

College Board Portal Access Form

2017-2018

Name of Academy: _____

In order to support the Academy by reducing the burden of securely transferring PSAT®/SAT® data to the Center, the Academy must provide the Center access to the Academy's College Board portal.

On the College Board's Access Management Tool, the Academy's Data Access Manager (DAT), must create logins with the roles specified below for two members of the Center. Helpful, step-by-step instructions to create logins and assign roles are available in the [attached document](#) from the College Board. For additional assistance, please contact the Michigan K-12 Director for the College Board, Jason Feig at (616) 531-3974 (jfeig@collegeboard.org) or Kari Anama at (616) 291-6323 (kanama@collegeboard.org), or the College Board Michigan Customer Service at (866) 870-3127 (michiganadministratorsupport@collegeboard.org).

The Academy's DAT must assign logins for these two members of the Center:

- Karen Mater, Assessment Coordinator, KMater@TheCenterForCharters.org
- Davie Store, Director of Data Analysis, DStore@thecenterforcharters.org
 - Assign the following roles to each account:
 - Access Management/DAT (K-12)
 - File Downloads (K-12)
 - Summary Reports (K-12)
 - Detailed Reports (K-12)
 - Set the access expiration date to 12/31/2019 or later.
 - Navigate to the "Invite User" tab and complete the steps to send the invitation email to both Karen Mater and Davie Store.

Center Employee	I assigned all four roles to this user	I sent the invitation to this user
Karen Mater		
Davie Store		

Signature

Name (printed)

Title

Date

Submission:

Please submit the completed form by **May 10, 2018**, to the Center via Epicenter, per the Master Calendar of Reporting Requirements.

For more information, please contact:

The Governor John Engler Center for Charter Schools
Central Michigan University
Mount Pleasant, MI 48859
(989)774-2100
www.TheCenterForCharters.org



Access the K12 Reporting Tool & Manage Access Tool

The new suite of College Board assessments will provide a robust set of online data analysis and reporting tools. The Educator Score Report will allow for institutional, demographical, test content and question analysis, and trend views. This online report will be available before the paper reports are sent out with all users receiving email notification when new scores are available.

In order for educators in your district/school to gain access to the K12 Reporting Tool, you must first access the Manage Access Tool in order to set up the users for your institution. The Manage Access Tool will allow districts/schools to manage who has access to data by user and manage an individual's access at any time. Follow the guideline below in order to access and establish data access for your district/school staff to the Manage Access Tool.

Quick Definitions		
	Manage Access Tool	The manage access tool allows a K12 institution to administer access to College Board Services and tools
	Access Manager Each district/school needs to identify the staff member(s) that manages access to the score report portal.	An access manager at the institution can grant, manage, and revoke access to their K12 Reporting Tool.
R O L E S	DAT for Assessment Reporting K12	The manage access role. This is not a reporting role, rather a role that is able to provide access to an Institution's K12 reporting tool to multiple individuals.
	Assessment Reporting K12 Data Files Management	Data files download access. These can be IT vendors hired by Institutions, Institution technology staff, or other Institution staff
	Assessment Reporting K12 Summary	Aggregate Basic Assessment Score Reporting, limited summary data access.
	Assessment Reporting K12 Detail	Detailed Basic Assessment Score Reporting, including drill down to individual student score data.

STEP 1 Create College Board Professional Account

To provide and manage access to the reporting tool, individuals must create a College Board professional login account. This must be completed prior to setting up the initial

Manage Access Tool.

If you already have an account, go to [Step 2](#).

Where do I find this?



<https://>

account.collegeboard.org/login/login

It may take 1-2 days for notification that the account has been created

STEP 2 Becoming the Data Access Manager

An access code is required for the first time the first access manager accesses the DAT application.

- Log in to your professional account
- Click the 'General' section on your dashboard
- Select the 'Managing Access to Support K-12 Assessment Reporting' link
- Provide your 'professional organization' from the drop down menu and enter your access code
- In some cases, multiple institutions may be available in the drop down menu, please be sure that you are selecting the correct institution for your access code

Where do I find my access code?



Reference communication sent to PSAT/NMSQT Coordinator or call the Midwest Regional Office at (847) 653-4500.

The image shows two screenshots from the College Board Professional Account interface. The left screenshot shows the 'My Tools And Services' section with a table of tools and services. The right screenshot shows the 'Managing Access to Support K-12 Assessment Reporting' form, which includes a 'Provide your access information' section with a dropdown for 'Professional Organization' and a text input for 'Access Code'. A red box highlights the 'Managing Access to support K-12 Assessment Reporting' link in the left screenshot and the 'Provide your access information' section in the right screenshot.

Tool or Service	My Role	Exp
AP® Teacher Community ▶	N/A	N/A
College Board Institutional Ordering ▶	N/A	N/A

*Dates in red are close to expiring. Select Edit to update.

Add Additional Tools And Services

- Recommended Tools and Services
- We've selected these tools and services based on your job function of Academic...
- ▶ College Board Search [Request Access](#)
- ▶ K-12
- ▶ Higher Education
- ▶ General
 - ▶ College Board Communities [Get Access](#)
 - ▶ College Board Online Store [Get Access](#)
 - ▶ Managing Access to support Higher Ed Assessment Reporting [Get Access](#)
 - ▶ **Managing Access to support K-12 Assessment Reporting [Get Access](#)**
 - ▶ Professional Test Administration Training [Get Access](#)

Get access to Managing Access to support Assessment Reporting

◀ back

Managing Access To Support **Assessment Reporting Enrollment Information**

In order to access your institution's Managing Access for Assessment Reporting, select your institution and enter the access code provided by the College Board. Once validated, you will have access to manage user accounts for SAT® score reporting for your institution.

If you have not received an access code, please call 1-855-475-3636 (toll free in the United States and Canada) for assistance.

Provide your access information

Professional Organization:

Access Code:

Enroll Later [Add ▶](#)

Your access

Organization	Position	Expiration Date

Finished

STEP 3 Accept Terms & Conditions for Use

The next screen after your initial login will require an agreement to the terms and conditions for use. Please carefully read the material and accept in order to gain access.

MANAGING ROLES IN THE REPORTING PORTAL

STEP 4 Manage Current User Access

Access managers can view and manage access already granted to individuals at their institution (or to vendor users, as appropriate). Once the access manager role has been set up, “Managing Access to support K-12 Assessment Reporting” should now be located on the dashboard. This link will help the access manager to:

- **View** all current access
- **Revoke** access for departing users
- **Grant/Renew** access as needed
- **Note: The Access Manager does not have access to reports, it is only an administrative role. To have access to reports, the Access Manager must assign the reporting roles to him/herself.**
- Use this link to assign roles to self or others

Tool or Service	My Role	Expires*	Manage Access
AP® Course Audit	AP Course Audit Administrator	01-Jul-2016	edit
AP® Online Reports	AP Course Audit Administrator	01-Jul-2016	edit
AP® Ordering	APO School Official	31-Oct-2020	edit
AP® Teacher Community	N/A	N/A	
PSAT/NMSQT® and ReadStep™ Summary of Answers and Skills (SOAS) Reports	OSR Pathways Admin	31-Dec-2015	edit
SSD Online - Disabilities Accommodation Management	SSD Coordinator	30-Jun-2035	edit
Test Ordering	TOS School Official	31-Mar-2016	edit
College Board Institutional Ordering	N/A	N/A	
Managing Access to support K-12 Assessment Reporting	DAT for Assmt Reporting K12	31-Dec-2016	edit

Other Tools

We offer an array of tools and services to support your work in education. See the College Board Professional website for more information.

STEP 5 Invite New Users

Access managers can provide access to users who don't have *College Board Professional Login Accounts*. When you invite users to the portal, an email will be sent. The user will need to create a College Board account (directions will be included in the email). Once an account is created, the role will be active.

- Enter the name and email for the educator you are inviting
- You can choose to be notified when the user accepts the invitation by clicking the box beneath the e-mail address
- Your organization should automatically be listed
- Identify the role and the date the access expires. ****Be sure to select a specific day and not just a month or year. The latest date you can currently set access to is 12-31-16****
- Click “Add Role to Invitation” (Add additional roles as necessary)
- Click “Send Invitation”

Managing Access

[Manage Current User Access](#) |
 [Add Users to Roles](#) |
 [Invite New Users](#)

Invite a User

First Name:

Last Name:

E-mail Address:

Notify me when user accepts invitation

Set Organization, Role and Expiration Date

Organization:

Role:

Role Expiration Date:

[Add Another Role](#)

Roles for this Invitation

X Sue Landers High School , Assmt Reporting K12 Detail , 2016-07-31

X Sue Landers High School , Assmt Reporting K12 Data Files Mgmt , 2015-12-31

[Send Invitation](#)

Do I need to forward the access code to them?

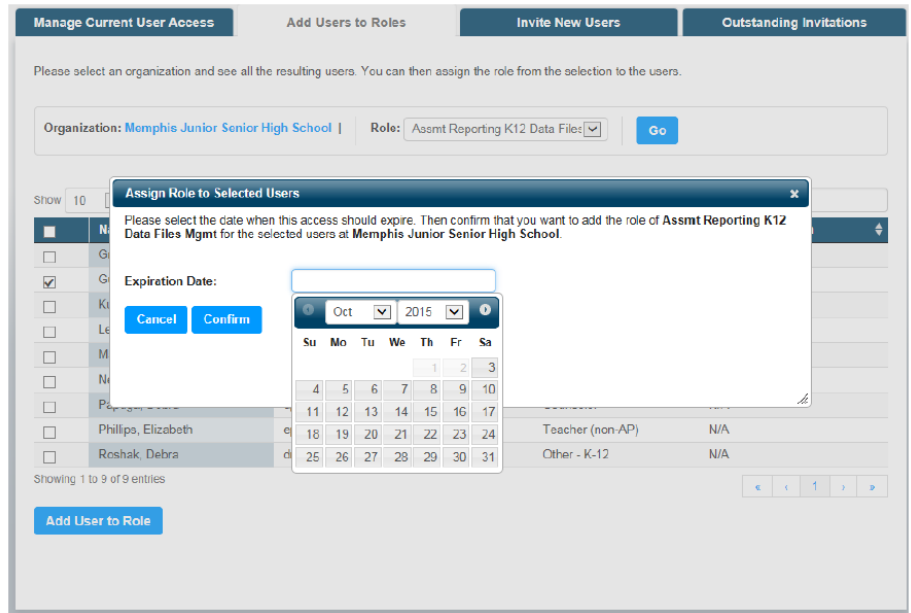
An access code is only required for the first access manager (DAT). Every additional user will only need a CB Professional login.



STEP 6 Add Users to Roles

Access managers can add roles to educators (or to vendor users, as appropriate) who already have a College Board Professional Login.

- Click the tab labeled “Add Users to Roles”
- All educators in your school with a *College Board Educator Professional Login (EPL)* will be listed. If an educator does not have an EPL, you can invite them to create one.
- Identify which role you are ready to assign from the drop down box
- Check all of the educators you want to assign the selected role



What if a staff member does not have an EPL?

You can invite educators to create one (see Step 5).



STEP 5 View Outstanding Invitations

The Access Manager can also follow outstanding invitations and can resend or cancel the invitation by navigating to the “Outstanding Invitations” tab.



I have more questions. Who can I call?

Speak to a real person at the College Board Midwest Regional Office at (847) 653-4500. We'll be more than happy to walk you through the process.

