Document Revisions

<table>
<thead>
<tr>
<th>Revision Date</th>
<th>Version</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/25/2014</td>
<td>1.0</td>
<td>Initial Version</td>
</tr>
</tbody>
</table>

If assistance is needed, contact the PARCC Support Center at 888-493-9888 or PARCC@support.pearson.com.

Copyright 2014, PARCC
Table of Contents

Additional Orders: What, Why and Who? ................................................................. 4
  Definition .................................................................................................................. 4
  Reasons for Placing an Additional Order ............................................................... 4
  Role Requirements .................................................................................................. 4

Placing an Additional Order .................................................................................... 5
  Additional Order Timing ......................................................................................... 5

Steps to Place an Additional Order .......................................................................... 5

Confirmation of an Additional Order ....................................................................... 8

Editing an Additional Order as a Requestor ............................................................ 8

Tracking an Additional Order .................................................................................. 8

Approving an Additional Order ................................................................................ 10
  Steps to Approve an Additional Order ................................................................... 10
  Editing an Order as an Additional Order Approver .................................................. 13

Canceling a Submitted Additional Order ................................................................. 15

Canceling an Approved Additional Order ............................................................... 16

Rejecting an Additional Order .................................................................................. 16

Tracking an Additional Order .................................................................................. 16

Appendix: Additional Orders for Schools or Districts Not Included in the Initial Shipment to the District or State ..... 18

Additional Order Procedures
Additional Orders: What, Why and Who?

Definition
An additional order is an order which is manually placed during the additional order window. It is placed after the initial order has been generated by the Student Registration Data Input (SRDI) or by manual input of students within the registration window.

Reasons for Placing an Additional Order
For example, an additional order would be placed for students who have transferred into the district after SRDI or for districts which did not complete the SRDI within the regular registration window.

Role Requirements
The Additional Orders Process requires Add-on Roles to be assigned to the PearsonAccess™ User Account(s).
- Request Additional Order Role - Allows a user to request additional orders in the system.
- Approve Additional Order Role - Allows a user to approve additional orders in the system.
Placing an Additional Order

Additional Order Timing
All additional orders will be shipped via UPS Ground. Allow 3-5 business days after an order is approved for receipt of the material.

- Any expedited material shipping requests must go through Customer Service.
- Please note that if a "Requested Date" is entered for a future date beyond the 3-5 business days, that order will be processed by Pearson to be received on that requested date.

Steps to Place an Additional Order

1. Select the appropriate Administration at the top of the screen and organization, if needed.

2. Under the Setup, select Orders and Shipment Tracking.
3. Under the Select Tasks dropdown menu check Create/Edit Orders and click the Start button.

4. Fill out the Details and Ship To sections.
5. Next click the Edit button that is located on the lower part of this screen.

6. Fill out the Materials Order screen. When complete, click the X button in the upper right hand corner.
   - Please note that all Test Material (Test Booklets and Answer Documents) are available in packages of 5 only. When entering an Additional Order, please ensure that the correct quantity of packages is entered, and not the total students. For example, if 13 Test booklets are required, enter 3 packages of 5.
   - Accommodated materials are packaged in kits: Large Print Test Kits, Braille Test Kits, and Read-Aloud Test kits. Order one accommodated kit per student.
7. Review your requested items. Again, ensure that your quantity ordered is correct as materials ship in packs of five. Click the Create button once you have reviewed that all your requested items are listed correctly.

8. The Additional Order will now be listed as “submitted” on the Orders & Shipment Tracking screen.

**Confirmation of an Additional Order**

Once an Additional Order has been placed, the person who submitted the order will receive an email stating that an Additional Order has been created. This email will not list quantities or items ordered.

**Editing an Additional Order as a Requestor**

A requestor cannot edit an additional order.

**Tracking an Additional Order**

1. Go to the Setup tab and click on Orders and Shipment Tracking, click Start.
2. To view an individual or any, click the blue “i” next to the order number listed in Order # column.

<table>
<thead>
<tr>
<th>Order #</th>
<th>Sales Order # / Line #</th>
<th>Type</th>
<th>Status</th>
<th>Receiving Organization (Code)</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td></td>
<td></td>
<td>submitted</td>
<td>SAMPLE DISTRICT (ZZ-654321)</td>
<td>2014-10-30</td>
</tr>
<tr>
<td>28</td>
<td></td>
<td></td>
<td>submitted</td>
<td>CAT SCHOOL (ZZ-111111-1111)</td>
<td>2014-11-13</td>
</tr>
</tbody>
</table>

The order details screen will appear. Click on the Shipments tab for shipment tracking information for an order.
Steps to Approve an Additional Order

Please note that in order to approve an additional order, a user must have the Approve Additional Order Add-on Role.

1. Log into the PearsonAccessNext Live site. State users will be logged in at a state level.

2. Select the appropriate Administration at the top of the screen and organization, if needed.

3. Under the Setup, select Orders and Shipment Tracking.
4. To search for orders needing approval, use the Find Orders Placed or Updated in field. This is a drop down menu from where you can select: Last week, Last two weeks, Last 30 days, Last 60 days, Last 180 days or Show all results.

Select your choice, click the Search button.

5. Orders that were created within the date window chosen will show Statuses of:
   1. Submitted: ready to approve
   2. Pending: order changes to this status after it is approved
   3. Processing: order was approved and in processing status for packaging to pack and ship the order
   4. In Transit: material is in transit to be delivered
   5. Delivered: material has been delivered
   6. Rejected: order was rejected/not approved

Please note that you may filter orders using one or more of these statuses.

6. To view an individual or any order in a submitted status before approving, click the blue “I” next to the order number listed in Order # column.
The order details screen will appear.

From the Order Details screen, there are four tabs:

- **Details & Status**: this first tab gives Status of the order, dates ordered and dates needed, Approved status, Users are who approved/rejected order or user that Last Edited the order, any Special Instructions regarding the order.
- **Ship To**: this screen lists the shipping contact name, shipping address, email information, phone, etc.
- **Materials Order**: this screen lists the actual testing materials that were ordered
- **Shipments**: this screen will have the shipping carrier tracking information

7. Click the box to the left of the order or orders you wish to approve, go to Tasks and click the drop down arrow and select/check the Approve Orders, click Start.
   - You may approve orders individually or as multiple orders in a submitted status.
8. Check the box to the left of the order number.

9. All additional orders will be shipped via UPS Ground.

10. The Release Date may remain blank for immediate approval and processing of the order. Allow 3-5 business days after an order is approved for receipt of the material.
   - Any expedited material shipping requests must go through Customer Service.
   - Please note that if a "Requested Date" is entered for a future date beyond the 3-5 business days, that order will be processed by Pearson to be received on that requested date.

11. To approve the order, select Approve.
   - Note: Once an order is approved it cannot be cancelled or rejected in PearsonAccess

12. Once you are finished approving click Exit Task at the top of the screen.

**Editing an Order as an Additional Order Approver**
Additional Order Approvers have permission to edit orders in a submitted status to change material quantities before approving the order.
1. Click the box to the left of a submitted order, go to Tasks and click the drop down arrow and select/check the Create/Edit Orders, then click the Start button.

2. On the Create/Edit Orders screen, click the order number (top image). Details will appear for the order listing the materials in the order (bottom image).

3. To change quantities or add additional materials to the order, click the Edit button (right side of screen) and an Edit Materials Order screen appears.
4. At the Edit Materials Order screen, you may edit the order of materials. Once finished click the X in the upper right hand corner.

5. You will be taken back to the Create/Edit Orders screen. Review the materials listed and if correct, click Save.

![Create/Edit Orders screen]

6. Click Exit Tasks and the order is now ready to be approved.

**Canceling a Submitted Additional Order**

You may cancel an order that is in a submitted status.

1. Click the box to the left of the order or orders you wish to cancel, go to Tasks and click the drop down arrow and select/check the Cancel Orders, click Start.

2. Select the order or orders you wish to cancel and click the Cancel Orders.

![Cancel Orders screen]

3. Click Exit Tasks.
Canceling an Approved Additional Order
If the order was approved, please contact PARCC Customer Service at 866-493-9888. Note: orders in pending or processing status cannot be cancelled via PearsonAccess next after they have been approved.

Rejecting an Additional Order
You may reject orders individually or as multiple orders in a submitted status.

1. Click the box to the left of the order or orders you wish to reject, go to Tasks and click the drop down arrow and select/check the Reject Orders, click Start.

2. Complete the Customer Note field with the reason the order is rejected.

3. Click Reject button.

4. Click Exit Tasks.

Tracking an Additional Order
1. Go to the Setup tab and click on Orders and Shipment Tracking, click Start.
2. To view an individual or any, click the blue “i” next to the order number listed in Order # column.

<table>
<thead>
<tr>
<th>Order #</th>
<th>Sales Order # / Line #</th>
<th>Type</th>
<th>Status</th>
<th>Receiving Organization (Code)</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td></td>
<td>additional</td>
<td>submitted</td>
<td>SAMPLE DISTRICT (ZZ-654321)</td>
<td>2014-10-30</td>
</tr>
<tr>
<td>28</td>
<td></td>
<td>additional</td>
<td>submitted</td>
<td>CAT SCHOOL (ZZ-111111-1111)</td>
<td>2014-11-13</td>
</tr>
</tbody>
</table>

The order details screen will appear. Click on the Shipments tab for shipment tracking information for an order.
Appendix: Additional Orders for Schools or Districts Not Included in the Initial Shipment to the District or State

When placing an additional order for a school or district that was not included in the initial shipment of materials, there are specific materials that need to be ordered along with the test materials. Those materials include:

- Test Coordinator Manual (1 per Order)
- Test Administration Manual ELA (1 per 25 Students)
- Test Administration Manual Math (1 per 25 Students)
- Math Reference Sheet (1 per Math Student)
- Paper Bands (1 per 10 Students)
- Used Answer Document Return School Headers (1 per Grade/Subject)
- Scorable Return Label (1 per 10 Students)*
- Non-scorable Return Label (1 per 25 Students)*
- UPS Return Labels (1 per 25 Students)*

* Please note that you must have one Pearson scorable or non-scorable AND one UPS scorable or nonscorable label per box.

Additional Notes:
- All materials will be generic, meaning no school or district information included on materials
- Student Labels and Rosters will not be provided
- Districts will not receive information on Chain of Custody reports for schools with orders placed only through Additional Orders