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Introduction to the User Guide

This user guide describes the features of the Smarter Balanced Assessment Consortium (Smarter Balanced) Reporting System, and provides detailed instructions for using each feature, including common scenarios that encompass related features.

Organization of the User Guide

This User Guide is organized into the following major sections:

- **Overview of the Reporting System**: provides a brief introduction, including the Reporting System's relationship with other Smarter Balanced applications, and an overview of user roles and permissions
- **Accessing the Application**: describes how to log in and out of the application, and how to switch to other Smarter Balanced applications
- **Understanding the User Interface**: outlines the overall layout of the system, including navigation, common tools and tasks, and profile management
- **Reporting Features in Detail**: outlines each reporting feature in depth, with step-by-step instructions
- **Error! Reference source not found.**: outlines steps users can take when the application is not behaving as expected

Document Conventions

Text

- **Bold Text** refers to a page element, such as a menu, page name, or field name
- **Bordered Blue Text** refers to a selectable button
- **Underlined Blue Text** refers to a link

Asides

The content blocks below will be used to call attention to a tip, note, caution, or warning that will help users maximize the usefulness of the Reporting System.

**Tip**

**Tip**: This symbol appears next to text that contains a helpful tip. Sample text included so this wraps across two lines.

**Note**

**Note**: This symbol appears next to text that contains helpful information or reminders. Sample text included so this wraps across two lines.
Caution

**Caution**: This symbol appears with text that contains important information regarding a task. Sample text included so this wraps across two lines.

Warning

**Warning**: This symbol appears with text that contains extremely important information regarding actions that may cause errors.

Intended Audience

This user guide is intended for teachers, school administrators, district administrators, and state education agency staff who need timely and accurate reports on student performance on Smarter Balanced assessments. Users should be familiar with web applications, entering data into form fields, and working with comma-separated value (CSV) files.
Overview of the Reporting System

The Smarter Balanced Reporting System allows teachers and administrators to access detailed student performance information for Smarter Balanced assessments. Authorized users of the system can view student data at the district, school, and grade levels. Users with the required permissions may also view, download and print individual student reports.

Browser Requirements

The application is intended to be accessed using a browser from a computer or tablet. It is compatible with all modern browsers, including Google Chrome, Mozilla Firefox, Microsoft Edge, and Apple Safari.

Relationship to Other Applications

The Reporting System is related to the following Smarter Balanced applications:

- **Administration and Registration Tools (ART)**: manages user registration and administration for access into Smarter Balanced applications such as the Smarter Balanced open-source Reporting System and Digital Library.
- **Single Sign On (SSO)**: manages user authentication and authorization, and allows users to log in to other Smarter Balanced applications such as the Digital Library without re-entering credentials.
- **Permissions**: authorization and control list to allow access into the Smarter Balanced services.
- **Test Delivery System (TDS)**: delivers assessments to registered students.
- **Digital Library**: provides subject- and grade-specific instructional and professional development resources intended to help educators apply the formative assessment process during daily instruction.

User Roles and Permissions

Access to student information in the Reporting System depends on the user’s role and the school(s) and district(s) with which that account is associated.

For example, teachers may have permission to view reports for students in their student groups; school administrators may view results for all students in their school; and district administrators may view results for all students in their district. The application has six primary user roles that can be assigned within ART to a specific school, district or state, listed here with a brief description:

- **PII_GROUP**: Allows access to reports and personally identifiable information (PII) for the students in groups to which the user was assigned. This role is intended for teachers.
- **PII**: Allows access to reports and personally identifiable information (PII) for the students in institutions (school, district, state) to which the user is assigned. This role is intended for administrators and others responsible for reporting at the institutional level.
- **GROUP_ADMIN**: Allows a school or district administrator to create/manage groups within the school or district to which they are assigned.
Reporting System User Guide

- **INSTRUCTIONAL_RESOURCE_ADMIN**: Allows a state, district, or school administrator to create/manage links to instructional resources within the institution to which the user is assigned.
- **EMBARGO_ADMIN**: Allows an administrator to control the release of summative test results within the institution to which the user is assigned.
- **CUSTOM_AGGREGATE_REPORTER**: Allows an administrator to generate aggregate reports of student assessment results within the institution to which the user is.

The table below shows the permissions associated with each role. Note that each role only has permission for its own school, district or state.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Associated Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create assigned student groups</td>
<td>GROUP_ADMIN</td>
</tr>
<tr>
<td>Edit assigned student groups</td>
<td>GROUP_ADMIN</td>
</tr>
<tr>
<td>Delete assigned student groups</td>
<td>GROUP_ADMIN</td>
</tr>
<tr>
<td>Create custom student groups</td>
<td>PII_GROUP</td>
</tr>
<tr>
<td>Edit custom student groups</td>
<td>PII_GROUP</td>
</tr>
<tr>
<td>Delete custom student groups</td>
<td>PII_GROUP</td>
</tr>
<tr>
<td>View individual student results by student group</td>
<td>PII_GROUP, PII</td>
</tr>
<tr>
<td>View individual student results by district, school and grade</td>
<td>PII</td>
</tr>
<tr>
<td>Search for students</td>
<td>PII_GROUP, PII</td>
</tr>
<tr>
<td>View student test history</td>
<td>PII_GROUP, PII</td>
</tr>
<tr>
<td>Export results as CSV</td>
<td>PII_GROUP, PII</td>
</tr>
<tr>
<td>Print individual student report</td>
<td>PII_GROUP, PII</td>
</tr>
<tr>
<td>Print student group batch report</td>
<td>PII_GROUP, PII</td>
</tr>
<tr>
<td>Print school and grade batch report</td>
<td>PII</td>
</tr>
<tr>
<td>Create/view/export custom aggregate reports</td>
<td>CUSTOM_AGGREGATE_REPORTER, PII</td>
</tr>
<tr>
<td>Edit embargo settings</td>
<td>EMBARGO_ADMIN</td>
</tr>
<tr>
<td>Edit instructional resource links</td>
<td>INSTRUCTIONAL_RESOURCE_ADMIN</td>
</tr>
</tbody>
</table>

**Note**: Student groups are distinguished into two types: assigned student groups, which are created by administrators for teachers, and custom student groups, typically created by teachers for their own use. To these users, the two group types appear as Assigned Groups and My Groups respectively.

**Understanding the Reporting System Hierarchy**

The Reporting system hierarchy organizes students and entities. For the purposes of this user guide, the term “entity” refers to institutions and groups of institutions, (e.g., state, districts, groups of districts, schools, groups of schools, and student groups). The figure below shows a simple hierarchy. In this case, a student is a member of a student group, a student group is at a school, the school is in a district, and the district is in a state. Within ART, it is possible to construct hierarchies with different structures as well.
A user may be granted permissions to view test results at a school, a group of schools, a district, or a group of districts. As shown in the organization hierarchy, each level grants permissions for all levels below it. For example, a regional administrator for a group of schools will have permissions for every school in that group. Or, an administrator for a group of districts will have permissions for every district in that group, and every school in each of those districts. This allows districts and schools to be organized into more manageable regions.
Accessing the Application

This section explains how to log in and out of the Reporting System, and the Single Sign On (SSO) feature.

Logging In

To log in to the Reporting System, users must have an authorized username (email address) and password. The Reporting System uses an integrated Single Sign On (SSO) system that allows users to log in one time and access any Smarter Balanced applications for which they are authorized. For example, usernames and passwords already assigned for the Digital Library will allow access to the Reporting System provided specific Reporting System permissions have been granted. Users who do not have login credentials for the Reporting System should contact the appropriate administrator.

**Warning:** Do not share login credentials with anyone. Access to student information is protected by federal privacy laws, and many instances of accounts being hacked are due to “social engineering”, whereby hackers exploit users through phone calls, social media, “phishing” attacks, and more to steal login information.

1. Open the web browser and navigate to the Reporting System landing page ([https://reporting.smarterbalanced.org/](https://reporting.smarterbalanced.org/))
2. Select the Log In button to go to the Single Sign On screen
3. Enter username (email address) and password
4. Select the Log In button:
   a. If the login credentials are correct, users are redirected to the Reporting System home page
   b. If login credentials are incorrect, a notification appears
Users may log out by following the steps below:

1. Select the Welcome [Name] menu in the upper right corner
2. Select the Logout menu item
3. The Reporting System landing page will appear 

Note: Select the Forgot Your Password? link to reset a password.
Understanding the User Interface

Home Page

When users log into the Reporting System, they are directed to the Home Page. This page allows users to perform tasks allowed per their assigned roles (e.g., the Home Page for teachers with only the PII_Group role does not display the Administrator Tools or Search by School features). Tasks include searching for assessment results, generating various reports, and performing administrative tasks, as shown below:

The elements of the home page are:

1. **Search by Student**: Search for assessment results for a specific student. See the Search by Student section for details.

2. **Search by School**: Search for assessment results for students of a specific grade or multiple grade within one or multiple schools. See the Search by School section for details.

Note

Item level data and session IDs are not available for tests administered prior to the 2017-18 school year.
3. **Search by Group**: View assessment results for a group of students. See the [Search by Group](#) section for details

4. **Administrator Tools**
   - **Custom Aggregate Report**: Generate a customized report of student performance. See the [Custom Aggregate Report](#) section for details
   - **District / School Exports**: Export a CSV file of assessment results for one or more schools and/or districts. See the [District / School Exports](#) section for details
   - **Student Groups**: Create and manage student groups for teachers. See the [Manage Student Groups](#) section for details
   - **Instructional Resources**: Upload instructional resources in the system. See the [Manage Instructional Resources](#) section for details
   - **Embargo**: Manage embargoes of summative results. See the [Manage Embargoed Results](#) section for details

5. **My Reports**: Allows access to all reports that have been generated by the user in the last 30 days. See the [My Reports](#) section for details

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**Note:** Only elements of the homepage (and the entire system) that are relevant to the user’s roles will be available to a user.

### Navigation and Menus

Navigation within the Reporting System is straightforward, and primarily relies on hyperlinks to drill down into further detail. There are links across the top of the page to access this User Guide and the Interpretive Guide that is designed to help educators understand and effectively use the results of the Smarter Balanced assessments.

When a user navigates to a page, a navigation path appears showing the current location within the system, and an icon to navigate back to the home page. Each item in the path is separated by a slash ("/"), representing the path from the home page to the current page. In the example below, the user is on a screen presenting results for student responses. To return to the home page, the user can click on the home icon (shown with red highlight).

```
Groups / Student: Dixon, Donald / Student Responses
```

### General Tools

In addition to basic navigation, there are tools used throughout the site to search for, select, and display information:

#### Dropdowns

Dropdown lists are common in web applications. The Reporting System uses multiple types of dropdowns to present and organize information.
Basic Dropdown
The basic dropdown contains a short list of fixed information, to allow easy and predictable navigation. Simply select to access the list.

Dropdown with Search
Some dropdown lists may have hundreds or thousands of items. In those cases, a search field allows users to type to filter. These dropdowns filter based on any match within the value, so a search term of “oak” would match “Oak Persimmon School”, “Elaenia Oak School”, and other schools with “oak” somewhere in the name.

Tip: Typing at least 3 characters will provide better performance in narrowing search results.

Dependent Dropdowns
Dependent dropdowns are two (or more) related dropdowns, where a value must be selected in the first dropdown before the second dropdown is selectable. In the example below, the user must select a school name before selecting the grade.
Live Search

Some input fields include “live search”, in which matching results are displayed as the user types. In the example below, the value entered retrieves matches anywhere within the group name.

Export / Download

Users may export selected reports to a file in comma-separated value (CSV) format by selecting the Export CSV button.

Some screens in the application allow users to download reports. In the screenshot below, from the My Reports page, selecting the Download Report Data menu option for a report name will download the report to the user’s computer.
The location of exported and downloaded files is dependent on the web browser used to access the Reporting System. Please see the web browser’s user guide for more information.

**Context Menus**

Context menus provide additional options for a button or icon. For example, when users select the [Student Reports] button, a context menu pops up with the ability to filter by **School Year**, and sort by one of the **Sort Order** dropdown values.

When users select the icon next to a student, a small context menu pops up with additional links specific to that student.
Column Ordering
Any tabular data containing columns which can be reordered by the user will have a column ordering control. This allows the user to move any selected column left or right, to reorder the columns as desired. Examples shown below:

If the user selects the Academic Year button and then selects the left arrow twice, the tabular data will appear as shown below:

Columns can also be reordered by simply dragging and dropping them with the mouse (left click, hold, drag, and release).

Sorting
Tabular data are presented with column headers, and any sortable column will display up and down arrows. Select a column name to sort by that column and select it again to reverse the sort order. The
Currently sorted column (and direction) are shown in a lighter gray color. In the example below, the results are sorted (ascending) by the students’ last names.

**Expand / Collapse**

Additional up and down arrow icons are provided to show/expand and hide/collapse results. These icons are displayed when a page contains information that might either be shown or hidden by default. For example, selecting the applicable icon with text (e.g., Expand All) will expand all results for all hidden items. Selecting the icon with the arrow only will expand or collapse that item only.

**Toggle Buttons**

Some values and data types can be displayed in different formats and/or view preference. For these content types, there is a display toggle button for each option. Select the button associated with the preferred format or view preference. In the examples below, the currently selected value is shown with either a gray background or blue highlight.

**Advanced Filters**

Test results have advanced filtering capability, which uses a variant of toggle buttons to allow users to select what to display in a report. As with toggle buttons, select the value to display; selected values are shown with a blue background.
Buttons
Selectable buttons may appear in different colors, depending on their purpose (buttons which generate reports and access Instructional Resources appear green). Typical buttons have a blue background and send or retrieve information when selected. If required information is missing, the button will be disabled, in which case it will not be selectable, and a gray circle with a line will appear when attempting to select the button. To enable the button, provide the required information in the associated text field(s) or dropdown(s).

Add / Remove Icons
Elements with an icon can be removed by selecting the icon. When it is possible to add elements to a list, a icon will appear next to the list. Select the icon to add a new element to the list.
Informational Icons

Whenever an informational icon (ℹ️) is displayed, users can select it to see an explanation of the term it accompanies. For example, when selecting the icon next to a table column, a popup displays with additional information.
Reporting Features in Detail

Accessing Assessment Results

There are several tools available to quickly search for assessment results by school, student, or group. Depending on the user’s permissions, one or more of these tools will be available on the Assessment Results home page.

Search by Student

If user permissions allow, the Search by Student panel will appear on the home page. Users can quickly search for a specific student using the Statewide Student Identifier (SSID).

1. Type the student’s SSID into the box. The full SSID must be entered to search for a student.
2. Select the Search button (or select enter).
3. If the SSID matches a student record with available assessment results and the user has permission to view that student’s information, the Student Test History Report page will be shown.

4. If the SSID doesn’t yield test results, a message will be displayed indicating that the user does not have permission to view that student’s information or there are no test results available for the student.
Student Test History Report
Once a student has been selected by SSID, the Student Test History Report page is displayed for that student, as shown below.

In addition to identifying the selected student and his/her SSID, the Student Test History Report page includes the following elements:

1. Selectors to choose which school years and subjects to display, or “All” of the years and all of the subjects for which assessment results exist for the student
2. An Advanced Filters selector which shows or hides a filter panel to more precisely select which assessment results to view (see below for a description of the Advanced Filters panel)
3. The assessments that match the school year, subject, assessment type, and Advanced Filters settings
4. A button to export all of the student’s test history to a CSV file for download
5. A button to select and download a printable report in PDF format
Advanced Filters

The **Advanced Filters** panel (element 2, as illustrated in the Student Test History Report section) allows users to filter the assessment results to view only selected types of assessments.

1. **Currently selected filters**: selecting the icon will remove the filter
2. **Assessment filters**, which include:
   a. **Off-Grade Assessments**: show results for all assessments regardless of whether the test taker’s enrolled grade matches the assessment grade, or hide results when the enrolled grade and assessment grade do not match
   b. **Manner of Administration (for interim)**: the way in which the test was administered in terms of protocols and security procedures (Standardized/Nonstandardized)
   c. **Valid/Invalid (for Summative assessments only)**: a test is noted as invalid if an appeal is submitted to invalidate the test due to a test irregularity or breach (not shown)
   d. **Complete/Partial**: indicates whether the test taker provided an answer for every question
3. A **Collapse Results** toggle that collapses the bottom half of the panel, leaving only the selected filters displayed. This toggle becomes an **Expand** toggle when the panel is collapsed and reopens the assessment filters panel

**Note:** The **Valid/Invalid** filter is not shown when the available assessment results do not include any summative assessments. Similarly, the **Manner of Administration** filter would be disabled if no interim (IAB or ICA) results were available.
Printable Reports

The Printable Reports button (element 5, as illustrated in the Student Test History Report section) opens a popup menu that allows users to generate and download a PDF report of student assessment results, as shown below.

The selections available for Assessment Type, Subject, and School Year are limited to the data available in the student’s test history. For example, if the student has not taken a Math assessment, the Subject dropdown will not include “Math”.

The report’s name defaults to the student’s name, but can be modified (to define the report more clearly if preferred). The New Students option may be selected to either show or not show any assessments from previous schools, if the student changed schools during the school year. The Student Accommodations option may be selected to either show or not show any accommodations made available to the student during testing.

Selecting the Create button will generate the report for the selections in the popup menu.

Export CSV

The Export CSV button (element 4, as illustrated in the Student Test History Report section) generates a CSV file for download containing all of the student’s test history for the selected School Year and Subject. An example of this file opened in Microsoft Excel is shown below.

Note: This feature does not include designated supports such as popup glossaries at this time.
Student Test History Report Results

The Student Test History Report results (element 3, as illustrated in the Student Test History Report section) are displayed in a dashboard format with each assessment that matches the selectors and advanced filters appearing as a separate card. A sample card is pictured below:

Each card contains:

- An icon representing the type of assessment
- The date the assessment was administered
- The student’s enrolled grade when they took the assessment
- The name of the assessment
- The student’s achievement level or reporting category for this assessment

Selecting anywhere within this card will cause a table of additional information to appear. Depending on the type of assessment chosen, this table will contain slightly different information.
For IAB assessments this table appears as follows:

In addition to the data described above, this table displays the status (Standardized, Nonstandardized, or Partially Complete) and the Scale Score / Error Band of each result.

- The reporting category (Below Standard, Near Standard, Above Standard) is based on the minimum scale score for the “Met Standard” achievement level on the ICA and Summative assessments. See the Interpretive Guide for additional information.
- The student’s error band is based on the Standard Error of Measurement (SEM) associated with the score.

Selecting the date with the icon brings up the Student Test History Report Details Menu

For ICA and Summative assessments, the table appears as follows:
The Overall Scores tab of this table is similar to the IAB table, but includes the student’s achievement level on the test (Did Not Meet Standard, Nearly Met Standard, Met Standard, Exceeded Standard) based on the scale score.

The table also includes buttons to toggle the scores between Overall Scores and Claim Scores, with Overall Scores being the default view. Selecting the Claim Scores button changes the view to show student’s scores on the various claims assessed, as shown in the image below.

For the selected ICA assessment above, claim scores are provided for “Concepts and Procedures”, “Problem Solving …”, and “Communicating Reasoning”. Claim scores are reported as Below Standard, Near Standard, and Above Standard. See the Interpretive Guide for additional information. Selecting the Overall Scores button returns to the default Overall Scores view.

Selecting the date with the icon brings up the Student Test History Report Details Menu.

**Student Test History Report Details Menu**

Each row in the Student Test History Report includes a context menu that provides access to additional information, as shown below.

For all interim assessments, this menu gives the user direct access to the student’s item responses (see Student Responses section) for the selected assessment. For IAB results, this menu also has a link to the Smarter Balanced Connections Playlists in the Smarter Balanced Digital Library as well as any Instructional Resources identified by the user’s state or district.
Student Responses

The **Student Responses** table includes student responses to interim assessment items.

Selecting an assessment item’s icon expands the row to allow drill-down into the item to view additional details:

The **Item Viewer** tab displays the interim assessment item as it appeared on the test and the student’s response. The item number is shown at the top-left for the item being viewed. This view is read-only; there are no user-editable fields.

The **Rubric and Exemplar** tab functions as described in the **Rubric and Exemplar** section. The **Item Information** tab functions as described in the **Item Information** section.
Search by School
If permissions allow a user to access student results for an entire grade or multiple grades within one school or multiple schools, the **Search by School** panel will be available on the home page. This panel allows quick access to assessment results by school and grade.

To search for a school:

1. Select the search box to expand the **Search by School Name** list. Schools are listed alphabetically by name and grouped by district.
2. Scroll through the full list to select a school or type the name of a school in the search box to find a specific school. As a user types, the list of schools accessible to the user (dependent upon granted access) will be filtered to only show school names that have matching text anywhere in the name.
3. Select the name of a school to select it.
4. If results are available for more than one grade at the school, select the desired grade using the **Grade** dropdown. If only one grade is available, it will be selected.
5. Select the **Search** button to search for assessment results for the selected school and grade.
6. If results are available, the default assessment results will be shown.
7. If no results are available a message will be displayed on the assessment results page.

Student Results by School and Grade
Selecting a school and grade for which assessment results exist displays the results page. The image below shows the top panel on that page.

This panel allows users to select the specific assessment results they want to view by:

1. Changing the school, assessment grade, or school year from which to select assessments  
2. Showing or hiding the **Advanced Filters** panel to more precisely select the results to view  
3. Selecting one or more assessments for which to view results  
4. Toggling between only the most recent assessments or the selected assessments  
5. Generating and downloading student assessment results reports, and test history results by entire district or filtered by school(s)
Student Assessment Results Report

The **Printable Reports** button (element 5, as illustrated in the Student Results by School and Grade section) opens a popup menu that allows users to create a report of student assessment results for a group of students, as shown below.

The selections available for **Assessment Type**, **Subject**, and **School Year** are limited to the data available for the group of students. For example, if no student in the group has taken a Math assessment, the **Subject** dropdown will not include “Math”.

The report's name defaults to the group's name but can be modified to define the report more clearly if preferred. The **New Students** option may be selected to either show or not show any assessments students took at previous schools during the school year. The **Student Accommodations** option may be selected to either show or not show any accommodations offered to students during testing (note that this feature does not include designated supports such as popup glossaries).

Selecting the **Create** button will generate the report for the selections in the popup menu.

Student Results Advanced Filters

The **Advanced Filters** panel functions the same as previously described in [Advanced Filters](#).

Selected Assessments

By default, the system displays the most recent assessment for the selected school, grade and school year, and the **Most Recent** button is selected. Selecting the **Select Assessments** button or the 🔽 icon opens a lower panel that displays all available assessments as shown below.
Selecting an assessment in the lower panel adds it to the list of selected assessments in the upper panel and adds its results to the **Results** panel as shown below. Clicking on a selected assessment de-selects it and removes its results.

**Search by Group**

The **Search by Group** panel on the home page displays a list of groups to which the current user has access. Selecting one of the group names in the list opens the **Groups** page for that group so the user can select and view assessments for the group.
Filter by Group Name
If there are a large number of available groups, a live search box will appear above the list to assist in finding the desired group. The process is:

1. Begin typing the name of a group in the **Search by Group Name** text box.
2. The list of groups shown will be automatically filtered to only show groups that match the entered characters.
3. Select the desired group from the filtered list.

No Groups Shown
A message will be shown if no matching groups are found. This could be because there are no assigned groups or because the search string does not match any of assigned groups. The displayed error messages are different in these two cases.

Case 1: No groups are available to current user:

Case 2: No groups match specified search string:
Searching My Groups
Teachers may create customized groups of students in addition to their Assigned Groups. These will appear in a second tab called My Groups, which is next to the Assigned Groups tab. Search functionality for My Groups is identical to Assigned Groups. See the next section for instructions on creating customized groups.

Creating My Groups
Teachers can create customized groups of students selected from their Assigned Groups by selecting the +Create button on the My Groups tab panel. This will bring up a New Group definition screen.
The process for creating the group is:

1. Select a group from the **Group** entry box. Clicking on this box will display a dropdown list of all assigned groups. Typing directly into the box will activate a live search to filter this list.
2. Select the group from which you want to create a new group. The students panel will be populated with the list of students in the selected group.
3. If necessary, filter the student list by entering characters into the **Student Name or SSID box**. It is also enabled for live search, and will filter the student list by the matching the entered characters.
4. **Advanced Filters** may also be used to filter the student list. See more about their use below.
5. Select students for the new group. The added students will appear in the panel to the right of the page.
6. Repeat steps 1 - 5 for additional assigned groups. The new group may contain students from multiple assigned groups.
7. Remove any students accidentally added to the new group by selecting their names in the new **Student list** in the right panel. Select **x Remove All Students** to clear the list and start over.
8. Select + Add All Students to add all of the students in the Assigned group to the new group.
9. Name the new group by entering it into the **Group Name** box in the right panel.
10. Select the tested subjects for the group using the **Subjects** buttons.
11. Select the **Save** button to create the new group or select the **Cancel** button to cancel creating a new group and return to the **My Groups** list.

Before saving, the right panel should appear similar to this one:

![Group Name and Students Panel](image)

After the new group is saved, it will be displayed in the list in the **My Groups** panel:
A group may be edited by selecting **Edit** in its row. The edit screen will also contain a **Delete** button, which allows the teacher to delete the new group from the system.

**Caution**: The delete action is permanent and cannot be undone.

**Note**: If a teacher does not have any assigned groups, then it is not possible to create custom groups. In this case the **Create** button is disabled.

### Using Advanced Filters
Advanced filters can ease the task of selecting students for the custom groups in **My Groups**. Selecting the **Show** button under **Advanced Filters** in the **New Group** page opens the filter controls.
These controls can be used to filter the list of students from the selected assigned group. Only the students that match the configured filters will be displayed. This makes it easier to identify and select students by subgroup. When filters are selected, the Show / Hide button displays a number indicating the number of configured filters. This number persists even when the Advanced Filters panel is toggled back to hidden.

**Note:** Filters only affect the list of students to be selected. The list of already selected students is not affected by adding or removing filters.

**Select Group Name to View Results**
Selecting a Group Name in the list takes users to the Groups page for that group. This is true whether the group being selected is one of the Assigned Groups or one of the customized groups from My Groups.
Student Group Assessment Results

Assessment results for student groups are accessed by selecting a group using the **Search by Groups** panel. Once a group has been selected, the results for that group are displayed. The way results are displayed varies by the type of assessment, but all results have the **Groups** panel as shown below.

Use the **Groups** panel to:

1. Select a different student group or school year for which to view results
2. Show or Hide the **Advanced Filters** panel to precisely select which results to view
3. Select the assessments for which to view results
4. Toggle between viewing results for each student's most recent assessment or the selected assessments
5. Buttons allow jumping to the IAB Dashboard, exporting data for a district or school, or downloading PDF reports of assessment results for students in the selected group (see IAB Dashboard and Student Assessment Results Report sections for details).

**Note:** **District/School Exports** button will not appear for teachers.

Selected Assessments

**Selected Assessments** works as described previously in **Selected Assessments**. Please see that section for details.

Assessment Results

The **Results** panel for an Interim Assessment Block (IAB) is shown below. One **Results** panel will be displayed for each assessment that was selected in the **Selected Assessments** panel as described previously. Assessments can include IAB, ICA, or summative.
Each IAB Results panel displays the following information and elements:

1. The name of the assessment.
2. The testing session(s) from which results are displayed.

3. **Results Summary**: The average scale score for the selected group of students and an error band based on the Standard Error of the Mean (SEM) associated with that score. Also shown is the number of student test results from which the scores are calculated.

4. The **Student Score Distribution** for the selected results
5. The **Select a results view** drop down offers the following options for display results:
   - Results By Student (default view)
   - Results By Item
   - Key / Distractor Analysis (for selected-response items)
   - Writing Trait Scores (for ELA Performance Tasks only)

**Tip**: Users can select a testing session to include its results in the combined results shown in the Student Results table. Selecting it a second time removes the session from the results.

**Note**: Test scores are estimates of student achievement and come with a certain amount of measurement error. See the Interpretive Guide for additional information about scale scores and measurement error.
6. The results, with sortable columns and additional information icons
7. The Instructional Resources button that shows related instructional resources from the Digital Library and the user’s state or district, if available
8. The Show Percentiles button which, if selected, displays the percentiles tables, and toggles to a Hide Percentiles button which, if selected, hides the percentiles tables
9. The Show value as toggle, which shows the student score distribution in percentages of students or numbers of students in each reporting category
10. The Collapse All button, which hides the Results table for all the displayed assessments, and toggles to an Expand All button, which displays the results again
11. The Export CSV button gives the option to download the results in CSV format
12. The Collapse Results button, which toggles to an Expand Results button, offers the same functionality as the Collapse All button, explained in item 10 above, but only applies to a single assessment

IAB Results By Student
When the Results By Student option is active, the IAB results panel shows a results table with the assessment results for each individual student. The table has sortable columns and additional information icons as shown below:

The table includes the following information for each student:

- Student’s full name
- Date of assessment
- Test session
- Enrolled grade at the time of the assessment
- The school where the student was enrolled at the time of assessment
- The assessment status, which includes whether it was Standardized or Nonstandardized or partial or complete
- The score reporting category, which is Below Standard, Near Standard, or Above Standard, as well as a link (open icon) to Instructional Resources for each of these categories
• The student’s scale score on the assessment and the error band based on the Standard Error of Measurement (SEM) associated with that score

**Note:** Smarter Balanced test scores are on a vertical scale, meaning that scores for all grades are reported on a single continuous scale to reflect the increased expectations as students advance through the grades. The error band is included because test scores are estimates of student achievement and come with a certain amount of measurement error. See the Interpretive Guide for additional information about scale scores and measurement error.

• A context menu icon allows a user to access a popup menu that allows further selections of student details to be made, see Student Options section

**Student Options**

When the context menu icon next to a student’s name is selected, the following popup menu appears:

![Select a results view](image)

The menu options are:

• **Responses**: Display the student’s responses to each item on the assessment. See the Student Responses section for details

• **Test History**: Display the test history of the student. See the Student Test History Report section for details

• **Print Full IAB Report**: Links to a printable Student Report in PDF format. The selections that are already known in the context of the IAB results, such as the Assessment Type, Subject, and School Year are auto-filled. See the Student Report section for details

**Note:** The performance standard is based on the minimum scale score for the "Met Standard" achievement level on the Interim Comprehensive and Summative assessments (the score that separates Levels 2 and 3). See the Interpretive Guide for more information on scale scores and reporting categories.
IAB Results By Item

When the Results By Item option is active, the IAB results panel shows a results table with an aggregate view of how the students performed on each item. The table has sortable columns and additional information icons as shown below:

![IAB Results By Item](image)

The data shown in the Results By Item view shows how the students performed overall on each assessment item, as described below.

1. **Item #**: the number of the item in the order it was presented to the student
2. **Claim / Target**: the topic area and particular knowledge and skills tested by the item

**Note**: Claims and targets are a way of classifying test content. The claim is the major topic area. For example, in English language arts, reading is a claim. Within each claim, there are targets that describe the particular knowledge and skills that the test measures. Each target may encompass one or more standards from the Common Core State Standards. Within the Reading claim, for example, one of the targets is concerned with finding the central idea in a text. For more information, see the Smarter Balanced Content Specifications for [math](#) or [English language arts/literacy](#).

3. **Item Difficulty**: item difficulty (easy, moderate, difficult) is based on the difficulty of the item for students in a reference population (Note: The reference population for an item consists of all the students who took the test the year the item was field-tested.)

**Note**: See the Interpretive Guide for a description of the reference population and how the difficulty categories are derived.

4. **Standard**: Common Core State Standard(s) related to the item
5. **Full Credit**: the percentage/number of students in the selected group who earned the maximum number of points for the item
6. **0, 1, 2, 3**: the percentage/number of students who earned each possible score-point level on the item

Users may sort by each of these categories of information to quickly identify items of interest. Additionally, an Export button is available to export the results of the report to a CSV file.
IAB Results By Item Details

Selecting an assessment item’s icon expands the row to reveal additional details about that item:

Student Scores and Responses

The Student Scores and Responses tab lists each of the students in the selected session(s) and the points earned by the student for each item, as shown above. For each student, it displays the student's name, the date and test session, the student's enrolled grade, and school. The report shows the number of points the student earned on the item, the maximum points available for the item, and the correctness of the student's response, which is the ratio of the student's points to the maximum points. For example, a student who earned 1 point out of a maximum of 2 would have a correctness value of 0.50.

Selecting a student's icon displays the assessment item the way the student viewed it when they took the assessment, and the student’s response. The item number is shown at the top-left for the item being viewed. This view is read-only; there are no user-editable fields. An example is shown below.
The Item Viewer tab displays the assessment item as it appeared on the test but does not show the student's response. The item number is shown at the top-left for the item being viewed. This view is read-only; there are no user-editable fields. An example Item Viewer is shown below.
Rubric and Exemplar

The **Rubric and Exemplar** view displays the answer key, or exemplar and the rubric for the assessment item.

---

**Select a results view**

<table>
<thead>
<tr>
<th>Item #</th>
<th>Claim/Target</th>
<th>Item Difficulty</th>
<th>Standard</th>
<th>Full Credit</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Reading - Informational Text / Target 15</td>
<td>Difficult</td>
<td></td>
<td></td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Student Points and Responses**
- **Item Viewer**
- **Rubric and Exemplar**
- **Item Information**

**Key:** C

---

The **Exemplar** provides the correct answer and, in some cases, multiple correct answers. For selected response test items (e.g., multiple choice, multiple select, or evidence-based selective response items) a **Key** (answer key) is shown.

The **Rubric** can also describe the point values associated with specific responses, as show below:

---

**Rubric**

<table>
<thead>
<tr>
<th>Points</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Response is an evidence-based explanation that provides two pieces of evidence from different sources that support this idea and that explains how each example supports the idea. Student cites the source for each example.</td>
</tr>
<tr>
<td>1</td>
<td>Response is an evidence-based explanation that provides two pieces of evidence from different sources that support this idea but doesn’t explain how each example supports the idea. Student cites the sources.</td>
</tr>
<tr>
<td>0</td>
<td>Response is an explanation that is incorrect, irrelevant, insufficient, or blank.</td>
</tr>
</tbody>
</table>

---

**Exemplar**

<table>
<thead>
<tr>
<th>Points</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Source #5 describes how...</td>
</tr>
<tr>
<td>1</td>
<td>Source #5 describes how...</td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
Item Information

The **Item Information** view displays a detailed description of the assessment item.

Elements shown in the **Item Information** view may include:

- **Claim** – the major topic area of the test item content
- **Target** – the particular knowledge and skills measured by the test item
- **Depth of Knowledge (DOK)** – the level of cognitive demand this test item requires; includes a link to the DOK matrix
- **Item Difficulty** – one of three possible values: Easy, Moderate, Difficult; includes a link to the Item Difficulty Descriptors
- **Common Core State Standards (CCSS)** – the content standard(s) that define what students should understand and be able to do
- **Mathematical Practice Standard** – for math questions, the CCSS Standards for Mathematical Practice describe the varieties of expertise that mathematics educators should seek to develop in their students
- **Calculator** – for math questions
- **Supporting Documentation** – a link to the Interpretive Guide
Key / Distractor Analysis
The Key / Distractor Analysis feature allows the user to evaluate whether there may have been common areas of misunderstanding among students who chose incorrect answers (called "distractors") in selected response items.

1. When the **Key / Distractor Analysis** option is active, the results panel shows an aggregate view similar to that of the **Results By Item** table, but with the percent distribution of student responses by answer option, as shown below:

The **Key/Distractor Analysis** table appears as described in the [IAB Results By Item](#) section, with the following difference:

2. The columns indicating students score-point level are replaced by columns which indicate the percentage/number of students who selected each answer choice. The correct answers are highlighted in green.

   ![Select a results view](image)

3. Selecting an item’s icon expands the row to reveal additional details (see the [IAB Results By Item Details](#) section).

4. Users may sort each column to quickly identify items of interest. Additionally, an **Export** button is available to export the results of the report to a CSV file.
Writing Trait Scores

Writing trait scores are displayed for ELA Performance Task IABs that include a written extended response (essay) item.

1. Selecting the Writing Traits Scores from the results view panel shows a Results By Item table with an aggregate view of how the students performed on the extended written response item. Only items with writing trait information are listed, as shown below:

   ![Select a results view](image)

   The Results By Item table appears just as described in the IAB Results By Item section, with the following differences:

   2. A new column, Writing Purpose, displays the purpose of the writing tasks (argumentative, explanatory, informational, narrative, or opinion)

   ![Points Distribution](image)

   Note: The columns indicating the percentage/number of students who scored at each possible score-point level on the item are not displayed.

   3. Selecting an item’s icon expands the row to allow viewing of the item and additional information about the item (see the IAB Results By Item Details section).

   4. Additionally, the Writing Trait Scores view shows a Points Distribution table.

   5. Each row lists the category of writing performance, or writing trait, the average and maximum points for that category, and the percentage/number of students who earned each number of points for that category.

   6. The final row is for the transformed points calculated from all categories (see the Interpretive Guide for an explanation of how transformed points are calculated for extended written response items).

   ![Note](image)

   Note: The Points Distribution table is not sortable.

   7. An Export button is available to export the results of the report (both the Results By Item table and the Points Distribution table combined) to a CSV file.
Interim Comprehensive Assessment (ICA) Results

The **ICA Results** panel contains many of the same elements as the **IAB Results** panel and is shown below.

The **ICA Results** differ from the **IAB Results** in the following ways:

1. The **Student Score Distribution** has four achievement levels rather than three reporting categories.
2. The **Instructional Resources** button is not displayed because Instructional Resources are only linked to IAB results.

When the **Select a results view** dropdown selection is **Results By Student**, the **ICA Results By Student** table is displayed, which differs from the IAB **Result By Student** table (see ICA Results By Student section).
ICA Results By Student
The Results By Student table for ICA results can be toggled to show Overall Scores or Claim Scores. Overall Scores is the default selection.

ICA Results By Student Overall Scores
When the Overall Scores button is selected, the ICA Results By Student view includes the information elements for each student shown below.

- Student’s full name
- Date of assessment
- Assessment session
- Student’s enrolled grade at the time of the assessment
- School where the assessment occurred
- The assessment status, which includes whether it was Standardized or Nonstandardized and partial or complete
- Student’s achievement level on the assessment, one of “Did Not Meet Standard”, “Nearly Met Standard”, “Met Standard”, “Exceeded Standard”
- Student’s scale score and score error band based on the Standard Error of Measurement (SEM) associated with that score
- A context menu icon provides access to additional student details (see Student Options section)
ICA Results By Student Claim Scores

When the **Claim Scores** button is selected the ICA Results By Student view changes to show each student’s assessment results by Claim, as shown below. Return to the default view by selecting the **Overall Scores** button.

Each student result in the **Claim Scores** view shows the following elements:

- Student’s full name
- Date of the assessment
- Test session
- School where the assessment was administered
- Student’s performance, noted as Above Standard, Near Standard or Below Standard, for each of the assessment claims. The example above shows the ELA claims, “Reading”, “Writing”, “Listening”, and “Research/Inquiry”.
- A context menu icon provides access to additional student details (see **Student Options** section)
ICA Writing Traits Scores
The ICA writing traits scores are similar to the IAB writing traits scores, but do not include an Instructional Resources button. Writing trait scores are available for ELA ICAs. A sample is show here:

Points Distribution
<table>
<thead>
<tr>
<th>Category</th>
<th>Average / Max</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evidence / Elaboration</td>
<td>2.1 / 4</td>
<td>29%</td>
<td>14%</td>
<td>0%</td>
<td>29%</td>
<td>39%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organization / Purpose</td>
<td>1.4 / 4</td>
<td>14%</td>
<td>57%</td>
<td>14%</td>
<td>0%</td>
<td>14%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conventions</td>
<td>0.6 / 2</td>
<td>71%</td>
<td>0%</td>
<td>0%</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transformed Points</td>
<td>2.6 / 6</td>
<td>14%</td>
<td>29%</td>
<td>0%</td>
<td>29%</td>
<td>14%</td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>

Summative Results
The Summative results panel contains many of the same elements as the ICA Results panel and is shown below.

The principal difference is that the Select a Results View drop down does not contain either Results By Item or Key / Distractor Analysis. These views are not available for Summative results. Also, this panel will contain Target Report, but only if the assessment’s subject has been configured to make target reports available.
Summative Writing Trait Scores
The Writing Trait Scores view for Summative results is similar to ICA and IAB ELA Performance Tasks, except that it only displays the Points Distribution table. It does not contain a Results By Item Section. Also, this table does not include a Transformed Points row.

<table>
<thead>
<tr>
<th>Category</th>
<th>Average / Max</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evidence/Elaboration</td>
<td>1.5 / 4</td>
<td>55%</td>
<td>17%</td>
<td>17%</td>
<td>53%</td>
<td>0%</td>
</tr>
<tr>
<td>Organization/Purpose</td>
<td>1.7 / 4</td>
<td>53%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Conventions</td>
<td>0 / 2</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

IAB Dashboard
The IAB Dashboard provides a summary of IAB assessments taken over the course of a school year for a group of students. The Dashboard also provides an easy way to select these assessments in order to generate a detailed assessment report. Selecting the View IAB Dashboard button on the Search Group panel will display this dashboard.

Note: The View IAB Dashboard button appears on both the Assigned Groups and My Groups panel, but it brings up the same dashboard page regardless of where it is selected.
The IAB Dashboard displays a quick-look summary of IAB results based on the selectors above. It shows the total number of students from the selected group and how many participated in each IAB, as well as basic performance statistics for each assessment. One or more of these assessments can then be selected and used to generate more detailed reports.

1. **Group** selector -- contains all the groups from the **Assigned Groups** and **My Groups** panels. It will default to a group belonging to the panel from which the **View IAB Dashboard** button was selected, but may be changed to any group from either panel
2. **School Year** selector -- the dashboard can only display IAB results from a single school year
3. **Subject** selector -- can be set to limit the displayed IABs to a single subject or set to **All**
4. **IAB** selection indicator-- When an IAB card is selected a checkmark appears, which indicates that this IAB is selected. Multiple IABs may be selected at the same time.
5. **View Assessments** button -- selecting this button will generate assessment reports for all the selected IABs. It is disabled until at least one IAB is selected.
Custom Aggregate Reports

Administrators with the CUSTOM_AGGREGATE_REPORTER role can create custom aggregate reports to see a summary of student performance in the user’s state, district, or school. The report can be broken down by student subgroups (e.g., race/ethnicity, gender) and may include summary information on performance at other levels (i.e., a school report can include a summary of performance in that school's district). Specialized reports allow tracking of performance broken down by claims and/or targets and tracking performance for groups of students over the course of multiple years.

The Custom Aggregate Report Query page is accessed by the Custom Aggregate Report button on the Home Page.

Selecting the button opens the Custom Aggregate Report Query page. This page allows an administrator to generate a report that includes selected data and filters. The data and filters are selected from each of the following sections of the page:

- Report type
- Schools and Districts
- Assessment Attributes
- Subgroup
- Advanced Filters
- Customized Subgroups

The page also provides administrators the ability to see a preview of the report, to name the report, and when the administrator is satisfied that all the settings are correct, to generate the report.
Report Type

The Report Type section of the page allows different report types to be selected. The Logitudinal Report and Target Report will only display if summative assessment results are available in the system.

1. Yearly Reports are the basic performance report. They summarize IAB, ICA, or summative assessment performance for student populations from one or more grade levels for one or more years.
2. Longitudinal Reports track summative assessment performance for a single student population as they progress through different grades. In addition to presenting tabular data, it includes a line graph showing how performance of the population changed from grade to grade. This report is only available if the reporting system includes summative assessment results.
3. Claims Reports are yearly reports that break down performance data by claim for the ICA and summative assessments.
4. Target Reports are yearly reports that break down performance by claim and target for the summative assessment only. Target reports are available for all ELA claims and the mathematics Concepts and Procedures claim only.
**Schools and Districts**

The **Schools and Districts** section of the page allows for specification of which districts and schools are to be included in the report, as shown below.

The **Schools and Districts** section provides the following functionality:

1. **Search a School or District** - Selection of a school or district to be included in the report. Users with district-level permission may select multiple schools or their entire district. Users with state-level permission may select multiple schools and/or districts.
2. **Districts** - Display of the selected districts to be included in the report
3. **Schools** - Display of the selected schools to be included in the report
4. **State results (Summatives only)** - If selected, the report will include state summative assessment results for each selected school and/or district
5. **School results for selected districts** - If selected, the report will include the results for each individual school within each selected district
6. **District results for selected schools** - If selected, the report will include a results summary for each selected school’s district
Assessment Attributes

The Assessment Attributes section of the page allows for specification of the following attributes to be included in the report, as shown below.

![Assessment Attributes](image)

The Assessment Attributes section provides the following attribute selections:

- **Assessment Type** - Choices are either ICA, IAB or Summative (if available).
- **Subjects** - Choices are Math, ELA, and any other subjects configured in your environment. The All option will cause the report to include results for all displayed subjects.

**Note:** Subjects can be configured to disallow Target Reports. If Target Report is the selected type, subjects that do not report target-level information will not be displayed as choices, and the report results will not include these subjects even if the All option is selected.

- **Assessment Grades** - One or more grades must be selected. A report will not be generated unless at least one grade is selected. For Target Reports, only a single grade may be selected.

**Note:** Longitudinal Reports track summative assessment performance for one student population as they progress through different grade levels, so at least two grades must be selected for this report type.
• **Academic Years** - One or more academic years must be selected. A report will not be generated unless at least one academic year is selected. For Target Reports, only a single year may be selected.

  **Note:** for Longitudinal Reports, only a single year can be selected, and it represents the year for the highest assessment grade selected above. For example, if the grades selected are 3 and 4 and the year is 2017-18, the results will include the population’s Grade 3 results for 2016-17 and Grade 4 results for 2017-18.

• **Manner of Administration/Validity**
  - If Assessment type is ICA or IAB, this attribute will be Manner of Administration and it defaults to **Standardized**. It can be changed to **Nonstandardized** to view results for non-standardized assessments only, or to **All**, which will generate a report with both types of administration.
  - If Assessment type is Summative, this attribute will be Validity. Choices are **Valid** or **Invalid**. The **All** option will generate a report with both valid and invalid results.

• **Completeness** - The default is **Complete**, but it can be changed to **Partial** for partial assessments, or to **All**, which will generate a report that includes results from assessments that are either complete or partial.

  **Note:** Assessments are considered complete when a student has provided a response to each item.

For Claim Reports only, an additional **Claims** button will appear in the Subjects panel. Selecting it will open a subpanel that allows specific claims to be selected. Only claims from the included subjects can be selected, and only the selected claims will appear in the generated claim report. For example, if the selections were as follows, the generated report would include all Math claims and also Reading, Writing, and Listening claims from ELA.
Subgroups and Filters
The Subgroups and Advanced Filters / Customized Subgroup panel provides two different strategies for configuring how student performance data are broken down within the report and how groups are filtered for inclusion in the report. These strategies are mutually exclusive, so at most one of these panels should be configured. The generated report will use the setting from whichever tab is currently selected.

Subgroups
Reports include aggregate values for each institution. The Subgroups section of the page allows a user to select additional student subgroups that will be compared within the report. Continuing the example from the Advanced Filters section, the user who has decided to filter for only male students may then use this section to compare results for male students by race/ethnicity. The available subgroups that can be specified are Gender, Race/Ethnicity, English Language Acquisition Status, Primary Language, 504, IEP, Migrant Status, Economic Disadvantage, and Student Enrolled Grade.
Advanced Filters

The Advanced Filters section of the page can be displayed by selecting the Show button below the Subgroup controls. It is useful when a user wants to focus on one or more student subgroups in a report and exclude all other students. For example, if a user wants to focus on male students only, selecting male for subgroup filter will generate a report that includes only results for male students. The available filters are Gender, Race/Ethnicity, English Language Acquisition Status, (Primary) Language, 504, IEP, Migrant Status, English Language Acquisition Status, and Economic Disadvantage.

Advanced Filters
Use this feature to include only selected student subgroups, e.g., only male Hispanic students.

**Gender**
- All
- Male
- Female
- Nonbinary

**Race/Ethnicity**
- All
- Hispanic/Latino
- American Indian or Alaska Native
- Asian
- Black or African American
- White
- Native Hawaiian or Pacific Islander
- Demographic Race of Two or More
- Filipino

**English Language Acquisition Status**
- All
- English Only
- English Learner
- Initial Fluent English Proficient
- Reclassified Fluent English Proficient
- To Be Determined

**Language**
- All
- Enter language

**504**
- All
- Yes
- No
- Not Stated

**IEP**
- All
- Yes
- No

**Migrant Status**
- All
- Yes
- No
- Not Stated

**Economic Disadvantage**
- All
- Yes
- No
Customize Subgroups

Customized subgroups provide complete control of which student groups are included in the generated report, and how the report data is broken down. It can be used in cases where the Subgroups and Advanced Filters do not provide enough flexibility. The controls are similar to the Advanced Filters, but allow multiple groups to be defined. The process is as follows:

1. Configure a subgroup using the filters as if creating an Advanced Filter
2. Select the +Create Subgroup button to add this group to the report
3. Repeat steps 1 and 2 to create additional subgroups

The report will include rows showing results for each the defined subgroups, as well as overall totals for all test takers. Keep in mind that the subgroups do not need to be mutually exclusive. For example, one
A subgroup could be defined as all males whose primary language is English and a second subgroup could be all English learners whose primary language is Vietnamese or Filipino. Depending on how subgroups are defined, some students could fall into multiple subgroups, while others fall into no subgroups at all. Therefore, the subgroup totals will not always sum to the overall totals.

**Note:** The Customize Subgroup configuration is not available for Target Reports.

### Report Review

The **Report Review** section of the page allows an administrator to review the selected criteria included in the report.

**Tip:** Each report is saved with the report name and can be accessed on the [My Reports](#) page, which is accessible from the home page. Save each report with a descriptive name that will allow it to be easily retrieved later. If no report name is entered, it will be saved as “Custom Aggregate Report”.

**Note:** All required fields must be populated before the report may be generated.
1. **Estimated row count**: Provides an estimate on how many rows the report will have, in order to provide some feedback on how large the report will be before generating it

2. **Report Name**: The report may be given a name here

3. **Generate Report**: The report may be generated by selecting this button

**Report Preview**

The **Report Preview** section of the page allows an administrator to see a preview of the selected attributes with mock data, as shown below, before generating the actual report.

The **Report Preview** section provides two additional viewing options:

1. **Column Order** - Allows the option to change your result column order to easily compare your results broken down in different ways.

2. **Show Value As** – Choices are **Percent** or **Number**.

3. **Show Achievement Levels** – Choices are either **All** or **Grouped**. If **All** is chosen, all four achievement levels are displayed in the report: **Did Not Meet Standard**, **Nearly Met Standard**, **Met Standard**, and **Exceeded Standard**. If **Grouped** is chosen, then **Did Not Standard** and **Nearly Met Standard** are combined into one result, labeled **Below Standard**. **Met Standard** and **Exceeded Standard** are combined into one result, labeled **At or Above Standard** (see below).
Generating the Custom Aggregate Report

The report is generated by selecting the Generate Report button on the left side of the page. The button is also available on the Report Review section of the page.

When this button is selected, a Custom Aggregate Report is generated and when completed, the report will be displayed in the Custom Aggregate Report page.

**Note:** The generation of this report may take several minutes.
The **Custom Aggregate Report** page has the following features/options:

1. The **Create New Query** button will go back to the **Custom Aggregate Report Query** page with the same settings that were used to generate this report. From here, the settings can be modified and used to generate a new report.

   **Tip**: Use the Create New Query button to quickly make adjustments to an existing report query

2. **Row count** indicates the total number of rows displayed in the report. It is not possible to generate a report that contains zero rows. Instead, an error message will be displayed.

3. The **Show/Hide** toggle control displays whether a panel listing the settings in the query is displayed. When the control is in the “Show” state, selecting it will display the query settings as shown below and set the control to the “Hide” state
4. The Export button will generate a CSV file with the contents of the report. The columns will be the same as displayed on the page, with one additional column: The Organization's Natural Id (Column B).

5. Column Order allows the option to change your result column order to easily compare your results broken down in different ways.

6. Show achievement levels works as described in the Report Preview section.

7. Show value as works as described in the Report Preview section.

8. The report results may be sorted either by ascending or descending value by selecting either the up or down button respectively for each column.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Organization</td>
<td>Assessment</td>
<td>Academic Year</td>
<td>Subgroup</td>
<td>Students</td>
<td>Test Average</td>
<td>Scale</td>
<td>Did Not Meet Standard</td>
<td>Met Standard</td>
<td>Exceeded Standard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Other</td>
<td>3</td>
<td>2017-18</td>
<td>Overall</td>
<td>625</td>
<td>2421 ± 3</td>
<td>16%</td>
<td>38%</td>
<td>40%</td>
<td>4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Other</td>
<td>4</td>
<td>2017-18</td>
<td>Overall</td>
<td>688</td>
<td>2469 ± 3</td>
<td>12%</td>
<td>36%</td>
<td>46%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Pintail Group</td>
<td>a277f2bce3</td>
<td>3</td>
<td>2017-18</td>
<td>Overall</td>
<td>382</td>
<td>2422 ± 4</td>
<td>17%</td>
<td>35%</td>
<td>42%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Pintail Group</td>
<td>a277f2bce3</td>
<td>1</td>
<td>2017-18</td>
<td>Overall</td>
<td>306</td>
<td>2468 ± 4</td>
<td>13%</td>
<td>34%</td>
<td>46%</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** It is possible for sections of aggregate reports to have all 0 totals. This indicates there are no results for these sections with the currently configured options and filters.

**Note:** Administrators can access every report that they generated within the past 30 days using the My Reports feature on the top navigation panel.
District / School Exports

An administrator with either a district- or school-level PII role can export a CSV file containing all district and/or school assessment results. There are no filtering or customization features for this report; however, the exported file may be filtered and sorted in a spreadsheet or data base program. The export is specified in the District / School Exports page, which is accessed by selecting the District / School Exports button on the Home Page.

The District / School Exports page elements are shown below.

1. **Export File Name**: The user must enter a name for this report
2. **School Year**: The school year for the report
3. **New Students**: The toggle control allows the user to either specify whether assessments from other schools are to be included in the report
4. **Search for an Organization**: Allows the user to search for schools or districts, depending on the user’s permissions, to be included in the report
5. **Select All**: If checked, then all allowed schools and districts will be included in the report
6. **Selected Organizations**: Displays all schools and districts will be included in the report
7. A school or district may be excluded from the report by selecting the icon of the school or district to be excluded
8. Selecting the **Export Results** button will generate the report. The report can be viewed by going to the My Reports page.
If the Select All checkbox is selected, then all schools and districts allowed to be seen by the user will appear in the Selected Organizations panel.

If the user has permission for only one school, the Search for an Organization search box is not visible. Furthermore, the Selected Organizations result panel is preloaded with that school and the school cannot be removed.

The School Year dropdown allows for a school year to be selected for the report. A New Students toggle control allows the user to specify whether assessments administered to students at a previous school or district are to be included in the report. The report is generated by selecting the Export Results button. The
report is a CSV file, which contains a comprehensive report of all students in the selected schools for the selected school year.

**My Reports**

All reports generated by the user appear in the My Reports page, which can be displayed by selecting the My Reports button on the homepage as shown below. All reports are retained for 30 days, after which they are automatically deleted from the system.

[Image of My Reports page]

**Access Assessment Results**

Selecting the icon on a report name opens a context menu for that report. If the report type is “Aggregate Report”, then the context menu has the following options:

- **View Report** - displays the report in the Custom Aggregate Report page (see Generating the Custom Aggregate Report section)
- **View Query** - displays the query used to generate the report in the Custom Aggregate Query page (see Custom Aggregate Reports section)
- **Download Report Data** - downloads the report to a CSV file on the user's computer
If the report with report type of “Aggregate Report” has an assessment type of “Summative” and the results have not yet been released (i.e., the results are under embargo), then the View Report and Download Report Data options will be disabled (grayed out).

If the report type is any other type other than "Aggregate Report", only the Download Report Data option will be available.

Manage Student Groups
Administrators with the GROUP_ADMIN role can create, view, and manage groups of students to allow users to easily view a collection of student assessment results. A student group could represent all the students in a teacher's classroom or a particular period of instruction, for example. The roles and permissions system can be used in conjunction with student groups to allow teachers access to student test results.

The Manage Student Groups page is accessed by selecting the Student Groups button on the Home Page.

The Manage Student Groups page elements are shown below.
The Manage Student Groups page provides the following features:

1. **School** - Specify which school to search for groups
2. **School Year** - Specify which school year to search for groups
3. **Subject** - Specify which subject to search for groups
4. **Upload Groups** button - Create or update one or more groups
5. **View Uploads** button - View the history of group data uploads
6. **Search groups by name** - Search for groups by name to limit which groups are displayed
7. **Student Groups List** - displays groups matching the filter conditions selected, including group and school name, school year, subject(s) and the number of students in the group
8. **Delete** – Link for option to delete the group

Selecting a school, school year, or subject immediately updates the list of student groups displayed in the **Student Groups List**. If groups do not exist for the selected school, year, and subject filters, a message appears in the **Student Groups List** as shown below.

<table>
<thead>
<tr>
<th>Name</th>
<th>School</th>
<th>School Year</th>
<th>Subjects</th>
<th>Num. of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emily Group</td>
<td>Antpitta Gnatcatcher Middle</td>
<td>2017-18</td>
<td>Math, ELA</td>
<td>37</td>
</tr>
<tr>
<td>G6-65500</td>
<td>Antpitta Gnatcatcher Middle</td>
<td>2017-18</td>
<td>Math, ELA</td>
<td>37</td>
</tr>
<tr>
<td>G6-65600</td>
<td>Antpitta Gnatcatcher Middle</td>
<td>2017-18</td>
<td>Math, ELA</td>
<td>44</td>
</tr>
<tr>
<td>G6-65700</td>
<td>Antpitta Gnatcatcher Middle</td>
<td>2017-18</td>
<td>Math, ELA</td>
<td>35</td>
</tr>
<tr>
<td>G6-65800</td>
<td>Antpitta Gnatcatcher Middle</td>
<td>2017-18</td>
<td>Math, ELA</td>
<td>34</td>
</tr>
</tbody>
</table>

No groups found matching the given filter criteria.
Uploading Student Group Files

Selecting the **Upload Groups** button on the **Manage Student Groups** page opens the **Upload Groups** page shown below. Here, administrators can upload comma-separated value (CSV) files of student group information by dragging the file(s) from a file system, and dropping it into the dotted box, or by browsing for files on a computer. The **Upload Results** list at the bottom will update the status of files after they are uploaded. In the example below, no files have been uploaded yet.

1. Selecting the **CSV File Format** button will display the **CSV File Format** page, which describes how to set up a CSV file to update (see Upload Template File and Validation Rules section)
2. To upload a file, either drag it to this entry, or select the “browse for files” to select one from the file system
3. Results of uploads will be shown here

If the uploaded file is properly formatted and passes all validation rules (see **Upload Template File and Validation Rules**), the system will display the file with an “Accepted” status. If the file is not properly formatted or fails validation, the system will reject the file and display a “Bad Data” status. Once the system has successfully processed the file, the system will update the file status to “Processed”. All of these results are shown below.

<table>
<thead>
<tr>
<th>Status</th>
<th>Id</th>
<th>File Name</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCEPTED</td>
<td>78</td>
<td>Upload_Acosta-Group-001.csv</td>
<td>Aug 22, 2017, 1:42:29 PM</td>
</tr>
</tbody>
</table>
In the case of a failed upload, the system will display a View Errors button. Selecting it will show the error(s) that caused the file to be rejected by the system. In order to be accepted, a student group file must be a properly formatted CSV file with column names and cell values matching the CSV file format template exactly.

### Upload Template File and Validation Rules

Selecting the CSV File Format button will display the CSV File Format page, as shown below.

![CSV File Format](image)

This page gives instructions on how to create a CSV file to be uploaded. Selecting the Template button will download a CSV file with required column titles.

![CSV File Example](image)

The uploaded file must contain these column titles in the first row (column order must match exactly):

- **group_name**: name of the group (must be unique per school)
- **school_natural_id**: the school identifier (must match identifier used in ART)
- **school_year**: four-digit school year (2018 represents 2017-18 school year)
- **subject_code**: ELA, MATH or ALL
- **student_ssid**: statewide student identifier
- **group_user_login**: email address of a user who has permission to access the group’s assessment results
In addition to the column title requirements above, the following validation rules are applied to determine whether a file will be accepted:

- The input file must be in CSV format
- Each row must contain valid values for school_natural_id, school_year, and group_name
- Groups for a school must be listed together, and must not be separated by lists of groups for other schools; a group is defined by the combination of school, school year, and group name
- The administrator attempting to upload groups must have the GROUP_ADMIN role for the school associated with those groups
- No more than 200 students may be assigned to a single student group

**Note:** If all rows for a group have a blank value for the subject, the system automatically assigns a subject of “ALL”.

**Caution:** Once a student group has been created for the first time, any subsequent file uploads for that same group will replace ALL of the student records assigned to the group.

**Warning:** Excel may convert values to an alternative format. For example, the school_natural_id value is a long number (e.g., 12345671234567) that Excel may convert to scientific notation (e.g., 1.23457E+13). If saved in this format, the reporting system will not be able to match it to a valid school identifier.

Here is an example of Excel making this change while creating a new CSV file:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>group_name</td>
<td>school_natural_id</td>
<td>school_year</td>
<td>subject_code</td>
<td>student_ssid</td>
<td>group_user_login</td>
</tr>
<tr>
<td>2</td>
<td>New group</td>
<td>1.23457E+13</td>
<td>2018</td>
<td>ALL</td>
<td>12345678</td>
<td><a href="mailto:test@example.com">test@example.com</a></td>
</tr>
<tr>
<td>3</td>
<td>New group</td>
<td>1.23457E+13</td>
<td>2018</td>
<td>ALL</td>
<td>12345679</td>
<td><a href="mailto:test@example.com">test@example.com</a></td>
</tr>
<tr>
<td>4</td>
<td>New group</td>
<td>1.23457E+13</td>
<td>2018</td>
<td>ALL</td>
<td>12345680</td>
<td><a href="mailto:test@example.com">test@example.com</a></td>
</tr>
<tr>
<td>5</td>
<td>New group</td>
<td>1.23457E+13</td>
<td>2018</td>
<td>ALL</td>
<td>12345678</td>
<td><a href="mailto:test@example.com">test@example.com</a></td>
</tr>
</tbody>
</table>

To avoid Excel auto-formatting data in scientific notation, the column must be formatted as a number with zero decimal places. Follow these steps to format the school_natural_id column:

1. Highlight the school_natural_id column by clicking on the header of the column (B in the example shown)
2. Right-click on any of the highlighted cells and select "Format Cells..."
3. Select “Number” as the **Category** and update the “Decimal places” value from 2 to 0. Click OK

4. Confirm the value in each cell is displayed as the full number, and not in scientific notation.
View Uploads

Selecting the View Uploads button on the Manage Student Groups page opens the View Uploads page, shown below.

![View Uploads page](image)

This page shows the results of all of the student group file uploads, from most recent to oldest. If there are no uploaded student group files, the system displays the message “Upload results will be shown here.”.

Troubleshooting Common Issues

Upload CSV “Bad Data”

The “Bad Data” status informs the user that there was a problem with the uploaded CSV file. Click the View Errors button to see more information.

Incorrect Headers

The system will display an error message if the order of the column headers does not match the expected order exactly:

**Message:** Row: 0 Failure: Invalid headers. Headers must be in order:
[group_name,school_natural_id,school_year,subject_code,student_ssid,group_user_login]

To resolve this error, update the CSV file to ensure the column header names in the first row match the expected names, in the correct order, or use the CSV File Format button to download a template.
School Cannot Be Found
The system will display an error message if it cannot find a school associated with the uploaded `school_natural_id` value:

Message: Row: 1 Failure: School [1.23457E+13] can not be found

To resolve this error, update the CSV file to include a valid school identifier. If the school listed in the error message is in scientific notation (e.g. 1.23457E+13) it is likely that Excel was used to create or view the file, and the column value was automatically formatted by Excel. See Working with Upload Files in Microsoft Excel for instructions on correcting this issue.

Manage Instructional Resources
Administrators with the INSTRUCTIONAL_RESOURCE_ADMIN permission can manage the repository of links to Instructional Resources. The Manage Instructional Resources page is accessed by the selecting the Instructional Resources button on the Home Page.

The Manage Instructional Resources page elements are shown below.

This page shows the available Instruction Resources, with the following information:

1. **Assessment Label(s)**: Name(s) of the assessment with which the resource is affiliated
2. **Type**: Options are State, Group of Districts, District, or Group Of Schools
3. **Organization**: The name of the organization
4. **Performance Level**: What performance level(s) the resource is intended for
5. **URL**: The location of the resource

6. **+ Create** button: Allows the user to add a new resource. Selecting this button opens the popup screen shown below.
When the context menu icon on an Assessment Label is selected, two options are presented for that resource: Edit or Delete. Selecting Edit brings up a similar popup screen as displayed when the Create button is selected, except that the menu elements are auto-filled with the existing information for the selected resource. The user may then edit that information. Delete allows the resource to be deleted.
Manage Embargoed Results

The reporting system allows test results to be embargoed until specifically designated for release. Using this feature, year-end summative test results can be collected without releasing them for viewing or analysis until the tests have been administered to all the students.

Users with the EMBARGO_ADMIN role can control when the embargo is lifted for their district or state. The embargo administrator may also preview the test results online prior to releasing them for all users.

District administrators may release the test results for their district before the state releases all results. However, once the state-level embargo is lifted, all results for all districts are released (in other words, a district administrator may not keep their embargo in place once the state has released all results).

The Manage Embargo page is accessed by selecting the Embargo button on the Home Page.

Examples of embargo management by State and District are shown below.

<table>
<thead>
<tr>
<th>State</th>
<th>ELA</th>
<th>Math</th>
<th>Individual Test Results</th>
<th>Aggregate Test Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>647234</td>
<td>487112</td>
<td>Embargo</td>
<td>Released</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>District</th>
<th>ELA</th>
<th>Math</th>
<th>Individual Test Results</th>
<th>Aggregate Test Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpaca Unified District</td>
<td>4543</td>
<td>1977</td>
<td>Embargo</td>
<td>Released</td>
</tr>
<tr>
<td>Dorset Unified School District</td>
<td>8403</td>
<td>2795</td>
<td>Embargo</td>
<td>Released</td>
</tr>
<tr>
<td>Santa Cruz Unified School District</td>
<td>2314</td>
<td>2782</td>
<td>Embargo</td>
<td>Released</td>
</tr>
</tbody>
</table>