PSAT™/SAT® College Board Portal Access Form

2020-2021

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 or extend the expiration date if these logins have been previously created, with the roles specified below for two members of the Center. 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 (michiganadministratorssupport@collegeboard.org).

The Academy's DAT must assign logins or extend the expiration date if these logins have been previously created, for these two members of the Center:

- Sherry Betcher, Assessment Manager, SBetcher@TheCenterForCharters.org
- Eric Cronstrom, Data Analyst, ECronstrom@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 12/31/2022 or later. If the College Board portal does not allow you to set it to 12/31/2022, set it to the latest date allowed.

  » Navigate to the "Invite User" tab and complete the steps to send the invitation email to both Sherry Betcher and Eric Cronstrom.

Center Employee	I assigned all four roles to this user	I sent the invitation to this user
Sherry Betcher		
Eric Cronstrom		

_____   _____   _____
Name (typed)   Title   Date

Submission:
Please submit the completed form by *May 13, 2021*, to the Center via Epicenter, per the Master Calendar of Reporting Requirements.

For more information, please contact:
Sherry Betcher, (586) 215-1402 or SBetcher@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.

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

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"

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.

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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).

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| Manage Current User Access | Add Users to Roles | Invite New Users | Outstanding Invitations |

Please select an organization and see all the resulting users. You can then assign the role from the selection to the users.

Organization: Memphis Junior Senior High School | Role: Assmt Reporting K12 Data Files   Go

Show 10

Assign Role to Selected Users   ✕

Please select the date when this access should expire. Then confirm that you want to add the role of Assmt Reporting K12 Data Files Mgmt for the selected users at Memphis Junior Senior High School.

Expiration Date: [   ]

Cancel   Confirm

	Oct ▾	2015 ▾	ⓘ
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Phillips, Elizabeth   Teacher (non-AP)   N/A
Roshak, Debra   Other - K-12   N/A

Showing 1 to 9 of 9 entries   « ‹ 1 › »

Add User to Role

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.

Managing Access

| Manage Current User Access | Add Users to Roles | Invite New Users | Outstanding Invitations |

Show 10 entries   Search: [   ]

☐	Name (Last, First) ⬍	Email Address ⬍	Organization/Role Pair ⬍	Invitation Sent Date ▾
☐	Doe, Jane	janedoe@school.com	Organization : Memphis Junior Senior High School Role : Assmt Reporting K12 Detail	October 2, 2015 9:46:23 AM EDT

Showing 1 to 1 of 1 entries   « ‹ 1 › »

Resend Invitation   Cancel Invitation

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.

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