



# Calvert Access

## User Guide for School Administrators



**CALVERT**  
EDUCATION



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## Converting Unprocessed Students

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If you are a returning school, Calvert has imported your existing students from our legacy ordering system into Access to help expedite the enrollment process. Your Access administrator will see the imported student records on the Access Dashboard, in the To Do List card, as “Unprocessed Imports”. Each student should be converted, if they are still active in your school’s program, and their contact information should be reviewed and updated as needed prior to completing enrollment. If the student has graduated from the program, moved away or left the program, you have the option to delete the student or not import them into Access. This process provides the following benefits:

- 1) Less data entry required, you can review and confirm or change the student and learning guild data provided from their previous enrollment.
- 2) Returning students will be able to continue using their existing CTN login credentials.
- 3) Updating the student grade level of record will streamline the ordering process, by displaying the course and products most likely needed for that student.

**NOTE:** We strongly advise that you opt to convert the returning student data instead of creating an entirely new record for the student. Reach out to your Calvert program manager or support contact if you have any questions or need assistance with converting unprocessed students.

This is a onetime review as we transition our ordering system process, you will not be asked to this every year, just for the current school season (2018). Moving forward, all of your student and staff information will remain in the Calvert Access platform and you will be able to add, edit and remove information as needed.

Below are step-by-step instructions for converting Unprocessed Imports for Students and Staff.

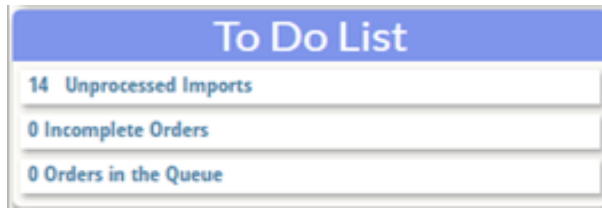
## Steps to Convert Imported Students

### Log into Access with an Administrator role

- Enter the following URL into a browser  
<https://access.calverteducation.com>

### Review the list of Converted Student Imports

- Click on the “Unprocessed Imports” task in the **To Do List** card on the dashboard.



You can scroll through the list of students and convert each one, or search for specific students.

- Click on a student’s name to review the imported record.

Student	Grade	Parent	Address	Import Group ID	Status
Eric Dissinger	4	Thomas Dissinger	15 Dulaney Hills Drive Timonium, MD 21093	Transfer 2018-07-10 06:34:03	UNVALIDATED
Everett Dissinger	4	Thomas Dissinger	15 Dulaney Hills Drive Timonium, MD 21093	Transfer 2018-07-10 06:34:03	UNVALIDATED
Carla Keman	K	Cathy Keman	17 Stowleigh Drive Towson, MD 21282	Transfer 2018-07-10 06:34:03	UNVALIDATED
Eliska Williams	2	Trish Williams	720 Houserville Road Hampstead, MD 21074	Transfer 2018-07-10 06:34:03	UNVALIDATED
Makia Williams	3	Trish Williams	720 Houserville Road Hampstead, MD 21074	Transfer 2018-07-10 06:34:03	UNVALIDATED
Zayne Williams	4	Cooper Williams	538 Liverton Drive Sparks, MD 21152	Transfer 2018-07-10 06:34:03	UNVALIDATED
Claudia Wright	4	Martha Wright	2110 Bay Ridge Avenue Annapolis, MD 21402	Transfer 2018-07-10 06:34:03	UNVALIDATED
Roger Wright	5	Martha Wright	2110 Bay Ridge Avenue Annapolis, MD 21402	Transfer 2018-07-10 06:34:03	UNVALIDATED
Bryan Zimmerman	4	Anne Zimmerman	345 Dulaney Hills Drive Timonium, MD 21093	Transfer 2018-07-10 06:34:03	UNVALIDATED

Review and make any changes to the information that you see in the Import Record, especially the following:

- Update the Grade Level
- Enter the Date of Birth
- Enter a Student ID (SIS or LMS ID)
- Verify and enter the Address**
- Click on the **[Save]** button.

**Import Record**

**Student Information**

First Name\* Eric  
 Last Name\* Dissinger  
 E-mail Address\* erichthediss@gmail.com  
 Grade\* 4 Date of Birth  
 Student ID 878701  
 Student CTNUsername eddissinger2

**Address Information**

Phone Number 410-235-1156  
 Address Line 1 15 Dulaney Hills  
 Address Line 2  
 City Timonium  
 State/Province/Region MD  
 ZIP/Postal Code 21093  
 Country USA

**Primary Parent Information**

First Name Last Name  
 Thomas Dissinger  
 Parent CTNUsername Thomas.dissinger@hometown.com  
 Parent ID

Buttons: Cancel, Save

Student	Grade	Parent	Address	Import Group ID	Status
Eric Deangier	4	Thomas Deangier	15 Dulaney Hills Drive Towson, MD 21283	Transfer 2018-07-10-063403	UNVALIDATED
Eventt Deangier	4	Thomas Deangier	15 Dulaney Hills Drive Towson, MD 21283	Transfer 2018-07-10-063403	UNVALIDATED
Carla Keman	K	Cathy Keman	17 Stoneleigh Drive Towson, MD 21282	Transfer 2018-07-10-063403	UNVALIDATED
Eliza Williams	2	Tresh Williams	720 Hockessville Road Hampstead, MD 21074	Transfer 2018-07-10-063403	UNVALIDATED
Maria Williams	3	Tresh Williams	720 Hockessville Road Hampstead, MD 21074	Transfer 2018-07-10-063403	UNVALIDATED
Zayne Williams	4	Cooper Williams	5346 Lumbus Drive Sparks, MD 21152	Transfer 2018-07-10-063403	UNVALIDATED
Shaula Wright	4	Martha Wright	2110 Bay Ridge Avenue Annapolis, MD 21412	Transfer 2018-07-10-063403	UNVALIDATED
Nager Wright	5	Martha Wright	2110 Bay Ridge Avenue Annapolis, MD 21412	Transfer 2018-07-10-063403	UNVALIDATED
Hope Zimmerman	4	Aime Zimmerman	145 Dulaney Hills Drive Towson, MD 21283	Transfer 2018-07-10-063403	UNVALIDATED

**Convert the updated student import record.**

- Click on the Convert Household icon to the right of the student's information.

**This household requires validation!**

1. Please enter information into all required fields.
2. Confirm the contact information is correct.
3. Update the student grade level to the correct grade for the 18-19 school year.

**Hold on one moment!**

You are trying to covert a household that has missing or invalid information.

Please correct all errors and fill in all required fields before continuing.

You may see an alert on the student's contact information screen. Read through the alert information and perform the suggested activity(s), such as:

- entering information into required fields
- correcting errors or
- updating data

**Duplicate Household Found**

We found another household that we think matches the one you are trying to convert.

Household you are converting	Household we think matches
<b>Address</b> 15 Dulaney Hills Timonium, MD 21093 USA	<b>Address</b> 15 Dulaney Hills Timonium, MD 21093 United States of America
<b>Parent</b> Thomas Dissinger CTN Username: demotom.dissinger@hometown.com	<b>Parent</b> Thomas Dissinger
<b>Student</b> Everett Dissinger (Grade: 4) CTN Username: edissinger3	<b>Student</b> Eric (Grade: 4)

Delete the import record  
 Just add student to existing household  
 Add entire household anyway

### Duplicate Household Records

When you try to convert a student that has the same Street Address as another student, you will be prompted to take an action. This functionality is used to align all of the students that are members of the same family or share the same Learning Guide. The choices available are:

- Delete the import record
- Just add student to existing household
- Add entire household anyway.

You will want to carefully review the data on the left side of the screen (the student you are importing) and compare it to the data on the right (a household that already exists in Access).

- Click on a convert option and then click the **[Continue]** button.

Method	Reason to use and Results
<b>Delete the import record</b>	Choose this option if you think the student you are converting may actually already exist. (The student name is the same on both sides of the screen.) This will remove the imported unconverted record entirely.
<b>Just add student to existing household</b>	Choose this option when the student is a family member of the existing household. The parent or learning guide for the family will be able to view the converted student's curriculum and grades in CTN.
<b>Add entire household anyway</b>	Choose this option to create a new household/family with the converted student's address. The imported student will be a separate household and the associated Parent will only be able to see the new student's CTN data.

## Review Converted Households and Students

After converting imported students, you will be able to review the households and associated students in the Manage Households screen. Scroll through or use the search box to locate a converted family. Households that have more than one student, will display all of the associated members along with the grade level, parent and contact information.

Name	Students	Grades	Parents	Address	Email	Phone
Adams	Jennifer, Jane	5, 4	Milly	2333 Warren Ave Cockeysville, MD 21030 United States of America	demo+jenjen@fakemail.com	301-895-1416
Adams	Katy	3	Karen	45 Main St Hanover, PA 36225 United States of America	demo+kadams@kidmail.com	410-926-9744
Atkinson	Faye	3	Sarah	9881 Southwest Place Monkton, MD 21111 United States of America	demo+fatkinson@kiddomail.com	301-895-1416
Baldwin	Jack	10	Terry	50 Amber Lake Baltimore, MD 21236 United States of America	baldmom@demogmail.com	
Bates	Catherine	5	Andrew	127 Lakeshore Blvd Monkton, MD 21111 United States of America	demo+cbates@kiddomail.com	301-895-1417
Boyd Davis	William	3	Martha		demo+billyboyd@kidmail.com	(410) 555-1212
Bradley	Daniel	3	John		demo+dannyboy@fake.com	(410) 555-1212
Brown				33512 Tractor Way Ocean City, MD 21889 United States of America	abrown@guerrasio.com	(555) 222-9874
Burwell	Carter	3	Calvin	256 Pulver Place Monkton, MD 21111 United States of America	demo+cburwell@kiddomail.com	410-555-7874

Clicking on the last name for the household (in the first column) will display all of the information for the family and learning guide. You can modify the contact information for the family or create and enroll additional siblings from the Modify Household screen.

**Modify Household: Adams**

Household Name: Adams

Household Email: demo+jenjen@fakemail.com

Household Phone: (932) 000-XXXX

Address Line 1: 2333 Warren Ave

Address Line 2: Type here...

City: Cockeysville

State/Province/Region: MD

ZIP/Postal Code: 21030

Country: United States of America

Active

Parents: Milly Adams

Students: Jane Grade: 4 JAdams1 1 Order(s); Jennifer Grade: 5 1 Order(s)

Buttons: Cancel, Save



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## Student Withdrawals, Cancellations and Returns

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Previous to this recent release of Calvert Access, schools have requested student Withdrawals, Cancellations, and Returns by sending a template email to Calvert Support. That method was a temporary process and we are now able to provide this full-service functionality to you through the [Calvert Access](#) platform. Moving forward, you should begin submitting these requests directly into the same system where you created the original enrollment order. Your school's Access Administrator or Purchasing Agent can initiate these requests from the Order Manager page, after locating and clicking into the student's order.

### Process Overview

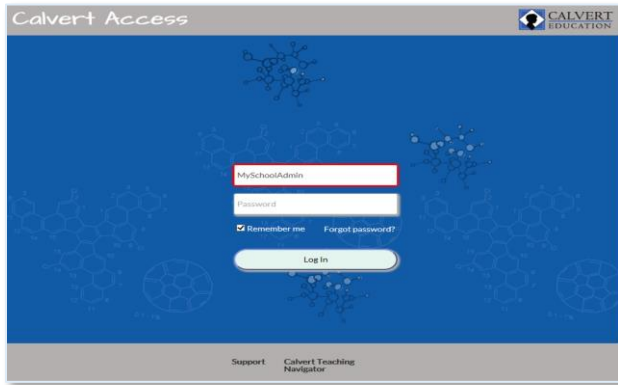
The overall procedure involves locating a student's order in the Order Manager screen then clicking into each specific order that has the items that need to be cancelled.

- You can remove all of the items on an order
- just specific items on an order (*e.g.* if you accidentally ordered the wrong elective, you will be able to cancel just that part of the order).
- and make multiple return requests to an order.

After locating the order, follow the steps below to process the requested withdrawal/cancellation/return. Upon submitting the request in Access, you will get an automated email indicating that Calvert has received the request. The Operations team will review your request, approve or deny it, and issue another email with the status and Return Merchandise Authorization (RMA) information if relevant. (Denied requests are rare and the customer is contacted directly to provide context or answer questions.) Approved requests are then finalized by our finance department and the online products are de-provisioned.

Below are step-by-step instructions for initiating and tracking Withdrawals, Cancellations and Returns.

## Steps to Withdraw, Cancel or Return a Student's Courses

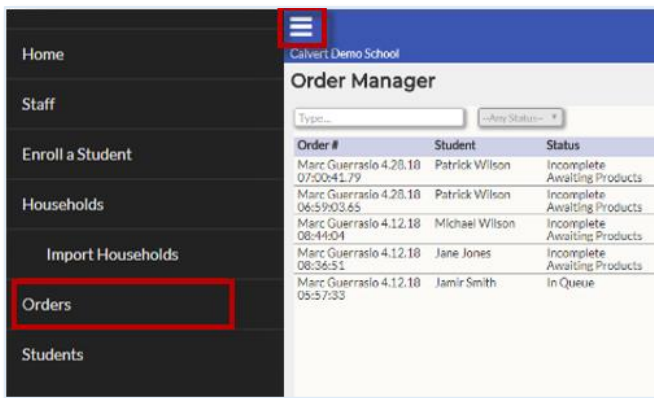


Log into Calvert Access using an Administrator or Purchasing Agent role.

- Enter the following URL into a browser  
<https://access.calverteducation.com>

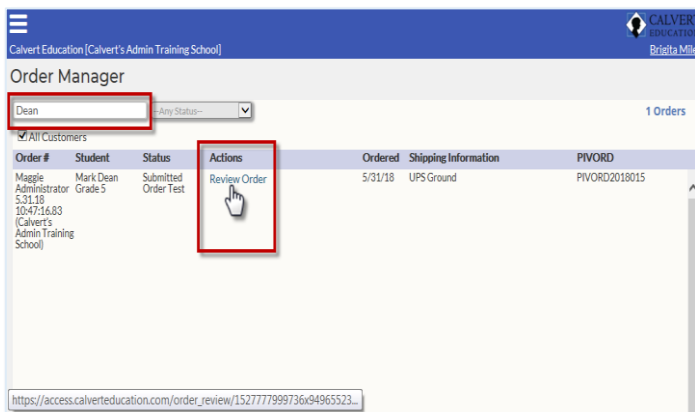
Cancellation and Returns are processed from the Order Manger page.

- Click on the Collapse Menu icon in the upper, left corner to reveal the left-nav menu.
- Click on **Orders** to go to the Order Manager page.

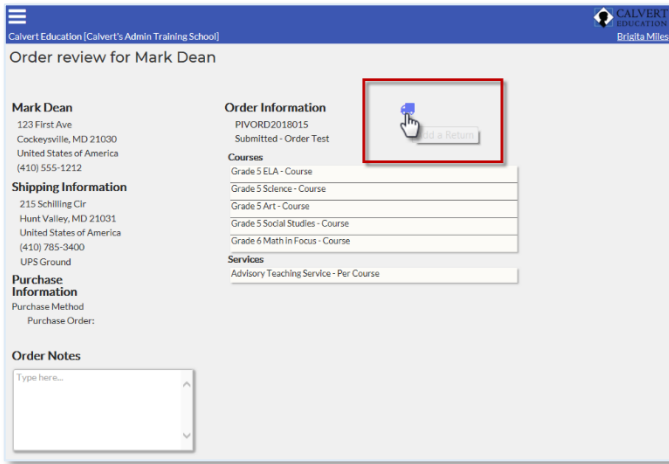


Search for the student's order(s) in Order Manger

- Enter the first or last name of the student into the search window in the upper left area of the Order Manager page.
- Click on the [Review Order](#) link under the Actions column.

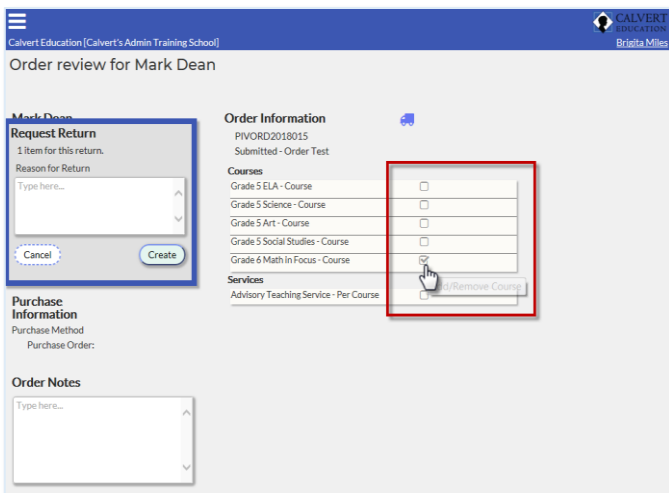


**NOTE:** If this is a withdrawal and the student's academic year was requested on several orders, then the cancel request will need to be processed on all of those orders.



### Add a Return to a previously submitted order.

- Click on the truck icon in the Order Information area to “Add a Return”



### Choose the items that need to be returned.

- The Request Return window will appear to the left of the Order Information and check boxes will appear to the right of each item that can be returned.
- Click in the check box next to the items that need to be returned.
- You can choose one, several, or all of the items that have a check box.
- If you choose a course that has associated print materials, the system will automatically check off the related print materials item.

**NOTE:** You are not able to return a course and keep the print, but you can return the print and keep the course.

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EDUCATION  
Bridgetta Miles

Order review for Mark Dean

**Request Return**  
1 Item for this return.

Reason for Return  
Family wants to stay with Grade 5 math for this student

Cancel Create

**Order Information**  
PIVORD2018015  
Submitted - Order Test

**Courses**

Grade 5 ELA - Course	<input type="checkbox"/>
Grade 5 Science - Course	<input type="checkbox"/>
Grade 5 Art - Course	<input type="checkbox"/>
Grade 5 Social Studies - Course	<input type="checkbox"/>
Grade 5 Math in Focus - Course	<input checked="" type="checkbox"/>

**Services**  
Advisory Teaching Service - Per Course

**Purchase Information**  
Purchase Method  
Purchase Order:

**Order Notes**  
Type here...

### Enter a Reason for the Request and click Create

- You must type in the reason for requesting the Return, this is a required entry.
- Click on the [Create] button.

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EDUCATION  
Bridgetta Miles

# 1 (10/17/18) created!

Order review for Mark Dean

**Mark Dean**  
123 First Ave  
Cockeysville, MD 21030  
United States of America  
(410) 555-1212

**Shipping Information**  
215 Schilling Cir  
Hunt Valley, MD 21031  
United States of America  
(410) 785-3400  
UPS Ground

**Purchase Information**  
Purchase Method  
Purchase Order:

**Order Notes**  
Type here...

**Order Information**  
PIVORD2018015  
Submitted - Order Test

**Courses**

Grade 5 ELA - Course	
Grade 5 Science - Course	
Grade 5 Art - Course	
Grade 5 Social Studies - Course	
Grade 5 Math in Focus - Course	Pending

**Services**  
Advisory Teaching Service - Per Course

### Verify the return was successfully created

- You will see a status message and date stamp appear at the top of the screen when a request has been created.
- You will also see a Pending icon appear next to the return items.
- The request has been sent to the Operations team to be reviewed and approved or denied.

**NOTE:** Most requests are immediately approved within 2-3 business days (during non-peak season)

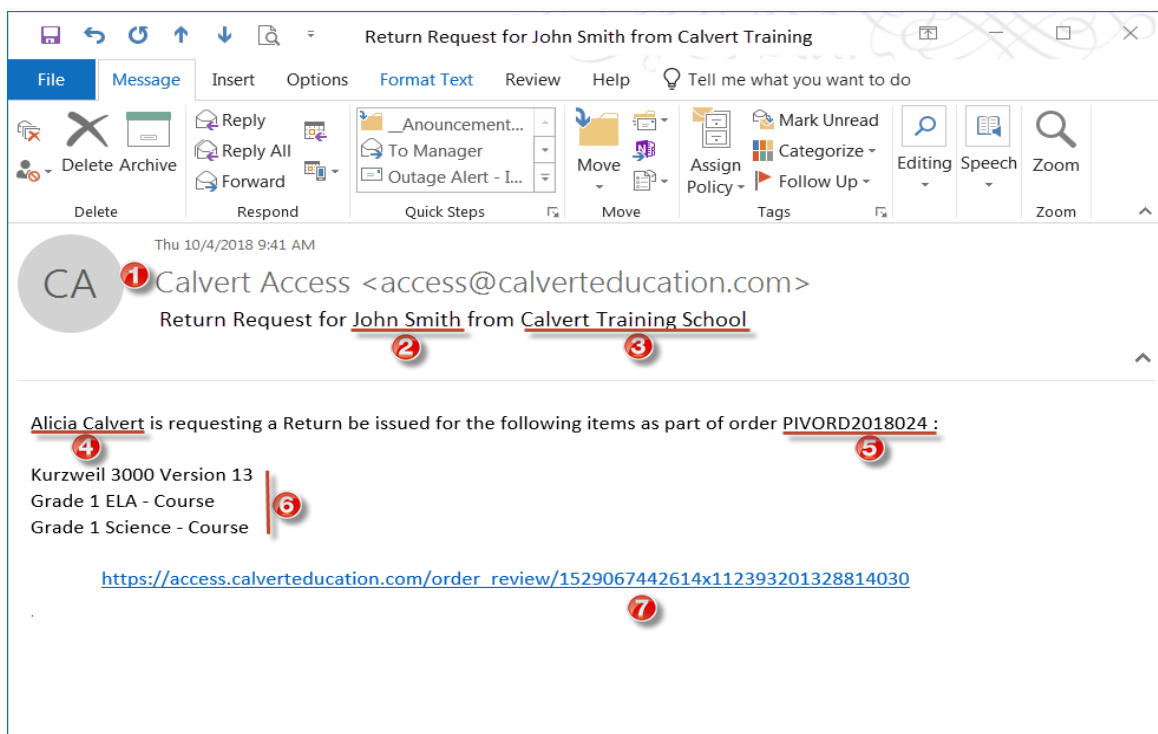
Most requests are immediately approved, but some examples of when a request is not approved are:

- A request to return was revoked by the school within seconds of making the request, possibly if entered in error. Forward a copy of the email receipt received to [withdrawals@calvertservices.org](mailto:withdrawals@calvertservices.org) and append the subject with Cancel Request.
- It is well outside of the return window to cancel and return the materials (based on our standard policy or as stated in the contract).

Denied requests are rare and will include a communication between the requester and a member of the Operations team or your school's Calvert Program Manager to provide context or answer any questions.

### Email Receipt for Return Request

Upon successfully submitting a request through Access, you will receive an automated email as a record of the requested return. The email will show the following:



1. The sender address of [access@calverteducation.com](mailto:access@calverteducation.com)
2. the student's name
3. the school's name
4. the requester's name
5. the associated PIV order number
6. and all of the items on the request
7. a link that you can click on to view the request

## Reviewing and Monitoring the Status of a Request

In the Order Manager screen, an order will have a truck icon indicating requested returns. If more than one request is made for an order, you will see separate timestamps in the Order Manager screen. You can drill into the order to see which specific items were returned by clicking on the [Review Order](#) link under the Actions column. You will see a Pending “truck” icon next to each item.

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Order Manager

Type... Submitted Filter: from 5 Orders

All Customers --Any Substatus-- mm/dd/yyyy

Order #	Student	Status	Actions	Ordered	Shipping Information	PIVORD
6.15.18 08:57:22.21	Jojo Smith Grade 1	Submitted Order Test	Review Order	6/15/18	FedEx Ground	PIVORD2018024
Maggie Administrator 5.31.18 12:14:33.81	Daniel Bradley Grade 3	Submitted Order Test	Review Order	5/31/18	UPS Ground	PIVORD2018016
Maggie Administrator 5.31.18 10:47:16.83	Mark Dean Grade 5	Submitted Order Test	Review Order  Has Returns	5/31/18	UPS Ground	PIVORD2018015
Maggie Administrator 5.31.18 09:47:47.17	William Boyd Grade 3	Submitted Order Test	Review Order	5/21/18	FedEx 2 Day	PIVORD2018014
Maggie Administrator 5.30.18 09:43:44.13	Shannon Franklin Grade K	Submitted Order Test	Review Order	5/30/18	UPS Ground with Adult Signature Required	PIVORD2018012

Calvert Education [Calvert's Admin Training School] Brigita Miles

### Order review for Mark Dean

**Mark Dean**  
123 First Ave  
Cockeysville, MD 21030  
United States of America  
(410) 555-1212

**Shipping Information**  
215 Schilling Cir  
Hunt Valley, MD 21031  
United States of America  
(410) 785-3400  
UPS Ground

**Purchase Information**  
Purchase Method  
Purchase Order:

**Order Information**

PIVORD2018015  
Submitted - Order Test

**Courses**

Grade 5 ELA - Course
Grade 5 Science - Course
Grade 5 Art - Course
Grade 5 Social Studies - Course
Grade 6 Math in Focus - Course  Pending

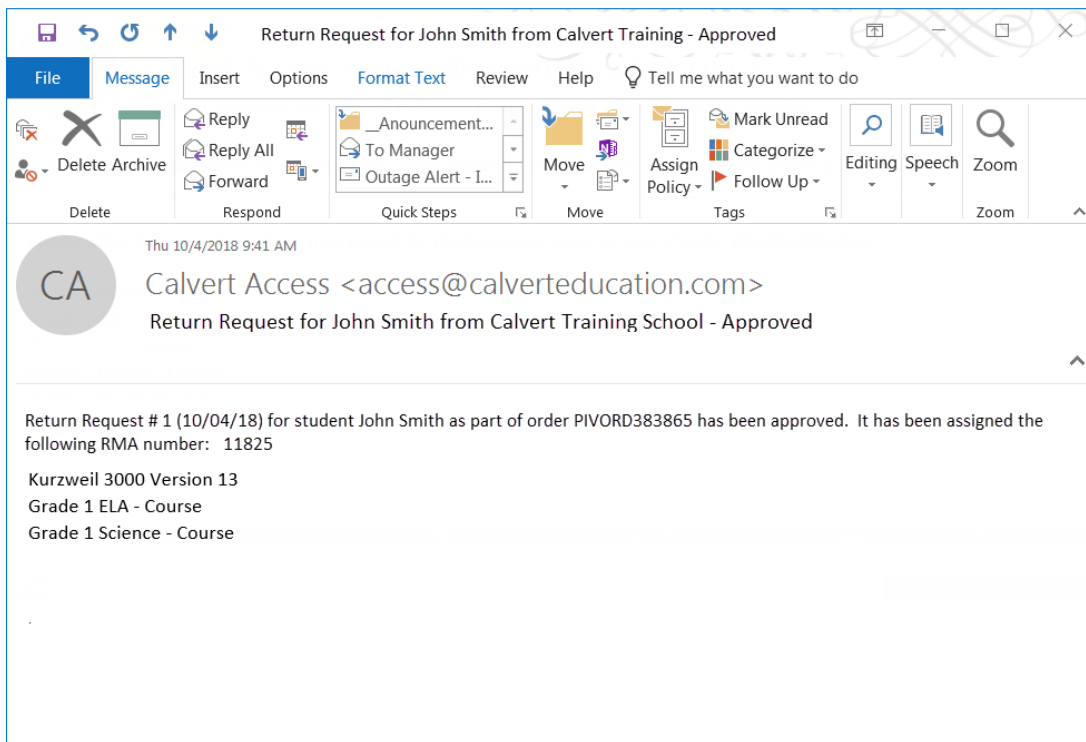
**Services**  
Advisory Teaching Service - Per Course

### Approved Requests

When a request has been approved by the operations team, the pending status on the line item in the order will include the date it was approved.

Courses	
Grade 3 Science - Course	# 1 (10/05/18)
Grade 3 Science - Print Add-On	# 1 (10/05/18)

The requester will receive an email indicating that their request was approved. If there is an associated RMA, then the RMA number will appear in the message. Typically, you can expect a response time of 1-3 business days during our peak order processing season, and 1-2 business days during general, non-peak time.



### **Denied Requests**

If the request was denied, all record of the return request is removed from Access. The pending status and icon will not appear on the order in Access, but you will still have an email record that it was denied. Denials are usually accompanied by additional conversation or interaction with the operations team or the school's Calvert Program Manager.

### **RMA's**

RMA's are only issued if there are printed materials that need to be returned. If a request is made outside of the standard return policy (or otherwise stated in your contract), then we may not issue an RMA to return the materials. If the RMA is issued, then it will appear in the approval email (see depiction above).

### **Instructions for RMA Returns**

When preparing to send your materials please follow these instructions:

Please do not use any printed materials such as newsprint or magazines to fill voids in the box. The ink from these items can bleed onto the textbooks and other materials causing damage. You will be responsible for any such damage incurred.

- Please label the box(es) clearly.
- Ensure that the box(es) are securely sealed.
- Please adhere to the address format outlined below.
- Do ensure that the RMA# and Student are written on the box as well as on the shipping label.
- Return Address information:

C/O Calvert Education  
 RMA#: 12536 Student Name: \_\_\_\_\_  
 2200 Ampere Drive  
 Louisville, KY. 40299



## De-provisioning

A student may continue to have access to courses in CTN during this turn-around time. The active flag in the student setup will be tied to logic in an upcoming version release, where you will not be able to deactivate unless a cancellation/return has been requested and approved. The CTN administrator can move the student out of their classes in CTN if necessary.

## Returning Printed and other Materials

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Please note the following when sending printed or other materials

- Printed Add-Ons and print-only courses like PreK, Calvert Math and Verticy should be returned to Calvert (with an RMA) if within the Return window.
- For truly digital courses you are not expected to return anything as there is nothing to physically return but you are expected to submit a Cancellation/Return Request.
- There are seven “Digital Only” K-8 courses that come with required print materials and we may include these items in an RMA that is issued for Print Add-Ons and Print-only courses
- We do not require returning these (required print) materials to Calvert
- Some customers will get these back from the family and use them as a “replacement or resource library” of their own or simply dispose of them.

## Missing, Damaged or Wrong Materials

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Occasionally, a recipient may discover that their shipment has arrived with missing, damaged or wrong items. Please report missing, damaged or wrong course materials to Calvert through our online support request widget.

You can access the ticket widget from this link: <http://support.calverteducation.com/support/>

We will need the following information in order to research and resolve your request:

### Help & Support

✉ ImaAdmin@myschool.edu

👤 Ima Admin

🔍 2018/2019 Missing or Damaged Item Replacement Request

**B** *I* U

1. **Student Name**
2. **School Program**
3. **Describe Issue: Missing Item/Damaged Item/Wrong Item**
4. **List of missing/damaged/wrong item(s) based on packing slip**
5. Ideal- Missing/damaged/wrong item codes from packing slip
6. Ideal- PIVORD# on packing slip

📎

Requester's Name: ★

Student(s) Name: ★

Are you enrolled through one of our partner schools?

How is this affecting you? ★

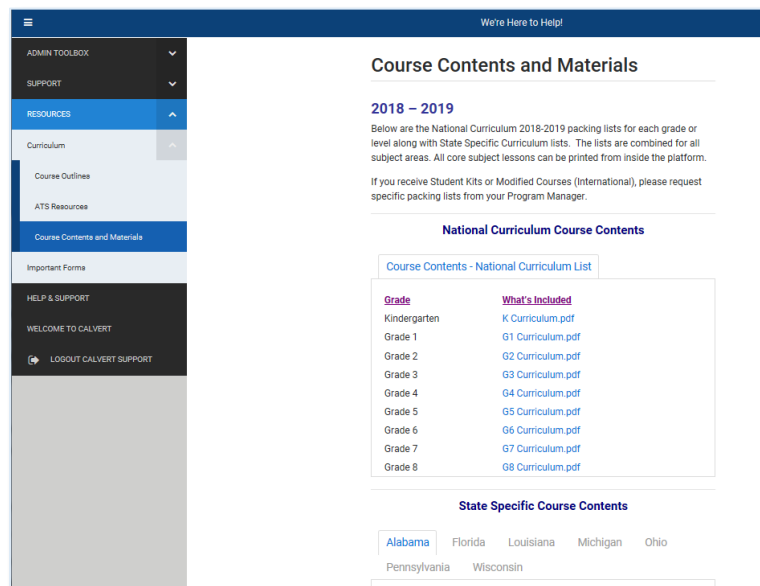
I want to talk to: ★

Reason for Sales & Enrollment Support: ★

- The subject must be:
  - 2018/2019 Missing or Damaged Item Replacement Request
- The body of the ticket must include:
  - Student Name
  - School Program Name
  - Describe the Issue: (Missing Item, Damaged Item or Wrong Item)
  - List of missing, damaged, or wrong item(s) based on the packing slip
- Ideally, you should include:
  - Missing, damaged, or wrong item codes from the packing slip
  - The PIVORD# on the packing slip

## Opening the Box

This process is similar to prior years, although what makes up our product has changed. The school or family will receive their delivery which may be one or more mailer or box depending on the order makeup, the order may consist of Kit, Components or a blend of both. With each shipment the customer will be provided packing lists to review their shipment to verify they have received everything they should have. The lists of Course Contents for the National Curriculum can be downloaded from the Calvert Support website through this link for the [Digital Experience & Course Materials](#). The administrator login for the Calvert Support Site also has the state specific course contents for Alabama, Florida, Louisiana, Michigan, Ohio, Pennsylvania, Wisconsin. Log into <http://support.calverteducation.com/> with an Admin role, then click on Resources → Curriculum → Course Contents and Materials.



Customers have 30 days from receipt of shipment to identify any missing materials and notify Calvert Education in order to receive reshipment at no charge.

## Shipment Summary

After opening the box you should review either the Shipment Summary section of the Shipment Notification email you received, or the shipping label on the box(s) to ensure your delivery contains all the Kits/Components associated with your order.

### Shipment Notification Email

Here is an example of the Shipment Summary section of the Shipment Notification email, (your actual email view may vary):

Shipment Summary				
Offer ID	Description	Backorder Quantity	Prior Shipped Quantity	To Ship Quantity
G3ELAPAO	Grade 4 Math in Focus - Lesson Manual	0	0	1
G4CMC	Grade 2 ELA - Lesson Manual	0	0	1
G3SCIPAO	Grade 3 Science - Print Add-On	0	0	1
G3SOCPAO	Grade 3 Social Studies - Print Add-On	0	0	1
G3ELALM	Grade 3 Social Studies - Print Add-On	0	0	1
G3SCILM	Grade 3 Science - Lesson Manual	0	0	1
G3SOCLM	Grade 3 Social Studies - Lesson Manual	0	0	1

Please note that the Shipment Summary will only contain physical items. No online items or services will be listed here.

Freight Carrier	Freight Service Description	Ship Date	Tracking #	Tracking Hyperlink
FEDEX GROUND	Ground Home Delivery	07/18/2018	XXXXXXXX	<a href="#">XXXXXXXX</a>

- Backorder Quantity – indicates that one or more items in the order are listed as backordered and not included in this shipment.
- Prior Shipped Quantity – indicates that one or more items were shipped in a prior shipment.
- To Ship Quantity – indicates that one or more items were shipped in this shipment.

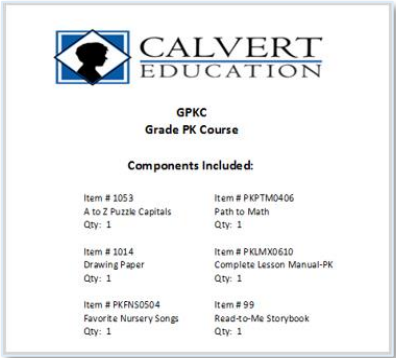
**Shipping Label**

Here is an example of the shipping label affixed to the box(s), (your actual shipping label may vary):

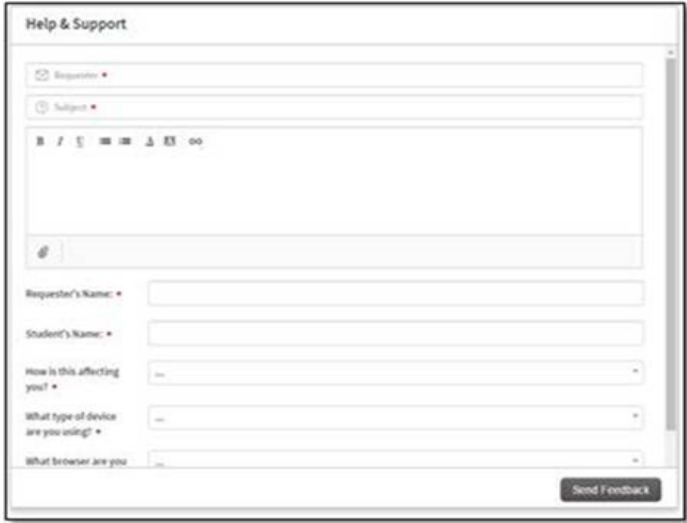


**Kit Packing List**

Kits are made up of one or more components. If the kit includes more than one component, we will provide you a Kit Packing List to use to confirm you received all the components associated with the kit. Customers have 30 days from receipt of shipment to identify any missing materials and notify Calvert Education to receive reshipment at no additional charge.



## How to get Help from Calvert Support

Support	Method of Contact
<p><b>Program Manager</b></p>	<p>Please call or email your school’s Program Manager for any assistance you may need generating or sending your order.</p>
<p><b>Web Ticket</b></p>	<p><a href="https://calverteducation.freshdesk.com">https://calverteducation.freshdesk.com</a></p> 
<p><b>Self Service Web Site</b></p>	<p><a href="https://support.calverteducation.com">https://support.calverteducation.com</a></p> 