PIE

Pathways for Instructionally Embedded Assessment

PIE PILOT EDUCATOR PORTAL USER GUIDE

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AUDIENCE AND PURPOSE

The PIE PILOT EDUCATOR PORTAL USER GUIDE provides users, both data managers and teachers, step-by-step procedures for using Educator Portal to complete administrative tasks required for the PIE pilot and access reports. Data managers are responsible for gathering, editing, and uploading user, enrollment, and roster data in Educator Portal. Teachers are responsible for structing their content units by standards and for using the assessments per content grouping in Educator Portal. Teachers may also be referred to as test administrators.

ABOUT THE PIE PILOT

Pathways for Instructionally Embedded Assessment (PIE) is a study aimed at improving assessments to better support classroom teachers. It is sponsored by the U.S. Department of Education and led by the Missouri Department of Elementary and Secondary Education (DESE) in partnership with ATLAS at the University of Kansas. For more information about the PIE project, please visit pie.atlas4learning.org.

The PIE pilot study will be conducted in participating Grade 5 classrooms throughout the 2024–2025 school year, ending before the Missouri state assessment testing window starts. PIE is aimed at helping teachers use assessments and assessment results to support **mathematics** instruction. Short diagnostic assessments that are embedded into instructional cycles and are grounded in research-based learning pathways can help teachers monitor where their students are in their learning progress toward mastery of grade-level skills.

IMPORTANT INFORMATION ABOUT NAMES AND DATA

All example names and organizations used in this document are fictitious. No identification with actual persons (living or deceased), places, and organizations is intended or should be inferred. All data including scores and identification numbers are randomly generated.

A NOTE ABOUT GRAPHICS

Every effort was made to ensure the graphics in this guide match what the teacher will see when using Educator Portal. In some cases, however, graphics vary depending on role or have been edited to allow you to view more information or to obscure personal details.

Contents

Audience and Purpose ... 2

About the PIE Pilot ... 2

Important Information About Names and Data ... 2

A Note About Graphics ... 2

Chapter 1: Getting Started in Educator Portal ... 6

Activate Educator Portal Account ... 6

Log in to Educator Portal ... 7

Reset Educator Portal Password ... 8

Change Password ... 10

Complete the Security Agreement ... 10

Common View Access Issues ... 11

Default Role, Organization, and Assessment Program ... 11

Change User Role View ... 11

Change User Default Role ... 12

Chapter 2: Teacher Overview ... 13

Checklist for Teachers ... 13

Chapter 3: Teacher Training ... 14

Access Training ... 14

Chapter 4: Teachers—Student Data ... 15

View and Check Student Data for Accuracy ... 15

View and Check Roster ... 16

Access the PNP Profile ... 18

From the View Students: Select Criteria Screen ... 18

From the View Student: Record Overlay Screen ... 18

Complete the PNP Profile ... 19

Chapter 5: Teachers—Create Content Groups, Assign Tests, and View Results ... 21

Create a Content Group ... 21

Edit a Content Group..24
Assign an Instructionally Embedded Assessment..24
View Results..28
Class Mastery Report...28
Student Pathway Profile..30
Student Usernames and Passwords for Kite Student Portal 32
Chapter 6: Data Manager Overview 34
Checklist to Manage Data 34
Chapter 7: Data Managers—Upload Templates and User Interface 36
Upload Template Files 36
User Interface...38
Chapter 8: Data Managers—User Data 38
Overview...38
User Roles...39
District Test Coordinator (DTC) 39
District User (DUS)...40
Building Test Coordinator (BTC) 41
Building User (BUS)..42
Teacher (TEA)..43
Add Users..44
Add a User Manually 44
User Account Management..46
Edit a User’s Account...46
Merge Multiple User Accounts..48
Resend the Kite Activation Email Message 49
Unlock a User Account 50
Activate a User 51
Deactivate a User..52
Remove a User 53

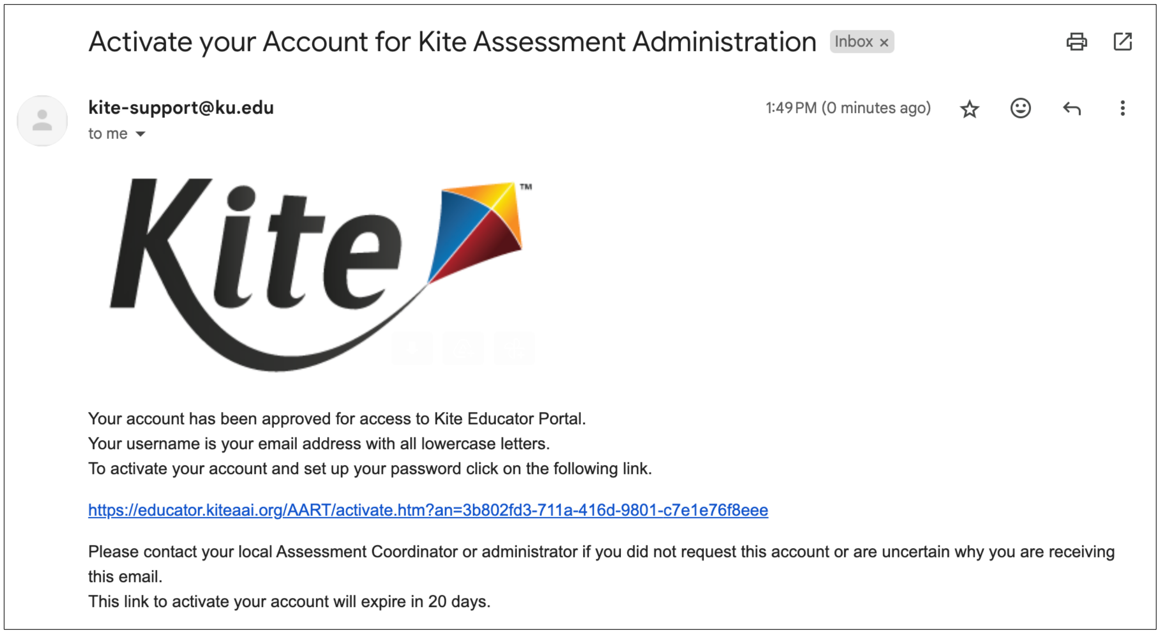
Chapter 9: Data Managers—Enrollment Data 54
Create and Upload an Enrollment Upload Template File 54
Enrollment Field Definitions 56
Change Enrollment Data Previously Uploaded 60
Add a Student Record Manually 61
Student Upload Definitions For Manual Uploads in the User Interface..........63
Edit a Student Record Manually 69
The Find Student Feature 71
Searching by State Student Identifier (SSID) 71
Searching by First and Last Name 72
Exit a Student from Educator Portal..73
Transferring a Student...75
Chapter 10: Data Managers—Roster Data.. 75
Best Practices for Naming Rosters 76
Create and Upload a Roster Upload Template File 76
Roster Field Definitions..76
Create a Roster Manually..78
Change Roster Data or Remove a Roster 81
Chapter 11: Dashboard reports and Extracts for Teachers and Data Managers 83
Data Extracts 84
Accessing All Extracts 85
PIE Reporting Dashboard 86
Chapter 12: Contacts 87
Contacts 87

CHAPTER 1: GETTING STARTED IN EDUCATOR PORTAL

ACTIVATE EDUCATOR PORTAL ACCOUNT

These steps are required for all first-time users.

1) Receive an activation email from kite_support@ku.edu.


Activate your Account for Kite Assessment Administration Inbox ×

kite-support@ku.edu
to me

1:49 PM (0 minutes ago)

Your account has been approved for access to Kite Educator Portal.
Your username is your email address with all lowercase letters.
To activate your account and set up your password click on the following link.

https://educator.kiteaai.org/AART/activate.htm?an=3b802fd3-711a-416d-9801-c7e1e76f8eee

Please contact your local Assessment Coordinator or administrator if you did not request this account or are uncertain why you are receiving this email.
This link to activate your account will expire in 20 days.

Note: Activation emails are sent after the state, district, or building data manager uploads your user information into Kite® Educator Portal. If you did not receive an activation email, ask the data manager to resend the Kite activation email or check to ensure you have been added as a user to Kite Educator Portal.

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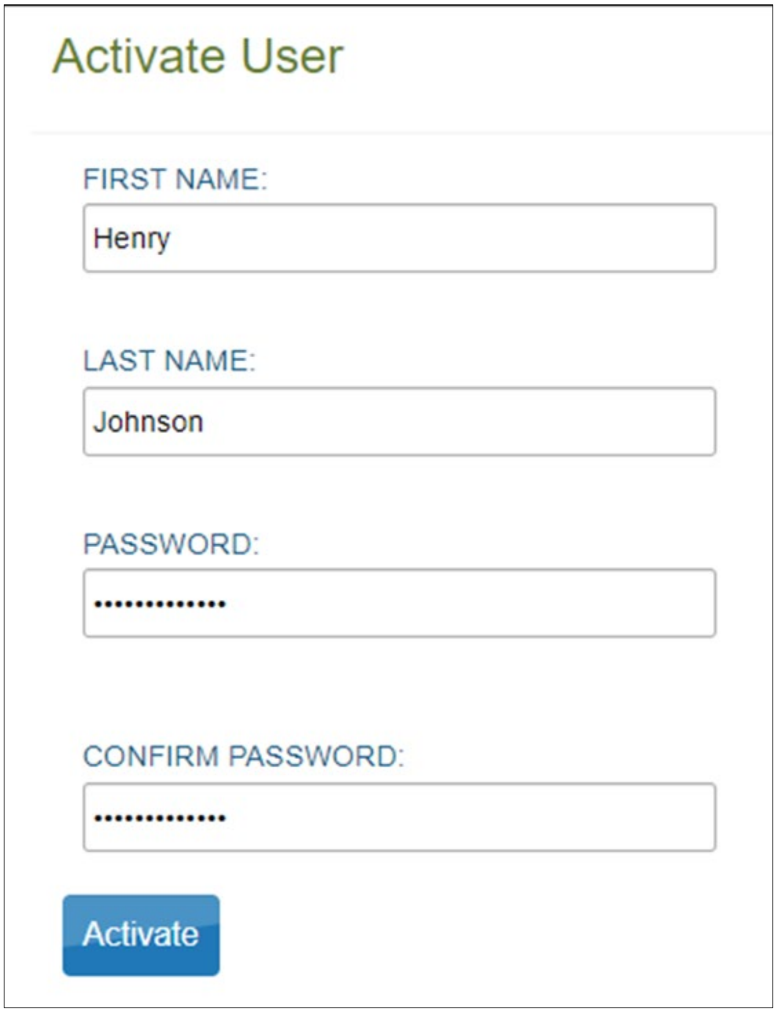
2) Select the link in the email to be redirected to the Activate User screen.
3) Fill out the fields and select **Activate**.



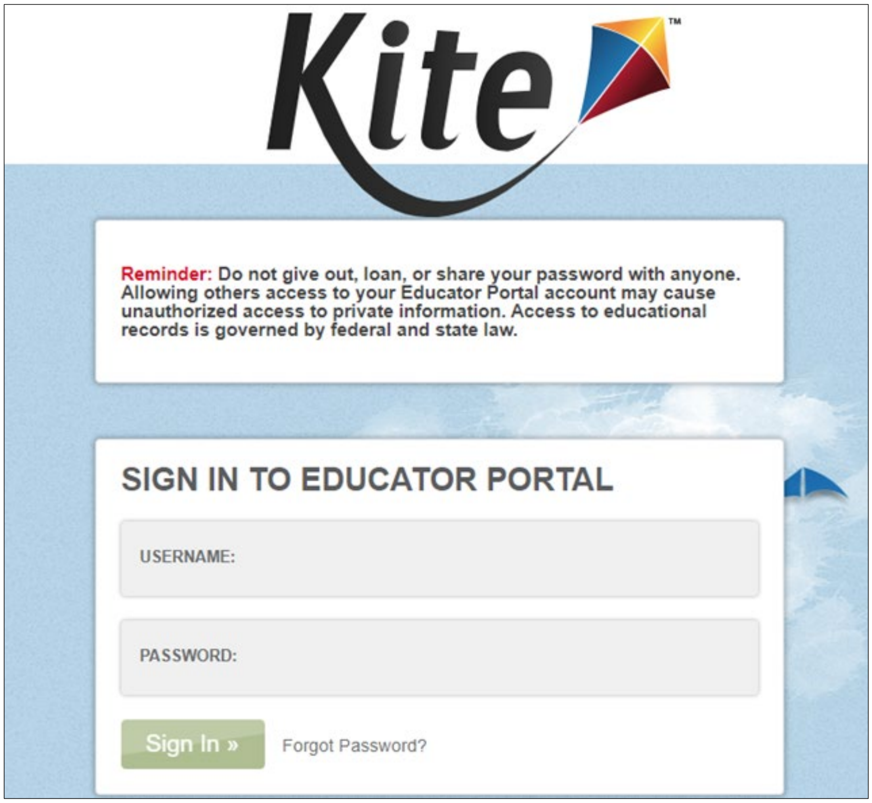
4) Receive a confirmation message and select **Back To Login**.

LOG IN TO EDUCATOR PORTAL

To log into Educator Portal, follow these steps:

1) Go to https://educator.kiteaai.org.
2) Complete these fields on the sign in screen:
   a) **Username** (your email address, all lowercase)
   b) **Password** (case sensitive)

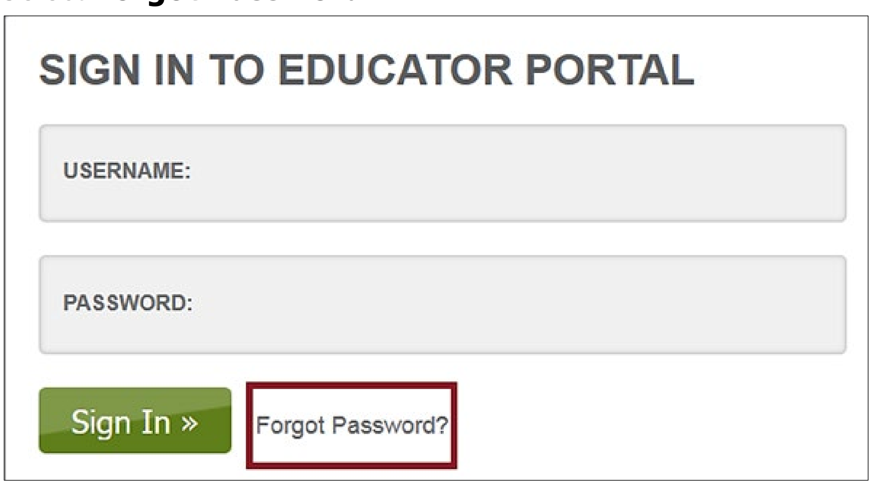
3) Select **Sign In**. Users will get five attempts to correctly sign into Educator Portal. If they are locked out, they will need to contact their assessment coordinator (District or Building Test Coordinator) for help.



RESET EDUCATOR PORTAL PASSWORD

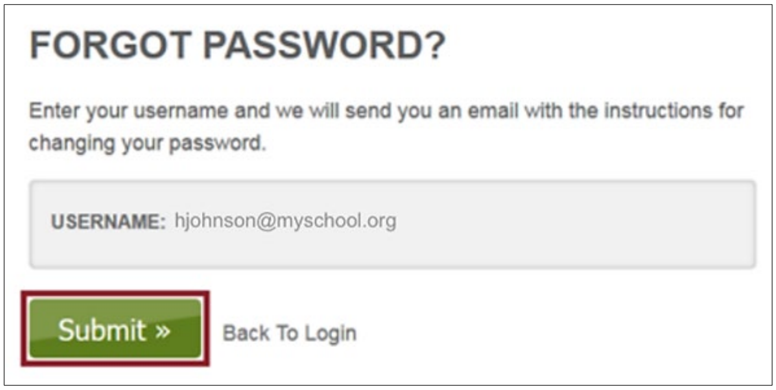
If you forgot your Educator Portal password, follow these steps:

1) Go to Educator Portal.
2) Select **Forgot Password?**

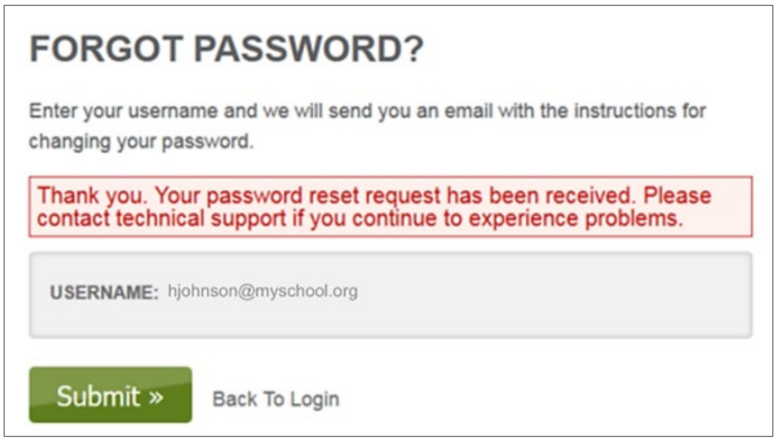


3) Enter username.

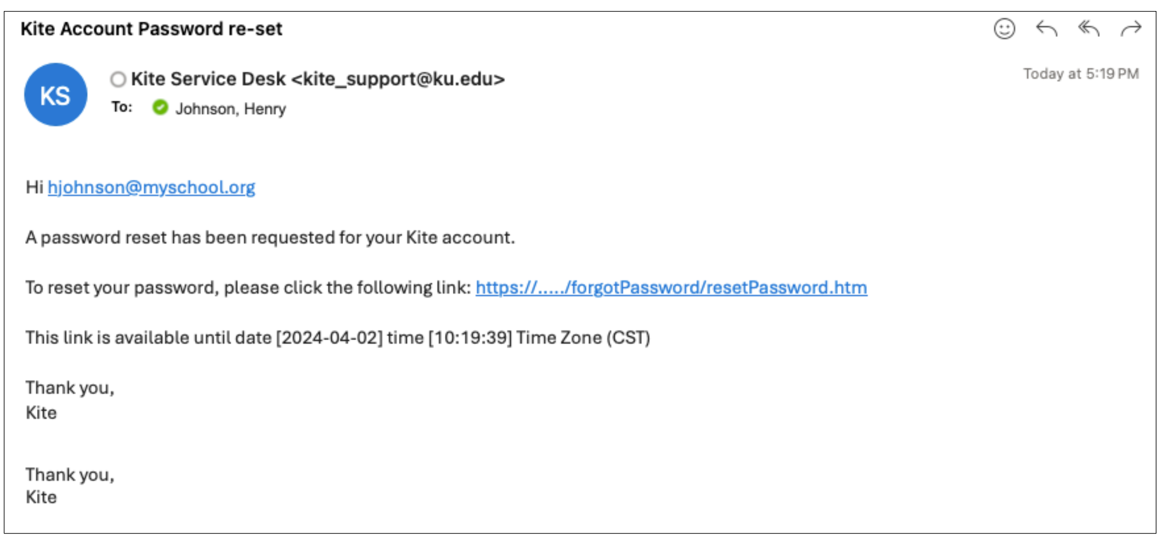
4) Select **Submit**.



5) A notification displays that the password reset request has been received.



6) Usually within an hour, kite_support@ku.edu sends a password reset email. Check junk or spam folders if you don't receive the password reset email. Select the reset link in the email.



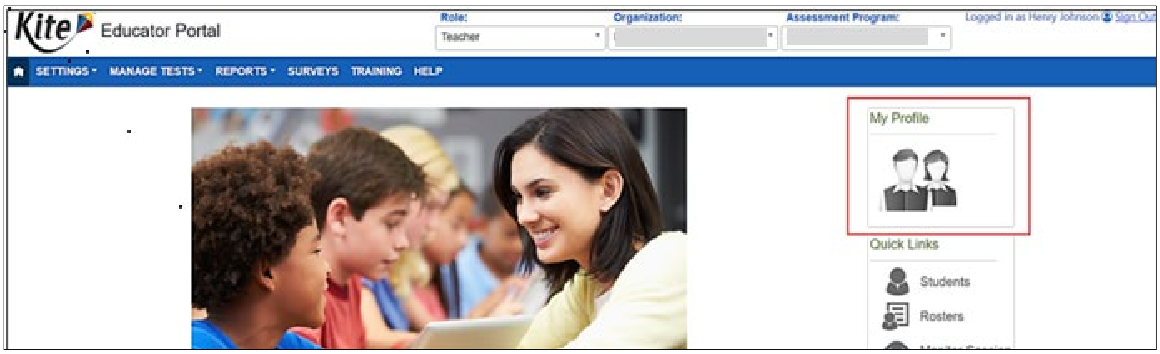
7) Enter username and a new password.
8) Confirm the new password.
9) Select **Submit**.

10) Select **Return to Kite Login Page**.

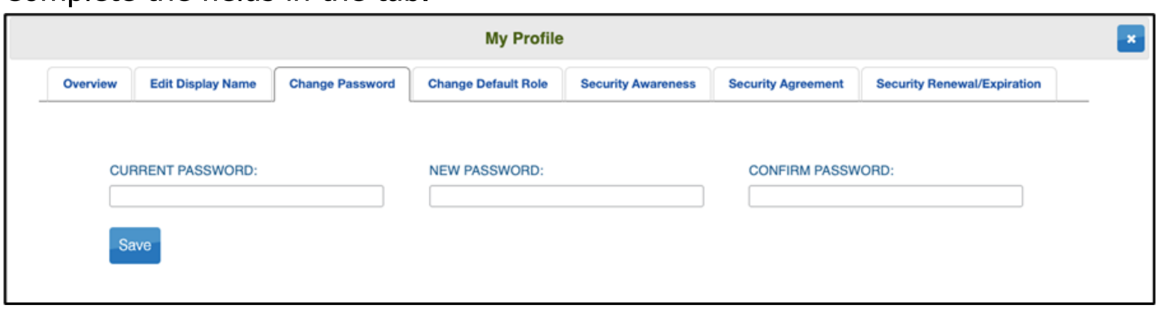
CHANGE PASSWORD

To change your password, follow these steps:

1) Select **My Profile**.



2) Select the **Change Password** tab.
3) Complete the fields in the tab.



4) Select **Save**.
5) Select **X** to close the pop-up window.
6) Receive a message to log out of Educator Portal and then sign in again.

Important: Never loan or share your password. Allowing others to access your account may cause unauthorized access to private information. Access to educational records is governed by federal and state law.

COMPLETE THE SECURITY AGREEMENT

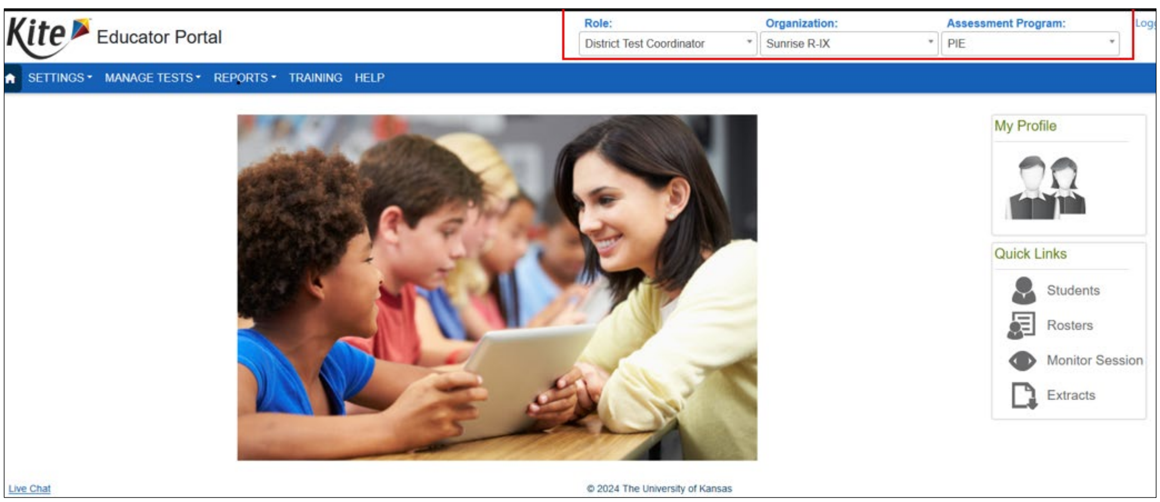
All users must read and agree to the security agreement in Educator Portal. Teachers must deliver the PIE pilot assessments with integrity and maintain the security of the assessments. Educators will not be able to move forward in Educator Portal until they agree to the security agreement.

COMMON VIEW ACCESS ISSUES

A user's role in Educator Portal determines the tabs, features, and data to which they have access. If a user cannot access information, a new or additional role may need to be assigned in Educator Portal by the data manager. To add roles, go to the Data Managers–User Data section found in Chapter 8 in this guide.

DEFAULT ROLE, ORGANIZATION, AND ASSESSMENT PROGRAM

The data manager selected the default role and organization for the user when the user's account was created which is displayed on the Educator Portal Home Screen. When a user signs in the default role, organization and assessment program will populate.



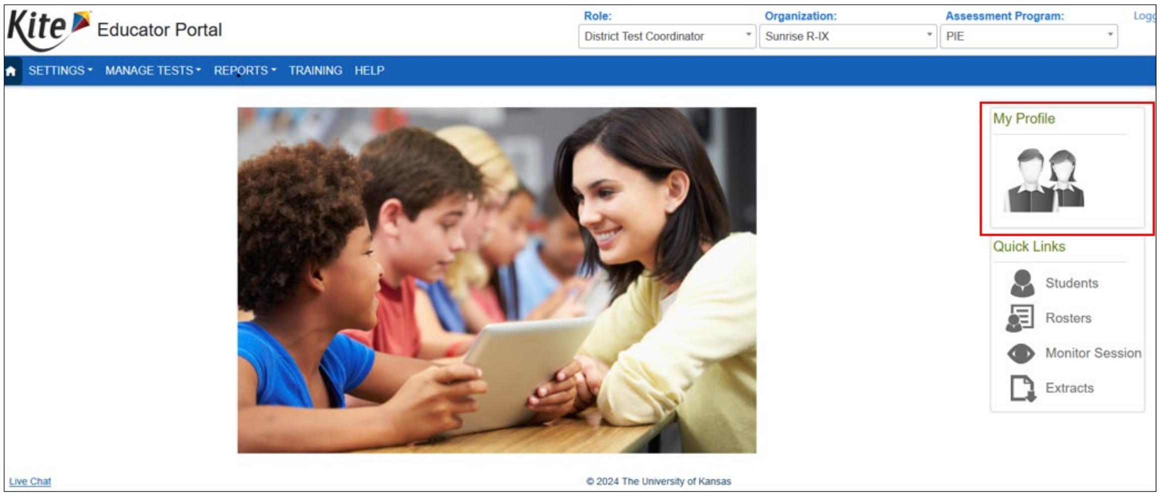
CHANGE USER ROLE VIEW

A user may have more than one role, be in more than one organization or assessment program. To change the user role view, follow these steps:

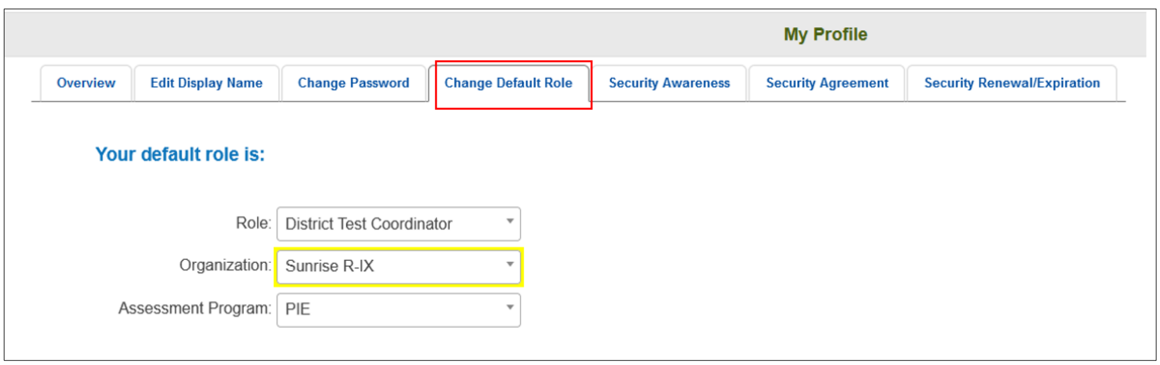
1) Select the desired role from the Role drop-down menu.
2) Select the desired organization from the Organization drop-down menu if not prepopulated.
3) Select the desired Assessment from the Assessment Program drop-down menu if not prepopulated.

CHANGE USER DEFAULT ROLE

1) The default role, organization, and assessment program determine the view that appears when users first sign into Educator Portal. To change the default role, organization, and assessment program, follow these steps:
2) Select **My Profile**. A pop-up window appears.



3) Select the **Change Default Role** tab.



4) Choose a new default role, organization, or assessment program from the drop-down menus, if desired.
5) Select **Save**.
6) Select **X** to close the pop-up window. The next time the user signs into Educator Portal, the default role will display along with the organization and assessment program.

CHAPTER 2: TEACHER OVERVIEW

The key tasks for the teacher to complete in Educator Portal are to take the training provided in the series of six modules, verify student and roster data, complete the Personal Needs and Preferences (PNP) Profile for any student requiring accessibility supports, access student usernames and passwords, create content groups, assign assessments during the instructionally embedded window, and access the Class Mastery report and Student Pathway Profiles, which provide student performance results to guide instruction. A teacher must have the role of Teacher in Educator Portal.

CHECKLIST FOR TEACHERS

The following table (Table 1) provides a list of steps for teachers to follow when participating in the PIE pilot.

Table 1
Steps for Teachers

☑	Steps
☐	Read Chapters 1–5, Chapter 11, and Chapter 12 of the PIE Educator Portal User Guide.
☐	Read the PIE Pilot Test Administration Manual
☐	Log in to Educator Portal and agree to the annual security agreement.
☐	Complete the required Training in Educator Portal (six training modules and corresponding resources)
☐	Verify student and roster data
☐	Complete the PNP Profile for any student requiring accessibility supports.
☐	Create content groups in Educator Portal and develop an instruction and assessment timeline for each content group. Assessment can only be done with one content group at a time.
☐	Access student usernames and passwords.
☐	For each content group, follow the assessment and instruction process.
☐	Complete instructionally embedded instruction and assessment for all content groups between 9/16/2024 and 2/29/2025.
☐	Complete the end of year assessment between 2/24/2025 and 3/21/2025.

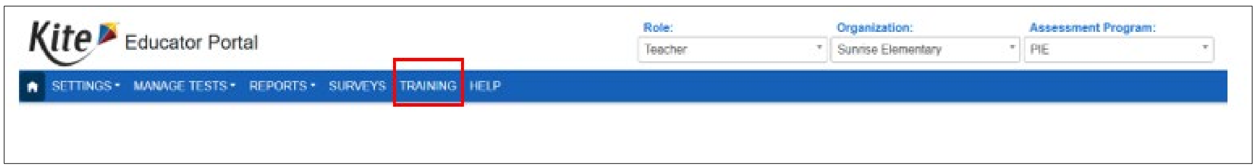
CHAPTER 3: TEACHER TRAINING

Teacher training for the PIE pilot is delivered and completed in Educator Portal. The course is comprised of six self-directed training modules. Users with the role of Teacher in Educator Portal are automatically enrolled in the training. Any educator administering the PIE pilot assessment is required to take PIE Pilot Teacher Training.

ACCESS TRAINING

To access the Teacher Training complete the following steps:

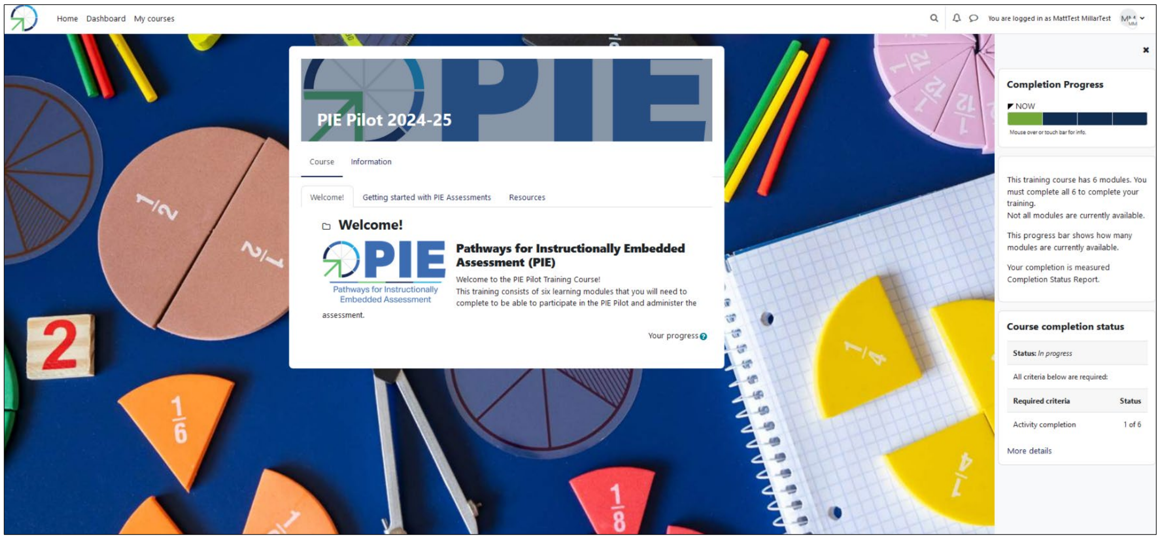
1) Select the **Training** tab on the Educator Portal home screen.



2) Select the desired course from the available courses.

Note: The first four of the six training modules in the PIE Pilot Teacher Training course must be completed for teachers to have access to the Manage Test Tab > Content Groups.

3) After selecting the PIE Pilot Teacher Training course, the course will open automatically. Training course completion directions are embedded within the training course. If the course does not open, please contact the Kite Service Desk at pie-support@ku.edu or 844-675-4479.



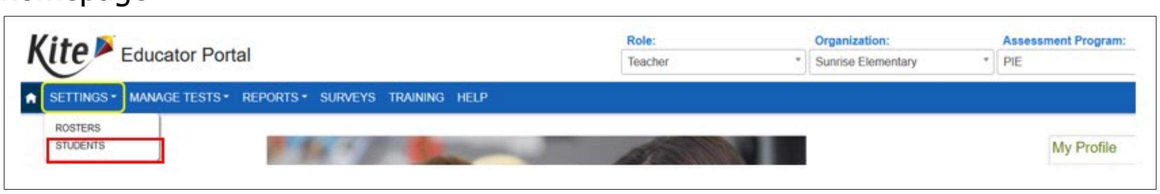
CHAPTER 4: TEACHERS—STUDENT DATA

Procedures in this section are the primary responsibility of the teacher. A teacher, or test administrator, must have the role of Teacher in Educator Portal.

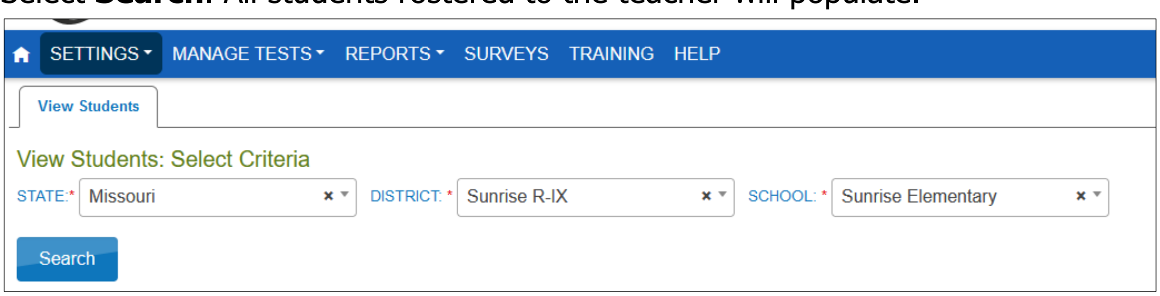
VIEW AND CHECK STUDENT DATA FOR ACCURACY

Having correct student data is very important, and everyone has a responsibility to ensure accuracy. Complete the following steps to check student data to ensure the students on the roster are current before **each** instructionally embedded assessment administration. If new students need to be added to a roster, please contact the District or Building Test Coordinator.

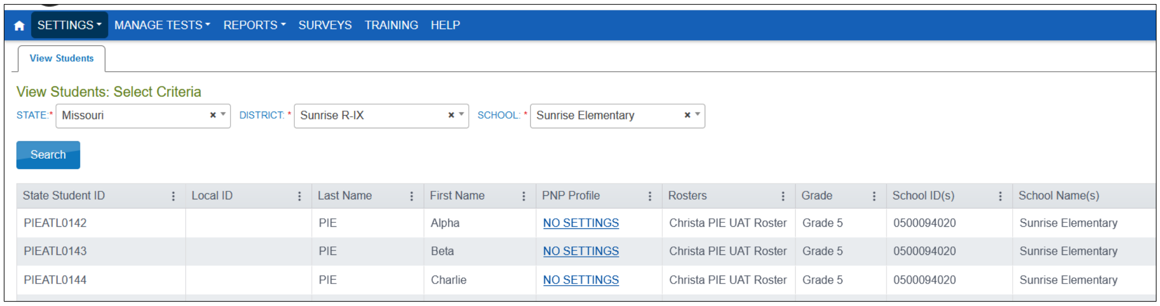
1) Select **Students** from the Settings drop-down menu on the Educator Portal homepage.



2) Select **Search**. All students rostered to the teacher will populate.



3) Review the state student identifier. Ensure the student's name is spelled correctly, the student's first name is in the first name field, and their last name is in the last name field. If one or more fields contain incorrect information for a student, contact the data manager to edit student accounts.

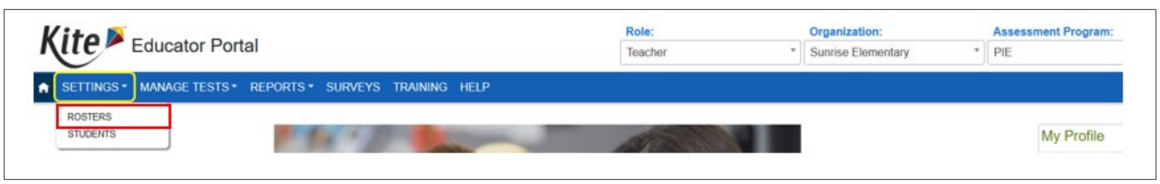


VIEW AND CHECK ROSTER

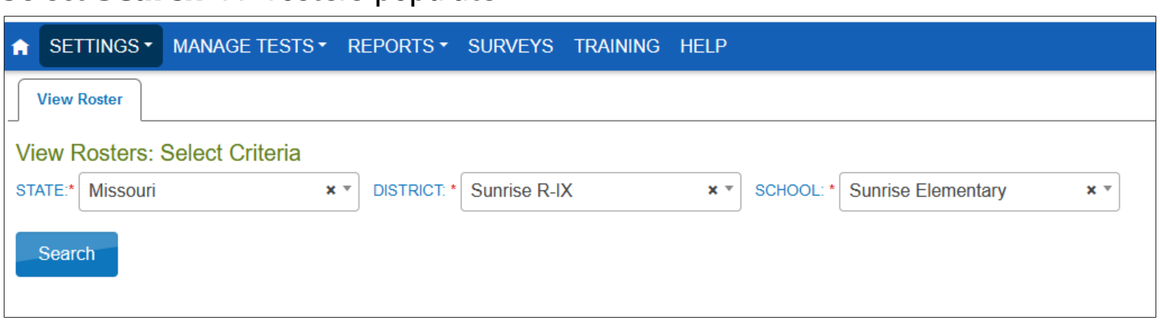
The data manager creates roster records that link students to teachers. Teachers will not have access to their students' data until their students are on their rosters. Teachers are responsible for confirming that students on their roster are participating in the PIE pilot.

Teachers can access their own rosters. Follow these steps:

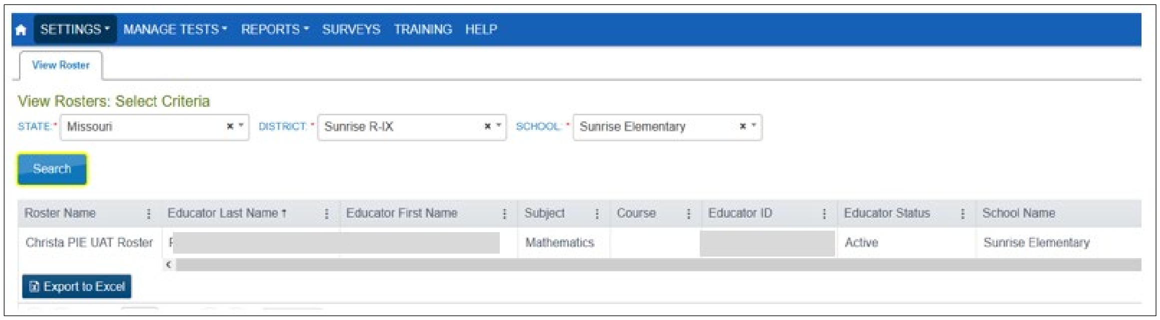
1) Select **Rosters** from the Settings drop-down menu on the Educator Portal homepage.



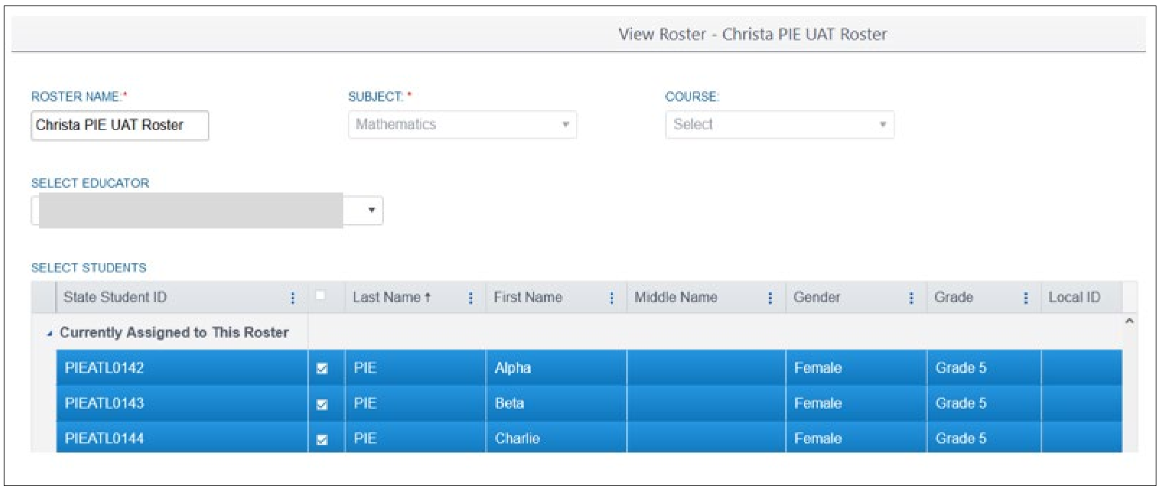
2) Select **Search**. All rosters populate.



3) Highlight a line in the grid.



4) The roster screen opens for that roster, and the students currently assigned to that roster can be viewed.



5) Check the roster data. If a problem occurs with the data, go to Table 2 for possible solutions.

Table 2

Troubleshooting for Roster Data

If	Then
Ineligible student appears on roster.	Work with the data manager to exit the student from Educator Portal.
Unknown student appears on roster.	Work with the data manager to remove the student from the roster.
Eligible student does not appear on roster.	Work with the data manager to add the student to the correct roster, at the correct grade level, for each subject to be assessed.
No rosters appear.	Work with the data manager to provide student and teacher data to create the roster records in Educator Portal.

ACCESS THE PNP PROFILE

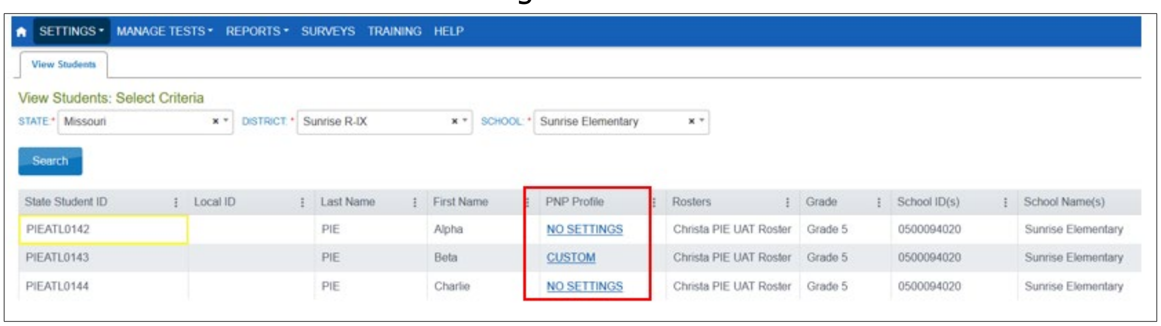
Teachers enter a student's personal needs and preferences in the PNP Profile. Not all students require PNP Profile settings for the assessment. Choose only suitable settings to ensure students have the most positive experience possible. Most Educator Portal roles can edit and save PNP Profile.

The PNP Profile can be accessed in two places.

From the View Students: Select Criteria Screen

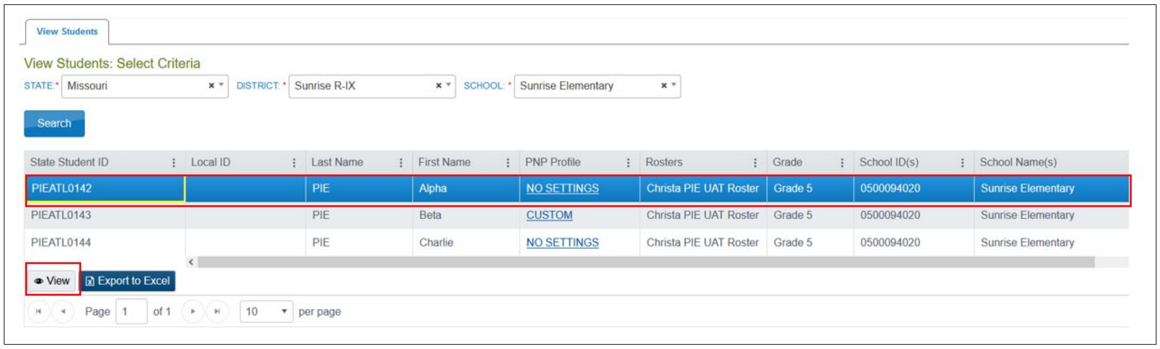
After students are enrolled and rostered, the teacher can complete the PNP Profile by accessing the student's account from the View Students screen in Educator Portal. Follow these steps:

1) Select **Students** from the Settings drop-down menu or the Quick Links on the homepage.
2) Select **Search**. All students rostered to the teacher will populate.
3) Go to the PNP Profile column. Does the link read Custom?
   a) If yes, select the hyperlink **Custom** and review the information. Edit if necessary.
   b) If no, in the PNP Profile column select the hyperlink **No Settings**. This will open the PNP Profile pages. Only select supports a student is accustomed to using so the student is not confused during assessment.

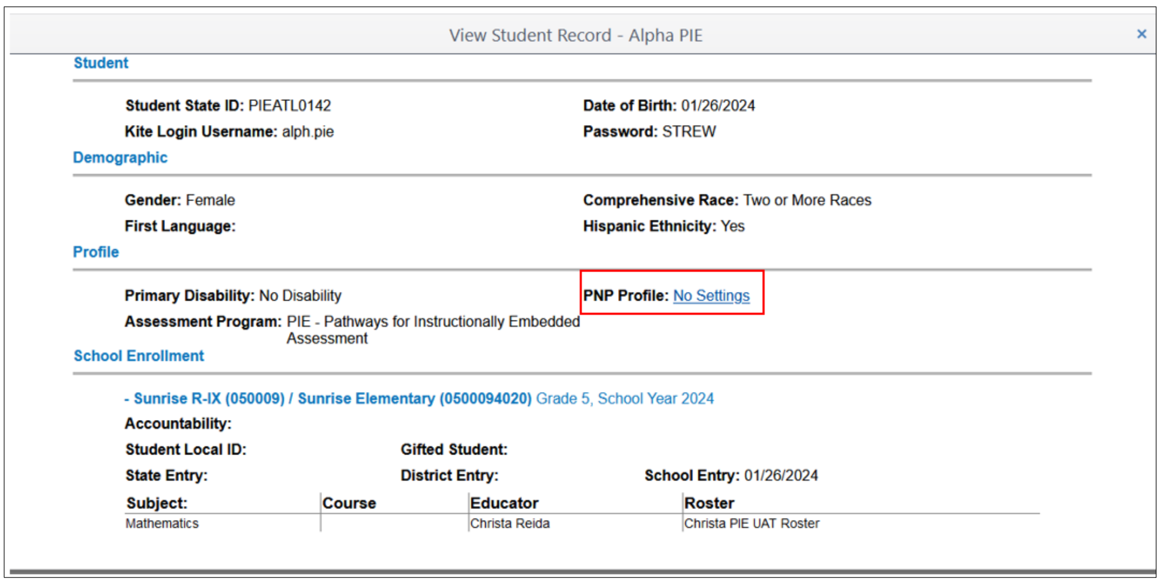


From the View Student: Record Overlay Screen

1) Select **Students** from the Settings drop-down menu or the Quick Links on the homepage.
2) Select **Search**. All students rostered to the teacher will populate.
3) Select anywhere in a row to highlight the desired student. Then, select the **View** button in the bottom left of the grid.



4) The View Student Record pop-up overlay appears. From here, the PNP Profile can also be accessed by selecting the hyperlink.

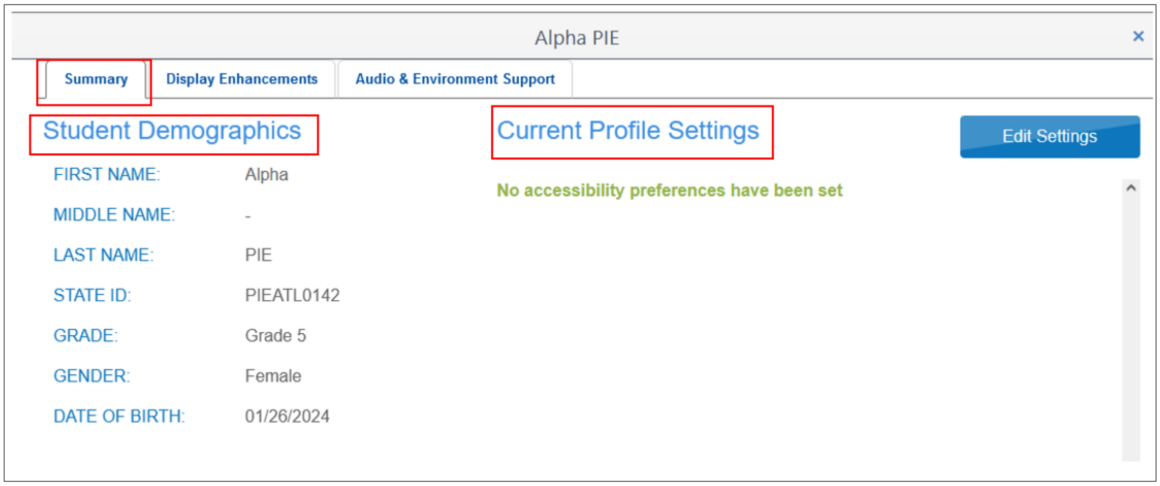


COMPLETE THE PNP PROFILE

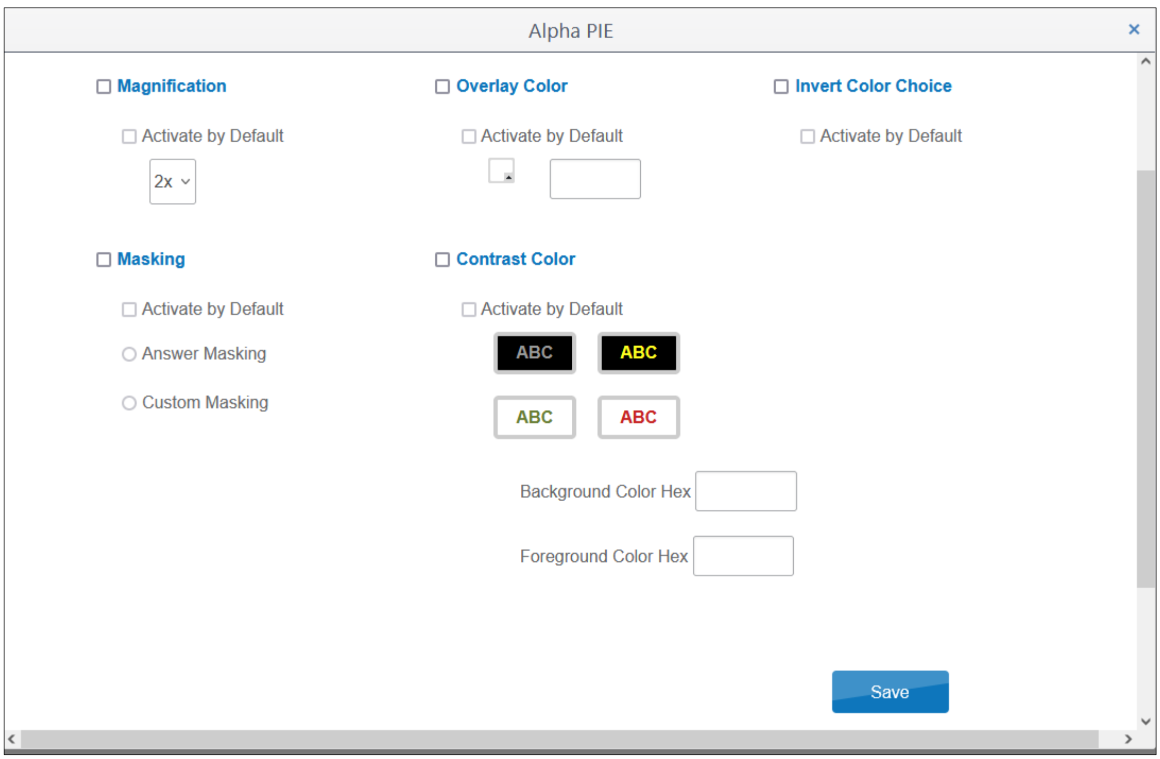
The PIE PILOT TEST ADMINISTRATION MANUAL contains information about the selection and use of accessibility supports available for students either through the PNP Profile or the Toolbox. The PIE PILOT TEST ADMINISTRATION MANUAL also includes best practices and policies about accessibility supports.

To complete the PNP Profile, follow these steps:

1) The **Summary** tab displays Student Demographics on the left and Current Profile Settings on the right. The other tabs provide two categories of accessibility. Alpha PIE has no accessibility settings selected at this time.



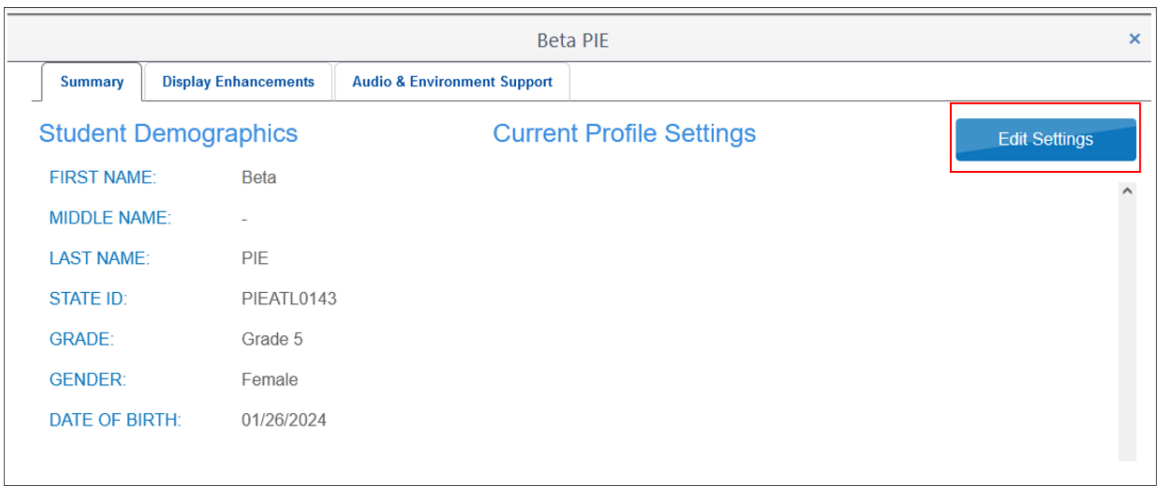
2) Select the **Display Enhancements** tab to review and select options. If necessary, use the vertical scroll bar on the right to view all available options.



3) To select a display enhancement, first select the box with the needed enhancement, for example, Invert Color Choice. If **Activate by Default** is selected for Invert Color Choice, then Invert Color Choice will be on upon login, but can be toggled off in the student's Kite Student Portal Toolbox. If **Activate by Default** is not selected, Invert Color Choice will be a tool in the student's Kite Student Portal Toolbox and can be activated by the student.

Note: Magnification is available for all students in the Kite Student Portal Toolbox and does not need to be selected in a student's PNP.

4) Select **Save** if any Display Enhancements are selected.
5) Repeat the process for the **Audio & Environment Support** tab. If Spoken Audio is chosen, scroll through the Spoken Audio categories and specify how it will be set up in Kite Student Portal. Since mathematics is included for both options in the Spoken Audio preferences, either "Mathematics and Science only" or "Mathematics, Science, and English Language Arts" must be selected. Select **Save** if any Audio & Environmental Support is selected.
6) To edit a student's PNP Profile, select **Edit Settings**.



7) Follow Steps 2–5 above to edit a student's PNP.

CHAPTER 5: TEACHERS—CREATE CONTENT GROUPS, ASSIGN TESTS, AND VIEW RESULTS

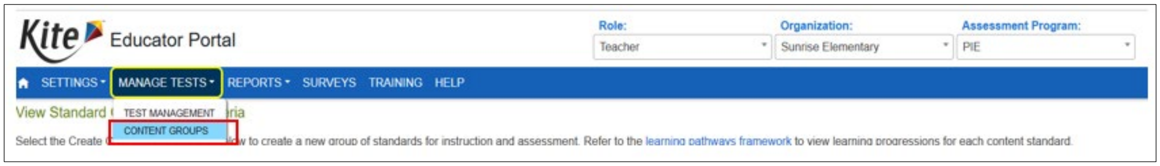
During the instructionally embedded window, teachers will create content groups, assign assessments, and view student results in Educator Portal.

CREATE A CONTENT GROUP

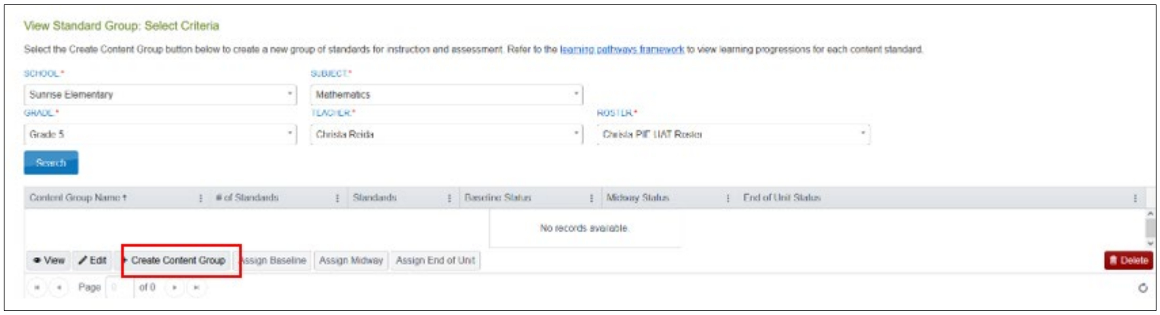
Content groups are created in Educator Portal during the instructionally embedded window. If you used the PIE Content Group Planning Template described in the PIE Training module "Creating and Using Content Groups" to document and plan your content groups, you may refer to that resource while creating the content groups in Educator Portal.

To create a content group, follow these steps:

1) Select **Content Groups** from the Manage Tests drop-down menu on the Educator Portal homepage.



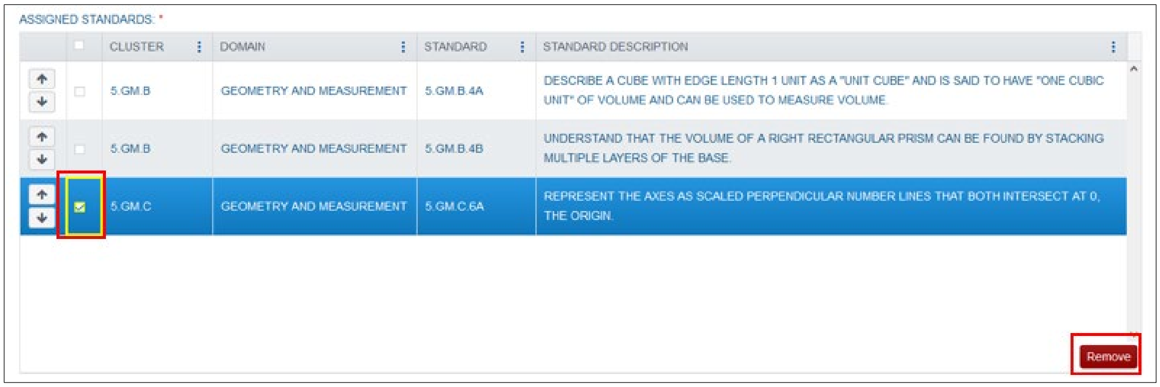
2) Select **Create Content Group** on the View Standard Group: Select Criteria screen.



3) Name the content group and select the desired standards from the available list of standards. Select **Add**. Please note that the name of the content group should be easy for you and the students to remember and use to navigate the platform as you assign assessments and view reports.

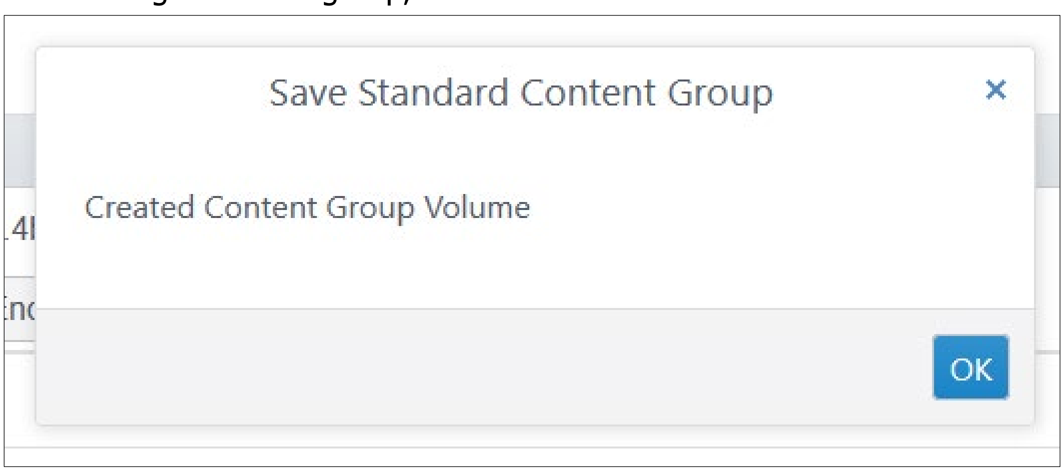
Note: A standard may not be added to more than one content group.

4) To add additional standards to the content group, return to the available standards, select the necessary standard(s), and select **Add**. To remove a content standard from the Assigned Standards, click the box for that standard and select **Remove**.



5) Review the Assigned Standards for the content group. The order of the standards is the order in which items will appear in the assessment. The order in which the items appear can be changed using the up and down arrows. When the standards are listed in the desired order, select **Save**.

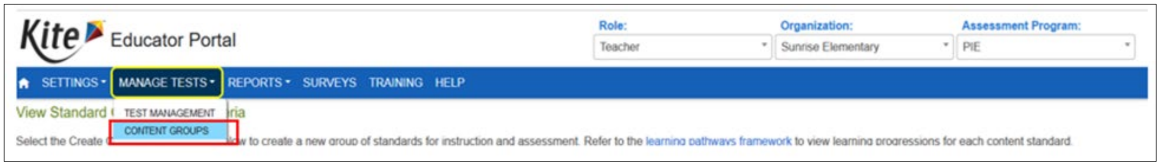
6) After saving a content group, select **OK**.



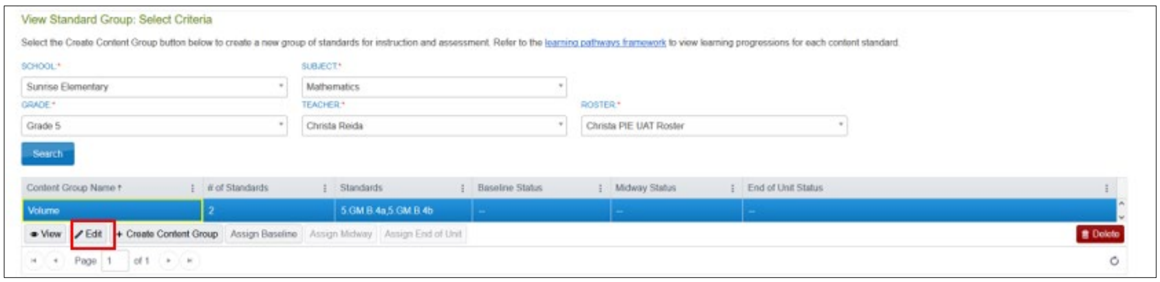
EDIT A CONTENT GROUP

A content group may be edited prior to any assessment being assigned. To edit a content group, follow these steps:

1) Select **Content Groups** from the Manage Tests drop-down menu on the Educator Portal homepage.



2) Highlight the content group name to be edited and select **Edit** on View Standard Group: Select Criteria screen.



3) On the Edit Content Group Screen, standards may be added from the available standards, assigned standards can be removed and the order to the standards may be changed following Steps 4–6 in the Create a Content Group section.

ASSIGN AN INSTRUCTIONALLY EMBEDDED ASSESSMENT

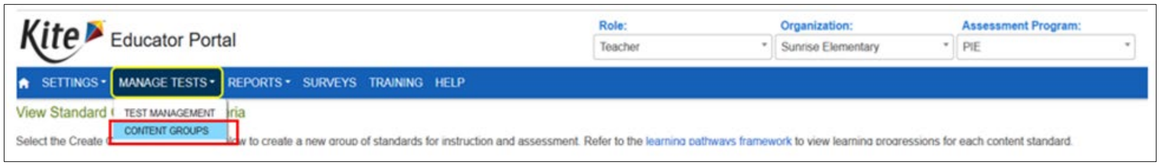
During the instructionally embedded window, three assessments—baseline, midway, and end of unit—will be assigned for each content group. The baseline assessment is assigned prior to instruction, the midway assessment is assigned approximately halfway through the instructional unit (after instruction on the learning pathway Levels 1 and 2 for the content group has been provided), and the end of unit assessment is assigned at the end of the instructional unit (after instruction on learning pathway Level 3 for the content group has been provided).

Please refer to Module 2 of the PIE Teacher Training for more information about when to administer the midway and end of unit assessments, which help ensure students have received the opportunity to learn the assessed content.

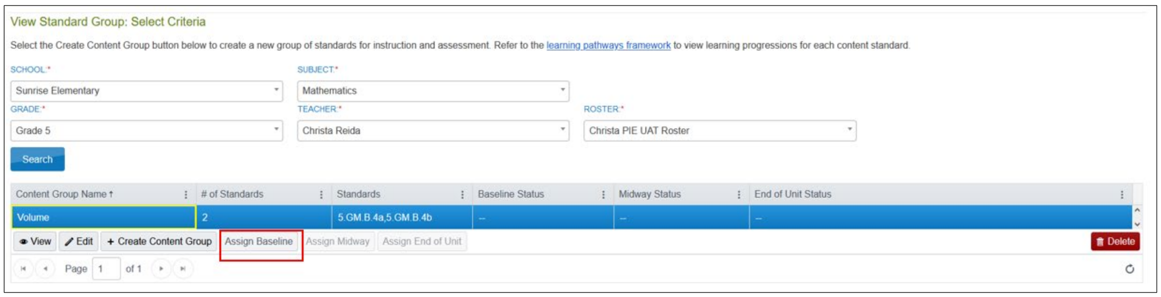
The assessment is assigned for all students on the roster for one content group. An assessment for another content group may not be assigned until all three assessments for the current content group are completed. See the PIE PILOT TEST ADMINISTRATION MANUAL for the process for managing absent students.

To assign assessments for a content group, follow these steps:

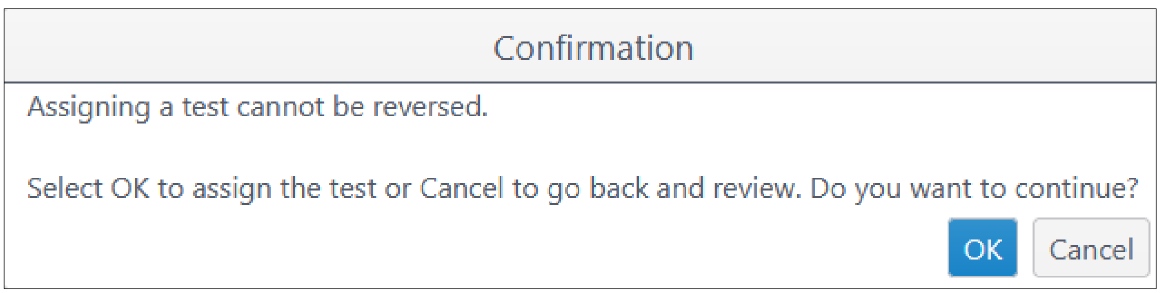
1) Select **Content Groups** from the Manage Tests drop-down menu on the Educator Portal homepage.



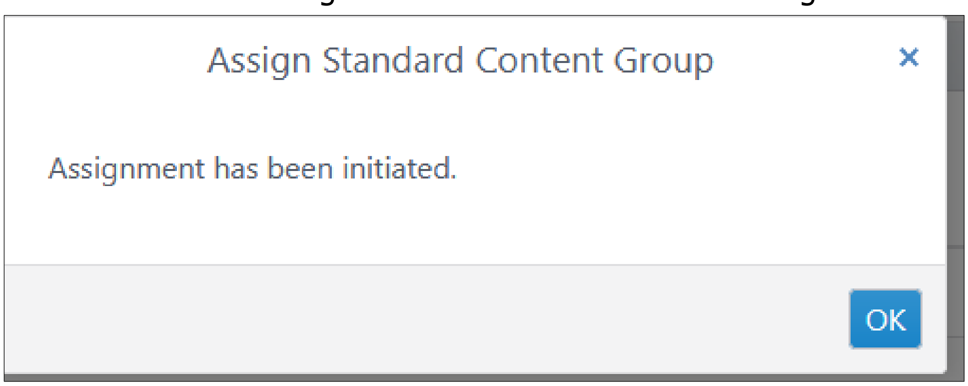
2) Highlight the desired Content Group and select **Assign Baseline** prior to instruction.



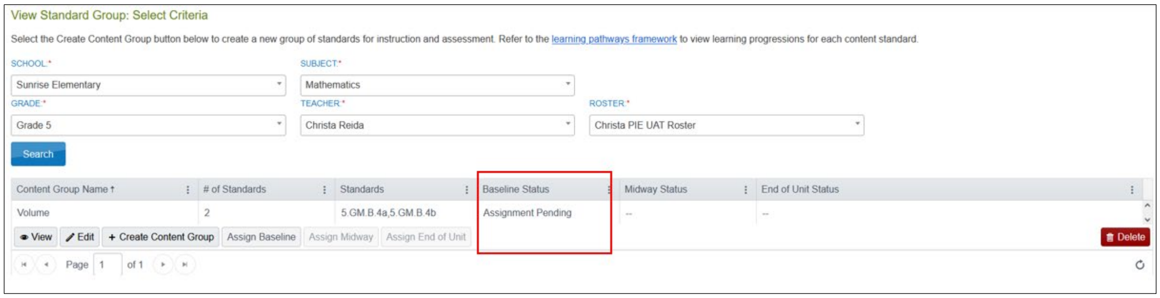
3) Confirm the assigning of the assessment by selecting **OK**. The assessment will be available for students to take in Kite Student Portal up to 24 hours after assigning.



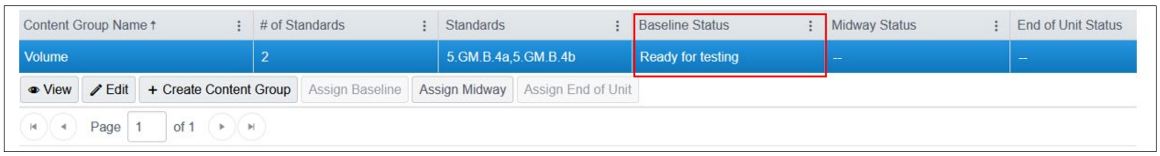
4) Select **OK** on the "Assignment has been initiated" message.



5) The Baseline Status is now "Assignment Pending."

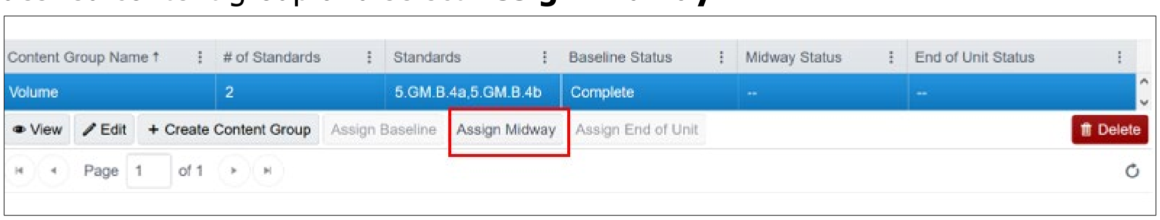


6) The Baseline Status changes to "Ready for testing" when the assessment has been delivered to Kite Student Portal.



7) After students have completed the baseline assessment, the Baseline Status changes to "Complete" if all students have completed the assessment. If any students did not complete the baseline assessment, the Baseline Status will be "In Progress."

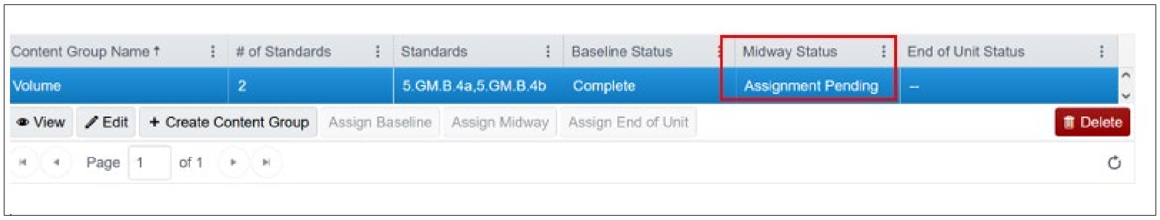
8) Upon completion of the baseline, midway, or end of unit assessment for a content group, student mastery results will be available in Educator Portal as assessments are submitted. Step-by-step instructions to access the results are provided in the View Results section of this chapter.
9) At the midway point of the instructional unit (after instruction on the learning pathway Levels 1 and 2 for the content group has been provided), highlight the desired content group and select **Assign Midway**.



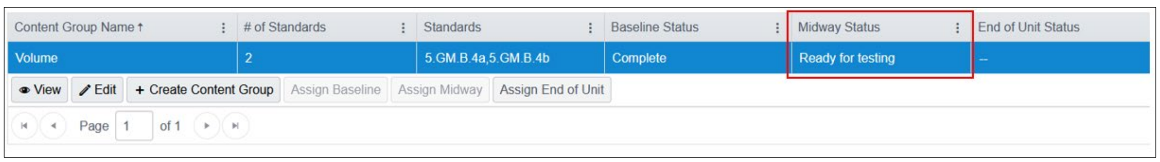
10) Confirm the assessment assignment by selecting **OK**.
11) If any students on the roster did not complete the baseline assessment, the following message will appear: "There are one or more students who have not completed the previous assignment. To inactivate these assignments and proceed with the new assignment select **OK**. Students who did not complete the previous

assignment will receive additional items for the previous level on the new assignment. If you do not wish to inactivate incomplete tests, select cancel.”

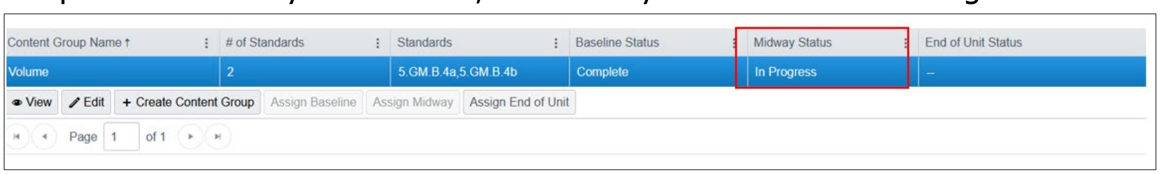
12) After the midway assignment has been confirmed, select **OK** on the “Assignment has been initiated” message. The assessment will be available for students to take in Kite Student Portal up to 24 hours after assigning.
13) The Midway Status will change to “Assignment Pending.”



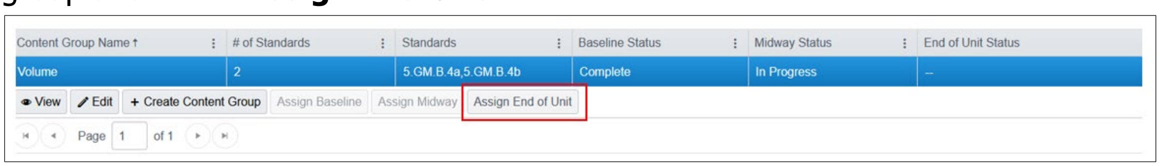
14) The Midway Status changes to “Ready for testing” when the assessment has been delivered to Kite Student Portal.



15) After students have completed the midway assessment, the Midway Status changes to “Complete” if all students have completed the assessment. If any students did not complete the midway assessment, the Midway Status will be “In Progress.”

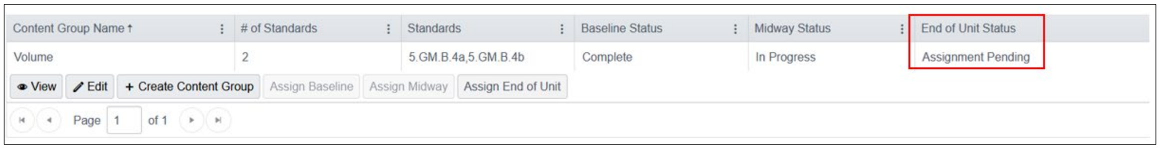


16) At the end of the content group instructional unit, highlight the desired content group and select **Assign End of Unit**.

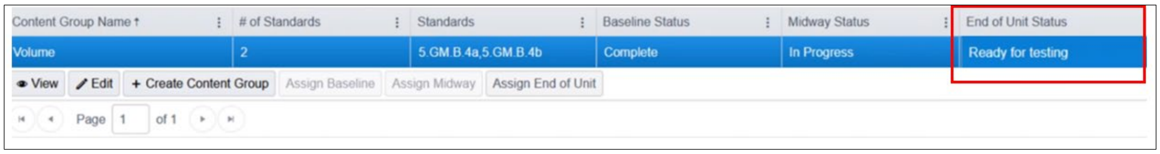


17) Confirm the assessment assignment by selecting **OK**.
18) If any students on the roster did not complete the midway assessment, the following message will appear: “There are one or more students who have not completed the previous assignment. To inactivate these assignments and proceed with the new assignment select **OK**. Students who did not complete the previous assignment will receive additional items for the previous level on the new assignment. If you do not wish to inactivate incomplete tests, select cancel.”

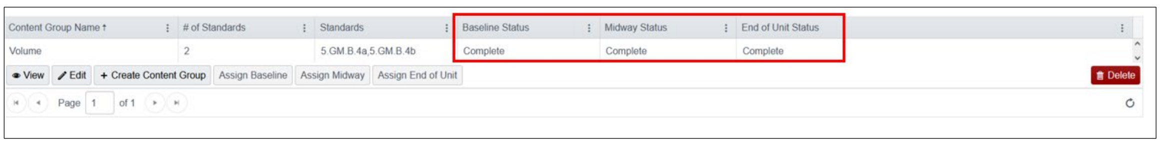
19) Select **OK** on the "Assignment has been initiated message." The assessment will be available for students to take in Kite Student Portal up to 24 hours after assigning. The End of Unit status will change to "Assignment Pending."



20) The End of Unit Status changes to "Ready for testing" when the assessment has been delivered to Kite Student Portal.



21) When all students have completed the end of unit assessment, the status for all assignments will change to "Complete."



22) If the End of Unit Status is "In Progress" or "Complete," another content group can be created, or the baseline assessment can be assigned for a different content group.

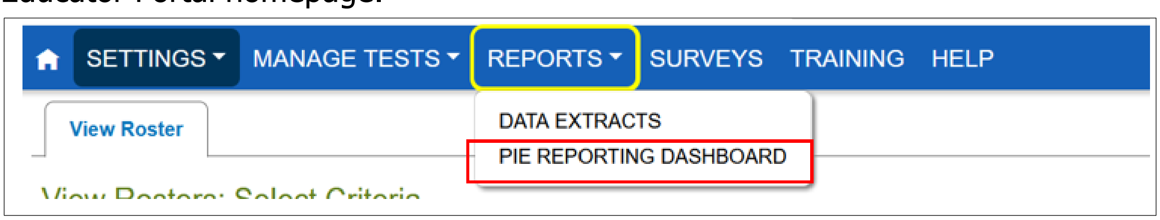
VIEW RESULTS

Results are provided in Educator Portal for a specific content group after any assessment is completed in the instructionally embedded window. Reports are available at the class and individual student level. Reports populate and update automatically as student assessments are submitted.

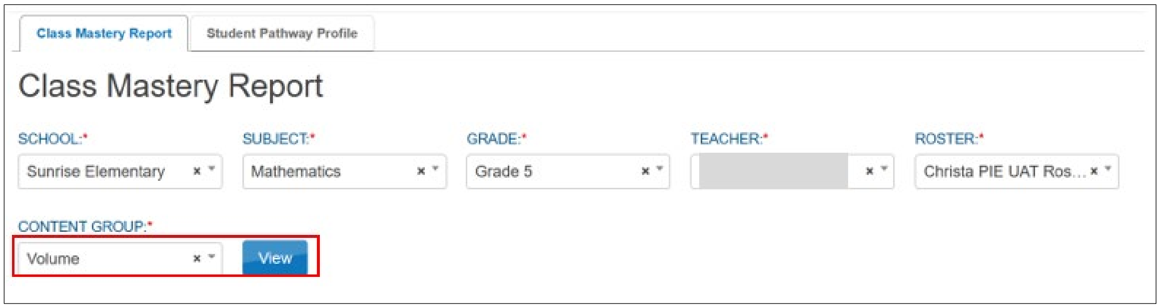
Class Mastery Report

To access the Class Mastery Report for a content group, follow these steps:

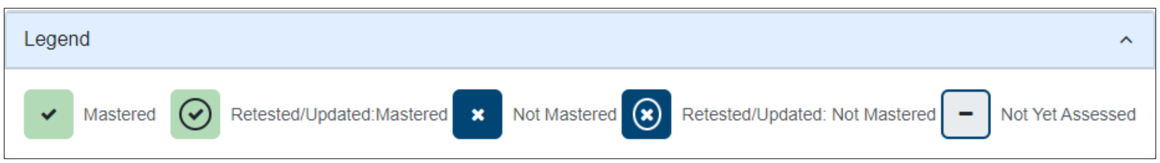
1) Select **PIE Reporting Dashboard** from the Reports drop-down menu on the Educator Portal homepage.



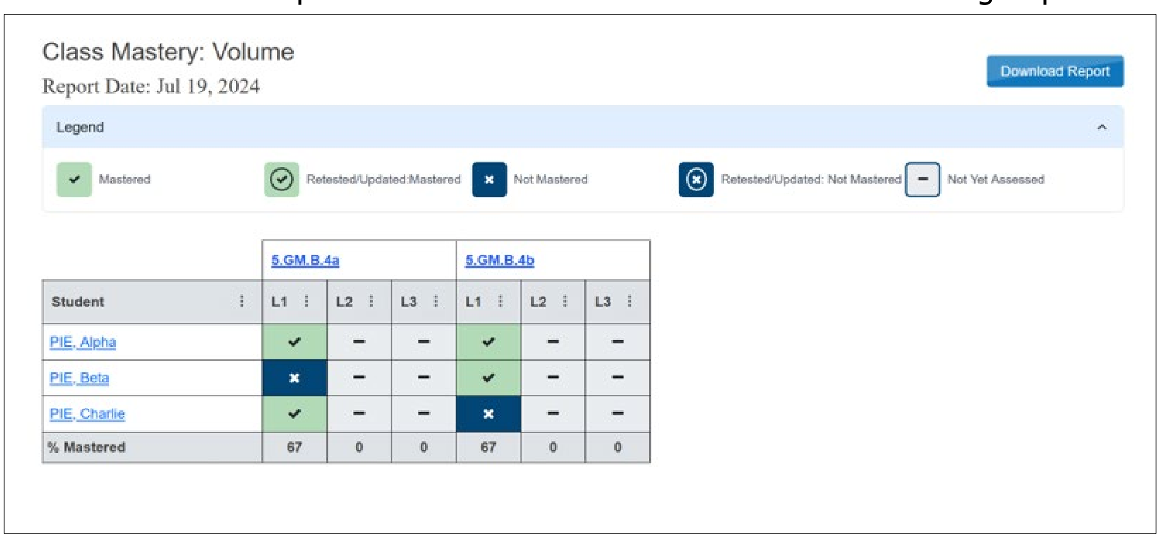
2) Select the desired content group from the Content Group drop-down menu and select **View**.



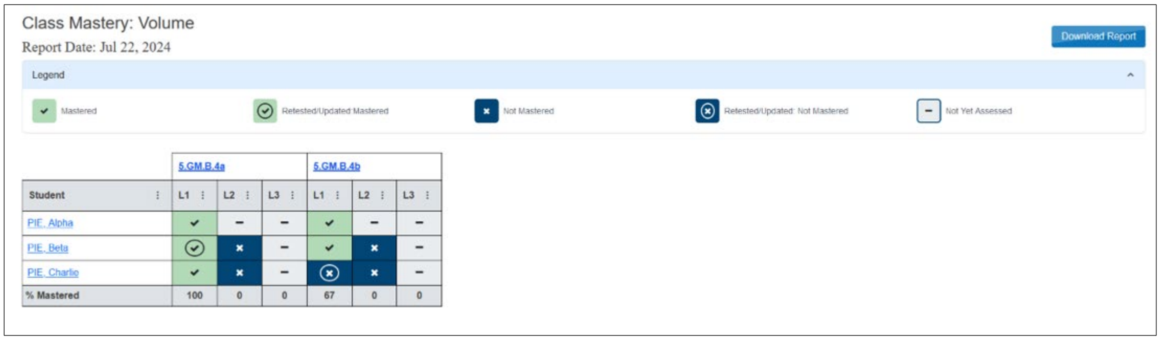
3) The legend provided at the top of the report will be used to interpret the results. A check mark in a green cell means the student demonstrated mastery of that level's skills when initially assessed. A circled check mark in a green cell means the student had not previously demonstrated mastery of that level's skills but did demonstrate mastery when reassessed. An X in a blue cell means the student did not demonstrate mastery of that level's skills when initially assessed. A circled X in a blue cell means the student did not demonstrate mastery of that level's skills when reassessed. A dash in a gray cell means the student was not assessed yet at that level.



4) The Class Mastery report contains results for the baseline assessment when at least one student has completed the baseline assessment for that content group.

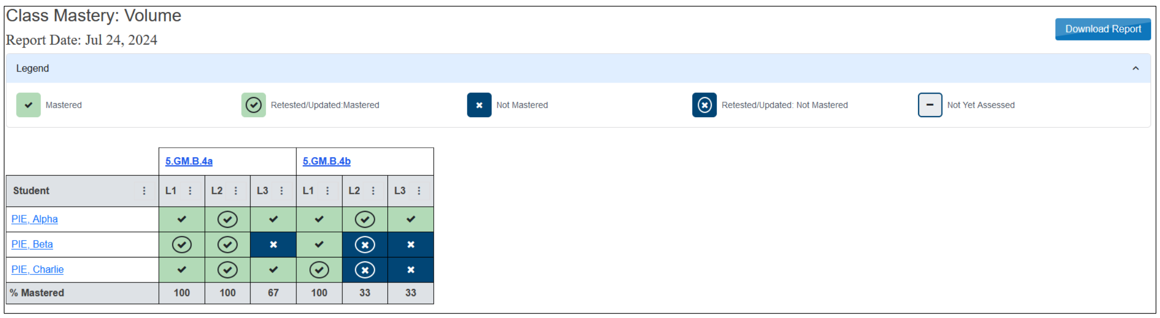


5) The Class Mastery report contains updated results for the midway assessment when at least one student has completed the midway assessment for that content group.



	5.GM.B.4a			5.GM.B.4b		
Student	L1	L2	L3	L1	L2	L3
PIE, Alpha	✓	–	–	✓	–	–
PIE, Beta	(✓)	✗	–	✓	✗	–
PIE, Charlie	✓	✗	–	(✗)	✗	–
% Mastered	100	0	0	67	0	0

6) The Class Mastery report contains updated results for the end of unit assessment when at least one student has completed the end of unit assessment for that content group.



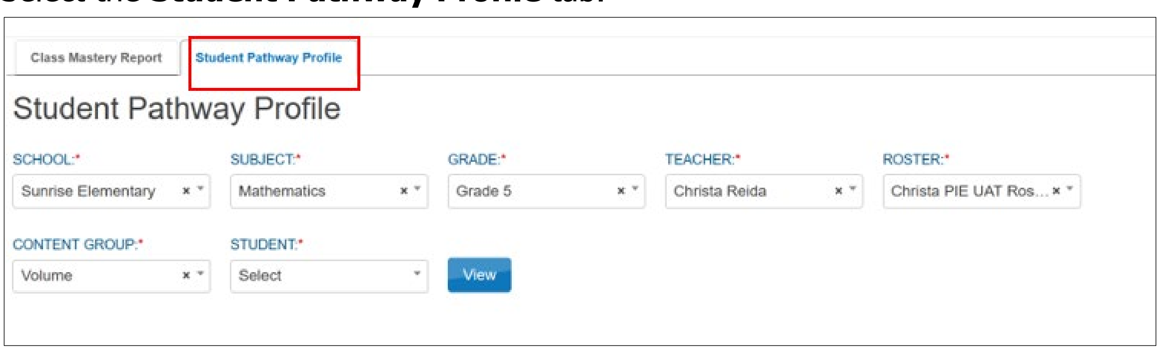
	5.GM.B.4a			5.GM.B.4b		
Student	L1	L2	L3	L1	L2	L3
PIE, Alpha	✓	(✓)	✓	✓	(✓)	✓
PIE, Beta	(✓)	(✓)	✗	✓	(✗)	✗
PIE, Charlie	✓	(✓)	✓	(✓)	(✗)	✗
% Mastered	100	100	67	100	33	33

Student Pathway Profile

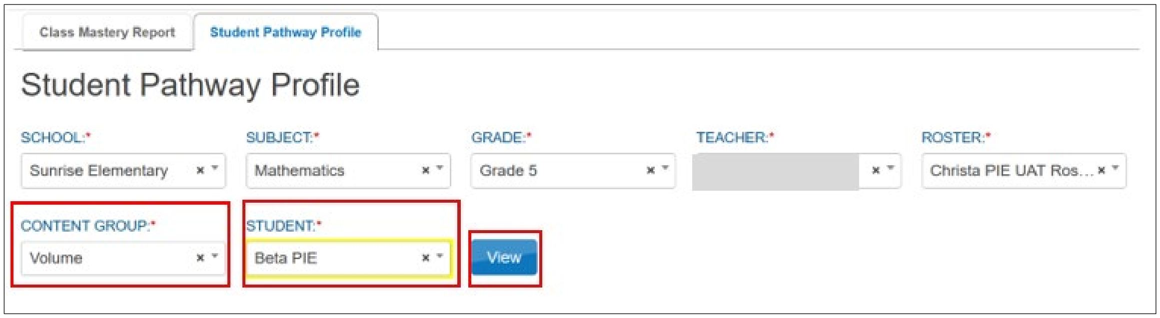
To access a Student Pathway Profile, which shows assessment results for a content group for an individual student, follow these steps:

1) Select **PIE Reporting Dashboard** from the Reports drop-down menu on the Educator Portal homepage.

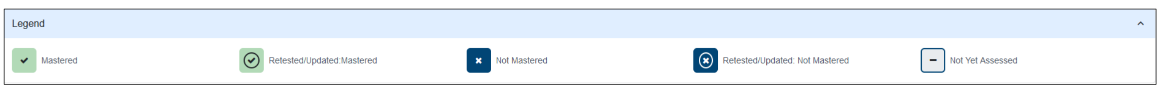
2) Select the **Student Pathway Profile** tab.



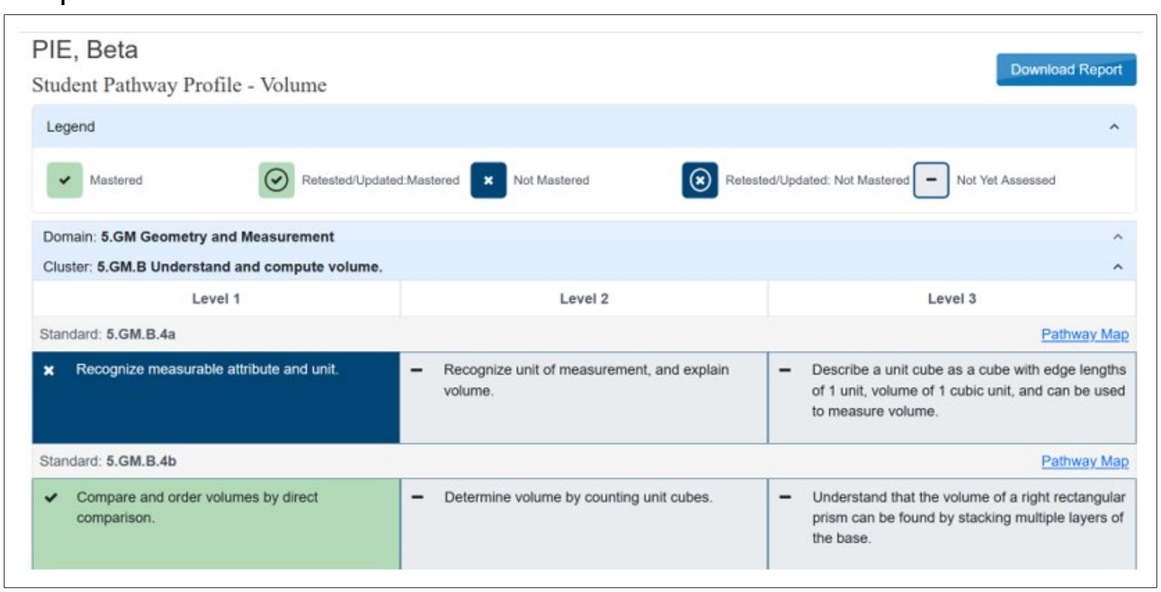
3) From the Content Group drop-down menu, select the desired content group and from the Student drop-down menu, select the desired student. Select **View**.



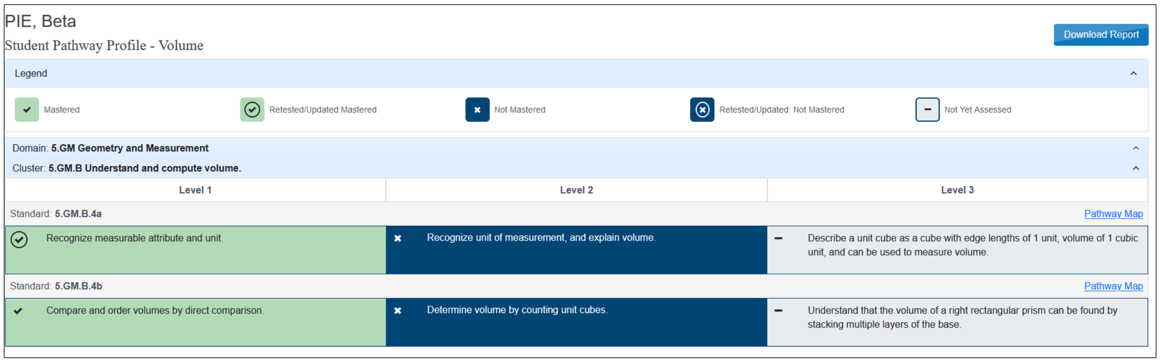
4) The legend provided at the top of the report will be used to interpret the results. A check mark in a green cell means the student demonstrated mastery of that level's skills when initially assessed. A circled check mark in a green cell means the student had not previously demonstrated mastery of that level's skills but did demonstrate mastery when reassessed. An X in a blue cell means the student did not demonstrate mastery of that level's skills when initially assessed. A circled X in a blue cell means the student did not demonstrate mastery of that level's skills when reassessed. A dash in a gray cell means the student was not yet assessed at that level.



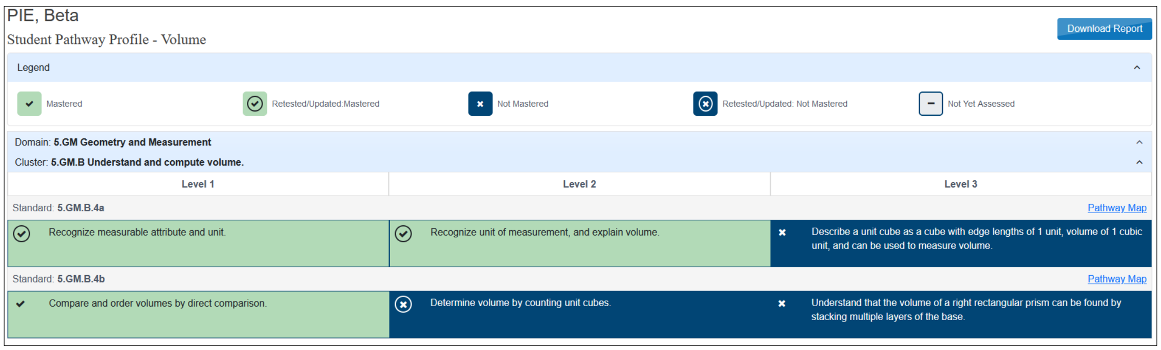
5) A Student Pathway Profile will provide the results for a specified student upon the completion of the baseline assessment.



6) A Student Pathway Profile will be updated to show baseline and midway results for a specified student upon the completion of the midway assessment.



7) A Student Pathway Profile will be updated to show baseline, midway, and end of unit results for a specified student upon the completion of the end of unit assessment.



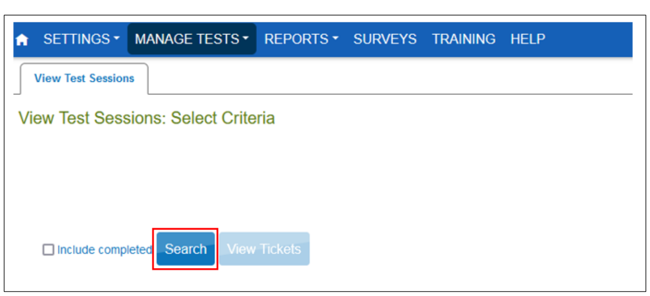
STUDENT USERNAMES AND PASSWORDS FOR KITE STUDENT PORTAL

Students will be provided a student username and password that must be used to access the PIE assessments during the instructionally embedded window and final assessment window. Student usernames and passwords will not change.

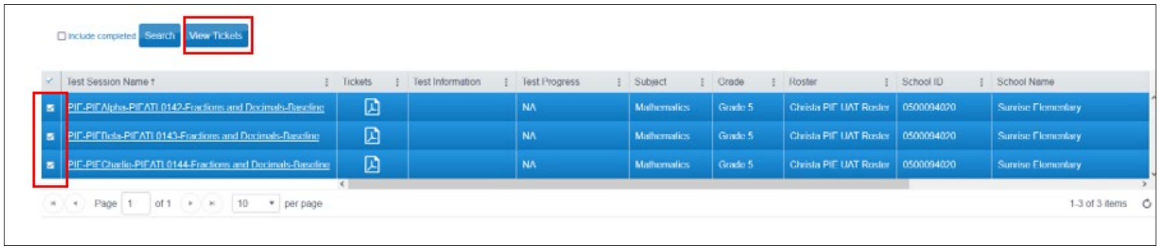
To access and create a PDF of student usernames and passwords for Kite Student Portal, follow these steps:

1) Select **Test Management** from the Manage Tests menu on the Educator Portal homepage.

2) Select **Search**.

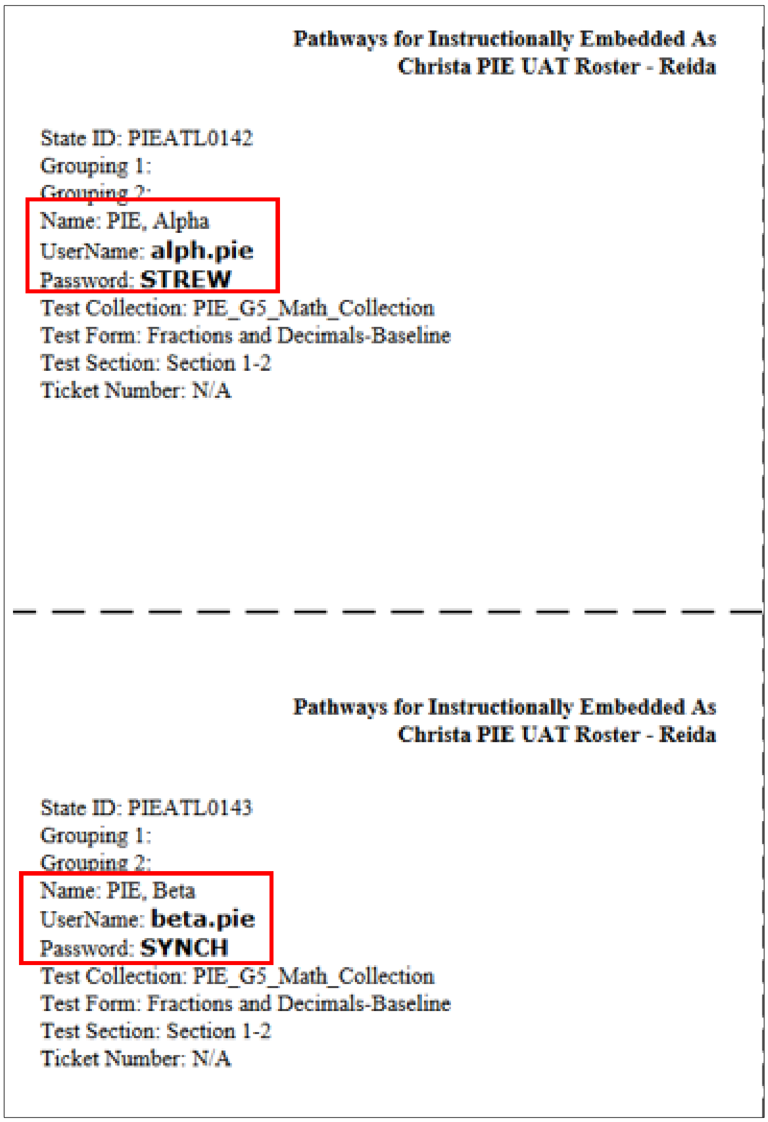


3) Test Sessions will populate when an assessment status is Ready for Testing. Check the box on the left of each test session name and select **View Tickets**.



Note: There is a test session listed for each student on the roster.

4) A downloadable PDF is created that contains each student's username and password.


Pathways for Instructionally Embedded As
Christa PIE UAT Roster - Reida

State ID: PIEATL0142
Grouping 1:
Grouping 2:
Name: PIE, Alpha
UserName: **alph.pie**
Password: **STREW**
Test Collection: PIE_G5_Math_Collection
Test Form: Fractions and Decimals-Baseline
Test Section: Section 1-2
Ticket Number: N/A

Pathways for Instructionally Embedded As
Christa PIE UAT Roster - Reida

State ID: PIEATL0143
Grouping 1:
Grouping 2:
Name: PIE, Beta
UserName: **beta.pie**
Password: **SYNCH**
Test Collection: PIE_G5_Math_Collection
Test Form: Fractions and Decimals-Baseline
Test Section: Section 1-2
Ticket Number: N/A

CHAPTER 6: DATA MANAGER OVERVIEW

The key duties of the local data manager are to gather, verify, and upload educator (i.e., teacher, test administrator), student, and roster data into Educator Portal and update records as needed. A summary of key responsibilities and steps is in Table 3.

Educator Portal is the administrative application in which staff and educators manage student data, assessment administration reports, and extracts appropriate to user role permissions, in addition to teacher access to the PIE Reporting Dashboard.

Several procedures in Educator Portal are necessary to prepare for administering the PIE assessment. To understand the complete process, review the entire series of procedures as well as the required and optional steps before beginning provided in Chapter 4 of the PIE TEST ADMINISTRATION MANUAL.

These procedures are completed in Educator Portal either through template uploads or manual entrance in the user interface. When working with several records, using a CSV file upload is much more efficient than manually adding data one at a time in the user interface. Depending on the situation, data managers can use the method that works best for them such as, for example, simply updating an educator's last name directly in the user interface or uploading all participating students in the district.

Data managers should work with the assessment coordinator to ensure that teachers and students participating in the PIE pilot assessment are uploaded and that rosters are created in Educator Portal so that the PIE pilot assessment can be administered during the instructionally embedded assessment window from September 16, 2024, to February 19, 2025, and the end of year window from February 24, 2025, to March 1, 2025.

CHECKLIST TO MANAGE DATA

Refer to the following (Table 3) for a checklist of the steps data managers are expected to complete.

Table 3

Steps for Data Managers

☑	Steps
☐	1) Read data management Chapter 1 and Chapters 6–12 of the PIE EDUCATOR PORTAL USER GUIDE.
☐	2) Log in to Educator Portal and agree to the security agreement.

☑	Steps
☐	3) Locate the district's information inside the State Organizational Table.xls located on the PIE webpage.
☐	4) Collect educator, student, and roster data for those participating in the PIE pilot study. Use the instructions in this manual and the templates to prepare user, enrollment, and roster upload templates. Templates are available on the PIE webpage.
☐	5) Upload participating users to Educator Portal using either the User Upload Template file or add users using the user interface.
☐	6) Assign an additional role or roles to each user as needed. Go to page 46 of this manual to Edit a User's Account.
☐	7) Upload the Enrollment Upload Template file or enroll participating students using the user interface.
☐	8) Upload the Roster Upload Template file or create rosters using the user interface.
☐	9) Notify the assessment coordinator and educators when data uploads are complete.
☐	10)Unlock Educator Portal accounts as needed.

CHAPTER 7: DATA MANAGERS—UPLOAD TEMPLATES AND USER INTERFACE

Data may be entered into Educator Portal through template uploads or via the user interface.

UPLOAD TEMPLATE FILES

The process described below is used when uploading enrollment or roster template files.

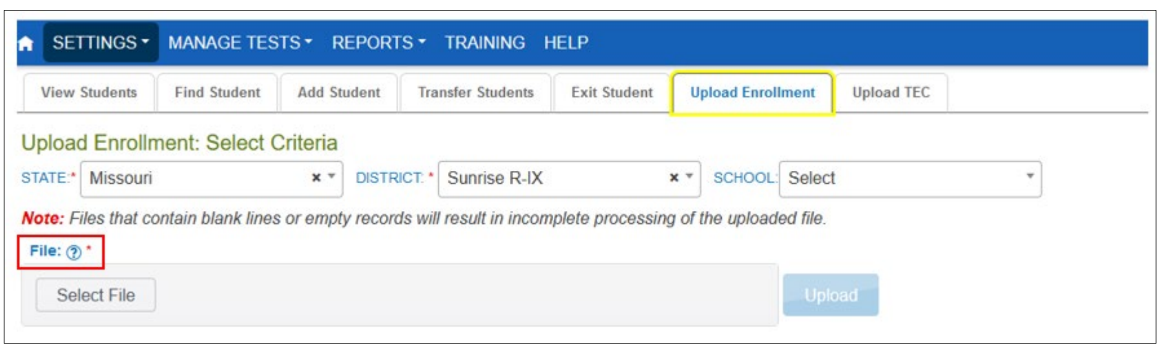
After users have been added to Kite through the user interface, upload enrollment and roster template files in the following order so that records and relationships are correctly linked.

1) The Enrollment Upload Template file: Use this file to create student records in Educator Portal.
2) The Roster Upload Template file: Use this file to link students to their teachers for the PIE pilot and to provide teachers access to their students' information in Educator Portal.

> HINT: Some fields are included in more than one file. The data in these fields must match across files, especially when the same data applies to multiple records. Copy and paste identical data to avoid typographical errors.

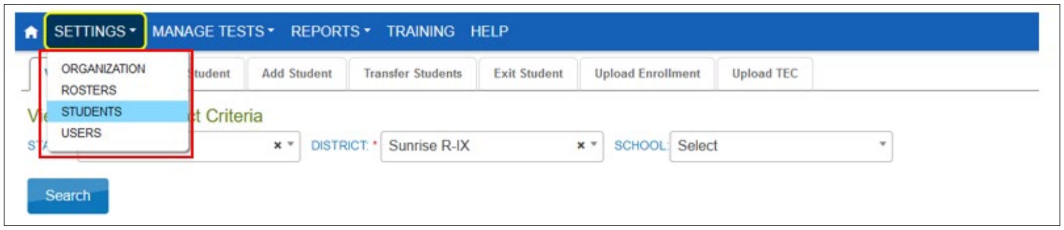
To access the templates for uploading students and rosters, download the applicable Upload Template file from the PIE webpage or Educator Portal (example shown below).

In Educator Portal, select **Upload** for the applicable action (enrollment or roster) and hover the cursor over the question mark next to the word File.

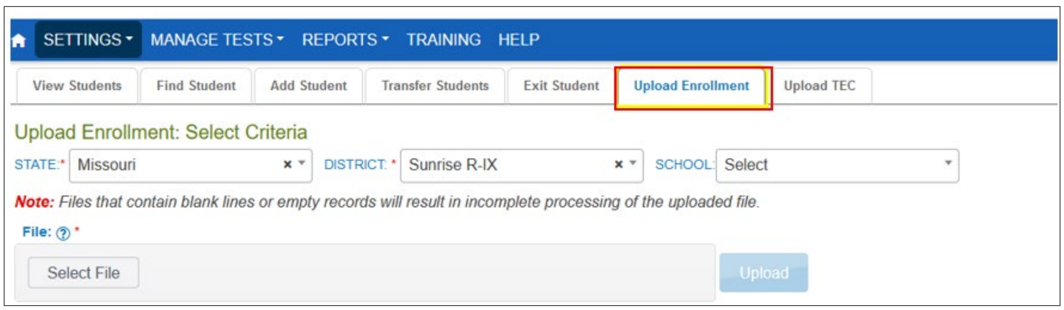


The process for uploading a template file is the same for all templates. In the example below, the uploading of an enrollment template file is demonstrated.

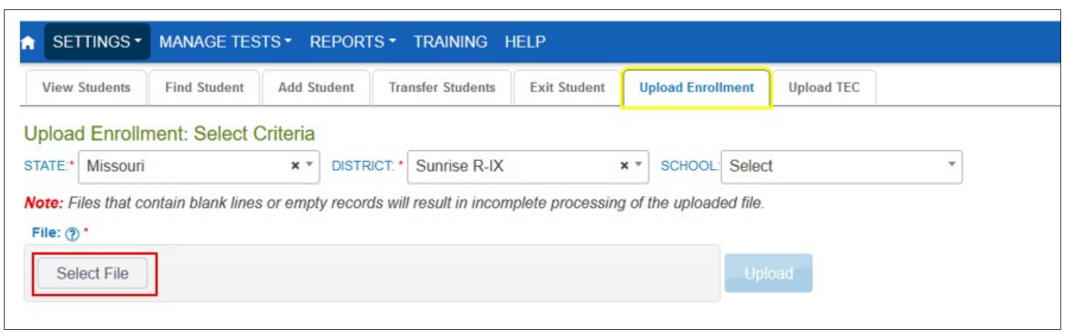
1) Select the applicable setting from the Settings drop-down menu on the Educator Portal homepage.



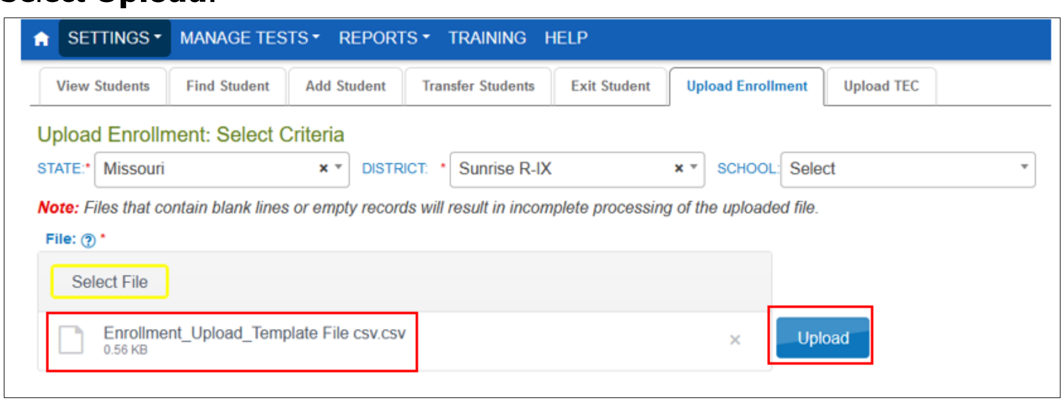
2) Select **Upload** tab.



3) Use the **Select File** button to open a browser window.



4) Locate the saved CSV file for upload.
5) Select the file name and open it in CSV format. Do NOT use Excel spreadsheet.
6) Select **Upload**.



7) A message will show the number of records created, updated, or rejected.
8) If a file is rejected, select the CSV icon under File. This file will display error messages for each line where an error occurred. If there are errors, correct the data and upload again. Common error messages and solutions related to Educator Portal file uploads are summarized on the Kite Troubleshooting webpage.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Monday, July 31, 2023 3:57:10 PM	COMPLETED	0	2	0	

USER INTERFACE

The user interface is a series of screens in Educator Portal where administrative tasks can be performed efficiently one at a time. The data manager can easily manage four or five records more quickly with the user interface than uploading a CSV file for so few records. Work in the user interface should follow the same order as template uploads: users first, enrollment second, and rostering last so that records and relationships are correctly linked.

Data in Educator Portal displays in grids and the columns can be rearranged by selecting the column heading, right-clicking, and dragging the column to arrange them in a different order. Some columns also have a lock feature. Once the columns have been selected and ordered, they can be locked. The grids may also be exported to Microsoft Excel. Filtering options are also available in Educator Portal.

CHAPTER 8: DATA MANAGERS—USER DATA

OVERVIEW

The Educator Portal user interface can be used to create new unique user accounts and to deactivate users who should no longer have access to data in Educator Portal. Each user is assigned at least one role but could have multiple roles if needed. Depending on the assigned role, the user will have permission to perform certain functions and to access specific student data within the assigned school or district.

Users include teachers (i.e., test administrators), data managers, and assessment coordinators. Typically, technology personnel do not need Educator Portal access, but they may have an account when access is needed.

When accounts are created for new users, they will automatically receive an activation email and must activate their new account by completing the steps from the system-generated activation email message. If users do not activate their account within 20 days, the data manager will need to resend their account activation email.

USER ROLES

Information about the various user roles and permissions for each role in Educator Portal is provided in the next sections.

District Test Coordinator (DTC)

The District Test Coordinator Role (DTC) can be a good match for assessment coordinators, district data managers, or other administrators. This role is assigned by the State Assessment Administrator. DTCs have the highest level of permissions in their district and can perform most data management and instructional and assessment oversight functions in Educator Portal for their district. Table 4 provides a list of permissions available to users with the District Coordinator Role in Educator Portal.

Table 4

Permissions in Educator Portal for District Test Coordinator Role

Educator Portal Actions	Permissions
Upload CSV template files	• Enrollment Template file • Roster Template file
Access reports on the dashboard in their district	• View and download Class Mastery Report • View and download Student Pathway Profile Report
Extracts	• Access
User Management in schools across the district	• Activate inactive users • Deactivate or remove users • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in schools across the district	• Create • Edit
Student Management in schools across the district	• Add • Edit • Exit • Find • Edit/save PNP Profile

Educator Portal Actions	Permissions
Manage Tests > Content Groups	• View • Create • Edit • Assign Assessments
Manage Tests > Test Management	• View Test Sessions • View Test Tickets

District User (DUS)

The District User role (DUS) can be a good match for assistant data managers, other administrators, or program directors at the district level. This role can be assigned by the DTC. A DUS can perform some of the same data management functions as a DTC, but this role does not have access to the Manage Tests tab. Table 5 provides a list of permissions available to users with the District User Role in Educator Portal.

Table 5

Permissions in Educator Portal for District User Role

Educator Portal Actions	Permissions
Upload CSV template files	• Enrollment Template file • Roster Template file
Access reports on the dashboard in their district	• View and download Class Mastery Report • View and download Student Pathway Profile Report
Extracts	• Access
User Management in schools across the district	• Activate inactive users • Deactivate or remove users • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in schools across the district	• Create • Edit

Educator Portal Actions	Permissions
Student Management in schools across the district	• Add • Edit • Exit • Find and activate • View PNP Profile
Manage Tests > Content Groups	• View

BUILDING TEST COORDINATOR (BTC)

The Building Test Coordinator (BTC) role can be a good match for assessment coordinators, data managers, building principals, or other administrators in the school. This role is assigned by the DTC or DUS. BTCs have the highest level of permissions in their school and can perform most data management and instructional and assessment oversight functions in Educator Portal for their school. Table 6 provides a list of permissions available to users with the Building Test Coordinator role in Educator Portal.

Table 6

Permissions in Educator Portal for Building Test Coordinator Role

Educator Portal Actions	Permissions
Upload CSV template files	• Enrollment Template file • Roster Template file
Access reports on the dashboard in their building	• View and download Class Mastery Report • View and download Student Pathway Profile Report
Extracts	• Access
User Management in their building	• Activate inactive users • Deactivate or remove users • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in their building	• Create • Edit

Educator Portal Actions	Permissions
Student Management in their building	• Add • Edit • Exit • Find • Edit/Save PNP Profile
Manage Tests > Content Groups	• View • Create • Edit • Assign Assessments
Manage Tests > Test Management	• View Test Sessions • View Test Tickets

Building User (BUS)

The Building User (BUS) role can be a good match for assistant data managers, assistant building principals, and other administrators and program directors at the school. This role can be assigned by the DTC, DUS, or BTC. A BUS can perform some of the same data management functions as a BTC, but this role does not have access to the Manage Tests tab. Table 7 provides a list of permissions available to users with the Building User Role in Educator Portal.

Table 7

Permissions in Educator Portal for Building User Role

Educator Portal Actions	Permissions
Upload CSV template files	• User Template file • Roster Template file
Access reports on the dashboard in their building	• View and download Class Mastery Report • View and download Student Pathway Profile Report
Extracts	• Access

Educator Portal Actions	Permissions
User Management in their building	• Activate inactive users • Deactivate or remove users • Add and Assign Roles • Edit • Send activation email to pending users • Unlock user account
Rosters Management in their building	• Create • Edit
Student Management in their building	• View PNP Profile
Manage Tests > Content Groups	• View

Teacher (TEA)

An educator with this role typically provides all instruction and performs PIE pilot assessment administration for the students who are rostered to them. This is a required role for an educator who administers the PIE pilot assessment to students. The TEA role must have a unique Educator Identifier and pass PIE Pilot Required Test Administrator Training. This role can be assigned by the DTC, DUS, BTC, or BUS. Table 8 provides a list of permissions available to users with the Teacher role in Educator Portal.

Table 8

Permissions in Educator Portal for Teacher Role

Educator Portal Actions	Permissions
Access reports on the dashboard for students on their roster	• View and download Class Mastery Report • View and download Student Pathway Profile Report
Extracts	• Access
Rosters Management	• View rosters
Student Management	• Edit/Save PNP Profile • View student data

Educator Portal Actions	Permissions
Manage Tests > Content Groups	• View Learning Pathways Framework • View Pathway Map • Create, edit, and delete Content Groups • Assign Assessments
Manage Tests > Test Management	• View Test Sessions • View Test Tickets

ADD USERS

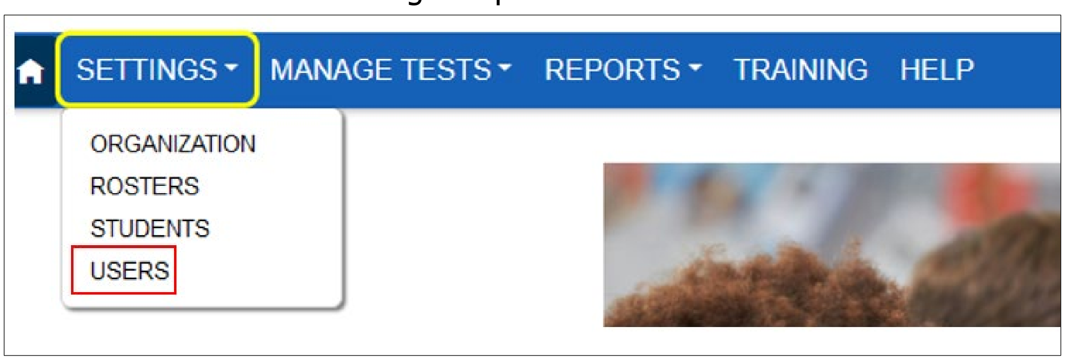
Users may be added manually through the user interface. Adding users manually is recommended for efficiency since only a few users will need to be added in districts and schools. If a large number of users need to be added through an upload, please contact the service desk for direction.

Educator Portal user logins are connected to email addresses. After the user is added into Educator Portal, within a few minutes, the system automatically generates a Kite activation email from kite_support@ku.edu. Using the hyperlink in the email, the user will activate their Educator Portal account. The activation link expires after 20 days. If the user does not receive the email, the district or building technology staff should be contacted. They can usually ensure the Kite activation email address is whitelisted so the email can get through the school's firewall.

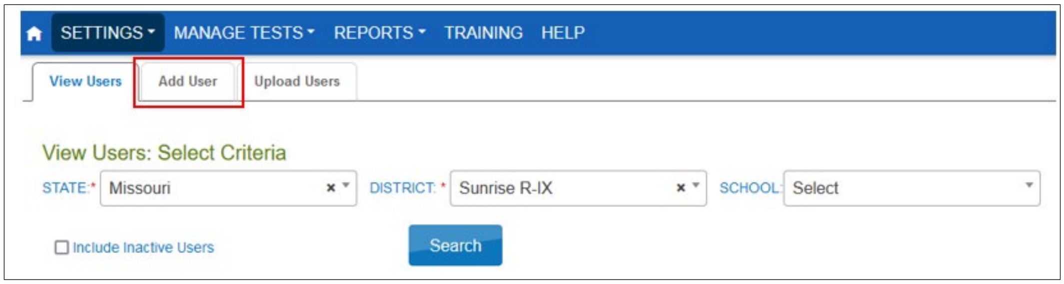
Add a User Manually

This procedure is most helpful when adding five users or fewer.

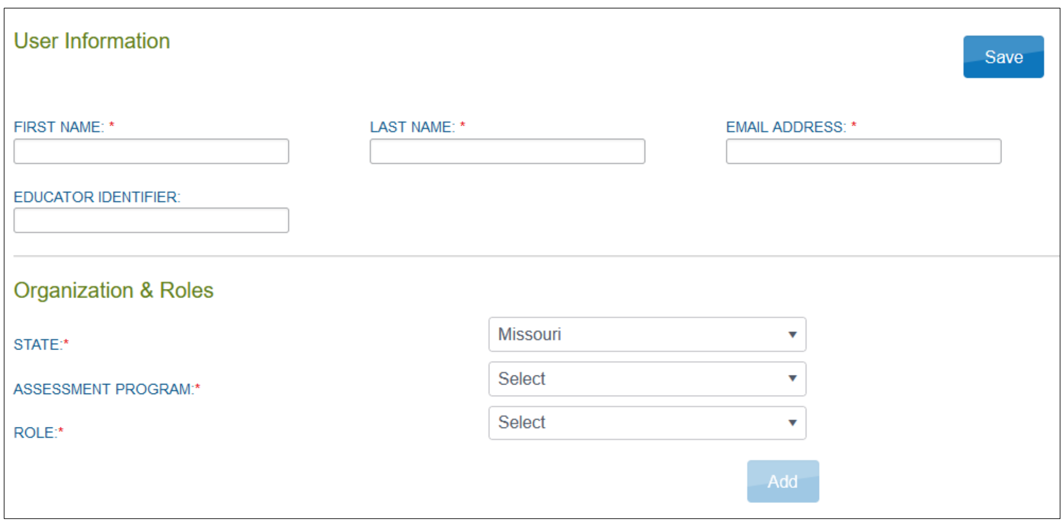
1) Select **Users** from the Settings drop-down menu.



2) The View Users tab is the default. Select the **Add User** tab.

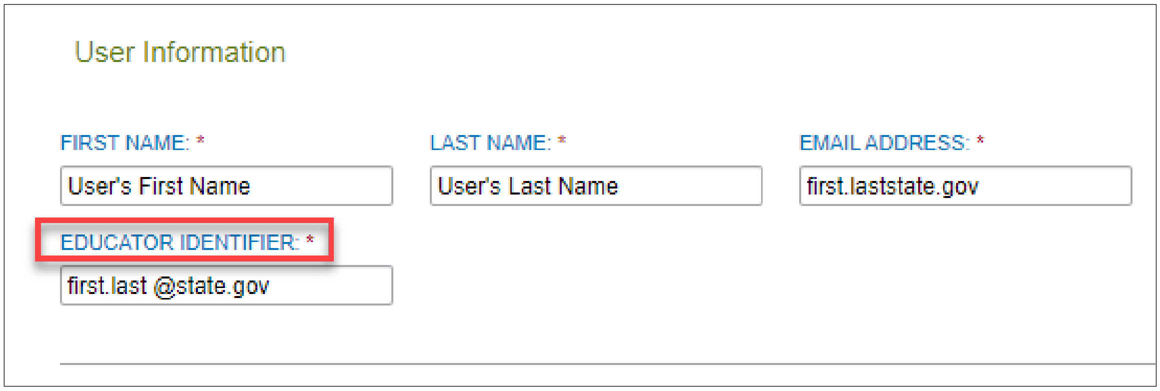


3) On the Add User screen, complete all User Information fields (fields marked with a red asterisk are required).
   - First Name
   - Last Name
   - **Email Address** will become the username when signing into Educator Portal.
   - **Educator Identifier** is required for users with the teacher role. The Educator Identifier links a teacher to their students when a roster is created. The Educator Identifier is case-insensitive.
   - Assessment Program
   - Role



4) If a user has only one, role select **Save**.
5) If a user has multiple roles in a district or serves multiple schools in the same district, the district data manager should complete Step 5 for each role and organization. Select **Add** after adding each role or school. Once all roles or organizations are added and the default role is chosen, select **Save** to complete the process.

Note: After the **Add** button is selected, the red asterisk will appear above the Educator Identifier field for users with the teacher role, making it a required field. Include the Educator Identifier if not already entered.



Note: If any user serves multiple districts or both the Dynamic Learning Maps® (DLM®) and PIE assessment programs, only users with the SAA role or a Service Desk agent can complete the above steps for the user.

6) Sometimes after adding a new user, an error message may display indicating that a user with the same email is already in the system.
7) To locate the existing user, use the following procedure for editing a user's account.

USER ACCOUNT MANAGEMENT

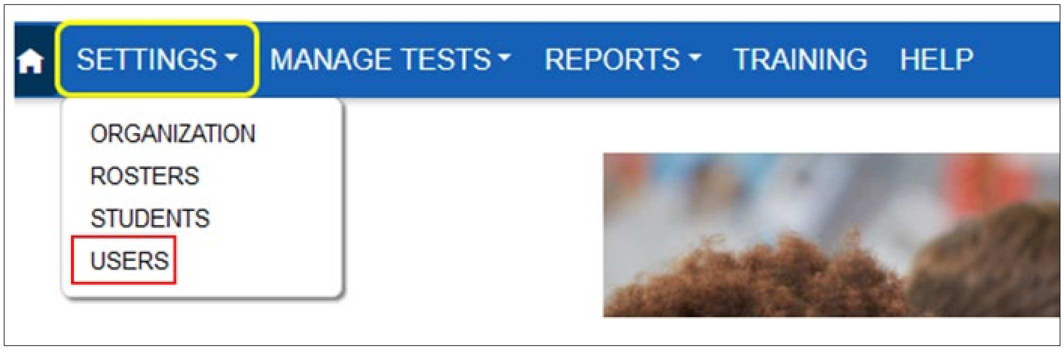
Once a user has been added to Educator Portal there are other tasks such as editing a user's account, resending the Kite activation email, unlocking a user's account, or activating or deactivating a user that a data manager may need to complete. The steps to complete these tasks are provided in the following sections.

Edit a User's Account

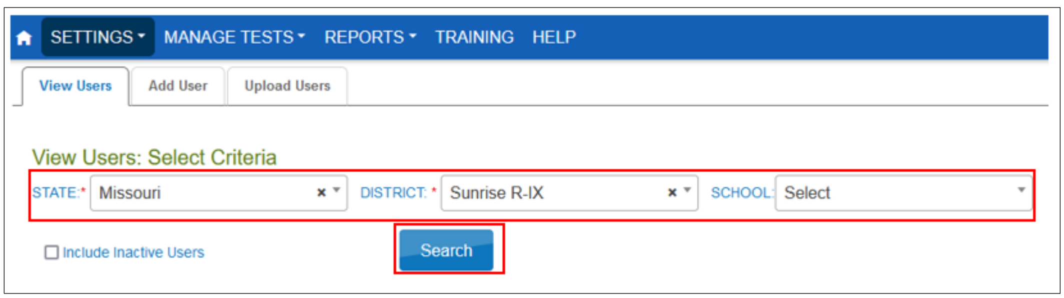
Use this procedure to edit data in a user's account or to change a user's role(s) or organizations from those previously assigned.

Note: Do not attempt to transfer an Educator Portal account from one user to another. This violates the security agreement. Instead, deactivate the user who no longer needs an Educator Portal account. Then, create an account for the new user. This process takes only a few minutes.

1) Select **Users** from the Settings drop-down menu.

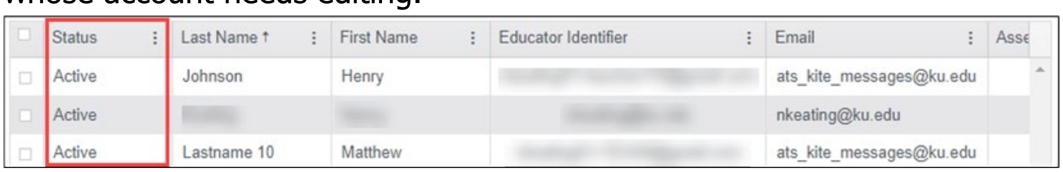


2) On the View Users: Select Criteria screen, the fields for state, district, and school will prepopulate according to the user's permissions in Educator Portal. If needed, apply filters. Use the drop-down arrow in the fields to choose a different organization from those that prepopulated. Select **Search**.

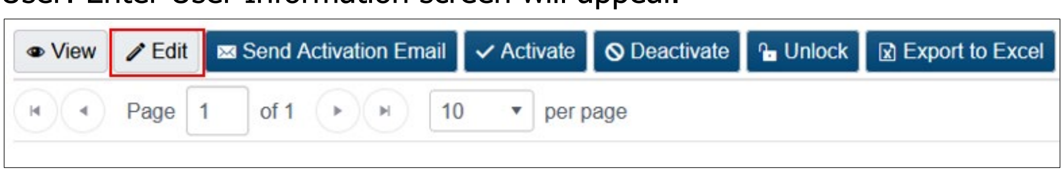


3) The list of all active or pending users for the applicable organization will appear. To include inactive users, check the box next to **Include Inactive Users** before selecting **Search**.

4) In the table of available users, select the box on the far left in the row for the user whose account needs editing.



5) At the bottom of the grid, select the **Edit** button (includes the pencil icon). The Edit User: Enter User Information screen will appear.



6) Table 9 below outlines the steps for making changes to a user's account. Follow these steps as needed to make specific changes to user accounts.

7) When all changes have been made and are ready to be saved, select **Save**. This will close the Edit User: Enter User Information screen. Messages will appear stating whether the changes were successful or if a required field was missed. Complete the

process and then **Save**. The message also recommends signing out of Educator Portal and then signing back in to see the changes.

Table 9

Making Changes to User Accounts in Educator Portal

To Make This Change	Do This on the Edit User: Enter User Information Screen
Change First Name, Last Name, or Email Address	Type the new information into the matching field at the top of the Edit User: Enter User Information screen.
Remove a role	Select the trash can icon in the row for the role to be removed. At least one role must remain for the user.
Add a role	Under Organization & Roles, use drop-down menus to select appropriate role(s).
Change the default role	In the list of roles beneath the Organization & Roles section, select the radio button in the Default column to the left of the desired role.
Change Educator Identifier	Type the new information into the matching field at the top of the Edit User: Enter User Information screen.
Add an organization	Under Organization & Roles, use drop-down menus to select appropriate organization.
Remove an organization	From the Edit User: Enter User Information screen, on the list of roles beneath the Organization & Roles section, select the trash can icon to remove an organization.

Merge Multiple User Accounts

If multiple accounts were created for an individual user, best practice is to have those accounts merged into one account. Only a Service Desk agent has the level of permission in Educator Portal to merge multiple accounts.

To prepare for the call to the Service Desk, determine which account to retain and use. If the user has the Educator Portal role of Teacher, choose the account associated with the PIE Training. Ask the Service Desk agent to make any needed edits while working with the accounts (e.g., ensuring the email address is correct).

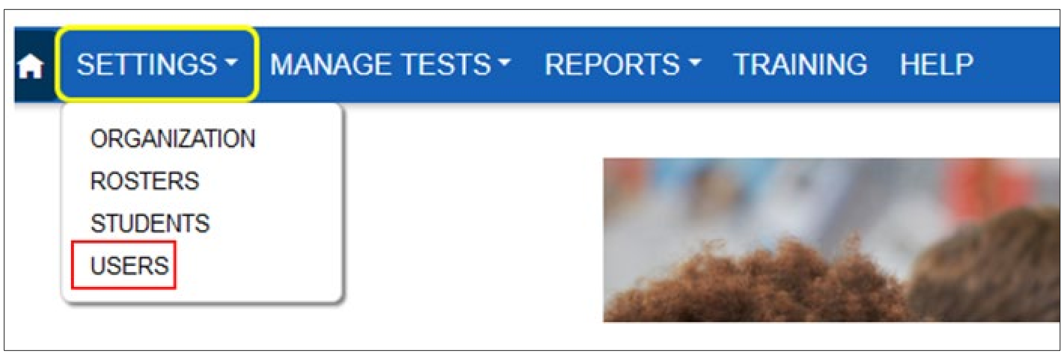
Resend the Kite Activation Email Message

The Educator Portal logins are connected to email addresses. After the user is loaded into Educator Portal, within a few minutes, the system automatically generates a Kite activation email from kite_support@ku.edu. Using the hyperlink in the email, the user will activate their Educator Portal account. The activation link expires after 20 days. If the user does not receive the email, the district or building technology staff should be contacted. They can usually ensure the Kite activation email address is whitelisted so the email can get through the school's firewall.

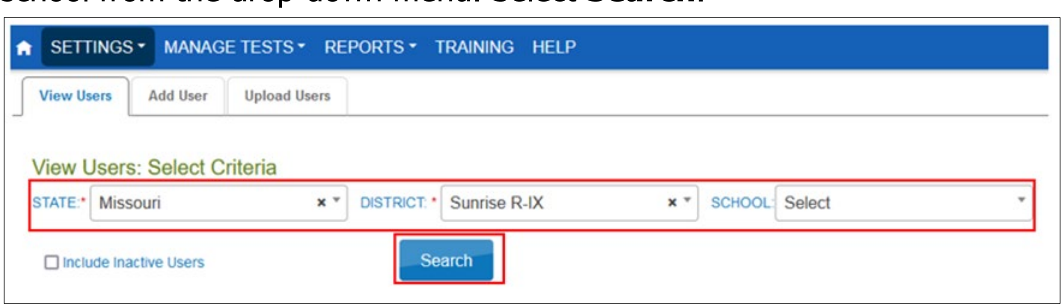
> Hint: A pending status indicates that the user has not activated their account. The user may have not received the activation email because a spam filter blocked it, or an incorrect email address was used when the account was created. The activation link expires after 20 days and will need to be reactivated.

Use the following procedure to resend the Kite activation email message to a pending user.

1) Select **Users** from the Settings drop-down menu.

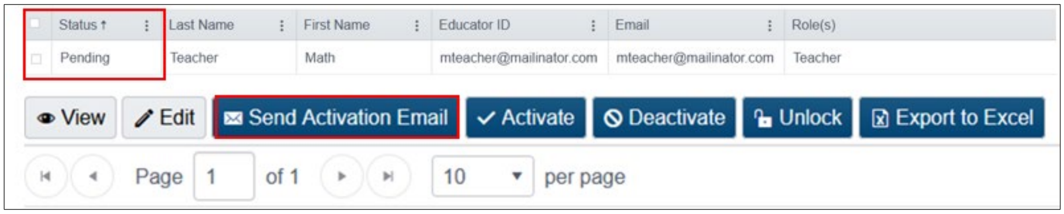


2) The View Users: Select Criteria screen will display. On that screen, the fields will prepopulate entries according to the user's level of permissions. Select the district or school from the drop-down menu. Select **Search**.



3) The list of all active or pending users for the applicable organization will appear.
4) Locate the pending user (options to filter, sort, and search are available).
5) Select the checkbox to the left of the user's name that is pending. (Uncheck the same box to deselect a user, when needed.) At the bottom of the screen, select the

Send Activation Email button (includes an envelope icon). The activation email will be resent to the pending user.

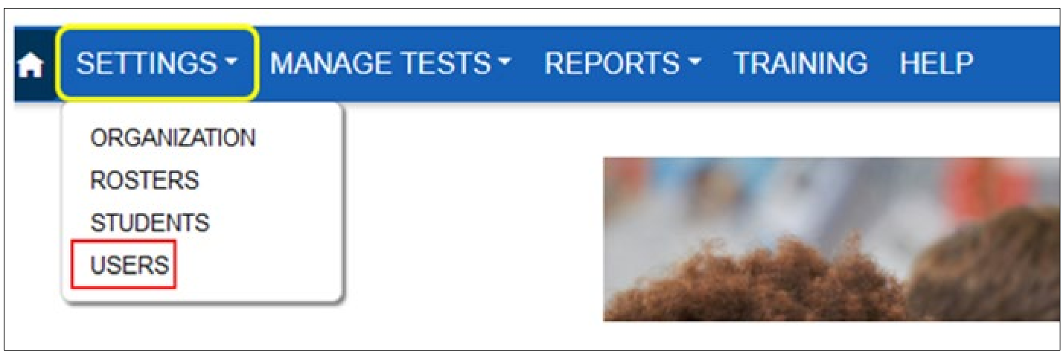


Unlock a User Account

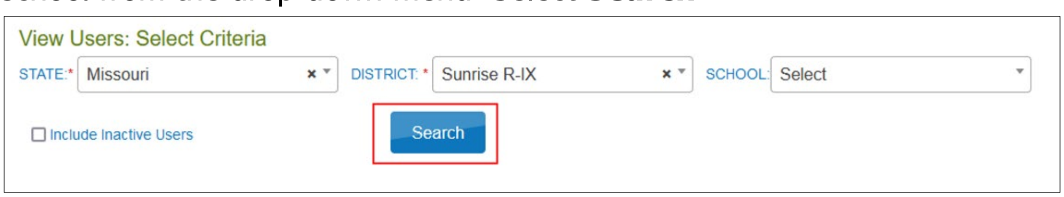
After a user's fifth failed login attempt, the user's Educator Portal account will be locked. The user receives the message, "This account is locked due to too many failed login attempts. Please contact your Test Coordinator to unlock your account."

A user with permission to unlock an account will follow these steps.

1) Select **Users** from the Settings drop-down menu.

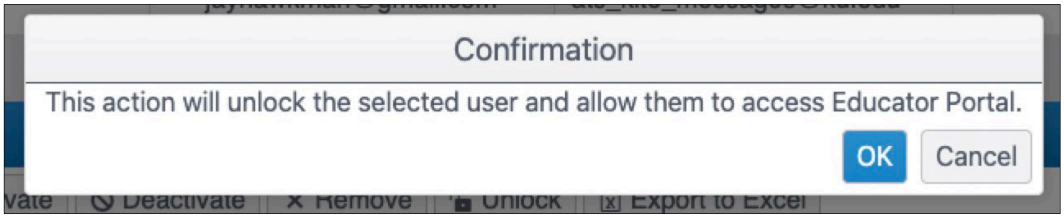


2) The View Users: Select Criteria screen will display. On that screen, the fields will prepopulate entries according to the user's level of permissions. Select the district or school from the drop-down menu. Select **Search**.



3) The list of all active or pending users for the applicable organization will appear. Locate the user (options to filter, sort, and search are available) and verify the user's account is locked using the Account Locked column on the far-right side. Select the checkbox to the left of the user's name that is locked. At the bottom of the screen, select the **Unlock** button.

4) A confirmation message will appear.

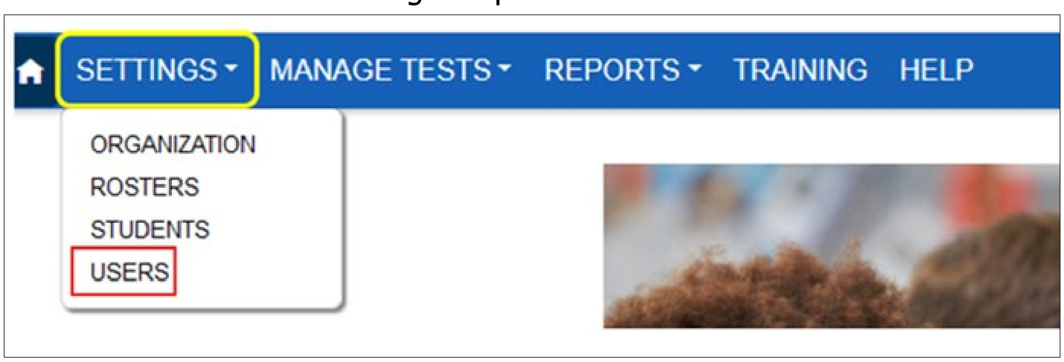


5) Select **OK** to unlock the user's account.
6) The system will provide a message that the user account has been unlocked.
7) The user's account is now unlocked. The user can attempt to login again if they now remember their password, or they can use the **Forgot Password** link to reset their password.

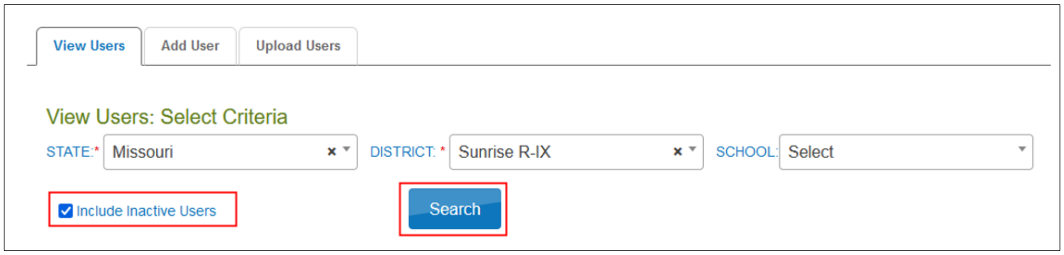
Activate a User

Sometimes users have been deactivated because they no longer needed an account in Educator Portal (e.g., they left the district). Their account in Educator Portal is now inactive. To activate an inactive user account (e.g., the user has returned to the district), follow these steps.

1) Select **Users** from the Settings drop-down menu.



2) On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district or school from the drop-down menu. Check **Include Inactive Users** and select **Search**.



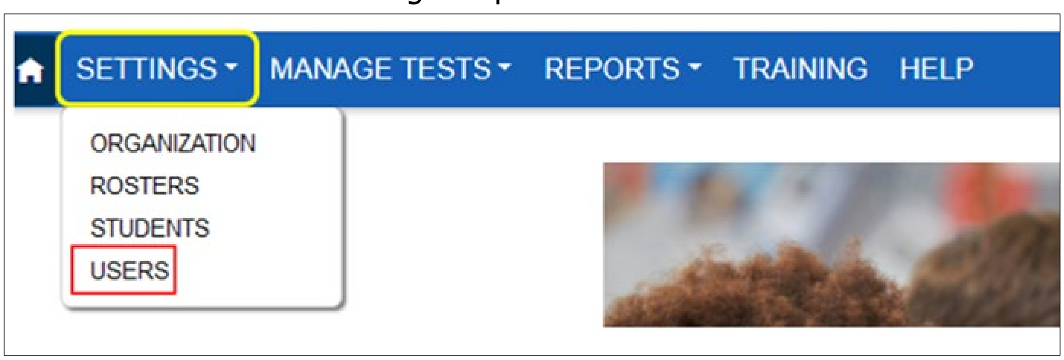
3) Find the inactive user in the list of all inactive, active, and pending users and select the checkbox on the left in the row for the user to be activated.
4) Select the **Activate** button (includes a checkmark icon ✓) below the list of users.

After activating the user, the user will quickly receive an activation email. The user's account must be activated within 20 days.

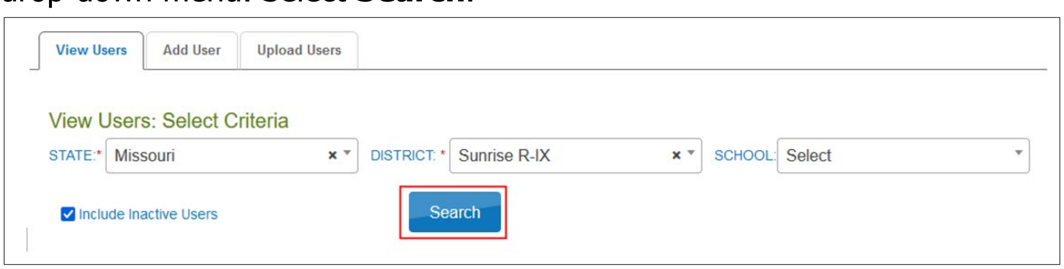
Deactivate a User

If a user no longer needs an Educator Portal account, the account should be deactivated. If multiple users need to be deactivated, the most efficient procedure is to use the User Upload Template.

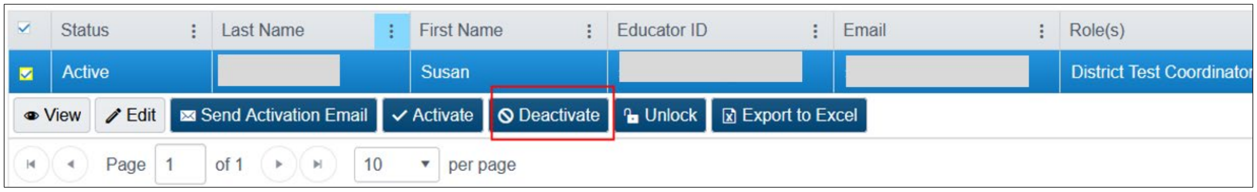
1) Select **Users** from the Settings drop-down menu.



2) On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district or school from the drop-down menu. Select **Search**.



3) The list of all active or pending users for the applicable organization will appear. Locate the user (options to filter, sort, and search are available) and select the checkbox to the left of the user's information.
4) Select the **Deactivate** button (includes the stop icon) at the bottom of the screen to deactivate the user.

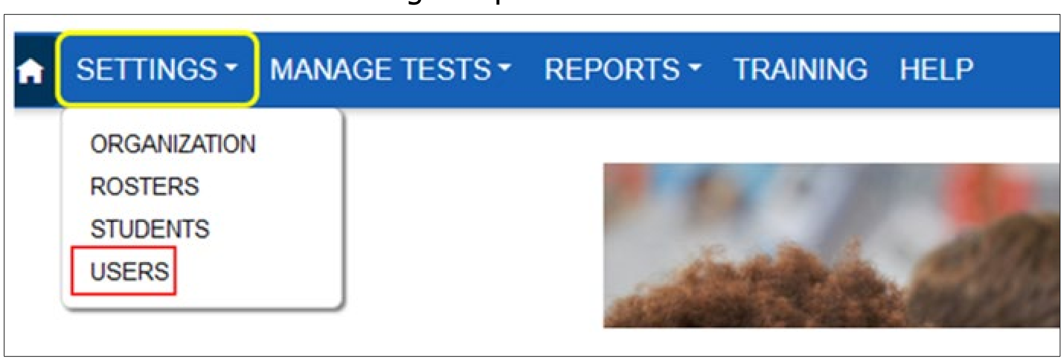


The deactivated user will not be visible in any organizations with which they were associated.

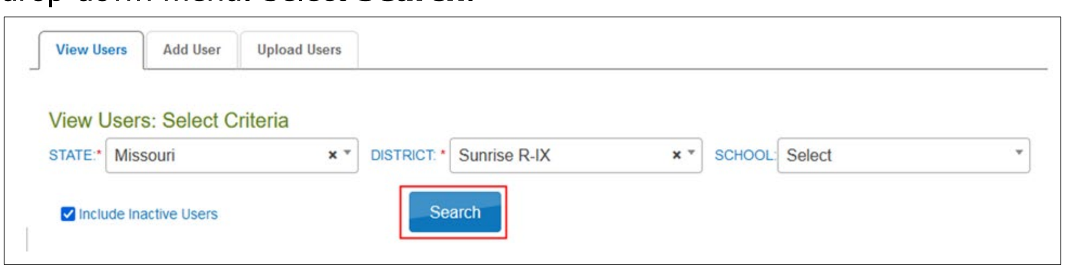
REMOVE A USER

If a user has moved out of state, has retired, is deceased, or no longer needs Educator Portal access, the account can be removed. The removed user will not be visible in any organizations with which they were associated or in any extracts. The state assessment administrator must be contacted in order to reactivate a removed user's account.

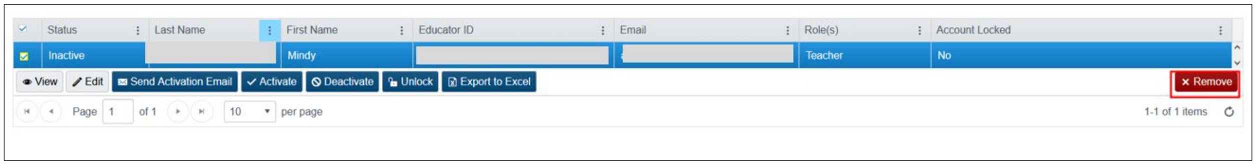
1) Select **Users** from the Settings drop-down menu.



2) On the View Users: Select Criteria screen, the fields will prepopulate entries according to the user's level of permissions. Select the district or school from the drop-down menu. Select **Search**.



3) The list of all active or pending users for the applicable organization will appear. Locate the user and select the checkbox to the left of the user's information. Select the **Remove** button at the bottom of the screen to remove the user.



4) Select **OK** on the Confirmation message. The system will provide a message that the user has been successfully removed.
5) If the user is on an active roster, they will not be removed. To remove a user, all students on that user's rosters must be moved to another teacher's roster.

CHAPTER 9: DATA MANAGERS—ENROLLMENT DATA

All students that will be participating in the PIE pilot study **must** be enrolled. To enroll multiple students, use the Enrollment Template File Upload. Students may also be enrolled using the user interface one at a time.

Note: If a student is enrolled as Grade 5 in error, the student should be exited.

CREATE AND UPLOAD AN ENROLLMENT UPLOAD TEMPLATE FILE

This is the optimal procedure for uploading multiple students into Educator Portal. The main enrollment template file should be created and uploaded. The upload can be done at the state level or locally by the district or building data manager. Changes can be made as needed by subsequent uploads or manual entries using the user interface in Educator Portal.

To create an enrollment file, follow these steps:

1) Download the Enrollment Upload Template file from within Educator Portal on the Upload Enrollment screen or from the PIE webpage.
2) Open the Enrollment Upload Template file in a spreadsheet program that can save data in the CSV format (e.g., Microsoft Excel). The template must be uploaded in this format.
3) Using a new row for each student, enter the information into the Enrollment Upload Template file. When using the Enrollment Upload Template file, each row that has a new State Student Identifier results in the creation of a unique student record. In a row with an existing or previously enrolled and uploaded State Student Identifier, the new upload overwrites and updates the previous record.
4) Complete all required fields.

5) Upload the Enrollment Upload Template file into Educator Portal. Directions for uploading template files into Educator Portal are found in Chapter 7 of this manual.

Use Table 10 on the next several pages to compile enrollment information.

Enrollment Field Definitions

Table 10

Enrollment Field Definitions

Column Letter in Enrollment File	Field	Required	Definition	Special Notes
A	Accountability_ District_Identifier	No	Leave Blank	Leave Blank
B	Accountability_ School_Identifier	No	Leave Blank	Leave Blank
C	Attendance_District _Identifier	Yes	6-digit district code	Use a District Number provided in column D in the state organizational table. An entry in the template must be identical to a district number in the organizational table. If a code is numeric and contains leading zeros, ensure that the leading zeros* are retained after each save.

Column Letter in Enrollment File	Field	Required	Definition	Special Notes
D	Attendance_School_ Identifier	Yes	10-digit district building code	Use a School Number provided in Column B of the state organizational table. If a code is numeric and contains leading zeros, ensure that the leading zeros* are retained after each save.
E	School_Year	Yes	Use 2025	
F	State_Student_ Identifier	Yes	10-digit MOSIS number	If the code is numeric and contains leading zeros, ensure the leading zeros* are retained in a student's local student identifier.
G	Local_Student_ Identifier	No	Leave Blank	Leave Blank
H	Student_Legal_ First_Name	Yes	The student's first name	Use spaces, accent marks, and hyphenation where needed.
I	Student_Legal_ Last_Name	Yes	The student's last name	Use spaces, accent marks, and hyphenation where needed.
J	Student_Legal_ Middle_Name	No	Leave Blank	Leave Blank
K	Generation_Code	No	Leave Blank	Leave Blank

Column Letter in Enrollment File	Field	Required	Definition	Special Notes
L	Gender	Yes	0 = Female 1 = Male	
M	Date_of_Birth	Yes	MM/DD/YYYY	
N	Grade	Yes	5	Use the number 5
O	School_Entry_Date	Yes	MMDD/YYYY date of enrollment	
P	District_Entry_ Date	No	Leave Blank	Leave Blank
Q	State_Entry_Date	No	Leave Blank	Leave Blank
R	Comprehensive_ Race	Yes	1=White 2=African American 4=Asian 5=American Indian 6=Alaska Native 7=Two or more races 8=Native Hawaiian or Pacific Islander	

Column Letter in Enrollment File	Field	Required	Definition	Special Notes
S	Primary_Disability_ Code	Yes	AM-Autism DB-Deaf/Blindness DD-Developmentally Delayed (ages 3-9 only) ED-Emotional disturbance HI-Hearing impairment ID-Intellectual disability LD-Specific learning disability MD-Multiple disabilities EI-Eligible individual DA-Decline to answer ND-No disability OH-Other health impairment OI-Orthopedic impairment SL-Speech or language impairment TB-Traumatic brain injury VI-Visual impairment WD-documented disability	
T	Gifted_Student	No	Yes or No or Leave Blank	
U	Hispanic_Ethnicity	Yes	Yes or No	
V	First_Language	No	Leave Blank	Leave Blank

Column Letter in Enrollment File	Field	Required	Definition	Special Notes
W	ESOL_Participation_Code	Yes	0=Not ESOL student 1=Title III funded 2=State ESOL/bilingual funded 3=Both Title III and state ESO/bilingual funded 4=Monitored ESOL student 5=ESOL program eligible, but not currently ESOL 6=Receives ESOL but not funded by Title III or State ESOL funding	
X	Assessment_ Program_1	Yes	PIE	Enter the code PIE in all caps.
Y	Assessment_ Program_2	No		Must leave blank.
Z	Assessment_ Program_3	No		Must leave blank.

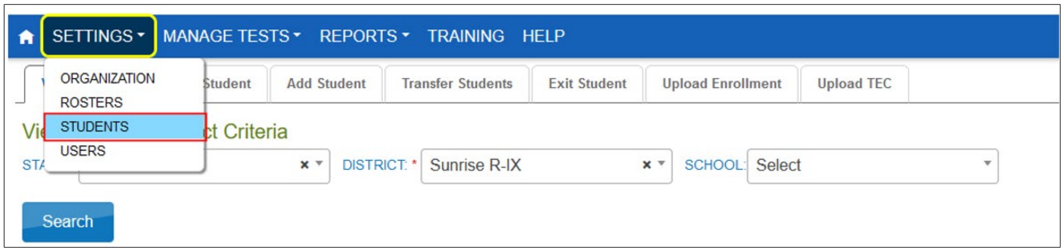
Change Enrollment Data Previously Uploaded

To correct or change a previously uploaded record, prepare a new file with the corrected information and repeat the upload steps outlined in the section Create and Upload an Enrollment Upload Template File on page 54. The new record will be matched to the previous record using the State_Student_Identifier field. The new record overwrites and updates the previous record.

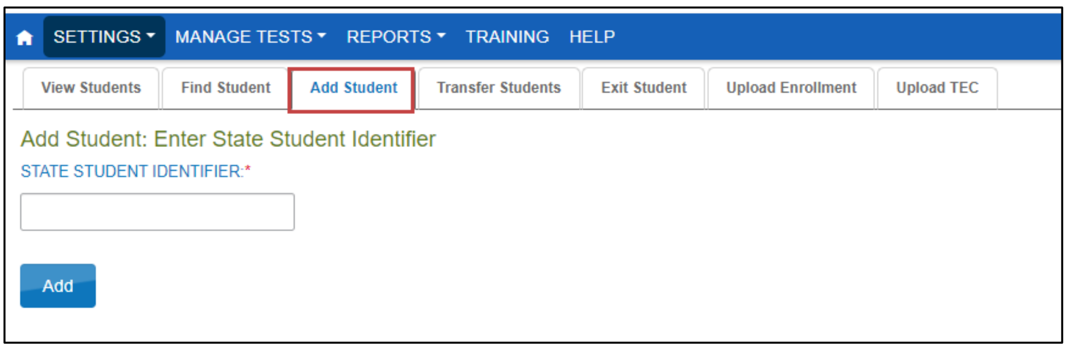
ADD A STUDENT RECORD MANUALLY

This procedure is most helpful when adding only a few students, typically five or fewer. Using the manual process enrolls students one at a time. To enroll a student manually, follow these steps:

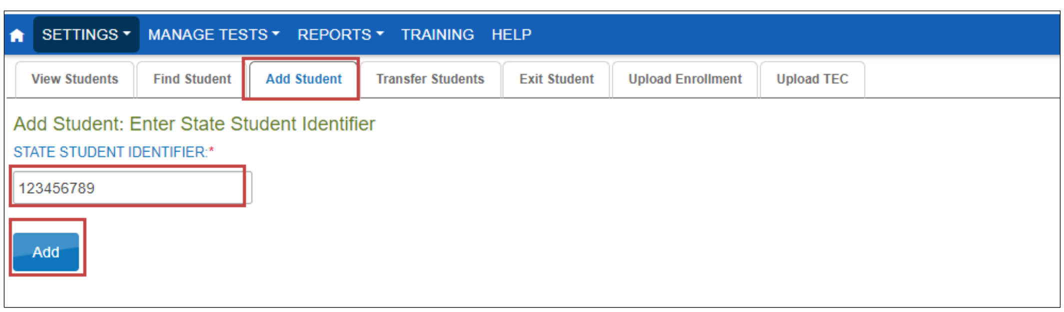
1) Select **Students** from the Settings drop-down menu.



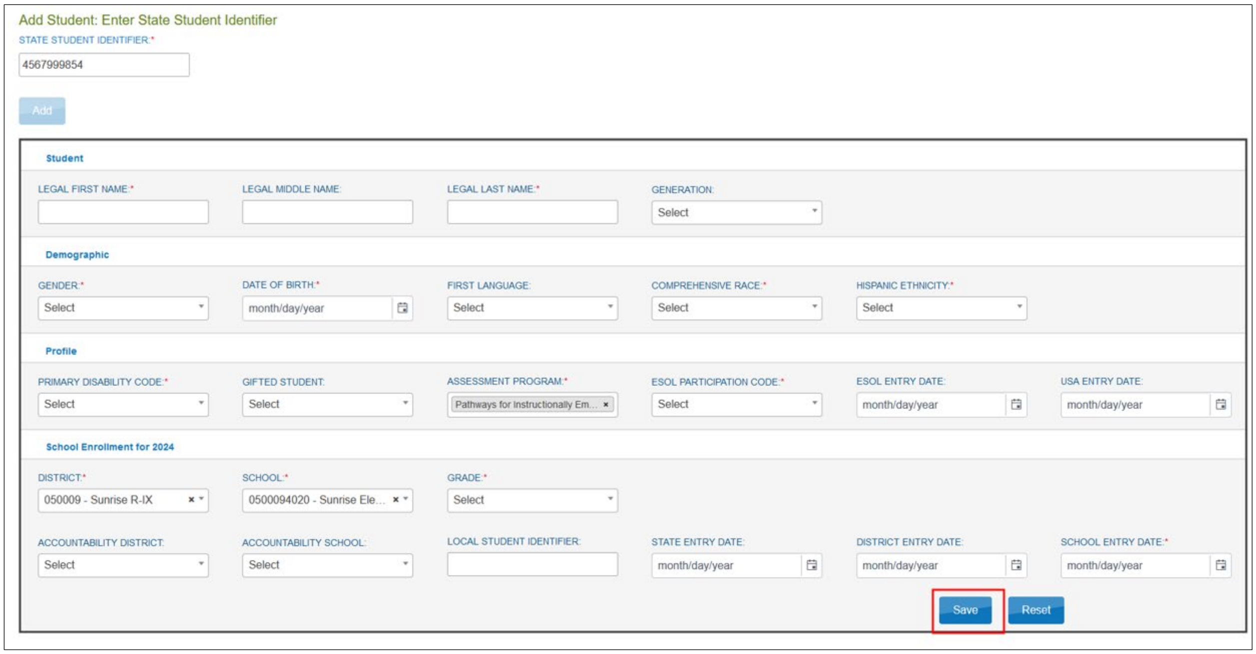
2) Select the **Add Student** tab.



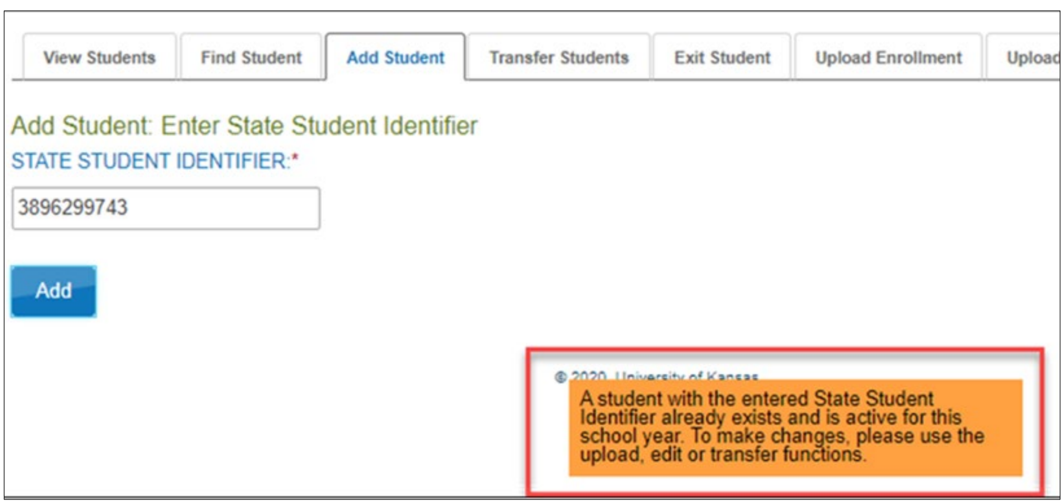
3) Enter the State Student Identifier and select **Add**.



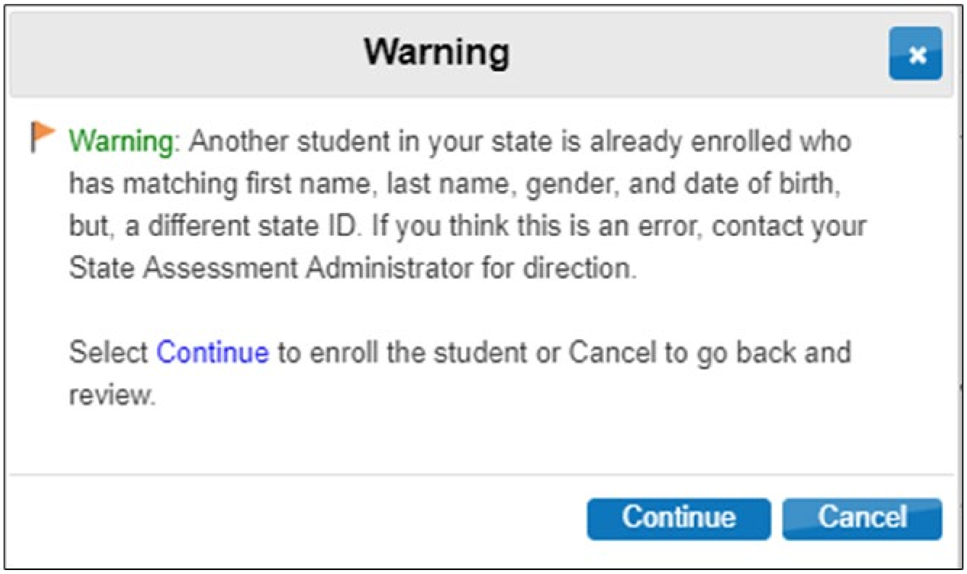
4) All fields with a red asterisk are required. Do NOT enter any data for fields not required.
5) Select **Save**.



6) Once all required fields are complete and **Save** is selected, a message will appear reading, "This student record was successfully saved."
7) If another student is already in the system for the school year with the same identifier, a message will display letting the data manager know that another student has the same identifier. The data manager will need to verify that the identifier entered is correct. If the identifier entered was not correct, edit the identifier and select the **Add** button again. If the identifier entered was correct, contact the State Assessment Administrator to resolve.



8) If no matching State Student Identifier is found, the system continues the next validation of the student's legal first name, legal last name, gender, and date of birth. If all four of these fields match an existing student, the data manager will receive the following warning message:



Student Upload Definitions For Manual Uploads in the User Interface

The information in Table 11 through Table 15 applies only when adding a student manually, one at a time, using the user interface. Field names with an asterisk are required. When uploading multiple students using an Enrollment Upload Template file, use the definition table(s) on page 56 of this manual.

Table 11

Student Upload Definitions for Manual Uploads (Field Name)

Field Name	Required	Definition	Special Notes
State Student Identifier*	Yes	10-digit MOSIS number	Include leading zeros when applicable.

Table 12

Student Upload Definitions for Manual Uploads (Student Name)

STUDENT	Required	Definition	Special Notes
Legal First Name*	Yes	The student’s first name	Best practice is to use upper and lowercase letters. Accent marks and hyphens can be used.
Legal Middle Name	No	Leave Blank	Leave Blank
Legal Last Name*	Yes	The student’s last name	Best practice is to use upper and lowercase letters. Accent marks and hyphens can be used.
Generation	No	Leave Blank	Leave Blank

Table 13

Student Upload Definitions for Manual Uploads (Demographic)

DEMOGRAPHIC	Required	Definition	Special Notes
Gender*	Yes	The student's gender: Female Male	
Date of Birth*	Yes	MM/DD/YYYY	
First Language	No	Leave Blank	Leave Blank
Comprehensive Race*	Yes	General racial category (or categories) that most clearly reflects a student's recognition of their racial background	
Hispanic Ethnicity*	Yes	A student's recognition of their Hispanic ethnicity (Yes or No)	

Table 14

Student Upload Definitions for Manual Uploads (Profile)

PROFILE	Required	Definition	Special Notes
Primary Disability Code*	Yes	Does the student have an active IEP under the Individuals with Disabilities Education Act (IDEA—Part B)	
Gifted Student	No	Leave Blank	Leave Blank

PROFILE	Required	Definition	Special Notes
Assessment Program*	Yes		Choose PIE
ESOL Participation Code*	Yes	English for Speakers of Other Languages (ESOL) The type of ESOL/bilingual program in which the student participates	
ESOL Entry Date	No	Leave Blank	Leave Blank
USA Entry Date	No	Leave Blank	Leave Blank

Table 15

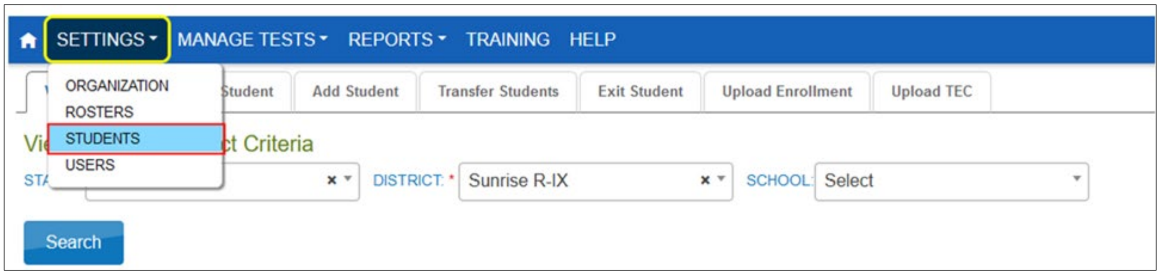
Student Upload Definitions for Manual Uploads (School Enrollment)

SCHOOL ENROLLMENT FOR 2024–2025	Required	Definition	Special Notes
District*	Yes	The 6-digit district code that has been assigned to a district as listed in column D in the organizational table.	This field will prepopulate for district- and building-level users. Choose from options presented.
School*	Yes	The 10-digit district building code that has been assigned to a school as listed in the organizational table.	This field will prepopulate for building-level users, but for a district-level user, school options are available for selection in a drop-down menu. Choose from options presented.
Grade*	Yes	The grade level that is entered should be 5.	Must be Grade 5.
Accountability District	No	Leave Blank	Leave Blank
Accountability School	No	Leave Blank	Leave Blank
Local Student Identifier	No	Leave Blank	Leave Blank

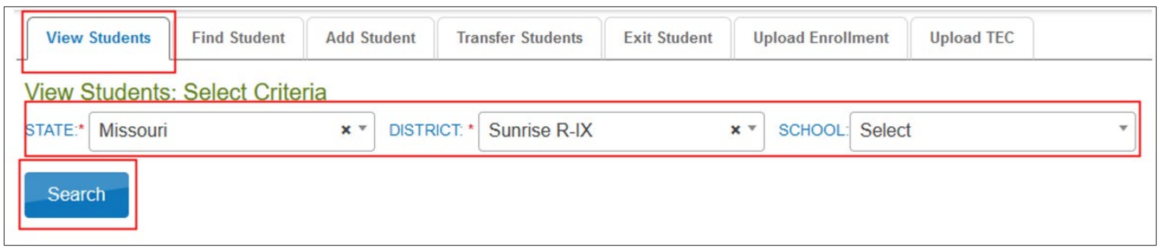
SCHOOL ENROLLMENT FOR 2024–2025	Required	Definition	Special Notes
State Entry Date	No	Leave Blank	Leave Blank
District Entry Date	No	Leave Blank	Leave Blank
School Entry Date*	Yes	The date on which the student enrolls and begins to receive instructional services in a school	

EDIT A STUDENT RECORD MANUALLY

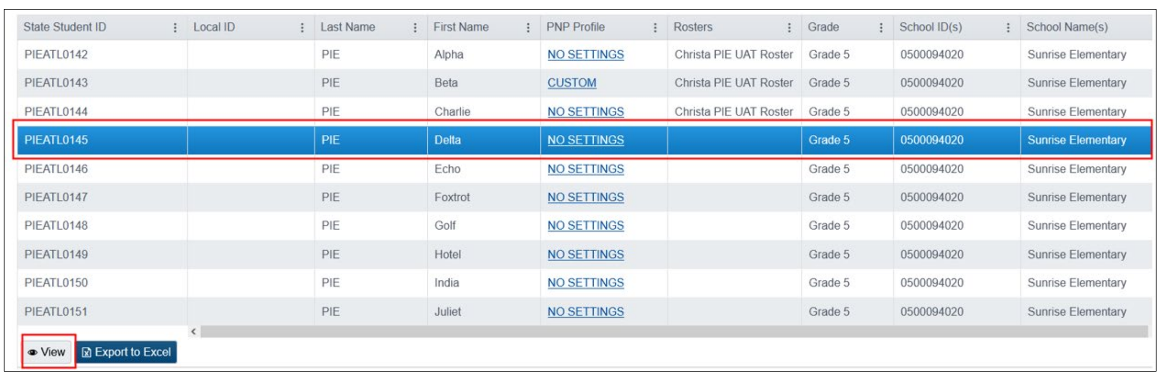
1) Select **Students** from the Settings drop-down menu.



2) On the View Students tab under Select Criteria, the fields will prepopulate entries according to the user's level of permissions. Select the school from the drop-down menu. Select **Search**.

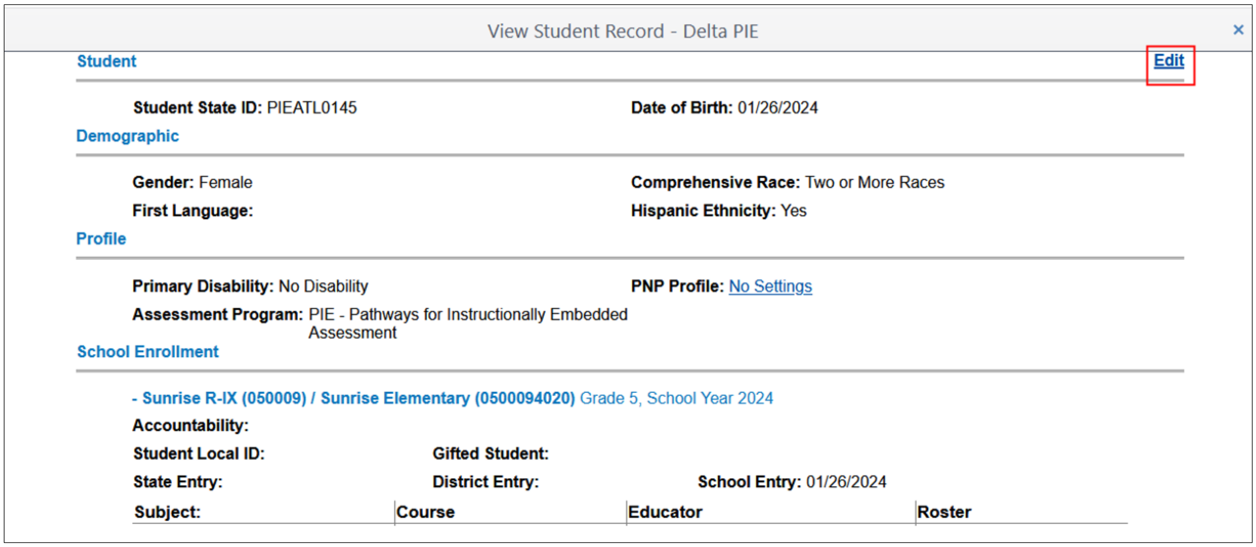


3) A list of students will become available for the selected organization. To edit a student record, highlight the row with the State Student Identifier to be edited and select the **View** button at the bottom of the screen.

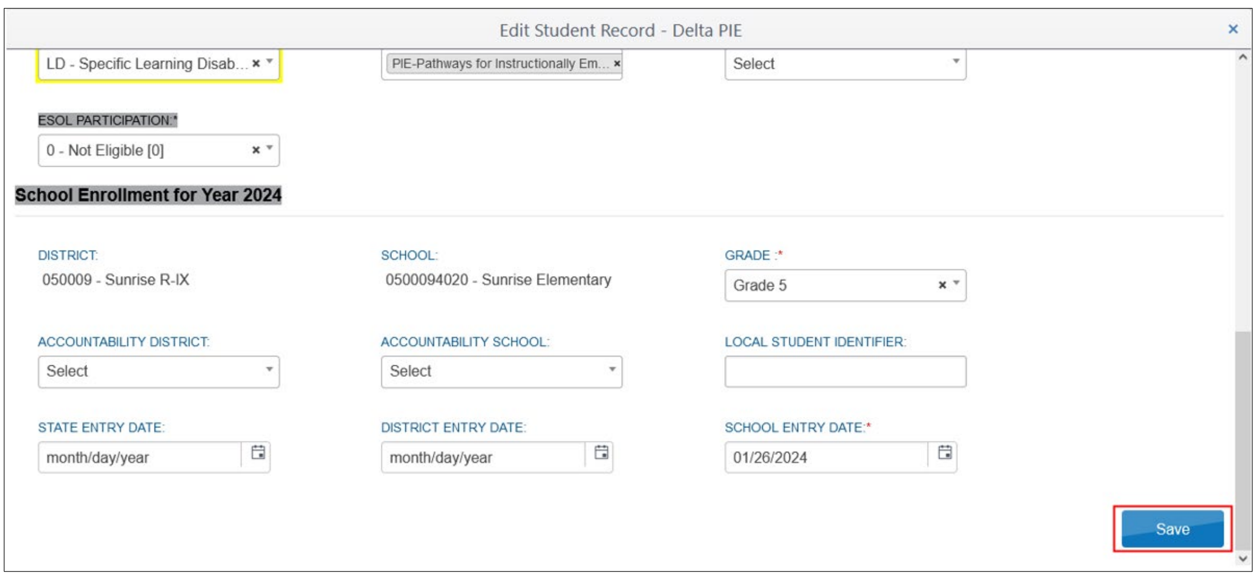


State Student ID	Local ID	Last Name	First Name	PNP Profile	Rosters	Grade	School ID(s)	School Name(s)
PIEATL0142		PIE	Alpha	NO SETTINGS	Christa PIE UAT Roster	Grade 5	0500094020	Sunrise Elementary
PIEATL0143		PIE	Beta	CUSTOM	Christa PIE UAT Roster	Grade 5	0500094020	Sunrise Elementary
PIEATL0144		PIE	Charlie	NO SETTINGS	Christa PIE UAT Roster	Grade 5	0500094020	Sunrise Elementary
PIEATL0145		PIE	Delta	NO SETTINGS		Grade 5	0500094020	Sunrise Elementary
PIEATL0146		PIE	Echo	NO SETTINGS		Grade 5	0500094020	Sunrise Elementary
PIEATL0147		PIE	Foxtrot	NO SETTINGS		Grade 5	0500094020	Sunrise Elementary
PIEATL0148		PIE	Golf	NO SETTINGS		Grade 5	0500094020	Sunrise Elementary
PIEATL0149		PIE	Hotel	NO SETTINGS		Grade 5	0500094020	Sunrise Elementary
PIEATL0150		PIE	India	NO SETTINGS		Grade 5	0500094020	Sunrise Elementary
PIEATL0151		PIE	Juliet	NO SETTINGS		Grade 5	0500094020	Sunrise Elementary

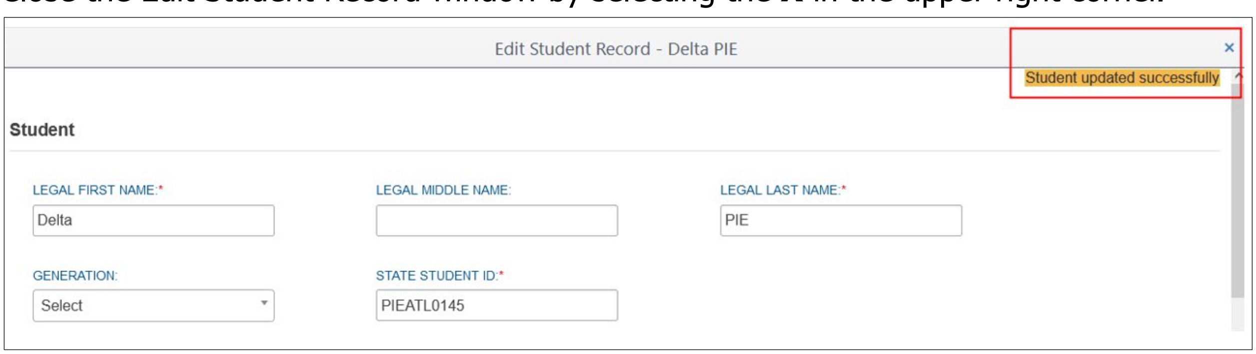
4) The View Student Record screen with the student's name will appear. At the top right of the screen, select the word **Edit**.



5) After making any necessary edits, scroll to the bottom of the screen to select the **Save** button.



6) A message at the top of the window indicates that the student updated successfully. Close the Edit Student Record window by selecting the **X** in the upper right corner.

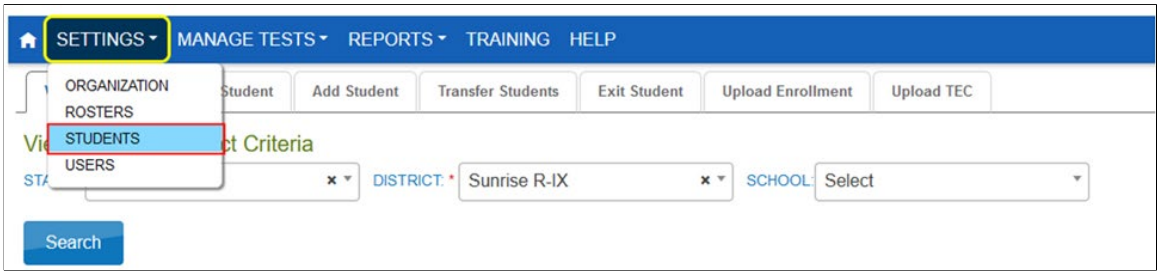


THE FIND STUDENT FEATURE

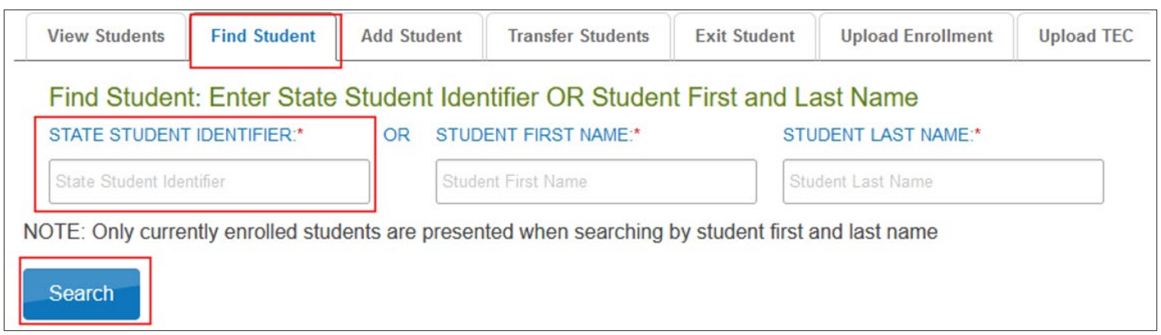
The Find Student feature allows a search by the state student identifier (SSID) or by the student's first and last name. Most users at the state, district, and building level may access the Find Student feature.

SEARCHING BY STATE STUDENT IDENTIFIER (SSID)

1) Select **Students** from the Settings drop-down menu.

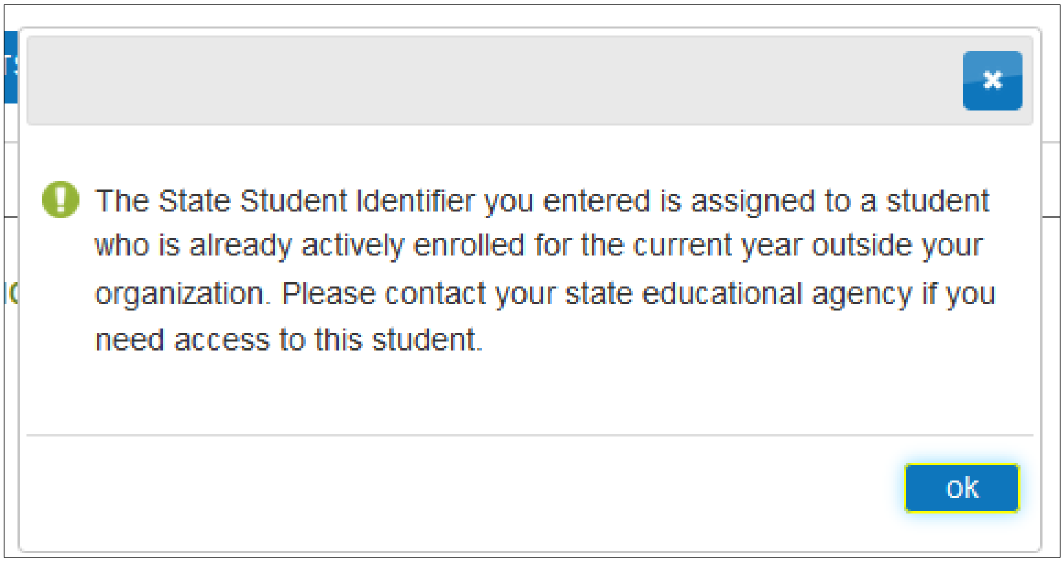


2) Select the **Find Student** tab.
3) Enter the State Student Identifier. The entry must EXACTLY match a student's SSID in the state or a matching record will not be found.
4) Select the blue **Search** button.

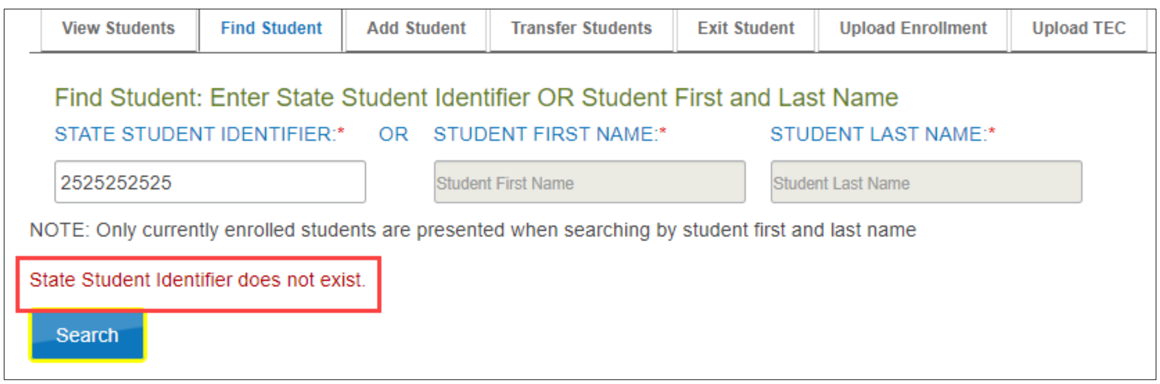


5) When Find Student is used to search for the state student identifier in Educator Portal, one of three search results will occur.

   - If a matching SSID exists for an active enrollment in the user's organization, the system will automatically pull up the View Student Record screen with the student's name displayed at the top. The user should review the information for accuracy and make corrections if needed by selecting the word **Edit** in the upper right corner of the screen. After making any edits, select **Save**.
   - If a matching SSID exists for an active enrollment but is not within the user's organizational level (i.e., district or school), the system displays the following message: "The State Student Identifier you entered is assigned to a student who is already actively enrolled for the current year outside your organization. Please contact your state educational agency if you need access to this student."

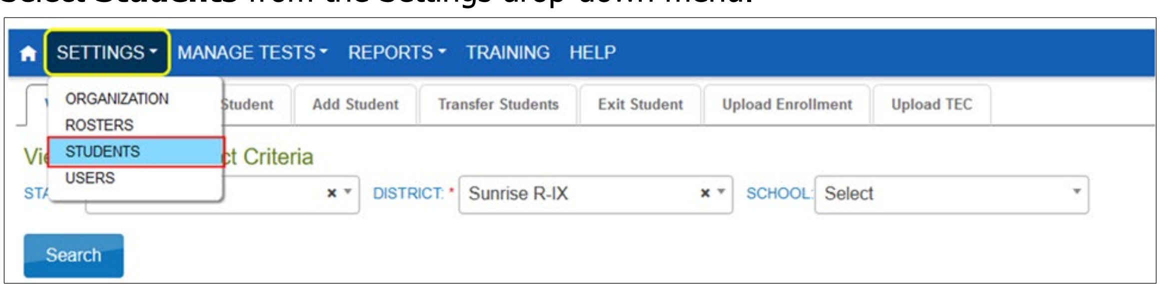


6) Select either the **OK** or the **X** to go back to the Find Student screen.
   - If no matching SSID exists for a student in the user's state, the system displays this message in red font: "State Student Identifier does not exist." When no students are found with a matching SSID, the student can be enrolled by using the Add Student feature or by uploading an Enrollment Upload Template file.

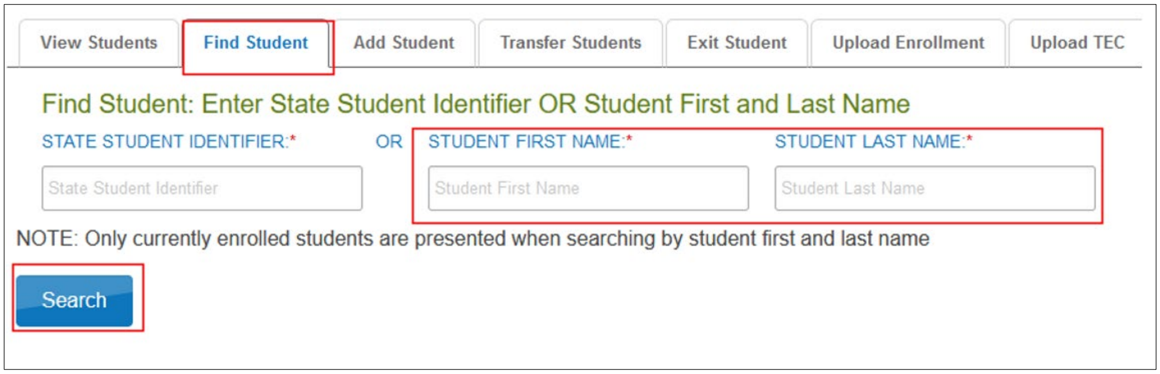


Searching by First and Last Name

1) Select **Students** from the Settings drop-down menu.



2) Select the **Find Student** tab. Enter the student's first and last name. The entry must EXACTLY match a currently enrolled student's first and last name in the user's organization or a student record will not be found. Select the **Search** button.



One of two search results will display:

- If no matches are found in the user's organization, the following message displays on the screen: "No records found."
- If a match is found, the system displays all student records that match the first and last name of a currently enrolled student in the user's organization. The user must select the correct student record.

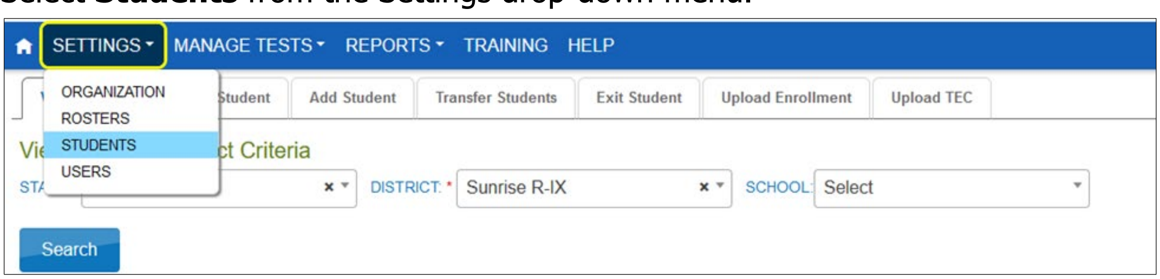
When no students are found by either a matching SSID or student first and last name, the student can be enrolled by using the Add Student feature or by uploading an Enrollment Upload Template file.

EXIT A STUDENT FROM EDUCATOR PORTAL

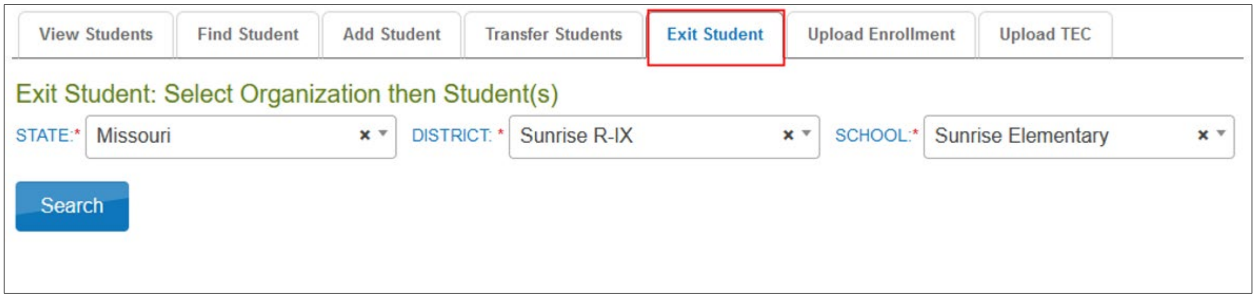
This procedure is required when a student was uploaded in error, moves out of state, transfers to another school, or will no longer participate in the PIE pilot study.

Exiting a student will automatically remove the student from the roster. Do not remove a student from a roster before exiting the student from the district or state.

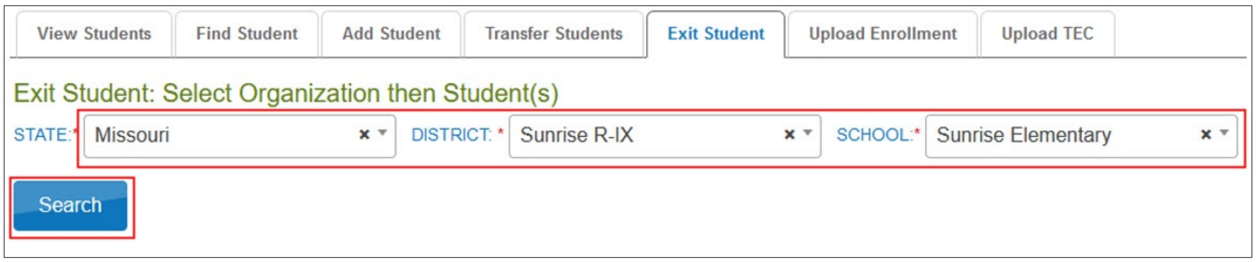
1) Select **Students** from the Settings drop-down menu.



2) Select the **Exit Student** tab.



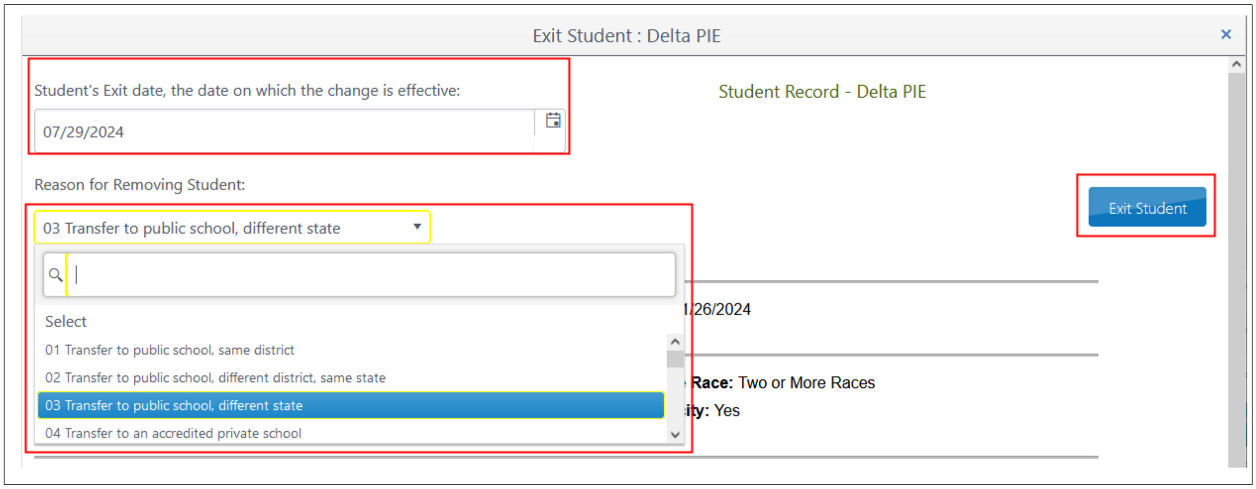
3) The state will always prepopulate. The other fields will prepopulate entries according to the user's level of permissions. Select the district and school if needed. Select **Search**.



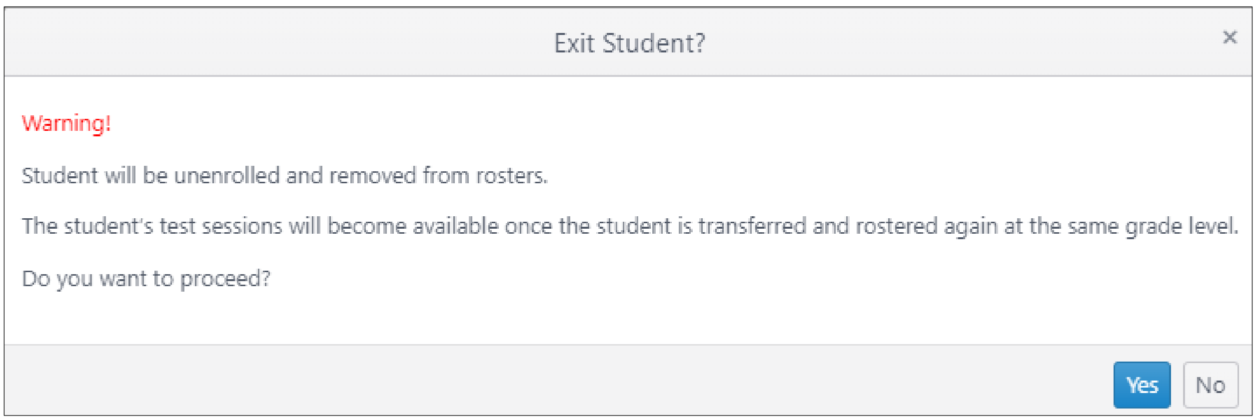
4) Select the student to be exited. Then, select **Continue**.

State Student ID	Local ID	Last Name	First Name	Grade	Residence District ID	School ID(s)	School Name(s)	First Contact	PNP Profile
PIEATL0142		PIE	Alpha	Grade 5	050009	0500094020	Sunrise Elementary	undefined	NO SETTINGS
PIEATL0143		PIE	Beta	Grade 5	050009	0500094020	Sunrise Elementary	undefined	CUSTOM
PIEATL0144		PIE	Charlie	Grade 5	050009	0500094020	Sunrise Elementary	undefined	NO SETTINGS
PIEATL0145		PIE	Delta	Grade 5	050009	0500094020	Sunrise Elementary	undefined	NO SETTINGS

5) At the top of the Exit Student screen, the student's name will appear. Ensure the correct student record is being exited before continuing. The exit date field prepopulates with the date on which this procedure is being performed. This will be the date when the exit is effective. To change the exit date, select the calendar icon. A drop-down menu appears. Choose a new date.
6) Select **Reason for Removing Student** (i.e., exit reason) from the drop-down menu. Slide the scroll bar down the page to access more options. The **Exit Student button** will be disabled until an exit reason is chosen.
7) After an exit reason is chosen, the **Exit Student button** is enabled. Select the **Exit Student** button.



8) The Exit Student warning will appear with the question, “Do you want to proceed?” Select either **Yes** or **No**.



9) If **Yes** is selected, a message displays that the student was successfully exited.
10) In cases where multiple students need to be exited, a TEC upload can be used. Contact the service desk for directions on uploading a TEC file.

Transferring a Student

Since not all districts and schools are participating in the PIE pilot study, a student who transfers out of your school should be exited. In the case that a student is transferring to another school or district that is participating in the PIE pilot study, contact the state assessment administrator to complete the student transfer.

CHAPTER 10: DATA MANAGERS—ROSTER DATA

Rosters can be created in two ways: through a roster template file upload or using the user interface.

Each row in the Roster Upload Template file connects one teacher to one student for the PIE pilot study. The data manager must keep in mind the following:

- One student for the PIE pilot study cannot be connected to more than one teacher.
- More than one roster can be created with a single upload.
- A district-level user can create rosters for teachers from several schools across their district with a single upload.
- A building-level user can create rosters for all teachers in their school with a single upload.

Five or fewer rosters can be created manually with the user interface. Go to Create a Roster Manually on page 78 of this manual.

BEST PRACTICES FOR NAMING ROSTERS

Consider defining a standard naming convention for rosters, which can make sorting and finding a specific roster easier later.
- Example: Teacher last name, Building, and PIE
- Barnett Lincoln Elementary PIE

CREATE AND UPLOAD A ROSTER UPLOAD TEMPLATE FILE

To create an enrollment file, follow these steps:

1) Download the Roster Upload Template file from within Educator Portal on the Upload Enrollment screen or from the PIE webpage.
2) Open the Roster Upload Template file in a spreadsheet program that can save data in the CSV format (e.g., Microsoft Excel). The template must be uploaded in this format.
3) Use a new row for each student participating in the PIE pilot assessment. Column M (Remove from Roster) is only used to remove students from a roster. Otherwise, leave column M blank.
4) Complete all required fields.
5) Upload the Roster Upload Template into Educator Portal. Directions for uploading template files into Educator Portal are found on page 36.

Roster Field Definitions

Table 16

Roster Field Definitions

CSV Column	Column Heading	Data Required	Definition
A	Roster_Name	Yes	TeacherBuildingPIE
B	Subject	Yes	M
C	Course	No	Leave Blank

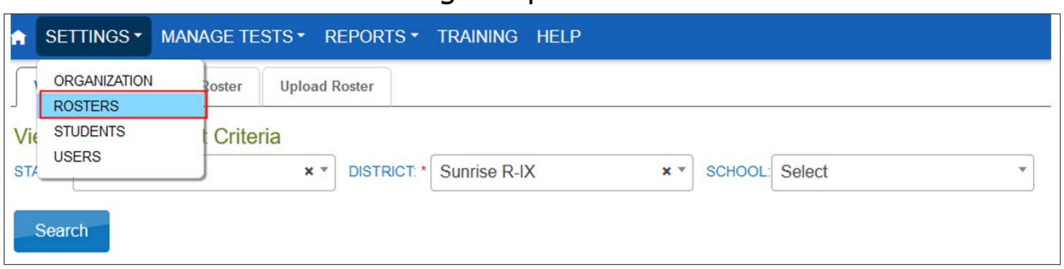
CSV Column	Column Heading	Data Required	Definition
D	Attendance_ School_Identifier	Yes	10-digit district building code The School Identifier code entered in the Roster Upload Template file must match exactly a School Identifier code (Column B) in the state organizational table located on the PIE webpage. Ensure leading zeros are entered where appropriate.
E	School_Year	Yes	2025
F	State_Student_ Identifier	Yes	MOSIS number Ensure leading zeros are entered where appropriate.
G	Local_Student_ Identifier	No	Leave Blank
H	Student_Legal_ First_Name	Yes	Enter exactly the student's first name used for enrollment in Educator Portal.
I	Student_Legal_ Last_Name	Yes	Enter exactly the student's last name used for enrollment in Educator Portal.
J	Educator_ Identifier	Yes	The teacher's email address A teacher's Educator Identifier in the Roster Upload Template file must match **exactly** an Educator Identifier in an educator's account in Educator Portal.
K	Educator_Legal_ First_Name	Yes	The educator's first name entered in the Roster Upload Template file must match **exactly** the educator's first name in the educator's account in Educator Portal.

CSV Column	Column Heading	Data Required	Definition
L	Educator_Legal_Last_Name	Yes	The educator's last name entered in the Roster Upload Template file must match **exactly** the educator's last name in the educator's account in Educator Portal.
M	Remove_From_Roster	No	If a student is no longer to be rostered to a teacher, the student can be removed from a previously created roster by typing REMOVE in column M. Otherwise, the field should remain blank. Note: Removing all students from a roster removes the roster.

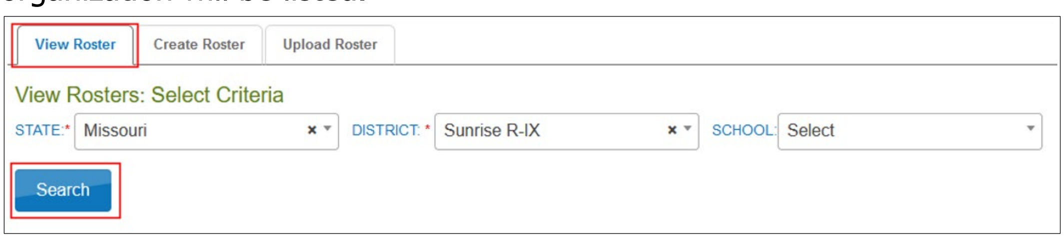
CREATE A ROSTER MANUALLY

The user interface is an efficient tool for creating five or fewer rosters. Follow this procedure to manually create a roster.

1) Select **Rosters** from the Settings drop-down menu.

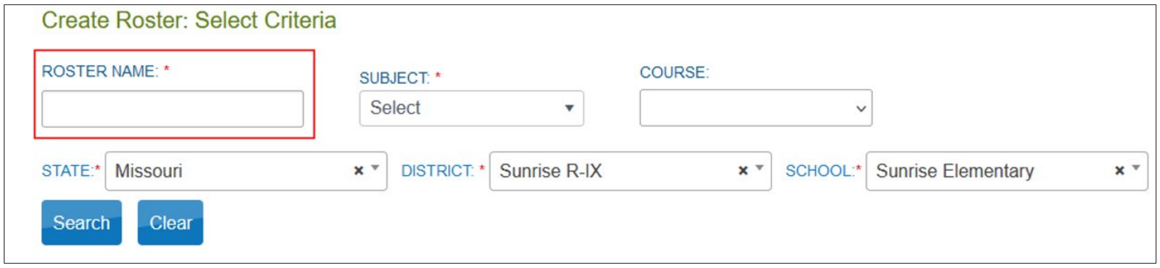


2) The View Rosters tab will open. Select the district or school from the drop-down menu if not prepopulated. Select **Search**. All rosters that have been created for that organization will be listed.

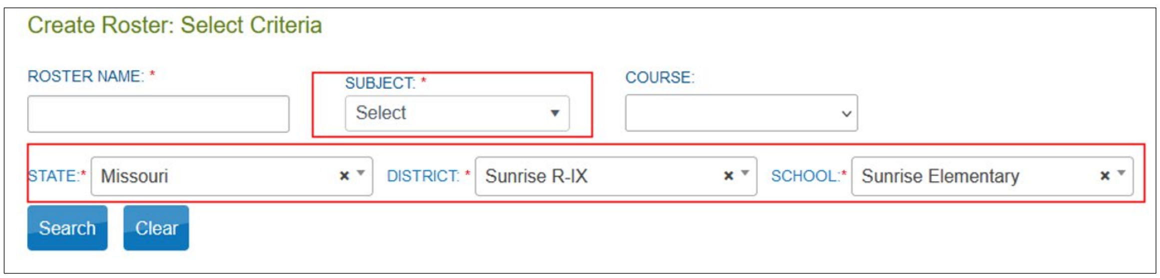


3) If a roster has not been previously created, select **Create Rosters**.

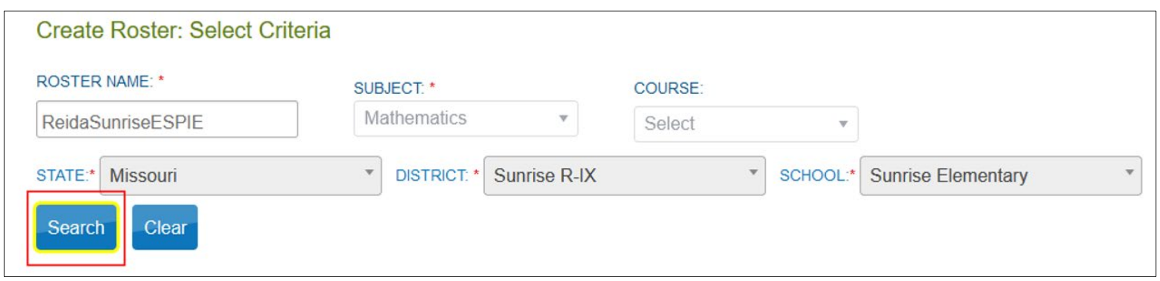
4) Complete all fields on the Create Rosters: Select Criteria screen. Create the roster name using the naming convention TeacherBuilding PIE.



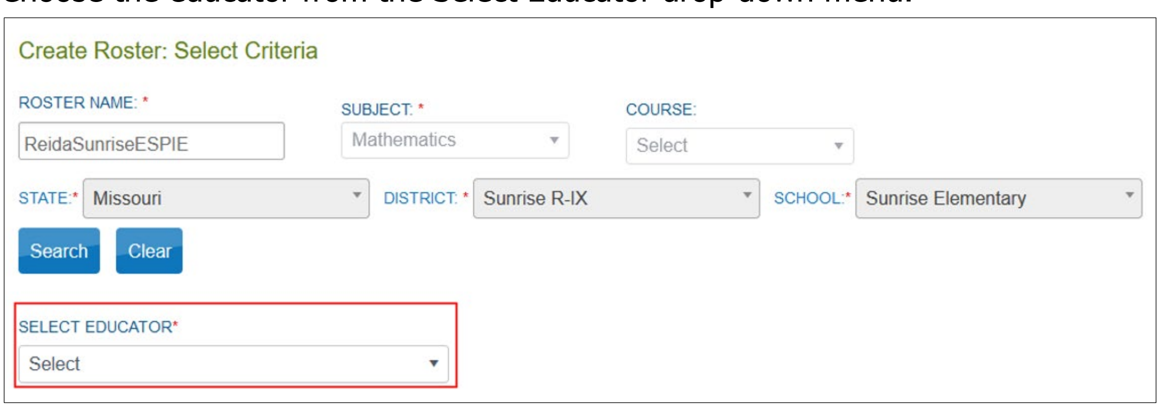
5) Choose **Mathematics** as the subject for this roster from the drop-down menu. Select the district or school from the drop-down menu, if not prepopulated.



6) Select the **Search** button.



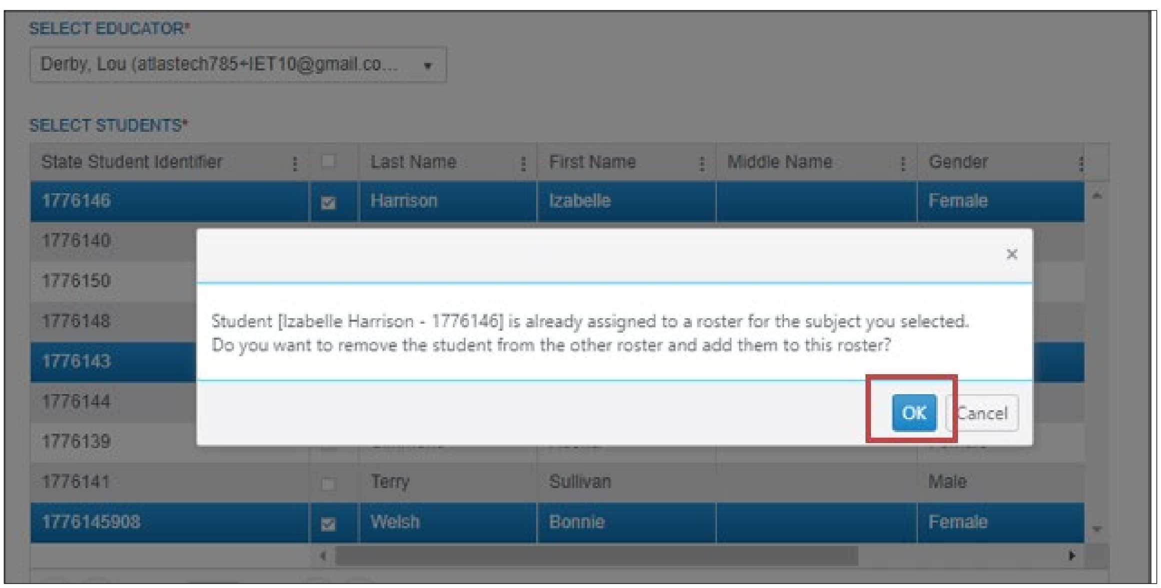
7) Choose the educator from the Select Educator drop-down menu.



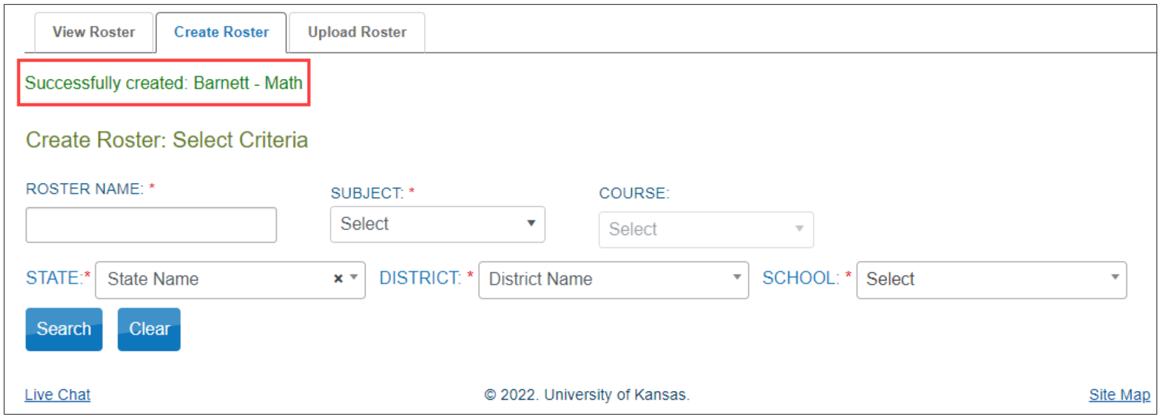
8) Choose the students to roster by selecting the checkbox to the right of their last name in the Select Student grid. Use the arrows at the bottom of the screen to move between pages when multiple students are listed. Scroll through the pages to see other students; multiple students can be selected. Check **Only show students who are NOT rostered to this subject** to eliminate students who are already rostered.

9) After selecting the appropriate students, select the **Save** button.

10) The data manager will receive a notification about each student who is currently on another roster for the PIE pilot study. In the notification, the data manager is asked to confirm their decision to remove the student from the first roster to add the student to the new roster. Select the blue **OK** button to continue or the **Cancel** button to return to the list of students.



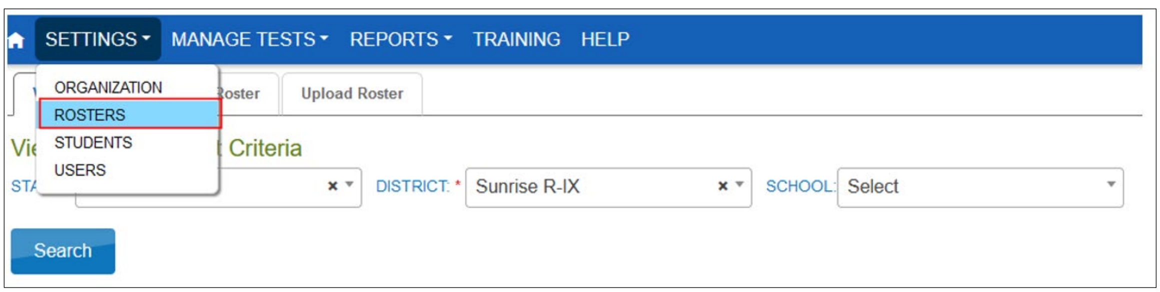
11) After making the decisions about each student and selecting **OK**, the system creates the new roster. The system returns to the previous screen and displays a message that the new roster was successfully created.



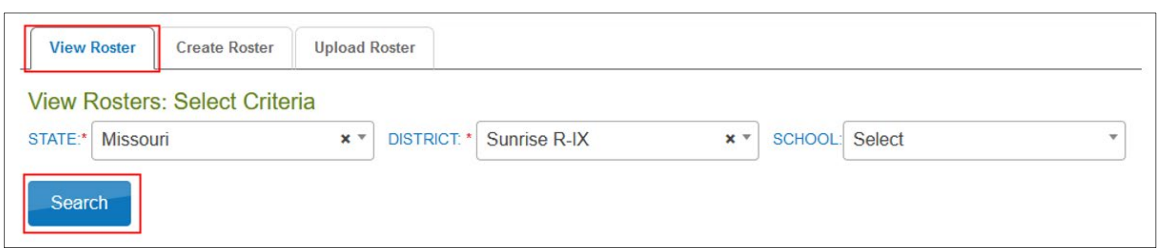
CHANGE ROSTER DATA OR REMOVE A ROSTER

Follow this procedure to change roster data or to remove a roster. To change roster data, follow these steps.

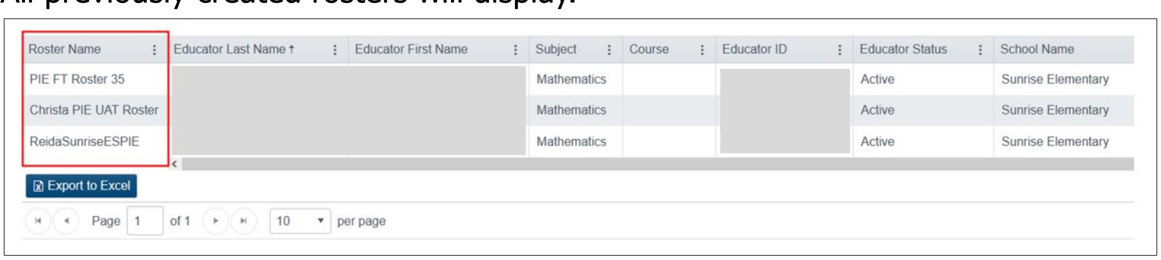
1) Select **Rosters** from the Settings drop-down menu.



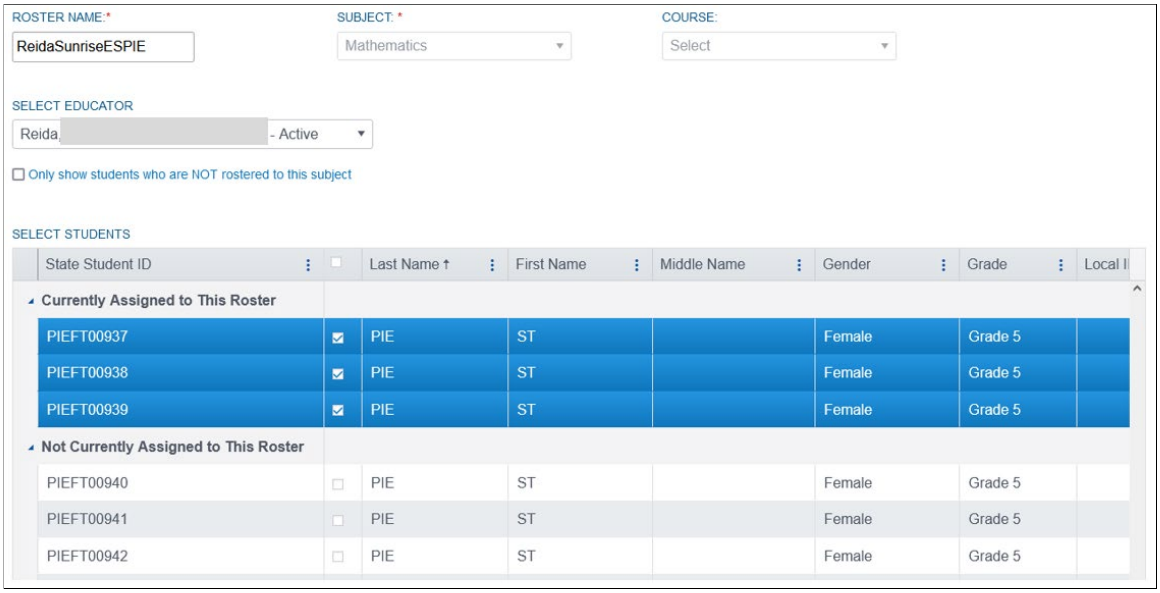
2) Select the district or school from the drop-down menu, if not prepopulated. Select **Search**.



3) All previously created rosters will display.



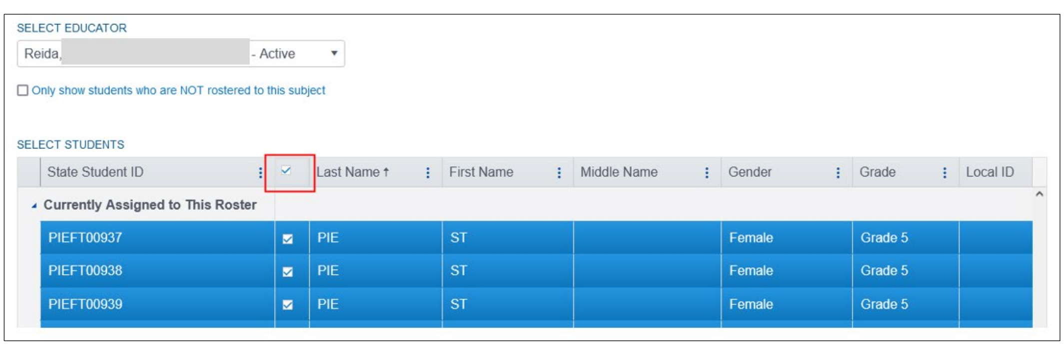
4) Select the desired roster to edit or delete. The View/Edit Roster screen will automatically display.



5) From this screen the following edits can be made to a roster:

- Change the Roster Name
- Change the educator connected to the roster by choosing another educator from those available in the Select Educator drop-down menu
- Change the students connected to the roster from those displayed in the Select Students section of the screen
- Deselect an individual student to be removed from the roster
- Select a student not currently rostered and add the student to a roster
- Deselect all students to completely remove the roster

6) Once all desired edits from the available choices are made, scroll to the bottom of the screen, and select the blue **Save** button.
7) To quickly remove all students from a roster, select the checkbox next to the State Student Identifier. All students on the roster will be highlighted.



8) Select the check box a second time to unselect all students and select **Save**.

CHAPTER 11: DASHBOARD REPORTS AND EXTRACTS FOR TEACHERS AND DATA MANAGERS

Reports and data extracts are available through Educator Portal. Each Educator Portal user role is granted certain access permissions within the system. Use the following keys and tables to determine which dashboard reports and extracts are available for each role.

Table 17

Key of Abbreviations and Definitions

Abbreviation	Definition
BTC	Building Test Coordinator
BUS	Building User
DTC	District Test Coordinator
DUS	District User
SAA	State Assessment Administrator
TEA	Teacher

Table 18

Extracts by Educator Portal Role

Extracts and Files	Roles with Access
Current Enrollment extract	SAA, DTC, DUS, BTC, BUS, TEA
PNP Setting Counts extract	SAA, DTC, DUS, BTC, BUS, TEA
PNP Settings extract	SAA, DTC, DUS, BTC, BUS, TEA
Roster extract	SAA, DTC, DUS, BTC, BUS, TEA
Security Agreement extract	SAA, DTC, DUS, BTC, BUS
Users extract	SAA, DTC, DUS, BTC, BUS

Table 19

Dashboard Reports by Educator Portal Role

Reports	Roles with Access
Class Mastery Report	SAA, DTC, DUS, BTC, BUS, TEA
Student Pathway Profile	SAA, DTC, DUS, BTC, BUS, TEA

DATA EXTRACTS

The following data extracts and files are available in Table 20. If the user does not have permission to view a particular extract or file, it will not appear in their list of extracts and files in Educator Portal. Refer to Table 18 to determine which extracts and files are available for each user role. All extracts and files contain data on the day and time the file or extract is accessed.

Table 20

Description of Data Extracts

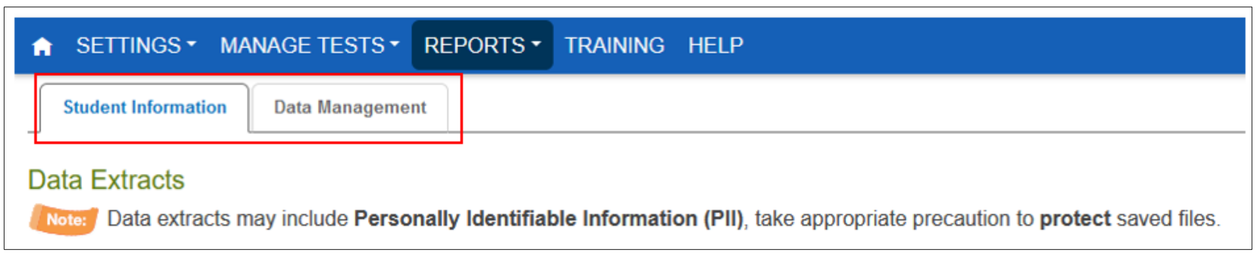
Name of Data Extract	Summary
Current Enrollment Extract	Student-level extract for currently enrolled active students The extract contains all the data that was entered when the student was enrolled for the year.
PNP Setting Counts Extract	Organization-level extract that has the number of individual Personal Needs and Preferences (PNP) settings by organization (e.g., braille was selected for 12 students)
PNP Settings Extract	Student-level extract that displays Personal Needs and Preferences (PNP) Profile settings by student
Roster Extract	Student-level extract that shows the student's roster assignment by educator and subject
Security Agreement Completion Extract	User-level extract that shows the day and time the user agreed to the security agreement
Users Extract	User-level extract showing all Educator Portal users; their associated roles; and whether the account is active, inactive, or pending Users with the State Assessment Administrator role will be able to include user accounts that have been removed.

Accessing All Extracts

To access extracts, follow these steps.

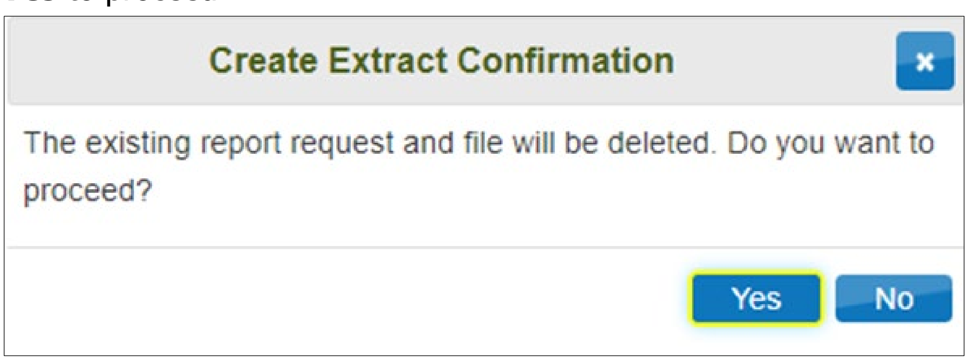
1) Select **Data Extracts** from the Reports drop-down menu.

2) In the upper-left tabs, select the category needed. The Student Information tab is where extracts with student information are located and the Data Management tab is where extracts with user information is located.

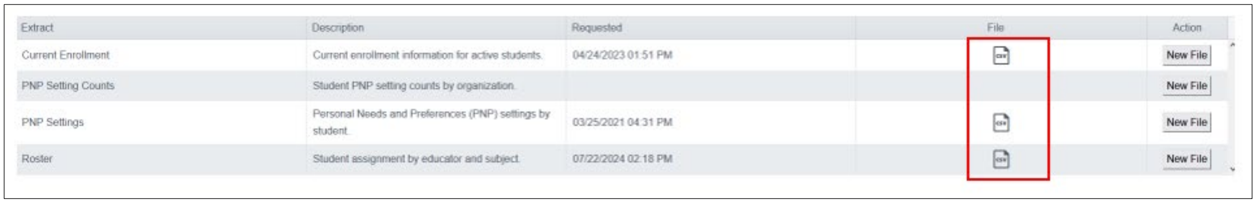


3) Always select the **New File** button to have the most current data for the selected extract.

4) If the extract was previously accessed, the following message will display. Select **Yes** to proceed.



5) During the download process, the File field transitions from In Queue to In Progress and finally to displaying the CSV icon. Select the CSV icon to access the extract.



Extract	Description	Requested	File	Action
Current Enrollment	Current enrollment information for active students.	04/24/2023 01:51 PM		New File
PNP Setting Counts	Student PNP setting counts by organization.			New File
PNP Settings	Personal Needs and Preferences (PNP) settings by student.	03/25/2021 04:31 PM		New File
Roster	Student assignment by educator and subject.	07/22/2024 02:18 PM		New File

Note: Each request for an extract replaces the previous extract. Users may save extracts and archive them if needed. Extracts and files that contain student Personally Identifiable Information (PII) data will need to be securely saved.

PIE REPORTING DASHBOARD

Results are provided in the PIE Reporting Dashboard for a specific content group after any assessment is completed during the instructionally embedded window. Class data is in the Class Mastery Report and individual student data is in the Student Pathway Profile.

The steps for accessing and interpreting the dashboard reports are found in this manual on page 28 in the section View Results.

CHAPTER 12: CONTACTS

CONTACTS

In addition to information sent to participating school districts and school buildings, the resources and contacts listed below can provide information regarding the PIE pilot study:

- **PIE website:** https://pie.atlas4learning.org/
- **Missouri Department of Elementary and Secondary Education (DESE)**
  - DESE Assessment
  - assessment@dese.mo.gov
- Shaun Bates
  - Standards, Curriculum, and Assessment Coordinator
  - DESE
  - Office of Quality Schools
  - shaun.bates@dese.mo.gov
- Mary Majerus, Ed.D.
  - Mathematics Pathways Director
  - DESE
  - Office of Quality Schools
  - Mary.Majerus@dese.mo.gov
- **Service Desk:** pie-support@ku.edu, 844-675-4479
- When contacting the Service Desk, do not send any PII about a student via email. PII includes such information as a student's first name, last name, birth date, etc. **Do not** send any information about the content of the assessment, such as the question or answer choices on a particular item. Information about items must remain secure.
- **Do** send the student SSID and the error or concern you are reporting regarding the test taker or the assessment item.