setup <ul style="list-style-type: none">• Download Roster File Template• Download Programs File Template	

2. Open the roster template and select the **Additional Users** sheet.
3. Complete the required, blue-shaded columns *at a minimum*, and follow the descriptions provided in the top rows:

B	C	D	E	F	G	H	I
School Name	Instructor ID	Instructor State ID	Last Name	First Name	Middle Name	User Name	Email Address
Optional*	Optional	Optional	Required	Required	Optional	Required	Optional, but requi
Blue Middle School	22111		Sample	Sam		sam.sample@GES.edu	sam.sample@GES.edu
Green Elementary	33444		Generic	Geena		geena.generic@GED.edu	geena.generic@GED.edu
Sample School			Broswell	Meg		megb@ss.edu	megb@ss.edu
Sample School			Brooks	Ben		benb@ss.edu	benb@ss.edu

- Beginning with column J, complete the roles you want to assign by typing “Y” in the appropriate column or columns.

Important: Also complete the **School Name** column when you assign roles to school staff, such as the School Proctor role. If you leave School Name blank, you will grant access to all schools. In the following example, the roles differ between schools:

School Name should not be blank, unless you want to grant permission to *all* schools

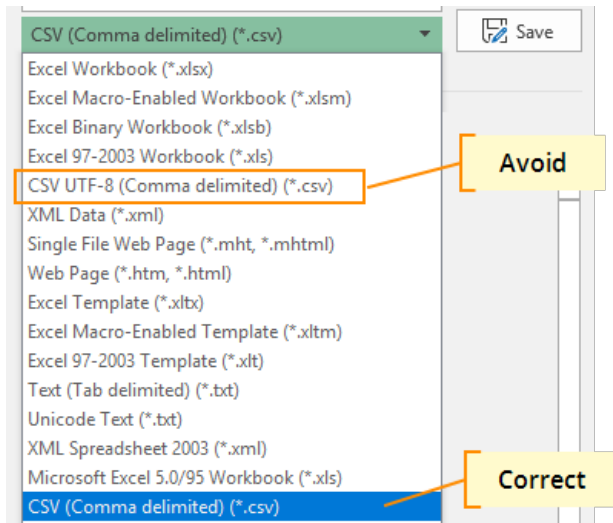
B	J	K	L	P	Q
School Name	Role = School Proctor?	Role = School Assessment	Role = Administrator?	Role = Interventionist?	Role = SN Administrator?
Optional*	Optional	Optional	Optional	Optional	Optional
Brown Elem	Y	Y	Y	Y	Y
Purple Elem				Y	Y

- Keep the first row in place, but remove the description rows, from row 2 through 8 (or whatever row is just above your information):

Remove description rows, but keep row 1

1	A	B	C	D	E	F	G	
	School State Code	School Name	Instructor ID	Instructor State ID	Last Name	First Name	Middle Name	
2	Optional	Optional*	Optional	Optional	Required	Required	Optional	
3	Code assigned by the state.	School that you permit staff to access.	Unique identifier assigned to	Unique identifier assigned to the teacher (instructor)	Last name connected with the	First name connected with the	Middle name connected with the	
4	Note: This ID does							
5	Alphanumeric	Alphanumeric	Alphanumeric	Alphanumeric	Alphanumeric	Alphanumeric	Alphanumeric	
6	2 characters min,	3 characters min,	100	2 characters min,	c	c	20 characters	
7	<u>Examples:</u>	Green Elementary	22111		Sample	Sam		
8	<u>(For details, see Prepare Your Poster video)</u>	Blue Middle School	22111		Sample	Sam		
9		Green Elementary	33444		Generic	Geena		
10	Add your data below. NEVER remove columns. When finished, remove rows 2 - 8 (keep row 1), and save as CSV (not t							
11		Brown Elem			Broswell	Meg		

- Save or export a copy of the spreadsheet using the comma-separated (CSV) file format. Make sure to choose the standard CSV format (there may be other variations to choose):



Import Additional Users

Required role: **Data Administrator**

1. Log in to the CAP site (teach.mapnwea.org) and choose **Import Profiles / Rostering**.
2. Click **Start New Import**.
3. On the Set Up Import page, choose **Additional Users**:

4. Under **Roster File** , click **Add** and browse to find the CSV file you saved.
5. Click **Next**.
6. Continue through the import process:

1: Preview	2: Validation	3: Import summary	4: Post records
The first 20 rows appear for you to check.	The Import Status message starts with “queued” and finishes with “validated.” Note: “Please wait” continually blinks, even after validation is complete.	The final summary appears.	Your data uploads.

1: Preview	2: Validation	3: Import summary	4: Post records
Actions			
<p>When you confirm that you chose the correct file, click Confirm.</p> <p>If <i>We Have Encountered an Error</i> appears, see Preview Errors on page 20.</p>	<p>If <i>File Format Validated with Errors</i> appears, click Review Roster Errors. See File Format Errors on page 21.</p> <p>– or –</p> <p>If <i>Data Validated with Errors</i> (or <i>No Errors</i>) appears, click Review Import Summary. Continue to Import Summary.</p>	<p>If Reconcile Errors appears (near the bottom), then click it. See Reconcile Errors on page 23.</p> <p>– After errors reconciled –</p> <p>When Post Valid Records appears, click it.</p>	

Inactivating or Activating a User Profile

Inactivating a user profile prevents that person from logging in to the assessment platform (teach.mapnwea.org). For example, you might deactivate a user profile when an individual takes a leave of absence. When the user returns, you can reactivate the profile.

You cannot deactivate your own user profile, nor can you deactivate a user profile with a higher priority than your own. The order of priority appears in the following list of roles, from left to right. For example, the District Assessment Coordinator cannot deactivate a user profile with the System Administrator role.

Required role: **System Administrator** or **District Assessment Coordinator** or **Data Administrator**

To deactivate a user profile:

1. In the left navigation pane, select **Manage Users**.
2. Search for the user profile.
3. In the Search Results section, select the profile you want to deactivate.
4. Click **Inactivate Profile**.
5. Click **OK**.

To activate a user profile:

1. In the left navigation pane, select **Manage Users**.
2. In the upper-right corner of the page, select **Include Inactive Users**.
3. Search for the user profile.
4. From the search results, select the profile you want to activate.
5. Click **Activate Profile**.
6. Click **OK**.

Deleting a User Profile

Deleting a user profile completely removes the user. To temporarily inactivate a user profile so that access is blocked but can easily be restored, see .

Important: You can delete a user profile only if no classes are associated with it. To disassociate classes, you must first edit the students; see [Edit Student Account Profile](#) on page 27.

You cannot delete your own user profile, and you cannot delete a user profile with a higher priority than your own. The order of priority appears in the following list of roles, from left to right. For example, the District Assessment Coordinator cannot inactivate or delete a user profile with the System Administrator role.

Required role: **System Administrator** or **District Assessment Coordinator** or **Data Administrator**

1. In the left navigation pane, click **Manage Users**.
2. Enter your search criteria.
3. Select the user profile you want to remove, and then click **Delete**.
4. Click **OK** in the confirmation box that appears.

Resetting a User Password

In most cases, users should reset their own password by clicking **Forgot Username or Password?** under the main login prompt. However, if needed, you can generate a temporary password by updating the user's profile.

Note: Your role may prohibit you from resetting the password of users with a role higher than your own (hierarchy depicted in the list of roles below).

Required role: **System Administrator** or **District Assessment Coordinator** or **Data Administrator**

1. In the left navigation pane, click **Manage Users**.
2. Enter your search criteria.
3. Select the correct profile and click **View/Update**.
4. In the All Roles section, click **Request Password Reset**.

Important:

- The new password does not take effect until you submit all changes to the user profile.
- If the user profile:
 - includes an email address, the password is automatically sent via email;
 - has no email address, the password displays on the screen after you submit all changes, and you must email it to the user manually.

5. At the bottom of the screen, click **Submit** when the page refreshes.

The User Profile Summary page appears.

- If you are resetting the password for an Instructor, you must click **Submit** a second time on this page.
 - A message states that the profile has been updated successfully. The page displays the new password or a confirmation that the password was sent by email.
6. If the password displays on the screen after you submit the profile, communicate the temporary password to the user.

When logging in with the temporary password, the user is immediately prompted to create a new password.

Roster for Students and Staff

Here are the main steps involved with the roster of students for Summative testing:

- State departments work with NWEA to complete and import the roster of students.
- Districts or schools check the state-provided roster.
- Districts or schools complete a standard roster to add other required data.

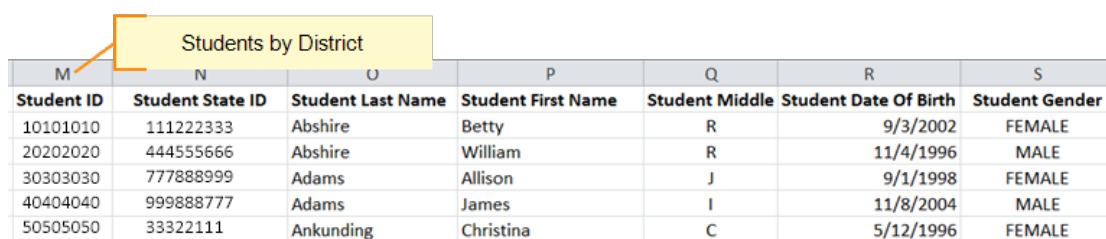
In addition, you might use the roster import to assign the roles needed for Summative testing. See [Optional: Assigning Roles Through Roster](#) on page 16.

Checking State-Provided Roster

To check the student records that your state provided, use the Students by District report.

Required role: **Data Administrator**

1. Log in to CAP (teach.mapnwea.org).
2. From the left menu, choose **View Reports > Operational Reports** and select **Students by District**.
3. Choose a term and click **Create Spreadsheet**.
4. From the next screen, select the file that you wish to download, then click **Download** under **Order Status**.
5. Open the file in Excel[®] or another spreadsheet program:



M	N	O	P	Q	R	S
Student ID	Student State ID	Student Last Name	Student First Name	Student Middle	Student Date Of Birth	Student Gender
10101010	111222333	Abshire	Betty	R	9/3/2002	FEMALE
20202020	444555666	Abshire	William	R	11/4/1996	MALE
30303030	777888999	Adams	Allison	J	9/1/1998	FEMALE
40404040	999888777	Adams	James	I	11/8/2004	MALE
50505050	33322111	Ankunding	Christina	C	5/12/1996	FEMALE

Tip: Sort by the columns indicating the student's school.

6. From your student information system, generate a report with similar information, and then compare.
7. If you find discrepancies, notify your state contact.

Completing a Standard Roster

Required role: **Data Administrator**

The roster provided by the state does not include class information and other required student data. Also, it does not include students who are testing only with MAP. Because of this, you must follow the standard roster preparation and import required for MAP testing.

1. **Prepare the roster template.** Pay attention to the **Student State ID** column, because it is the link between your data and the roster provided by the state. If needed, refer to the Student by District report from the previous task. For a guided video, see the help topic: [Platform Setup > Students/Staff Roster > Prepare Your Roster](#)
2. **Import the roster.** Specify the spring term and keep the default **Add/Update** selection, *not* Overwrite. For a guided video, see the help topic: [Platform Setup > Students/Staff Roster > Import Your Roster](#)

Optional: Assigning Roles Through Roster

If your school has been using MAP, the roles you assigned to staff will also apply to Summative testing. However, for Summative testing, the roles are split differently:

Roles to Set Up Test Sessions	Roles to Run Testing	Access
District Assessment Coordinator	District Proctor	All Schools
School Assessment Coordinator	School Proctor	Assigned Schools

For these roles and others, you can use the roster template to make assignments in bulk. Log in to CAP (teach.mapnwea.org), and download the latest **Roster File Template** from the home page. Complete the **Additional Users** tab, and import using the Additional Users roster type option. For details, see [Add Staff and Roles in Roster Import](#) on page 8.

Prepare Your Roster

A roster spreadsheet is required for importing staff and students.

The purpose of roster preparation goes beyond testing. The way you put together the roster also *determines the organization and access for reports*. It groups students into classes, and connects those classes to any educators who need to access the students' CAP results.

You should know how to edit a spreadsheet. For help with using Microsoft[®] Excel[®], see the tutorials on this site: <https://edu.gcfglobal.org/en/topics/excel>

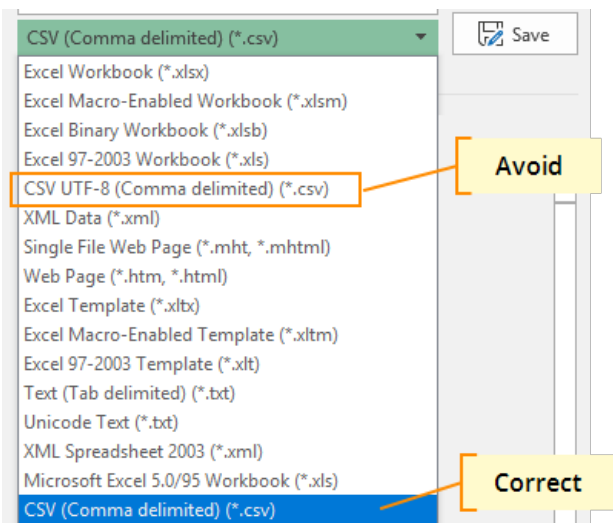
About the Roster Templates

You create your roster file using NWEA templates. You can obtain the roster templates from the homepage when you log in the CAP site (teach.mapnwea.org):

- **Roster File Template**—Primary template with two spreadsheet tabs:
 - **StandardRoster** tab—Main template for inputting teachers, students, and classes.
 - **Additional Users** tab—Optional template to input additional staff or to add other roles to teachers (teachers only receive the Instructor role by default). For details, see [Add Staff and Roles in Roster Import](#) on page 8.

Saving Roster as CSV Format

After preparing the roster file, you need to save it as the comma-separated (CSV) format before you continue with the roster import. In Excel, use File > Save As. In other editors, you may need to export or download. Make sure to choose the standard CSV format (there may be other variations to choose):



Import Your Roster

Before you can import, you must prepare a roster file (see [Prepare Your Roster](#) on page 16).

Timing Tips:

- Coordinate at the district level because you can run only one import process at a time within a district.
- During peak testing times, the import puts requests into a queue, which may take up to 48 hours
- If needed, you can break the import file into small batches instead of one large file
- To prevent conflicts, inform all users when an import is in progress so they avoid updating user profiles

About the Import Options

In almost all cases, you'll use the following options on the Import Profiles page:

The screenshot shows the 'Set Up Import' step of the import process. A yellow callout box labeled 'Most common options' points to the 'Standard' radio button under 'Roster Type' and the 'Standard - Add/Update' radio button under 'Add/Update or Overwrite data for selected term?'. The 'Term' dropdown is set to 'Spring 2019-2020'. The 'Roster Type' section includes a link 'Help me choose'. The 'Add/Update or Overwrite data for selected term?' section includes four radio button options: 'Standard - Add/Update Recommended (Add to or Update existing data)', 'Standard - Overwrite Warning (This will replace all existing data for the term with the new file data.)', 'Add/Update Students Only Warning (Only student related data will be imported.)', and 'Add/Update Instructors Only Warning (Only instructor related data will be imported.)'.

- **Roster Type Standard**—Specifies that you are importing the Standard Roster template. (For information about the Additional Users template, see [Add Staff and Roles in Roster Import](#) on page 8.)
- **Term**—Typically, you keep the default, current term.
- **Standard—Add/Update**—Imports both students and teachers, and updates information for anyone previously imported.

Other import options

Warning: All of these options could result in students failing to appear on reports or teachers failing to have access to reports. Use caution and be prepared to possibly correct the situation with another roster import.

Option	Result	Example Use
Standard - Overwrite	<p>Overwrites both student and teacher information for a specified term. The overwrite not only adds and updates, but also <i>removes</i> existing information. For every school that appears in your roster file, the overwrite starts by removing existing information from the CAP site for the specified term. The information removal applies to <i>all</i> students and teachers in a school, not just the individuals listed in your roster.</p> <p>The overwrite does <i>not</i> affect:</p> <ul style="list-style-type: none"> • test results • login passwords • any information for schools that do not appear in your roster file 	<p>You can both remove and replace incorrect information, such as students accidentally assigned to the wrong grade or imported to the wrong term.</p> <p>Be sure your roster file includes <i>all</i> students and classes you want enrolled for the target term and school. For example, you might need to correct only grade 3 students. Your roster should also include students from all other grades to keep them enrolled for the term. If you do not, then you would need to repeat the roster for those missing students to add them back.</p>
Add/Update Students Only	<p>Only imports student data, not teachers and not class assignments.</p> <p>Because this option excludes class assignments, any students you <i>add</i> will fail to appear on CAP reports.</p>	<p>You can quickly add students if you have an urgent need to begin testing before your full roster information is complete. You could also use this option to correct information for existing students.</p> <p>Be sure to import the full roster soon after using the Students Only option. If you do not, then any students you <i>added</i> will not appear on reports because they do not have class associations. (Students you updated will retain their current classes.)</p>
Add/Update Instructors Only	<p>Only imports teacher data (found in the Instructor columns), but not students and not class assignments.</p> <p>Because this option excludes class assignments, any teachers you add will fail to have access to reports.</p>	<p>You can quickly provide teachers with access to the CAP site before your full roster information is complete. You could also use this option to correct information for existing teachers.</p> <p>Be sure to import the full roster soon after using the Instructors Only option. If you do not, then any teachers you <i>added</i> will not have access to reports because they do not have class associations. (Teachers you updated will retain their current classes.)</p>

Import Errors Guidance

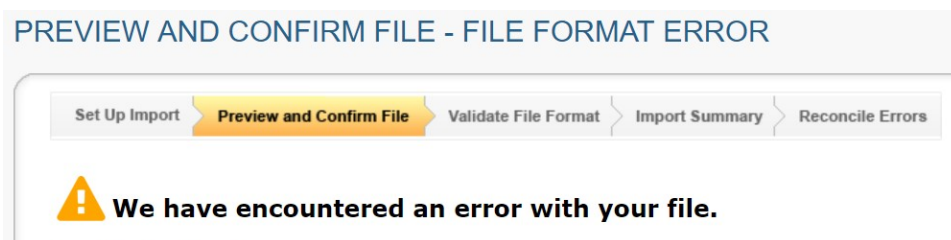
During the roster import, you could receive errors at various stages, described in the following sections:

- [Preview Errors](#) on page 20
- [File Format Errors](#) on page 21
- [Reconcile Errors](#) on page 23

For help with using Microsoft® Excel®, see the tutorials on this site:

<https://www.gcflearnfree.org/excel2016/>

Preview Errors



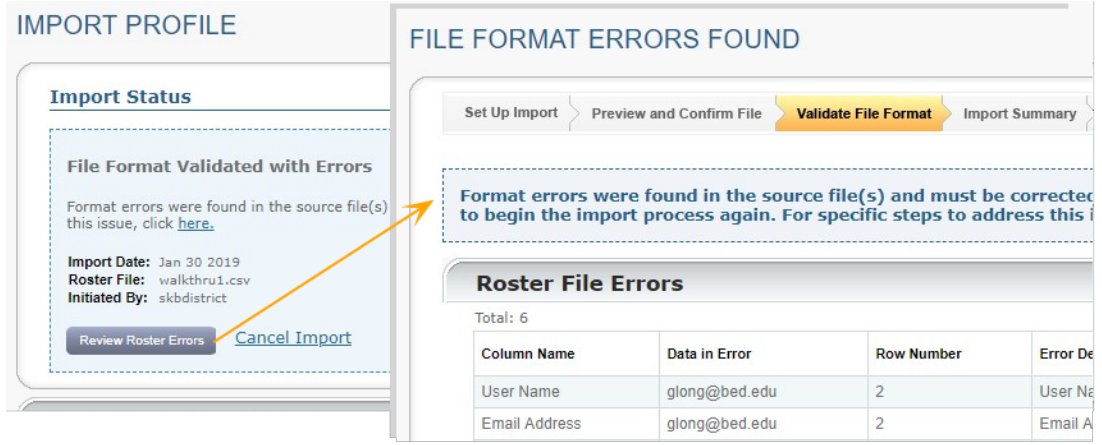
This error indicates a problem in the completed roster file you are attempting to import. Correct the issue and click **Start Over**.

Possible cause	Solution
Wrong CSV (comma delimited) file format	<p>Choose the correct format when you save:</p>
Columns or headings do not match the NWEA template	<ul style="list-style-type: none"> • Compare your completed roster with the NWEA roster template* • Look for added or missing columns • Copy the heading row from the template into your completed roster

Possible cause	Solution
Extraneous data	<ul style="list-style-type: none"> Select the range of cells with data; for example, start with cell A2, drag to the last column, then drag down to the last row Copy and paste into a clean copy of the NWEA roster template*

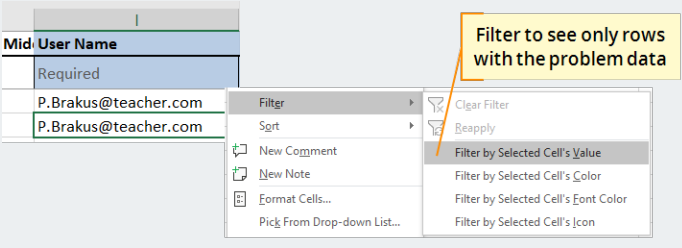
*If you need to download the NWEA roster template, open teach.mapnwea.org and look for Templates on the homepage.

File Format Errors



When you encounter these errors, click **Review Roster Errors** for details. Examine the error list and check your completed roster file.

Error description	Solution																								
XXX cannot be the same for more than one YYY – OR – ZZZ must be the same for this XXX	<p>Two different people in your roster file mistakenly share an ID, user name, or similar data. For example:</p> <table border="1"> <thead> <tr> <th>F</th> <th>G</th> <th>H</th> <th>I</th> </tr> <tr> <th>Instructor Last Name</th> <th>Instructor First Name</th> <th>Instructor Mid.</th> <th>User Name</th> </tr> </thead> <tbody> <tr> <td>Required</td> <td>Required</td> <td>Optional</td> <td>Required</td> </tr> <tr> <td>Brakus</td> <td>Parthenia</td> <td></td> <td>P.Brakus@teacher.com</td> </tr> <tr> <td>Corwin</td> <td>Jamila</td> <td></td> <td>P.Brakus@teacher.com</td> </tr> <tr> <td>Corwin</td> <td>Jamila</td> <td></td> <td>J.Corwin@teacher.com</td> </tr> </tbody> </table> <p>Two people with the same user name</p> <p>To find the problem in your roster, refer to the Column Name and Row Number shown in the error message. In many cases, multiple errors result from the same issue in your roster file.</p>	F	G	H	I	Instructor Last Name	Instructor First Name	Instructor Mid.	User Name	Required	Required	Optional	Required	Brakus	Parthenia		P.Brakus@teacher.com	Corwin	Jamila		P.Brakus@teacher.com	Corwin	Jamila		J.Corwin@teacher.com
F	G	H	I																						
Instructor Last Name	Instructor First Name	Instructor Mid.	User Name																						
Required	Required	Optional	Required																						
Brakus	Parthenia		P.Brakus@teacher.com																						
Corwin	Jamila		P.Brakus@teacher.com																						
Corwin	Jamila		J.Corwin@teacher.com																						

Error description	Solution
	<p>Tip: To make the issue easier to find, try filtering to show only the rows that match what appears under Data in Error. For example, with the problem column and row selected, you can right-click (control-click on Mac) to choose Filter by Selected Cell's Value:</p> 
Field cannot be empty	One of the required columns (a “field”) is missing information. Refer to the Column Name and Row Number shown in the error message.
Date of Birth must be a valid date – or – Gender must be “M” or “F” (or other errors, such as invalid characters)	Follow the requirements described in row 4 of the roster template. For example, dates must follow the MM/DD/YYYY or MM/DD/YY format. If your dates begin with the year or day, then select all date information and change the number formatting.
Student ID does not match any student ID in the CRF file	<p>If you attempted to import both a roster file and Programs File, then this error might occur from a student ID that appears in the Programs File but not in the standard roster file.</p> <p>Either add or remove the missing student and make sure your source records are also correct.</p>

Reconcile Errors

Data Validated With Errors

Reconcilable errors were found for the following file:

Import Date: Oct 31 2019
Roster File: Winter2019
Initiated By: cris.waller

[Review Import Summary](#)

Import Summary

Records

Records imported: 0
Records already present: 0
Total records ready for import: 0
New records to add: 0
Existing records to update: 0

[Post Valid Records](#)

Errors

Total errors to reconcile: 2

[Reconcile Errors](#)

Review errors to reconcile before posting records.

Troubleshooting Steps:

1. Click on a Group Error or Individual Error to correct the remaining errors.
2. Select an option on the error page to reconcile each error.

Group Errors

Group Errors	Errors Remaining
School Errors	0
Ethnic Group Errors	0
Grade Errors	0
Program Errors	0

We recommend reconciling all Individual Errors to ensure all records are posted to the system.

Individual Errors

Individual Errors	Errors Remaining
Instructor Errors	0
Student Errors	2

Reconcile errors occur when information in your completed roster doesn't match records *previously imported* into the CAP site. To display the errors, click **Review Import Summary** and then click **Reconcile Errors**.

You could have multiple errors, as shown under the **Errors Remaining** column. You access the errors under one of the following categories:

- School, Ethnic Group, Grade, or Program Errors
- Instructor or Student Errors

Tip: Before you reconcile errors, you may want to export a list of all errors so that you can make corrections in your student information system or other data source. To export errors, click **Return to Error Summary**, then click **Export Errors**.

School, Ethnic Group, Grade, or Program Error Reconciliation

In this situation, names like school or ethnic group do not match between your roster and the settings stored in the CAP site. For example, the same school might be listed as "Foxcroft Elem" in your roster and "Foxcroft Elementary" in CAP preferences.

You see the mismatched name when you click the error link. It is called the "incoming" name. Refer to the following descriptions of the most common reconciliation options you might see:

Error Reconciliation

Choose one of the following options:

- 1 Do not reconcile at this time
Ensure this school exists and is active in the selected term. Return to reconcile this error later.
- 2 Replace incoming School Name with the following selection:
Start typing, then select a name from the list.
- 3 Import users without creating associations to this school.

Option	Recommendation
1: Do not reconcile at this time	You might choose this option to review each error as you decide what action to take. You can either edit the roster file or edit the CAP preferences. Note: To check or edit CAP preferences, you need either of these CAP roles: System Administrator or District Assessment Coordinator.
2: Replace incoming XX with the following selection	For a quick but temporary fix, you can choose to replace the incoming name with a name from the CAP preferences, assuming the preferences are correct. You will also need to correct your source information.
3: Import users without creating associations	Avoid this option. The import will fail to include the information required for your records to be complete. As a result, teachers or students might be missing from reports.

Instructor or Student Error Reconciliation

In this situation, there could be more than one matching record for a person you are importing. In addition, conflicts can arise when the user name or email address matches someone within the world of all CAP users, even outside your district.

For each error, you will see applicable options. Refer to the following descriptions of the most common options you might see:

Error Reconciliation

Choose one of the following options:

1 Do not reconcile at this time

2 Update User Name and/or email in the incoming record with the following:

3 Update the following selected [user / student] with the incoming record:

Last Name	First Name	Middle Name	Date of Birth	Student State ID	Student ID	User Name	Email Address	Gender	Profile Created On	Profile Last Modified
Granger	Harry	P	Aug 25 2005	-	1027894	hgranger@mj.edu	hgranger@mj.edu	M	Sep 5 2015	Jun 10 2016

4 Create a new profile

5 Do not import incoming records that contain this user

.....

Option	Recommendation
1: Do not reconcile at this time	You might choose this option to review each error as you decide what action to take. If you make corrections directly in the roster file, then you would cancel and restart the import with the corrected roster file.
2: Update User Name and/or email address in the incoming record	You can use this option if the user name or email in your roster file is wrong. The import will use the new information you enter here instead of what appears in your roster. However, make sure you also correct your roster and source information to permanently fix the issue.
3: Update the following selected [user or student]	If available, you can find and choose the correct match that you want updated. However, having multiple choices may mean there are extra duplicate records for the same person. After the import, you should remove duplicates to prevent confusion. For instructions, see the article: <ul style="list-style-type: none"> Duplicate instructor (teacher): How to correct duplicate users (from nwea.force.com/nweaconnection/)
4: Create a new profile	You can use this option to force the creation of a new profile. Be sure to check that none of the other choices are correct so you don't mistakenly create a duplicate record.
5: Do not import incoming records	Avoid this option. Instead of temporarily skipping an error, this choice removes the instructor or student from your import, ignoring the root conflict.

Manage Students

In addition to the roster import, you can also add and edit student profiles individually using **Manage Students**. With Manage Students, you can:

- Add a student individually; see [Creating a Student Profile](#) on page 26
- Edit students one at a time or in bulk; see [Edit Student Account Profile](#) on page 27.

Note: Changes to a student's profile can be made manually in CAP, but it is also important to update the student information in your SIS to maintain consistent information across data management systems.

Creating a Student Profile

If you have a new student or a student missing from the roster, you can create the student record directly.

Required role: **Data Administrator** or **District Proctor**

1. In the left navigation pane, select **Manage Students**.
2. Search to make sure the profile doesn't already exist.

Tip: To broaden your search, try using an asterisk (*) as a wildcard in the student names. To narrow your search, try specifying the Term when the student was added into system records.

3. Click **Create Student** (near the top) if the search does not return an existing profile.
4. Fill in the student's information and click **Continue**.
5. On the next page, specify information that changes from term to term. Complete any fields that your state testing program requires:
 - a. **Ethnic Demographics:** Required for state-level reporting of Summative testing
 - b. **Expanded Student Data:** Required for state-level reporting of Summative testing
 - c. **State Reporting Accountability and Attendance:** Start typing a school name and then choose from the drop-down list.
 - d. **Add School:** You must search for the school name.
Use any part of the name (such as "ele" for Elementary). You can add multiple schools, but make sure to select one and choose **Designate as School of**

Record.

- e. **Add Classes:** Start by typing the last name of the Instructor (teacher), then select classes. If the Instructor does not appear, you might have chosen a term that does not yet have the teachers loaded into the system.
6. Click **Add Term** when the information has been completely filled in.
7. Click **Continue** in the review page.
8. Click **Submit** to finish.

Important: If you do not see the confirmation message, the profile failed to save. Be sure to click **Submit**, or you risk losing all of the student information you specified.

Edit Student Account Profile

Correcting an Individual Student

Required role: **Data Administrator** or **District Proctor** or **School Assessment Coordinator**

1. In the left navigation pane, select **Manage Students**.
2. Enter criteria to search for the student and click **Search**.

Tip: To broaden your search, try using an asterisk (*) as a wildcard in the student names. To narrow your search, try specifying the Term when the student was added into system records.

3. Select the student to update and click **View/Update**. Complete any gaps in the profile, particularly the attributes marked **R** (Required for reporting), so that the student appears on reports.
4. If you need to correct or add term-related data, such as adding an instructor or class, then select the term and click **View/Update Term**.
5. If you updated term information, click **Update Term**.
6. Click **Continue**.
7. Click **Submit**.

You are finished when you see: "**Student profile has been updated successfully.**"

Handling Students with Multiple Schools

What if a student attends multiple schools or has recently changed schools? To reflect those schools on reports, find the student under **Manage Students** and click **View/Update**, then click **View/Update Term**.

- Under **Schools**, choose **Add School** and add any needed schools. Once they are added, select which school will include the student's results on summary reports, then click **Designate as School of Record**.

Updating in Bulk

To correct numerous students, you can either:

- Re-import the student roster—consult a leader with the Data Administrator role.
—or—
- Use the Bulk Update feature in Manage Students—see the following steps.

Required role: **Data Administrator** or **District Proctor** or **School Assessment Coordinator**

1. In the left navigation pane, select **Manage Students**.
2. Select a **Term**. A term selection is necessary to do a Bulk Update.
3. As needed, refine your search by using the other menu choices that appear, such as **Programs** or **Grades**.

You can also specify the **Data Range** when the student profile was created.

4. Click **Search**.

The search results list student profiles that match your search criteria.

5. When you are satisfied with the search results, select the students whose profiles you want to update.
6. Click **Bulk Update**.

Note: If the button is disabled, you probably need to specify a term. Click **Clear** and perform the search again using a specific Term.

7. To apply a change, use the buttons that appear:



8. Click **Submit**.

Important! Before taking any action, make sure the list contains the correct students for the change you want to make.