

Material Management and Additional Materials Order (AMO) Guidelines

The following guidelines are provided to assist you in the process of managing paper/pencil testing materials and placing orders for additional materials, if needed.

#	IF...	THEN
1	Testing on paper and materials haven't been received...	<ul style="list-style-type: none"> • Check PearsonAccess^{next} for status of initial shipment. • From Setup > Add'l Material Order Tracking, search to find your order. • Change the search to find orders during a specific period of time by changing the setting in the box next to the Search button. • Use the filters on the left to filter by Organization Type (initial or additional). • Click on the blue information bubble next to the order number to view order details. • Order details are found on the four displayed tabs – Details & Status, Ship To, Materials Order, Shipments. • Note: Freight orders are not displayed in Add'l Material Order Tracking. If an initial shipment order isn't displayed contact Pearson Help Desk (866-683-6668) to see if the order was shipped via freight. For additional information on freight shipments following guideline #2.
2	Summary or detail information of shipped test materials is needed...	<ul style="list-style-type: none"> • From Reports > Operational Reports select Report Category – Orders & Shipment Tracking • Select Material Summary to create a report summarizing materials shipped (across orders) at the selected organization. • Select Material Detail to create a report detailing materials shipped (across orders). When created at the corporation level, this report will display materials by school. • Note: this report will NOT show the status of backordered items.



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3	Packing Lists or breakdown of materials by box are needed...	<ul style="list-style-type: none"> From Reports > Operational Reports select Report Category – Orders & Shipment Tracking Select Packing List to create a packing list view of a specific order. Enter the specific order number displayed on the Add'l Material Order Tracking page.
4	Initial shipment of materials doesn't match enclosed packing list or if quantity received is insufficient...	<ul style="list-style-type: none"> Survey all schools for material shortages. Use corporation overage to fill school orders first. Consolidate school orders and place AMO through PearsonAccess^{next} following steps in guideline #5.
5	Additional materials are needed...	<ul style="list-style-type: none"> Place AMO through PearsonAccess^{next}. From Setup > Add'l Material Order Tracking, click the Select Tasks drop-down and select Create/Edit Orders. Click Start. Select Create Additional Order. Enter the required detail about the order. Click Add Items under Materials Order. Enter the amount of each item and click Save. Click Create.
6	Testing online and a paper version is needed for a student with an accommodation...	<ul style="list-style-type: none"> Use the Part 2 materials list found on page 22 of the ISTEP+ Spring 2017 Test Coordinator's Manual to determine materials needed. Place AMO through PearsonAccess^{next} following steps in guideline #5.
7	Unable to find status or view details of AMO...	<ul style="list-style-type: none"> Check PearsonAccess^{next} for status and order details, following the steps in guideline #1.
8	AMO was approved but unable to locate shipment information and tracking number...	<ul style="list-style-type: none"> Find order details by following steps in guideline #1. Tracking numbers for each box are located on the Shipment tab.



9	Practice Test Examiner's Manuals are needed...	<ul style="list-style-type: none"> Place AMO through PearsonAccess^{next} following steps in guideline #5. OR download practice test examiner's manuals from the IDOE – Test Coordinator Corner Learning Connection Community.
10	Edits need to be made to a submitted AMO...	<ul style="list-style-type: none"> Check status of order in PearsonAccess^{next}. An order in a "submitted" status may be edited. From Setup > Add'l Material Order Tracking, search to find your order. Click the Select Tasks drop-down and select Create/Edit Orders. Click Start. Select your order from the Additional Orders list. Click Add/Edit Items under Materials Order. Enter the amount of each item and click Save. Click Save. A new order will need to be created if the order has a pending, processing, transit or delivered status.
11	An AMO needs to be cancelled...	<ul style="list-style-type: none"> Check status of order in PearsonAccess^{next}. An order in a "submitted" status may be edited. From Setup > Add'l Material Order Tracking, search to find your order. Click the Select Tasks drop-down and select Cancel Orders. Click Start. Select your order from the Additional Orders list. Click Cancel Orders. Click Exit Tasks. An order in a "submitted" status may be cancelled. If order has a pending or processing status, contact Pearson Help Desk (866-683-6668) to see if the order can be cancelled.
12	STC wants to place AMO...	<ul style="list-style-type: none"> AMOs are placed by CTCs. STCs should contact their CTC for additional materials.