



QUICK GUIDE TO: ROSTERING

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Assessment & Technology
Solutions

OVERVIEW

Each row in the Roster Upload Template file connects one teacher to one student for one subject, thus creating one roster. Each roster can connect several students from various grades for the same subject to the same teacher.

The data manager must keep in mind the following:

- One student for one subject cannot be connected to more than one teacher.
- One student can be connected to the same teacher twice if the subjects are different.
- Students must be rostered for each subject in which they will be testing in the current school year.
- Students can only be rostered in the subjects and grades available for testing.
- 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.

There are two methods to create rosters: uploading a CSV file or manually entering information through the user interface.

ROSTERING USING UPLOAD METHOD

ACCESS ROSTER UPLOAD TEMPLATE FILE

To roster students by uploading a CSV file, following these steps:

1. Select **Settings**.
2. Select **Rosters**.
3. Select the **Upload Roster** tab.
4. Select the question mark symbol next to the word File.
5. A small pop-up window will display the **Roster Upload Template**.

The screenshot shows the 'Upload Roster' interface. At the top, there are three tabs: 'View Roster', 'Create Roster', and 'Upload Roster'. The 'Upload Roster' tab is selected and has a red circle with the number 3 next to it. Below the tabs, the heading 'Upload Roster: Select Criteria' is displayed. There are two dropdown menus: 'STATE:' with 'Kansas' selected and 'DISTRICT:' with 'Sunflower District' selected. Below these, there is a message: 'Please use the current version of the Roster Upload Template.' with a red circle and the number 5 next to the text. At the bottom, there is a 'File:' label with a question mark icon and a red circle with the number 4 next to it. Below the label is a 'Select File' button and an 'Upload' button.

- Select the link and open the Roster Upload Template file in a spreadsheet program that can save data in CSV (comma-delimited) format, such as Microsoft Excel. The file can only be uploaded using CSV format.

ENTER ROSTER INFORMATION INTO TEMPLATE FILE

Enter the roster data into the CSV file. Use a new row for each student and for each subject being assessed. A student can be entered more than once with a different subject and a different teacher. Students in other grades can be entered for the same subject and teacher.

Remember to save your file in CSV format. The upload will fail if any other file format is used.

Use the table below for guidance on what to enter in each column.

Col.	Column Title	Description	Acceptable Values
A*	Roster_Name	The name for the roster (see Best Practices for Naming Rosters below)	Alphanumeric
B*	Subject	Use only the acceptable subject values. No other abbreviations will be accepted.	M = Mathematics ELA = English language arts
C	Course	This field is not applicable for the Testlet assessment. Please leave blank.	[BLANK]
D*	Attendance_School_Identifier	Identification codes assigned by the state (or other organization) that indicate where the student attends school. The School Identifier code entered in the Roster Upload Template file must match exactly a School Identifier code in the state organizational table. If the codes do not match exactly, the upload will fail. To view School Identifiers, go to Settings > Organization.	Alphanumeric
E*	School_Year	The four-digit year that concludes the current school year.	YYYY
F*	State_Student_Identifier	The State Student Identifier (SSID) must match exactly a SSID in a student's enrollment record in Kite Educator Portal. If the two do not match exactly, the roster record will fail to upload.	Numeric
G	Local_Student_Identifier	If entered, a Local Student Identifier file must match exactly a Local Student Identifier in a student's enrollment	Numeric

		record in Kite Educator Portal. If the two do not match exactly, the record will fail to upload.	
H*	Student_Legal_First_Name	A student's first name in the Roster Upload Template file must match exactly a student's first name in a student's enrollment record in Kite Educator Portal. If the two do not match exactly, the record will fail to upload.	Alphanumeric
I*	Student_Legal_Last_Name	A student's last name in the Roster Upload Template file must match exactly a student's last name in a student's enrollment record in Kite Educator Portal. If the two do not match exactly, the record will fail to upload.	Alphanumeric
J*	Educator_Identifier	This is a required field for a user with the Kite Educator Portal role of Teacher. A teacher's Educator Identifier in the Roster Upload Template file must match exactly an Educator Identifier in an educator's account in Kite Educator Portal. If the two do not match exactly, the record will fail to upload.	Alphanumeric
K*	Educator_Legal_First_Name	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 Kite Educator Portal. If the two do not match exactly, the record will fail to upload.	Alphanumeric
L*	Educator_Legal_Last_Name	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 Kite Educator Portal. If the two do not match exactly, the record will fail to upload.	Alphanumeric
M	Remove_From_Roster	To remove a student from a roster, type REMOVE in column M. Otherwise, the field should remain blank. NOTE: A roster can also be removed manually using the user interface.	REMOVE [BLANK]

*Indicates this field is required.

BEST PRACTICES FOR NAMING ROSTERS

Consider defining a standard naming convention for rosters, which can make sorting and finding a specific roster easier later. For example, if the teacher last name is followed by the subject to create the roster name, rosters appear neatly grouped when sorted alphabetically.

UPLOAD THE EDITED TEMPLATE FILE

1. From the Upload Roster tab, select the **Select File** button.
2. Find the saved Roster Upload Template file. Select **Open**.
3. The file name appears in the file field. Select the blue **Upload** button.

4. Once the upload completes, a confirmation message will appear, indicating the number of records uploaded and the number of records rejected, if applicable. Select the SCV file icon in the File column to read the error messages related to the upload. The error file will display the line number for the record that has the error.
5. Fix the lines in the file that had errors, remove the lines that uploaded successfully, and follow the previous steps to upload again.

Uploaded	Status	Created/Updated	Rejected	Alerts	File
Friday, September 09, 2022 3:44:26 PM	COMPLETED	1	0	0	
Friday, September 09, 2022 3:40:32 PM	COMPLETED	32	1	0	
Friday, September 09, 2022 10:05:34 AM	FAILED	0	33	0	

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NOTE: If a student is incorrectly rostered for a subject in a state that does not test the grade in which the student is enrolled, an error message will convey that information. Correct the roster and upload again.

ROSTERING MANUALLY THROUGH USER INTERFACE

The user interface is an efficient tool when rostering a small number of students or editing an existing roster by adding or removing students.

CREATING A NEW ROSTER

1. Select **Settings**.
2. Select **Rosters** from the drop-down menu.
3. Select the **Create Roster** tab.
4. Create the roster name and select the subject and course (if applicable) for this roster.
5. Select the district/school from the drop-down menu.
6. Select **Search**.
7. Choose the educator from the Select Educator drop-down menu.

8. Choose the students to roster by selecting the checkbox in the Select Student grid.

The screenshot shows the 'Create Roster: Select Criteria' form. At the top, there are three tabs: 'View Roster', 'Create Roster' (highlighted with a red circle 3), and 'Upload Roster'. Below the tabs, the form is titled 'Create Roster: Select Criteria'. It contains several input fields: 'ROSTER NAME:' with a text box containing 'Smith-ELA' (circled 4), 'SUBJECT:' with a dropdown menu showing 'Mathematics', and 'COURSE:' with a dropdown menu showing 'Select'. Below these are 'STATE:' (Kansas), 'DISTRICT:' (Sunflower District), and 'SCHOOL:' (Meadowlark School), all with dropdown menus (circled 5). There are 'Search' and 'Clear' buttons (circled 6). Below the search buttons is the 'SELECT EDUCATOR:' dropdown menu showing 'Smith, Sean (4596621778) - Active' (circled 7). At the bottom of the form is a 'Save' button (circled 9). The 'SELECT STUDENTS' section contains a table with columns: State Student Identifier, Last Name, First Name, Middle Name, and Gender. The table has 5 rows. The second and third rows are highlighted in blue and have their checkboxes checked (circled 8). The second row is for student 826051, Artis, Marcellia, Peta, Male. The third row is for student 634874, Basham, Kenna, Lyn, Male. The first row is for student 298207, Anetts, Kakalina, Carley, Male. The fourth row is for student 22229, Frant, Martin, Marina, Female. The fifth row is for student 439811, Braga, Marie-jeanne, Kore, Male. At the bottom of the table, there is a pagination control showing 'Page 1 of 5', '10 per page', and '1-10 of 50 items'.

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

10. If a student is already rostered in the subject chosen, a pop-up message will appear. Select **OK** to remove the student from the first roster and add the student to the new roster. Select **Cancel** to return to the list of students.

The screenshot shows a pop-up message dialog box with a close button (X) in the top right corner. The message text reads: 'Student [Moishe Bestwick - 317511028] is already assigned to a roster for the subject you selected. Do you want to remove the student from the other roster and add them to this roster?'. At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'.

11. Once the students have been added to the roster, a Success message will display a message that the new roster was successfully created.

The screenshot shows the 'Create Roster: Select Criteria' form with the 'Save' button highlighted. Below the form, a success message is displayed: 'Successfully created: Smith-ELA'. Below the success message, the form title 'Create Roster: Select Criteria' is repeated.

EDITING AN EXISTING ROSTER

To change roster data or remove a roster, follow these steps:

1. Select **Settings**.
2. Select **Rosters** from the drop-down menu.
3. Select the district/school from the drop-down menu.
4. Select Search.
5. All previously created rosters will display. Select the desired roster to edit/delete.
6. The View/Edit Roster screen will automatically display. The following edits can be made to a roster on this screen:
 - 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. This includes adding and removing students from the roster.
 - Delete the roster by deselecting all students from the roster.
7. Once all desired edits from the available choices are made, scroll to the bottom of the screen, and select **Save**.

NOTE: The subject and course fields are not editable. If either of these fields must change, a new roster must be created for the correct subject and course. Select the new teacher and the students. This moves them from the incorrect roster to the correct roster. Once all students are removed from the incorrect roster, the incorrect roster is automatically deleted.

ROSTER EXTRACT

A data extract of existing rosters is available by navigating to the Reports menu and selecting Data Extracts. From the Student Information tab, locate the Roster extract and select the New File button. The Roster extract is a CSV extract that lists all roster records for a user's organization. The extract includes the student's teacher and subject. The Roster Extract can be used to create a Roster Upload to edit student roster data.

EDITING A ROSTER USING THE ROSTER EXTRACT

For users that have a large number of changes to their rostering data and for which editing the roster manually would be cumbersome, a CSV upload can be used to edit existing roster data. The process will involve downloading the Roster Extract, editing the roster information, and then uploading this information.

To edit a roster using this method, perform the following steps.

1. Download a new Roster extract for your organization (see above).
2. Remove the first 11 columns of data (Extract_State through Extract_Educator_Email_Address).

3. Keep rows of information that require correction. Delete rows of information that do not require correction.
4. Make any needed corrections to your data.
5. Ensure the column headings EXACTLY match the Roster Upload Template file. You should only have columns A through M (Roster_Name through Remove_From_Roster).
6. Upload the file using the process described in the Upload the Edited Template File section.