

Transferring Student Data Between Agencies

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If a student enrolls at your adult education agency and says she previously tested at a different agency, then you may request her test records from that other agency using TOPSpro Enterprise. Additionally, her demographic data as recorded at the other agency may be requested.

This document provides steps for creating a data sharing request to another agency, how to analyze incoming requests from other agencies, and how to process data sharing responses for your requests.

Requesting data from another agency

1. Go to **Records > Students > Demographics** and locate the student or students whose data you wish to request. Multiple records may be selected by using Ctrl+click or Shift+click in the lister. This is useful when requesting data for more than one student at the same time, but it works only if all selected students previously attended the *same* agency. For students coming from different agencies, repeat the process once per agency.



The screenshot shows the 'Students' lister in TOPSpro Enterprise. The interface includes a menu bar (TE, View, Organization, Records, Reports, Tools, Help) and a toolbar with buttons for New, Enroll, TCQA - TCQA, Subsites, Filter, Columns, Sort, Delete, and a Refresh button. A status bar at the bottom indicates '19 / 104' records. The table below lists student records with columns for Student ID, Name, Birth Date, Gender, Ethnicity, Races, and Native Language.

Student ID	Name	Birth Date	Gender	Ethnicity	Races	Native Language
10001	Sandeep Maske	3/27/1997	Male	Hispanic or Latino	White	English
1001	Marius Grigoras	8/10/1982	Male	Not Hispanic or Latino	White	Other
1002	Andrew James	7/31/1982	Male	Hispanic or Latino	Asian	Spanish
101	Oliver Hanson	11/9/1994	Male	Hispanic or Latino	White	English
101010	Ivy Nealla	12/9/1985	Female		Black or African American	

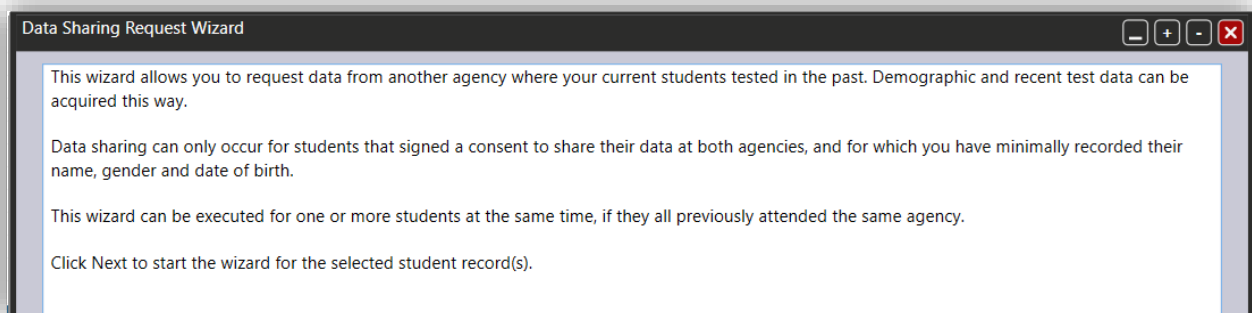
- Only students who have signed a consent form granting access to their data can be processed by the sharing wizard. Ensure the Student Demographic Record's "Data Sharing Consent" field is set to "Signed." If it is not, then that student's data cannot be requested.



- When the desired students are selected (highlighted in blue), click the **Request Data** button in the toolbar. On a small screen, you might need to click **More** first to find the button.



- After clicking the **Request Data** button, the **Data Sharing Request Wizard** will start.



- The wizard will display the list of selected students. Records that are missing required data (name, gender, date of birth and signed consent) will appear in red.

Data Sharing Request Wizard

The list below contains the selected student population.

Student records missing the required data are flagged in red and will not be processed.

Use the Remove button provided to remove records from this list. Multiple records can be selected using CTRL + click.

Data sharing requests will be sent only for the remaining students in the list with name, gender, birth date and signed consent.

Student ID	Name	Gender	Birth Date	Consent
101010	Ivy Nealla	Female	12/09/1985	
101	Oliver Hanson	Male	11/09/1994	Not signed
1002	Andrew James	Male	07/31/1982	Signed
1001	Marius Grigoras	Male	08/10/1982	Signed

- Now the agency from which data is requested must be found. If you already know the agency where this student or students tested previously, then use the fields to look for the agency. At least one field must have a value to start the search. Click the **Search** button.

Agency Filters

Agency name contains: City name contains:

State: Agency ID contains:

Search...

- All databases (including those on different servers) will be searched.

Searching agencies in all TE databases...

Searching agencies in Global service instance...

Progress bar: [||||||||||||||||]

- The list of all agencies found using your search parameters will be displayed. You can sort the list by clicking on a column header (Ctrl+click headers for a multi-field sort). You can add or change search criteria in the Agency Filters fields. Then click **Search** again to refine the results.

Data Sharing Request Wizard

Use the filters below to specify criteria for the previously attended agency, then use the Search button to search for it in all TOPSpro Enterprise databases.

The filters are cumulatively applied. All matching agencies will be displayed in the list below.

Once found, select the appropriate record and click Next to continue.

Agency Filters

Agency name contains: City name contains:

State: Agency ID contains:

Search...

Agency ID	Agency Name	State	City
10059	DC OSSE: Department of Youth Rehabilitation Services (DYRS)	District Of Columbia	Washington
10399	DC OSSE: Health Resources Service Intake Center	District Of Columbia	Washington
10418	DC OSSE: Department of Human Services (DHS)	District Of Columbia	Washington
10479	DC OSSE: Byte Back, Inc.	District Of Columbia	Washington
10553	DC OSSE: National Children's Center, Inc. (NCC)	District Of Columbia	Washington
10576	DC OSSE: Bright Beginnings Inc.	District Of Columbia	Washington

Cancel **<< Back** **Next >>**

- When you've found the correct agency, click on that row to select it. Click **Next** to proceed.
- Choose which records to request: test data, demographic data, or both. Note the demographic data can be merged with your existing TOPSpro Enterprise (TE) data upon completion of the transfer. You could update the student's email address or highest year of school, for example, to match what the other agency entered into its database. You may optionally add a comment to send to the other agency's staff. Click **Next**.

Data Sharing Request Wizard

Use the checkboxes below to specify if you are requesting demographic data, test data or both (default).

Additionally, you have the option to include a comment with your data sharing request.

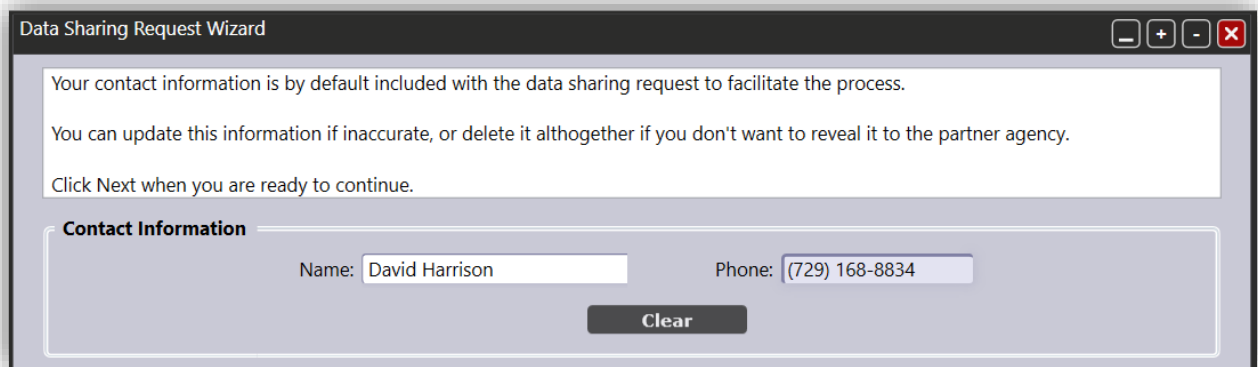
Click Next when you are ready to continue.

Request Options

☒ Request demographic data ☒ Request test data

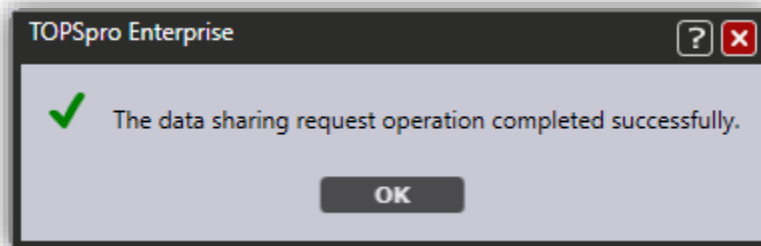
Request comment:

11. Your user contact information also will be sent along with the data request. Adding your current phone number can be helpful in case the other agency has questions.



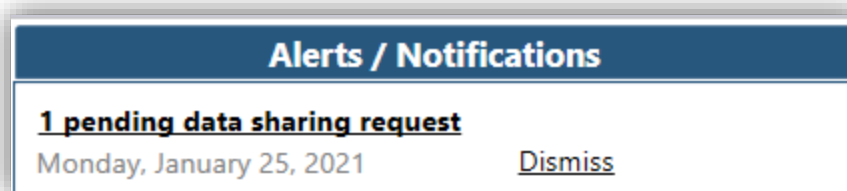
The screenshot shows a window titled "Data Sharing Request Wizard". Inside, there is a text box with the following text: "Your contact information is by default included with the data sharing request to facilitate the process. You can update this information if inaccurate, or delete it altogether if you don't want to reveal it to the partner agency. Click Next when you are ready to continue." Below this text is a section titled "Contact Information" which contains two input fields: "Name:" with the value "David Harrison" and "Phone:" with the value "(729) 168-8834". A "Clear" button is located below these fields.

12. The final page of the wizard lists the students whose data you are requesting. Click **Finish** to finalize and send the request. You will see the progress for each student in the Processed and Succeeded columns. When the process completes, a confirmation message will display. Click **OK** to close the wizard.

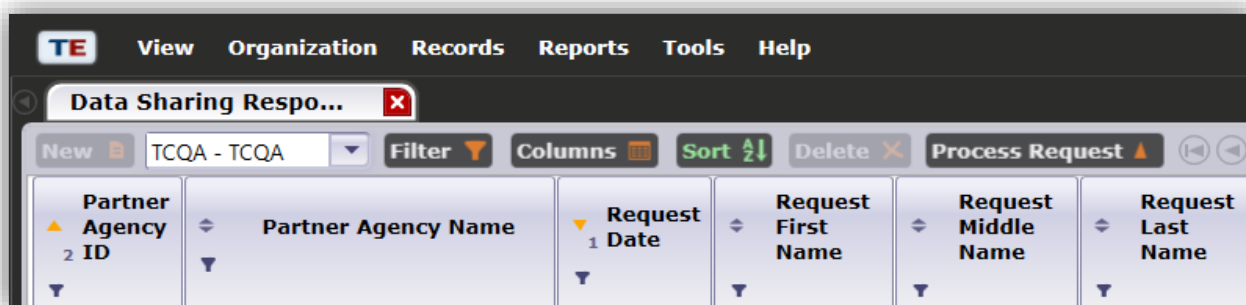


Receiving data sharing requests from another agency

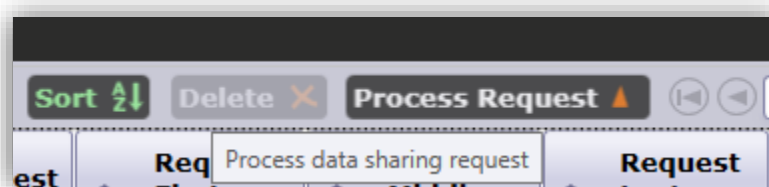
1. When another agency sends data sharing requests to your agency, you will receive a notification on the TE Start Page. Click the notification to open the Data Sharing Responses lister.



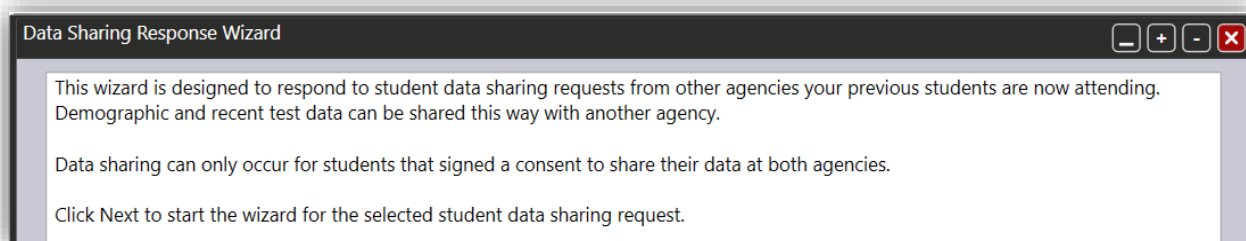
- All data sharing requests from other agencies can be found in the **Data Sharing Responses** lister. Click on a Start Page notification or go to **Organization > Data Sharing Responses** to open it. Here you can see the requests that have been made of your agency and information about the person who made each request. You will also see demographic data for the students whose data was requested: the name, gender, and birthdate that were recorded at the partner agency.



- Click on a record to select it and then click the **Process Request** button in the toolbar.



- The **Data Sharing Response Wizard** starts. Remember that you can only process responses for students who signed a data sharing consent.



5. The wizard asks if your agency allows data transfers. Select an option and click **Next**.

☒ Data sharing is allowed by agency policy
☐ Data sharing is not allowed by agency policy

Note: Some agencies may not allow data sharing at all at the agency level. If your agency does not allow data sharing, the wizard will end after one more step, and a default answer will be sent to the requesting agency that data sharing is not allowed, along with an optional custom message and your user contact information.

6. If data sharing is allowed, then the wizard will continue. It searches your database for students who match the sharing request. Records shown in red are missing signed consent. Students are listed in order by their matching weight, with Birth Date taking precedence, then Last Name, and then First Name. The more fields that match between a record and the request, the higher that record will be positioned in the list. If you find the correct student in the list, then click on that record to select it.

Data Sharing Response Wizard

The list below contains the student records that match one or more identifying fields from the data sharing request, in addition to the Gender field, which is applied as a default filter. Most relevant results are at the top of the list. Records in red indicate students without a signed consent for data sharing. Double-clicking a record in the list will open the view page for that record.

If you determine that one of these students is the same person that was requested, then select that record and leave the default sharing response option below.

If you're not sure what record matches the data sharing request and you think further details would be required for an exact answer, select the second response option.

Request Information

Gender: **Male** Birth Date: **8/9/1982** First Name: **Marius** Middle Name: Last Name: **Grigoras**

Student ID	Birth Date	First Name	Middle Name	Last Name	Consent
1001	08/10/1982	Marius		Grigoras	Signed

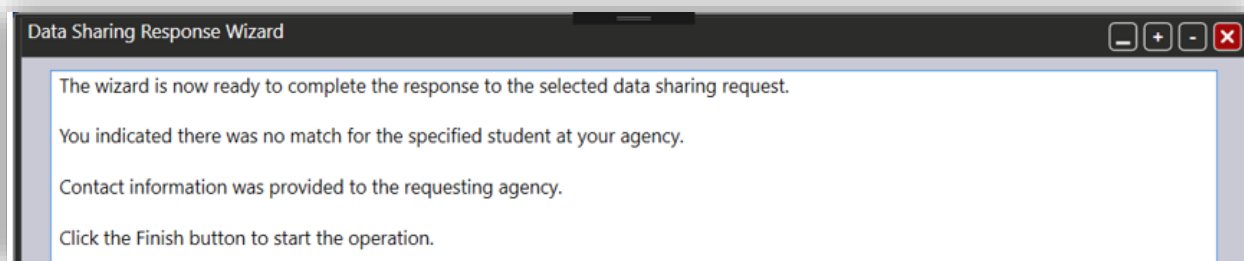
7. There are three possible options for your response to the request:

- a. The student is not found:

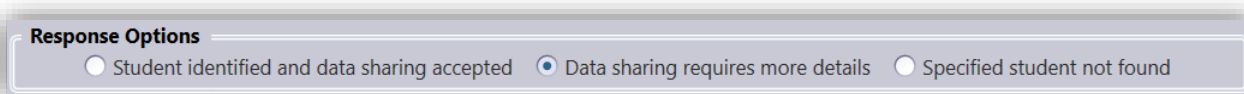
Response Options

- ☐ Student identified and data sharing accepted ☐ Data sharing requires more details ☒ Specified student not found

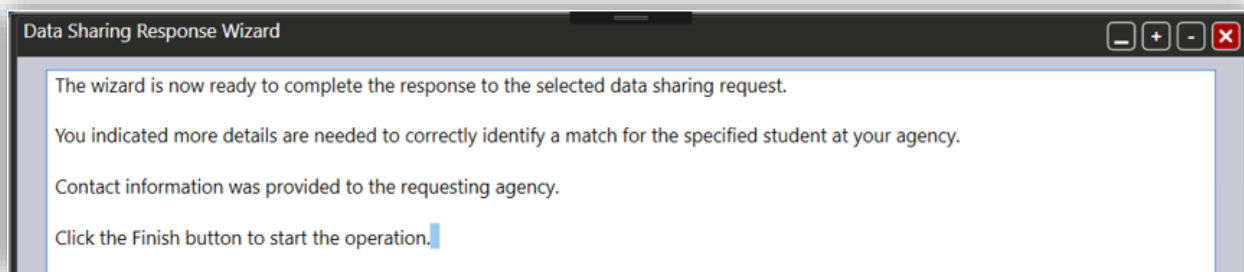
In this case, an appropriate response message will be sent to the requesting agency and the wizard will end.



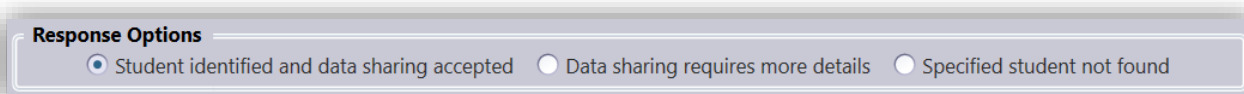
b. There is not enough data to find a match and more details are needed:



In this case, just like above, an appropriate default message will be sent to the requesting agency along with an optional comment and your user contact information. You may use the comment field to communicate which information was missing from the request. The wizard completes and closes when you click **Finish**.



c. The student has been identified:



In this case, the student demographic data is processed and presented in various categories. You can choose which demographic information to share by checking or unchecking the category checkboxes. If demographics were not requested, then the wizard skips to the next step.

Data Sharing Response Wizard

This is the demographic data that may be shared for the selected student.

You may choose to remove some or all of this information by unchecking the selection box for each category.

Click Next to continue.

Demographic Information

☒ Share Ethnicity, Race and Language Information

Ethnicity: Not Hispanic or Latino *Races:* White

Native Language: Other

☒ Share Education Information

Highest Year of School: N/A *School Outside US:* N/A

Highest Degree or Diploma: None *Earned Outside US:* N/A

☒ Share Contact Information

Phone: N/A *Cell Phone:* N/A

Email: user1@teamcode.net *Fax:* N/A

Address: N/A *City:* N/A

Zip: N/A *Ward:* N/A *State:*

Next, the test record data is processed and displayed (if originally requested). If you don't want to share a specific test record with the other agency, click on that row to select it and then click the **Remove Selected Records** button. Tests remaining in the list will be transferred to the requesting agency. Click **Next**.

Data Sharing Response Wizard

These are the test records that may be shared for the selected student.

You may use the Delete button provided to remove records from this list. Multiple records can be selected using Control-click.

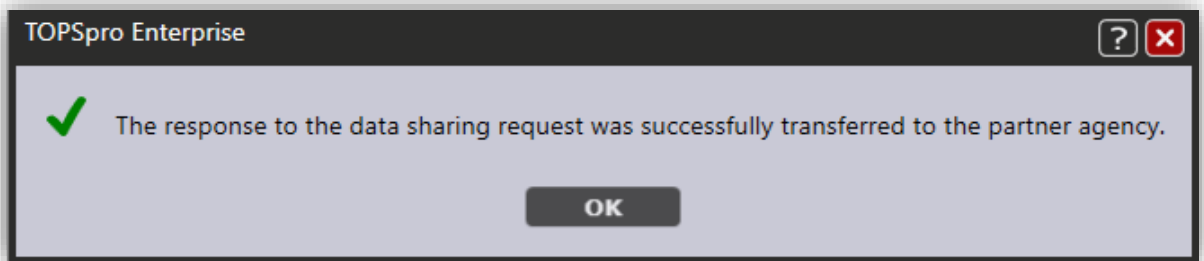
Double-clicking a record in the list will open the view page for that record.

Click Next to continue.

Assessment Date	Form	Modality	Raw Score	Scale Score
12/17/2019 12:00:00...	913M	Math	27	210
12/2/2019 12:00:00 AM	905R	Reading	25	227

Your user contact information and an optional custom message are included on the final page of the wizard. Make any desired edits and then click **Next**.

8. A summary of what will be shared appears on the final page. Click **Finish**. The wizard processes the selected data and completes the data sharing response. A message is displayed on the screen informing you that the process is complete.

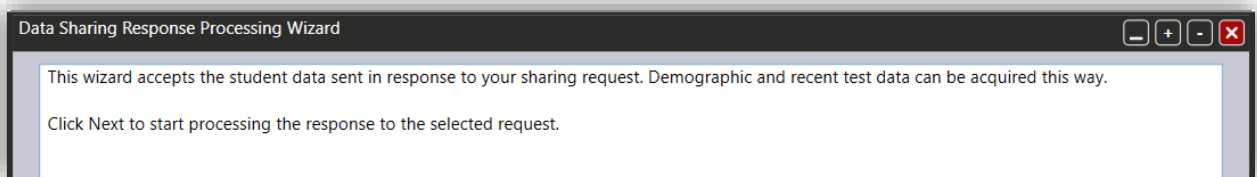


Processing data sharing responses

1. When another agency responds to your agency's data sharing request, you will receive a notification on the TE Start Page. Click the notification to open the Data Sharing Requests lister.



2. You can process a data sharing response in the **Data Sharing Requests** lister, accessible via the **Records > Students > Data Sharing Requests** menu. Requests to which a partner agency has responded will have a value in the Response column. Click on a record to select it and then click the **Process Response** button.
3. The Data Sharing Response Processing Wizard starts to help you process the data sent from the other agency.



- The partner agency's response is shown selected in the list (indicated with a blue dot). The responding user's name, phone number, and comment, appear below if provided.

The response received for your data sharing request is indicated below.

You will be able to review the data received in the next pages.

If the other agency's user provided contact information or comments, they are displayed in the boxes below.

Click Next when you are ready to continue.

Data Sharing Response

- ☒ Student identified and data sharing accepted
- ☐ Student identified, but the data sharing consent is missing at the partner agency
- ☐ Data sharing requires more details. Contact the partner agency using provided information
- ☐ Specified student was not found at the partner agency
- ☐ Data sharing is not allowed by partner agency policy

Note: If the response sent was anything other than “Student identified and data sharing accepted,” then the wizard will display a message and end.

- Next, the wizard displays the demographic data that was shared with your agency. You can choose which data will be imported in the end by unchecking the selection box for any demographic category.

Below is the demographic data received from the other agency for the selected student.

You may exclude some of this information by unchecking the selection box for each category.

Data in the remaining checked demographic categories will be imported when the wizard completes.

Click Next to continue.

Demographic Information

<input checked="" type="checkbox"/> Share Ethnicity, Race and Language Information	
<i>Ethnicity:</i> Not Hispanic or Latino	<i>Races:</i> White
<i>Native Language:</i> Other	
<input checked="" type="checkbox"/> Share Education Information	
<i>Highest Year of School:</i> N/A	<i>School Outside US:</i> N/A
<i>Highest Degree or Diploma:</i> None	<i>Earned Outside US:</i> N/A
<input checked="" type="checkbox"/> Share Contact Information	
<i>Phone:</i> N/A	<i>Cell Phone:</i> N/A
<i>Email:</i> user1@teamcode.net	<i>Fax:</i> N/A

6. The next page shows the test records shared with your agency. If you don't want to import a test, then select its record in the list and click the **Delete Selected Records** button.

Data Sharing Response Processing Wizard

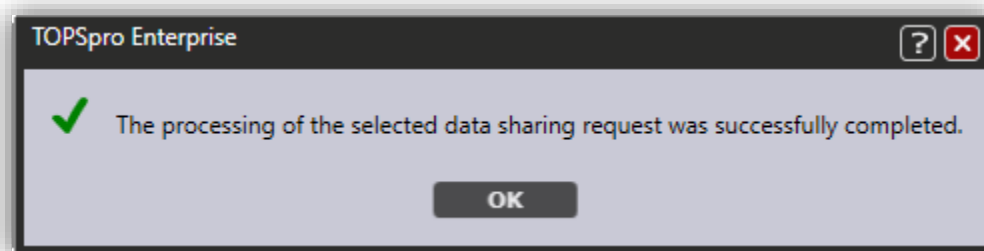
These are the test records that have been shared by the target agency for the selected student.

You may use the Delete button provided to remove records from this list. Multiple records can be selected using Control-click.

Click Next to continue.

Assessment Date	Form	Modality	Raw Score	Scale Score
12/17/2019 12:00:00...	913M	Math	27	210
12/2/2019 12:00:00 AM	905R	Reading	25	227



7. The final page shows a summary of the data selected for import into your agency's database. Click **Finish** to start the import process. A confirmation message will display. Click **OK** to close the wizard.



8. Records that were received from another agency will be marked as "transferred."
 - a. You can right click on the header area of a **Demographic History** lister to show the **Was Transferred** column. Records listed as Yes were shared by a partner agency. Note this column is not available in the Student Demographics lister because those records are undated and are partially aggregated from a student's dated Demographic History records. Viewing an individual Demographic History record displays the date the transfer was completed and the ID/name of the agency that shared it with you.

Highest Degree or Diploma	Earned Outside US	Highest Year of School	School Outside US	Was Transferred
High School Diploma		10		Yes
None	No	10	No	
Technical/Certificate		11		

- b. You can right click on the header area of a **Tests** lister to show the **Was Transferred** column. Records listed as Yes were imported from a partner agency. The test record itself shows the original agency's ID/name and when the transfer was completed.

 **Assessment Info**

Site:	01 - ABCUSD: Adult School - Cuesta Campus			
Assessment Date:	11/24/2020	Remote Test:	No	
Assessment Type:	Fixed Form	Form:	081R - Life and Work Reading Level A	
Score Override:	Yes	Raw Score:	20	
Accurate:	Yes	Scale Score:	205	
Related Class:	333 TOM BELL RD. - Love & Logic 04/16/2019		Passed:	N/A
		Retested:	No	
		Duration:		
Transferred From:	TCQA - TCQA		Transferred On:	11/25/2020