## Bulk Registration for the PSAT/NMSQT®
## Fall 2019

### Slide 1
Thank you for joining us today.  We are excited to be entering another year of delivering the PSAT/NMSQT for Idaho grade 10 students in partnership with the Idaho State Department of Education.  I'm Eddie Pawlawski, State Implementation Manager and one of the College Board Idaho Field Team members.  We have a lot of information to share on this webinar and we look forward to the collaborative effort for the PSAT/NMSQT administration for fall 2019.  The link to this recorded webinar is being provided to bulk registration coordinators so that it can be used as a reference for the bulk registration process.

All right… let's begin.

### Slide 2
Today's agenda includes a high-level overview of the bulk registration tool, deadlines, preparing the bulk registration file, uploading your file, making changes and fixing errors/warnings, deadlines, and then of course, next steps.

### Slide 3
What does the bulk registration tool do?

### Slide 4
Bulk registration is required for the Idaho-provided PSAT/NMSQT for grade 10 administration, and it allows districts and schools that participate in this administration in October to pre-identify students electronically and securely for the administration.

The bulk registration file helps report accurate student accounting back to the SDE and creates pre-ID labels that will be affixed to the student's answer sheet and helps create cleaner reporting of data.

### Slide 5-
So, what are some of the key deadlines?

### Slide 6-Key Dates

There is a two-step process for completing a PSAT/NMSQT order and registration:
- First, schools will order test materials through the College Board Test Ordering System (TOS).
- Second, schools and/or districts will use the bulk registration system for registering students.

The bulk registration tool will be open from **August 20 through September 19.**  All bulk registration should be completed by **9:59 PM Mountain Time on September 19.**

Pre-ID labels will then be received by **October 2**.

And, please be aware if you go to the College Board's website about bulk registration, dates you find may not necessarily be applicable to the Idaho-provided PSAT/NMSQT administration.

*Slide 7*
An access code is needed for the bulk registration tool. The bulk registration coordinator who was designated on the PSAT/NMSQT site intake form will receive this access code in August.

The file can be uploaded by a school level staff member with one school in the file, or by a district level designee with multiple schools in the file. Please remember that SDE will not be uploading on behalf of schools or districts.

*Slide 8*
How do you prepare the bulk registration file?

*Slide 9*
To access the Templates and File specifications, go to https://bulkreg.collegeboard.org and click "Getting Started."

*Slide 10*
File templates in Excel or CSV are available. Use the Bulk Registration File Specifications to understand each field in the template. No access is needed to obtain templates or the file specifications.

*Slide 11*
Download the file template and identify students that will be testing. Do not change the template as all fields and column headers must remain as they are in the template. You should pull the required data elements in order to prepare your file, particularly the state ID or EDUID. **Schools/districts must use the student's EDUID as the student ID number.**

*Slide 12*
Download the File Specifications and use in order to understand the required vs optional fields, the maximum length of fields, and the valid values for each field.

*Slide 13*
There are three fields for student ID – state student id, district student id, and school student id. For this PSAT/NMSQT bulk registration, **please enter each student's EDUID in the state student ID, the district student ID, and the school student ID fields.** Again, we will repeat that. We ask you to enter the student's EDUID number in the state student ID, the district student ID, and the school student ID fields.

If your students do not have valid EDUIDs due to being new, please contact your District ISEE Coordinator. If you have questions about student eligibility to take the PSAT/NMSQT, please contact Danielle Taylor (dtaylor@SDE.idaho.gov) or Paul Kleinert (pkleinert@SDE.Idaho.gov) at the Idaho State Department of Education for assistance.

*Slide 14*
Understanding the template is important, and we can identify several typical errors that will occur during file submission. A common error, for example, is found in the date of birth field.

The date of birth should be entered as MMDDYYYY, which is made up of 8 numbers without extra characters.  If 7 numbers are provided, the system will automatically insert a leading zero and generate a warning in the system.

### *Slide 15*
How do you upload your file? Here's a quick, step-by-step outline.

### *Slide 16*
Access codes are required to link your College Board professional account to the bulk registration tool.  If you can't access the system or you are new to using the bulk registration tool, an access code will be provided.  Codes will be emailed to the Test Coordinator and/or District Test Coordinator.

We recommend coordinating with your District Test Coordinator to determine who will complete the upload.  In districts with more than one school, it is often easier to have a single person submit the data for all schools in the district.

Regardless of who does the bulk upload, bulk registration coordinators need a College Board professional account to access the tool.  If you don't have an account, go to www.collegeboard.org to sign up for one.  If you already have a College Board professional account, you do not need to create a new one.

### *Slide 17*
Check your dashboard for "Bulk Registration and Pre-ID tool" listed under My Tools. If that is present, click the link to access the tool.  If that is not present, scroll to the bottom of the page to "Add Additional Tools and Services," and expand the K-12 section.

### *Slide 18*
Select "Get Access" next to the bulk registration and pre-ID label tool.

### *Slide 19*
Select the professional organization that matches the organization name that you were given in the email containing your access code. It may be your district name, but it could also be your school name.

Enter the 6-letter access code you received in the email, then click "Add."

### *Slide 20*
To log in once your account is linked to the Bulk Registration tool, go back to the Dashboard of your professional account.  Under My Tools and Services, click Bulk Registration and Pre-ID Label Tool. From the Bulk Registration Tool Dashboard, click "Create New Request."

### *Slide 21*
Choose the date of your PSAT/NMSQT administration, select the box next to the date, upload the file that was created using the template, and click "Submit."

### *Slide 22*
The file will go through a validation process. The time it takes depends on the size of the file, but usually occurs within 1 hour.  You can follow the progress of the validations on the dashboard. Please note the green buttons on this screen shot which signify the progress that is being made on the validations.

### *Slide 23*
Sometimes, the bulk registration upload will have errors or warnings, or changes will need to be made.

### *Slide 24*
If you receive a message that you have errors, click "View Request Details" for information on how many errors and warnings you have in the file. If the validation fails, you will have the opportunity to make changes.

You can either upload a brand new file or fix errors and warnings within the tool itself.

### *Slide 25*
Errors MUST be fixed before the file can be submitted. Warnings are not required to be fixed but should be reviewed. If changes can be made, it is recommended that they be done.

One way to make corrections is through the tool itself. To do so, click "Fix Errors and Warnings."

### *Slide 26*
In this example, there are a total of 28 errors.
13 of the errors are caused by an incorrect AI code (where the code in the file doesn't match College Board records for your school.)

You can include the correct AI in the box above the field and apply this entry to all records. Or you could make individual changes, depending on the error.

Follow the directions on the screen to go to the next error.

Warnings should be reviewed to determine if changes need to be made.

Always be sure to save your changes!

### *Slide 27*
Once you've fixed the errors and warnings, the file must be re-validated after the changes are made.

### *Slide 28*
If you have numerous errors that are difficult to fix in the tool, it may be easier to fix in the spreadsheet and try over again. Simply choose "Upload Full Replacement File" and resubmit and the process will begin again.

### *Slide 29*
Please remember that the process is only complete when Submit Request has been clicked. Some people forget this last step…make sure to click Submit Request.

## *Slide 30*

You are only complete when you see Done on the progress bar and the status has changed to In Fulfillment.  Bulk registration coordinators will receive an email that indicates that your order is in fulfillment.

## *Slide 31*

What are the next steps?

## *Slide 32*

This month, in August:
Review your enrolled student list to ensure all students have EDUID's. If your students do not have valid EDUIDs due to being new, please contact your District ISEE Coordinator. If you have questions about student eligibility to take the PSAT/NMSQT, please contact Danielle Taylor (dtaylor@SDE.idaho.gov) or Paul Kleinert (pkleinert@SDE.Idaho.gov) at the Idaho State Department of Education for assistance.

Review the resource materials such as:
>    Bulk Registration Tool:  https://bulkreg.collegeboard.org
>    Clicking Help on the Dashboard
>    Video tutorials and FAQs are available

Review the resource materials and prepare the file for upload.

The bulk registration file should be uploaded before **9:59 PM Mountain Time on September 19.**

## *Slide 33*

Students who are eligible to test but did not make it in the bulk upload can still test on test day if you ordered enough materials.  For these students, there will be no Pre-ID label.  These students will need to grid all information on their answer sheet.

When testing is complete, review that students completed all required fields, and verify the school AI code, grade level, and EDUID are accurate.

## *Slide 34*

So again, that is a quick overview.  Thank you for reviewing this pre-recorded webinar.  If you have questions, please contact your Danielle Taylor or Paul Kleinert at SDE, or contact your Idaho field team at the IdahoSDSupport Email, or Steve McCue or Eddie Pawlawski at their College Board email addresses.  With that, we will bid you a pleasant day.  Thanks!