Assessment Data Review

In order to properly match Assessment data with CTEIS data, the UIC from both records must match. Unfortunately, this is often not the case. This document will take you through the Assessment Data Reviews process.

You can now review your assessment data and make sure that your students have the correct UIC. The Assessment Data Review process will match the Student's UIC in the Assessment data with the Student's UIC in CTEIS. If a match is not found, then that record will be marked with a check mark. This will allow you to correct the student's UIC either by making a change on the screen itself or by exporting the marked records to an Excel file. Once you make the changes to the Excel file, you may import the Excel file to verify the data. Alternatively, you could also make the UIC change on the screen itself. In both cases, the records are verified and if a match is found then the CTEIS UIC, CTEIS First Name, and CTEIS Last Name fields will be populated.

> **When:** Assessment data reviews are done in **Late Summer.**
>
> **Who:** Users with the <u>Fiscal Agency Level 5</u> role do assessment data reviews.
>
> CEPD Administrators who ensure that the Assessment Data Review is done.

Access Assessment Data Reviews

1) Log into CTEIS at www.cteis.com using your MEIS Username and Password.

2) Using the **Admin** drop-down menu, under **Fiscal Agent**, select **Assessment Review**. (<u>Note</u>: User must be a Fiscal Agent.)
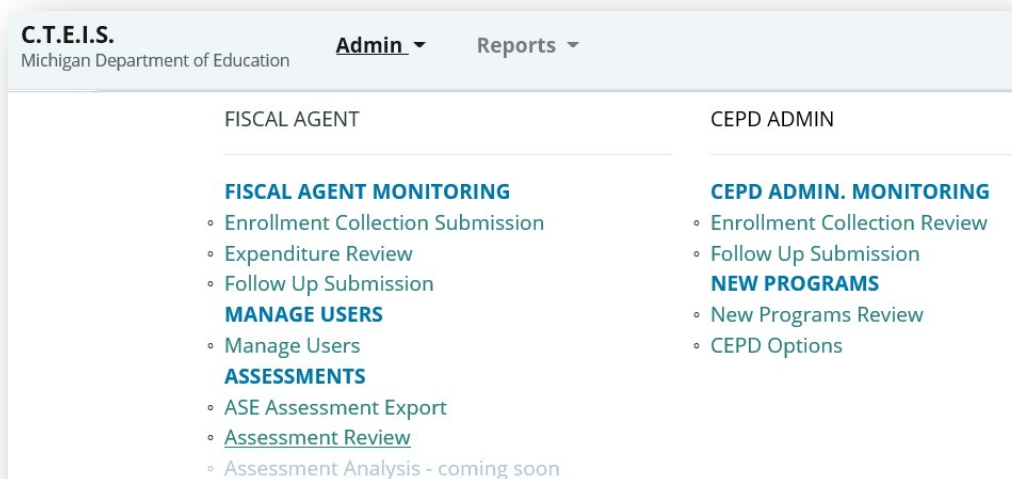
3) The **Assessment Review** page appears.

Steps for Assessment Data Review

To review data by exam there are two options:

- Manual review
- Export records

The data in the following example screens has been intentionally obscured to protect sensitive information.

Let's start with the first option of Manual Review.

Manual Review

To do a manual review follow these steps:

1) Choose the Fiscal Agency you would like to review by selecting the **Choose Fiscal…** drop-down menu in the upper left corner of the screen (if it has not been already selected.)
2) To display all the student records in your district for those who have taken an exam in a specific program, select the desired Program / CIPCode using the **Select CIPCode…** drop-down list in the upper right corner of the screen.
   The screen then populates with the appropriate students' records.

In the Assessment Records grid, there may be records that have a blank **ASMUIC** code (UIC from the Assessment record). This is because they do not have a matching CTEIS UIC (UIC currently in CTEIS). Fix the **ASMUIC** code for that record so it will match the CTEIS UIC.

Tip: This is also useful if you notice the assessment record has the wrong UIC based upon a name comparison.

Note: The *only* field that is editable on this page is the **ASMUIC** field.

There are two scenarios in case of unmatched UICs:

Example1:

CTEISUIC	CTEISFirstName	CTEISLastName	ASMUIC	ASMFirstName	ASMLastName
-	-	-		mmmmmm	mmmmmm

In this case, the UIC from the Assessment record does not match any record in CTEIS. You need to locate and enter the appropriate UIC so that it will find a match in CTEIS.

Example2:

CTEISUIC	CTEISFirstName	CTEISLastName	ASMUIC	ASMFirstName	ASMLastName
XXXXXX	John	Doe	XXXXXX	Sue	Smith

In this case, the UIC's match but the names do not. This implies that the **ASMUIC** is incorrect. You will need to do some research and find the appropriate UIC for this student, so their name matches the one listed in CTEIS.

1) Correct the **ASMUIC.** After changing the **ASMUIC** you must click the **Save Changes button** to save the record. If a match is found, it will be displayed.

2) Review your updates. Now if you select "Automobile Technician" from the **Select CIPCode...** drop-down list, you will see that the CTEIS values are filled in for the previously incorrect records. This indicates that the UIC is now correct for the records and matches were found. Using a similar process, you can verify all your assessment data and correct any other UIC errors.

Export Records

You have the option of reviewing your assessment data by exporting the records to an Excel file. Corrections can then be made, and the file can then be imported back into the system.

> **_Note_**: *Because the Excel file will be imported back into the database:*
> ** The only field (column) that should be edited is the **ASMUIC**.*
> ** Column headings (field names) should not be changed.*
> ** The **ID** field must not be altered. It is used to find and join the imported records.*

To export your Assessment Review records:

1) Display the assessment records to review by selecting a **CIPCode** from the **Select CIPCode...** drop-down list. (If additional details are needed, refer to the previous section, **Manual Review**.)
   Note: By default, all displayed records will be exported, even those not requiring changes.
2) Click the **Export to Excel** button.

3) You will get an option to **Open** or **Save** the Excel file.
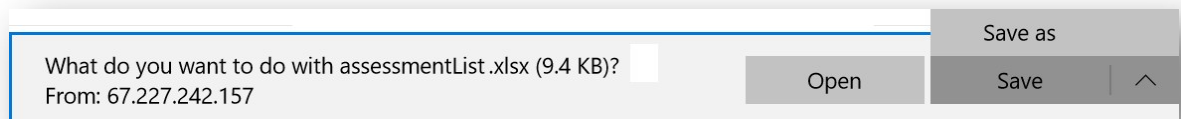
Using the arrow on the **Save button**, select **Save As**. In the resulting dialog box, save the Excel file to a location of your choice.
Note: The name of the file is not important. The default file name is **AssessmentList.xlsx** and may vary (e.g.; AssessmentList(2).xlsx) depending on how many file exports you perform.

4) Edit the **ASMUIC** column (in the Excel file) as necessary. Refer to the Excel file example given below.

5) After editing the Excel file, you can import and update the records. If you have not done so already, close the Excel file. Click on the **Browse** button above the **Import Assessments** button. Locate and select the updated file and then select Open. The file name and location will display in the **Browse** box.

6) Click the **Import Assessments** button. This process will import your records and display the results. Once the upload is complete, a message appears below the **Import Assessments** button indicating that the process was a success, or that there were problems.

7) Review your updates.

Submitting Assessment Data

To submit the assessment data review, follow these steps:

1) Ensure that all UIC's have been corrected (or are correct) for each of the programs in your Fiscal Agency.

2) Click the **Mark Reviewed** button at the bottom of the page. A status message will display beneath the **Mark Reviewed** button.

Note: The CEPD Administrators can see all Fiscal Agencies that have assessment data either reviewed or to be reviewed.