

terrace  metrics



User Manual

Powered by:
 **actionaly**



www.terracemetrics.com
www.actionaly.com



support@terracemetrics.org
support@actionaly.com

Last Updates: July 27, 2023

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Introduction

Welcome to the Terrace Metrics manual. This guide is designed to help you effectively navigate and utilize Terrace Metrics from data integration to using reports to the next steps. It provides clear instructions, explanations, and troubleshooting guidance. The manual is structured logically and covers an overview, getting started, user interface, main functionality, advanced features, troubleshooting, and support. Make the most of it by reading thoroughly, following instructions precisely, and referring whenever needed. Enjoy learning and exploring with this manual as your helpful resource! [Click here](#) to learn about the benefits of using Actionaly.

Suggested Timeline

When planning it is best to use backward design. What day is best for you to assess students? Use that as a starting point and work backward. The Terrace Metrics team will assist along the way.

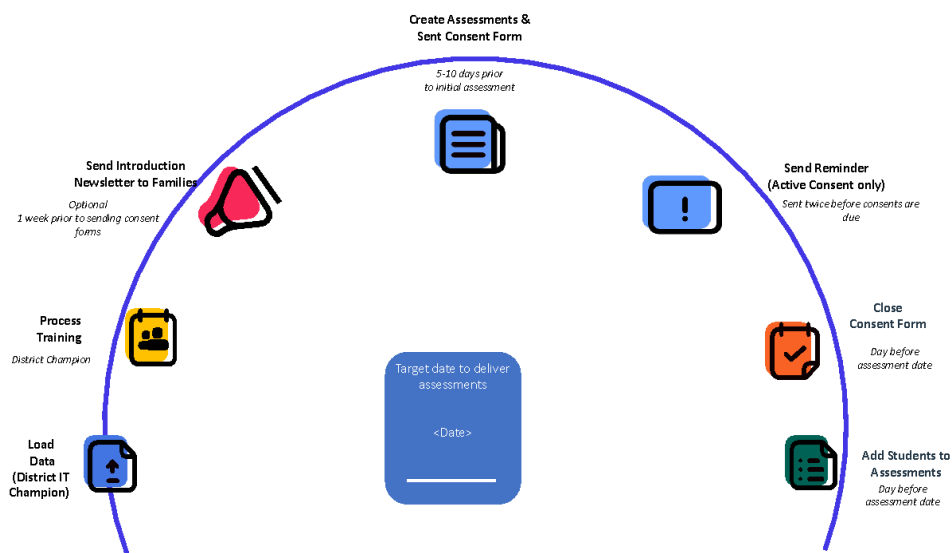
Prepare:

1. Data Integration with District IT Champion
2. District Champion Process Training Working Session
3. Educational Information Sent to Parents/Guardians (Optional but suggested)
4. Send Consent & Create Assessments
5. Close Consent & Add Students with permission to assessment.
6. School Champion Training
7. Student Assessment Data

Please take a moment and study the two graphics below. The first one explains the process of the District Champion. Notice that the target date is in the middle. Determine what you want that date to be and then plug in appropriate dates for the other steps.

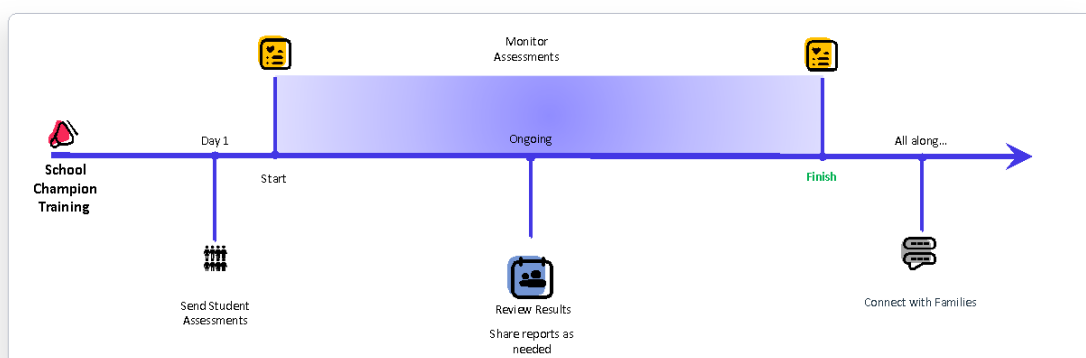
The second graphic explains the School Champion process. This process does not begin until after the District Champions have been trained.

Process & Responsibilities for District Champion



- Manage settings for all schools.
- Manage permission of school staff to give access to Terrace Metrics Module
- Edit TM Consent Language
- Create and send newsletters to all participating schools

Process & Responsibilities for School Champions



- Manage settings for your school
- Ability to create and send assessments and consent
- Administer and Monitor assessments
- Send parent report
- Download reports
- Edit group names

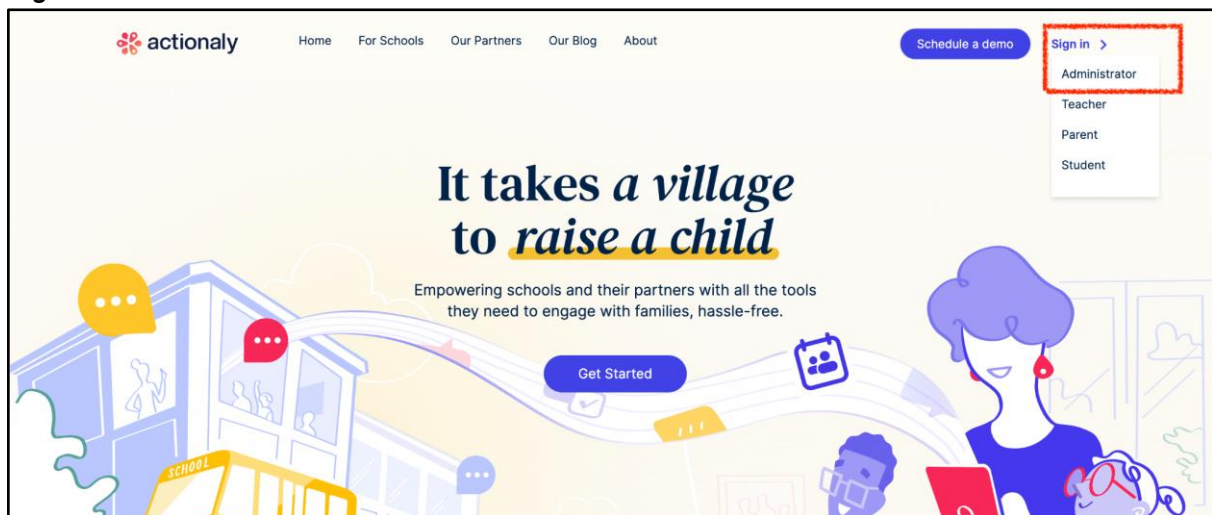
Actionaly Settings

How to Log In to Actionaly

Actionaly Website

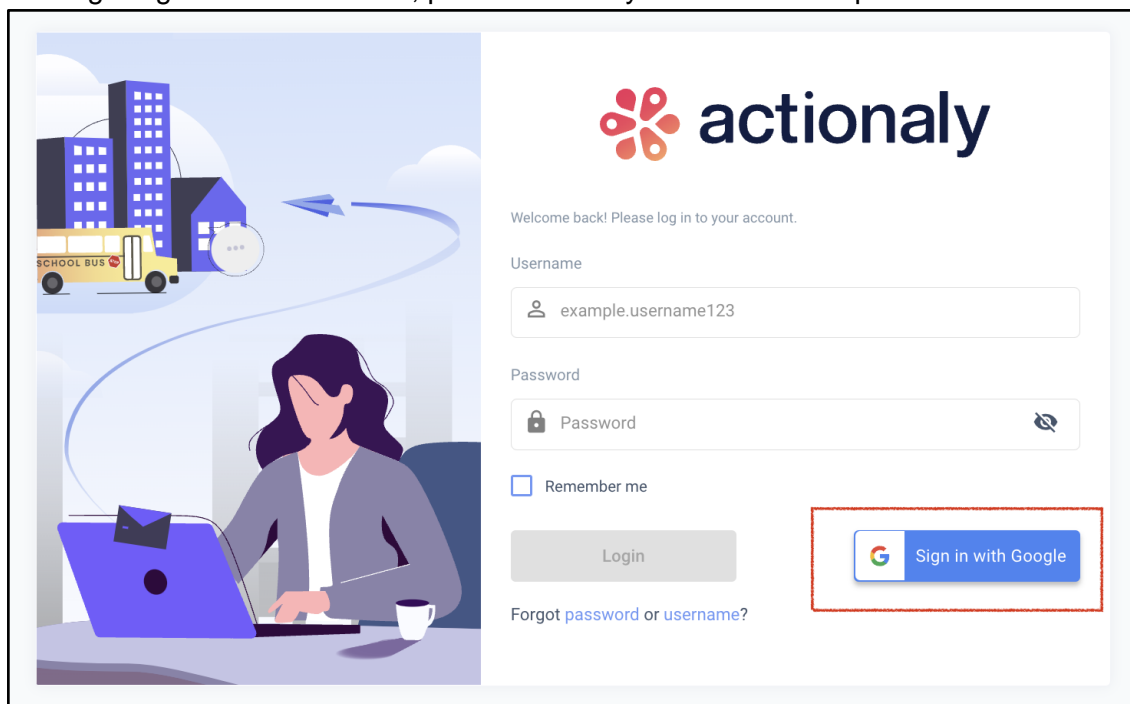
www.actionaly.com

Sign In as "Administrator"



Sign in with Google

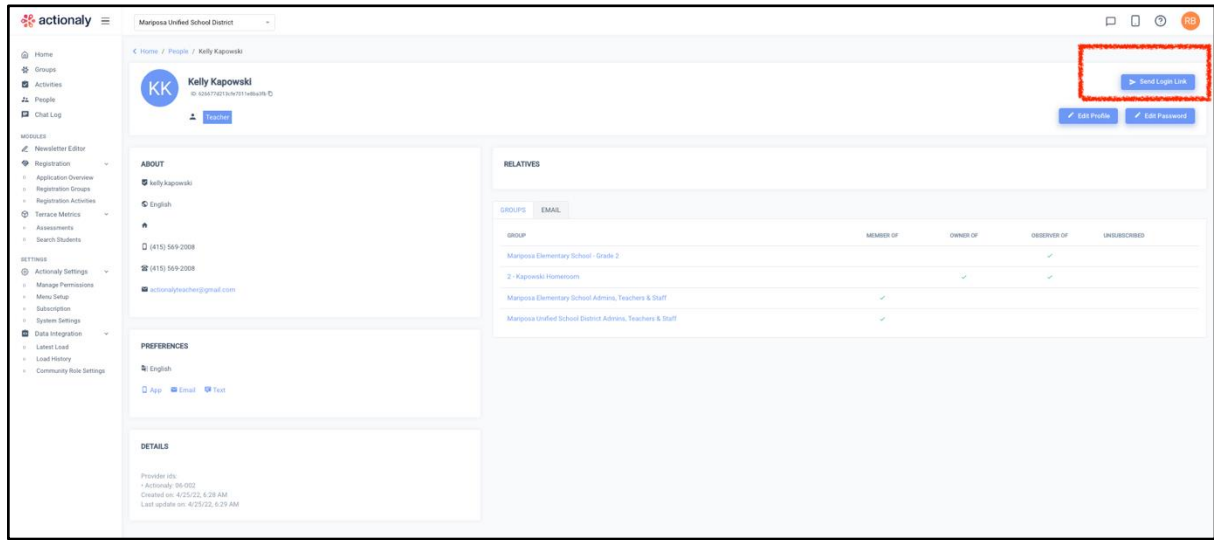
If Google sign-in does not work, please contact your district champion.



Send Log-in Link

As District Champion you can send log-in invitations to School Champions and troubleshoot log-in issues by following the steps below:

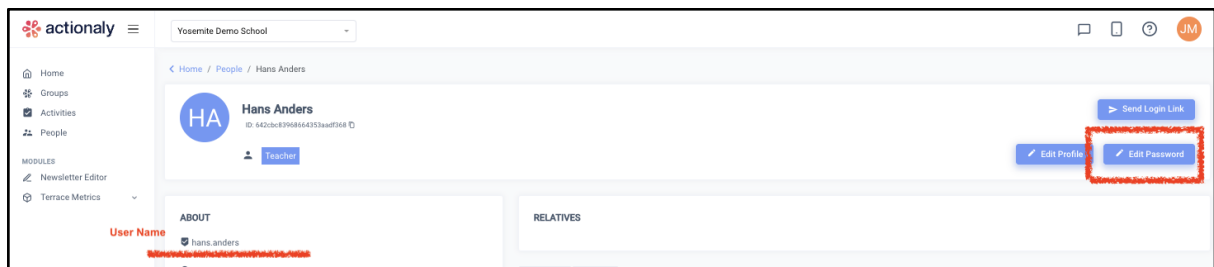
- From the admin dashboard
- Go to people (left-hand side)
- Filter to Select Teacher as Role (Right-hand side)
- Select Teacher Name



Edit Password

As the District champion you have the ability to edit the school champions password by following the steps below:

- Select the name of the teacher (Ex. Hans Anders)
- Click edit Password
- Create generic password
- Email teacher generic password



School Champion will enter the username and new generic password on the main screen. Once logged in they can change their password to something of their liking.

Staff can also change it to link it to their Google account once they are logged in.

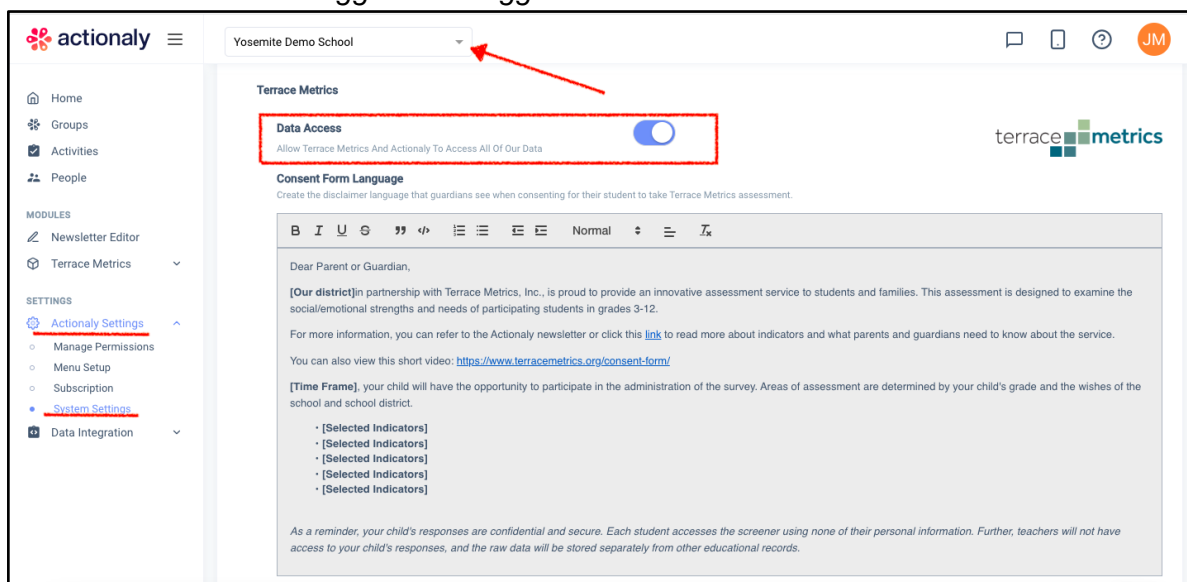
System Settings Page

Data Access

For optimal support, it is recommended that data access is toggled on. By allowing data access you are permitting Terrace Metrics to create aggregated district reports, as well as any other customized reports you may want to use.

To turn data access on/off:

- *Select Individual School from the top of the page dropdown.*
**Note: Cannot set up at district level*
- *Click Actionally Settings on the left panel of the screen.*
- *Select System Settings*
- *Data Access = Toggle on or toggle off*



Consent Form Language

The consent request email that parents receive includes suggested default language to introduce the parent consent form and provides links to additional material.

District or School champions can add their own default language at the school level under the system settings page. (See below “To edit the default language”). It is recommended that you only include the indicators you are assessing. Any changes made on this page will reflect all groups in the school.

Things to Consider:

Will you be using the consent form per season or yearly? Language within the consent form can be modified to reflect this.

Here is where you can find the default language:

Consent Form Language
Create the disclaimer language that guardians see when consenting for their student to take Terrace Metrics assessment.

Dear Parent or Guardian,

Our [district/school] in partnership with Terrace Metrics, Inc., is proud to provide an innovative assessment service to students and families. This assessment is designed to examine the social/emotional strengths and needs of participating students in grades 3-12.

For more information, you can refer to the Actional newsletter or click this [link](#) to read more about indicators and what parents and guardians need to know about the service.

You can also view this short video: <https://www.terracemetrics.org/consent-form/>

Between [Time frame], your child will have the opportunity to participate in the [fall/spring] administration of the survey. Areas of assessment are determined by your child's grade and wishes of the school and school district.

Note: You may want to list the indicators you will be assessing in your parent consent form.

Resiliency Factors

- Grit Scale:** Tenacity to achieve a goal; to not get distracted by the next shiny thing that comes our way.
- Hope:** Ability to develop multiple strategies when something is blocking a goal, and the motivation to pursue each until successful.
- Leadership:** Specific skills need to influence others in a positive way. Those with these skills intact are more self-confident and believe they can influence others.
- Resiliency:** External resources needed to overcome adversity. This indicator examines if basic needs are met (food security, neighborhood safety) as well as social supports that help overcome adversity.
- Global Satisfaction:** Higher levels of positive life outlook; measures an individual's current view about themselves, their world and their future.
- Positive School Experiences:** Examines attitudes to teachers and overall school experiences.
- Personal Standards:** Higher expectations of one's personal abilities.

Risk/Adversity Indicators

- Anxiety:** Examines general anxiety symptoms not specific to any one source.
- Getting Bullied:** Assess frequency of victimization; reports are flagged if the student endorses getting bullied at least 1 time per week.
- Bullying Others:** Assess frequency of using bullying to others; reports are flagged if the student endorses victimizing others at least 1 time per week.
- Depression:** Examines levels of depressive symptoms; also includes a self-harm ideation identification.
- Self-Criticism:** Tendency to focus only on one's perceived faults; difficulty accepting mistakes
- Distriction:** Assess levels of perceived isolation from others, measured by being ignored or actively excluded.

Supplemental Factors

- Drug/Alcohol:** Assesses whether any drug/alcohol behaviors (if endorsed) are causing significant distress to self or others.
- School Violence:** Assess the most common predictors of the tendency to use violence to solve problems in school; emotional deregulations, impulsivity, and past/present behaviors.
- Trauma Screen:** Assesses current distress concerning one or more endorsed traumatic experiences (not identified).

As a reminder, your child's responses are confidential and secure. Each student accesses the screener using none of their personal information. Further, teachers will not have access to your child's responses, and the raw data will be stored separately from other educational records.

[Edit](#)

To edit the default language:

- *Select School Level from the top of the page dropdown.*
- *Click Actional Settings on the left panel of the screen.*
- *Select System Settings*
- *Scroll to Consent Form Language*
- *Click Edit*
- *Make changes.*
- *SAVE!*

actional Yosemite Demo School

Data Access
Allow Terrace Metrics And Actional To Access All Of Our Data

Consent Form Language
Create the disclaimer language that guardians see when consenting for their student to take Terrace Metrics assessment.

Dear Parent or Guardian,

[Our district] in partnership with Terrace Metrics, Inc., is proud to provide an innovative assessment service to students and families. This assessment is designed to examine the social/emotional strengths and needs of participating students in grades 3-12.

For more information, you can refer to the Actional newsletter or click this [link](#) to read more about indicators and what parents and guardians need to know about the service.

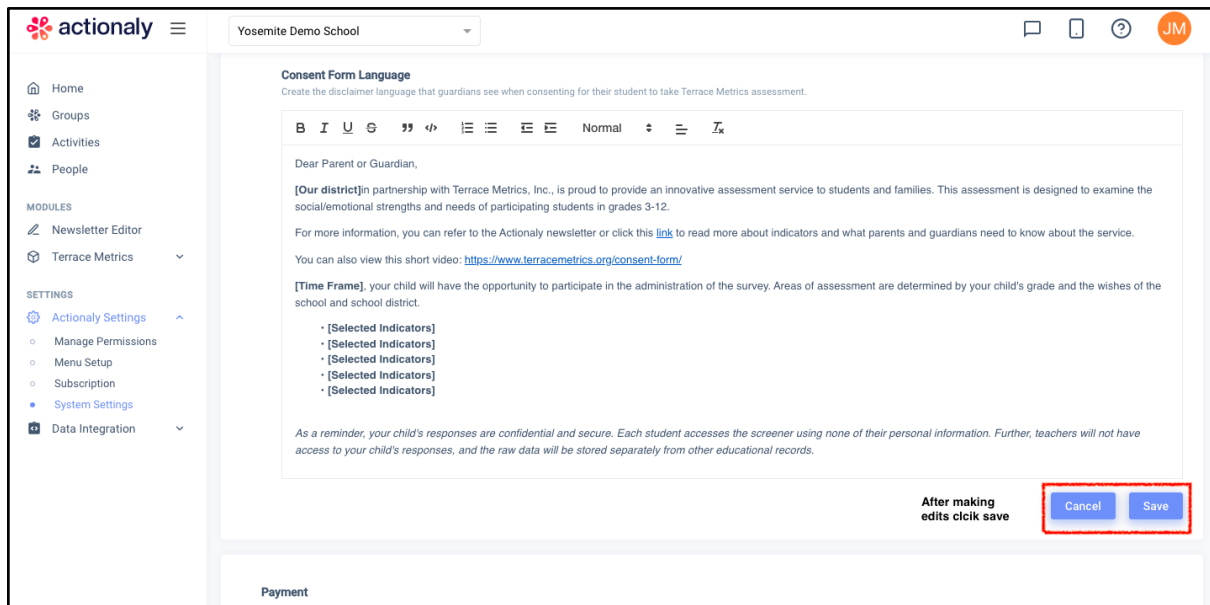
You can also view this short video: <https://www.terracemetrics.org/consent-form/>

[Time Frame], your child will have the opportunity to participate in the administration of the survey. Areas of assessment are determined by your child's grade and the wishes of the school and school district.

- [Selected Indicators]
- [Selected Indicators]
- [Selected Indicators]
- [Selected Indicators]
- [Selected Indicators]

As a reminder, your child's responses are confidential and secure. Each student accesses the screener using none of their personal information. Further, teachers will not have access to your child's responses, and the raw data will be stored separately from other educational records.

[Click the edit button to customize the form](#) [Edit](#)



Manage Permission Page

Setting Champions Up

All champions need access to the Actionaly Admin Panel to be able to send newsletters, manage the consent process, create assessments, and proctor assessments.

Actionaly uses roster information from your Student Information System (SIS) to create accounts for district and school champions. Roster information is synchronized daily, weekly, or on a custom schedule based on district requirements. Contact support@actionaly.com if you need to make changes or customize your sync.

Roles and Permissions

Champions must have the role of admin in Actionaly to have access to the Terrace Metrics module, however, it's not uncommon for champions to have the role of staff or teacher in the SIS.

Providing admin access to champions is typically solved during the "Preparation" phase using the Add Administrator button on the Manage Permissions page.

Manage Permissions

Add or remove champions from the Manage Permissions page. If you do not have access to the Manage Permissions page, contact your District Champion.

To set up district champion permissions:

- *Select School District Page*
- *Click Actionally Settings*
- *Click Manage Permissions*

We recommend adding checkmarks for “Settings”, “Groups”, “Terrace Metrics” and “Newsletter”

LAST NAME	FIRST NAME	ROLE	SETTINGS	GROUPS	CHAT LOGS	TERRACE METRI	NEWSLETTERS	REGISTRATIONS	SOURCE
Admin	Actionally		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SIS
Hill	James	admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SIS
Manil	Richard	admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SIS
Mung	Josh	admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SIS
Young	Heather	admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SIS
5 Total									

As a district champion you manage permissions for school champions. Permissions for school champions are set at the individual school page.

To set up school champion permissions:

- *Select Individual School Page from the dropdown.*
- *Click Actionally Settings*
- *Click Manage Permissions*
- We recommend adding checkmarks for “Groups”, “Terrace Metrics” and “Newsletter.”

Inform Families Process

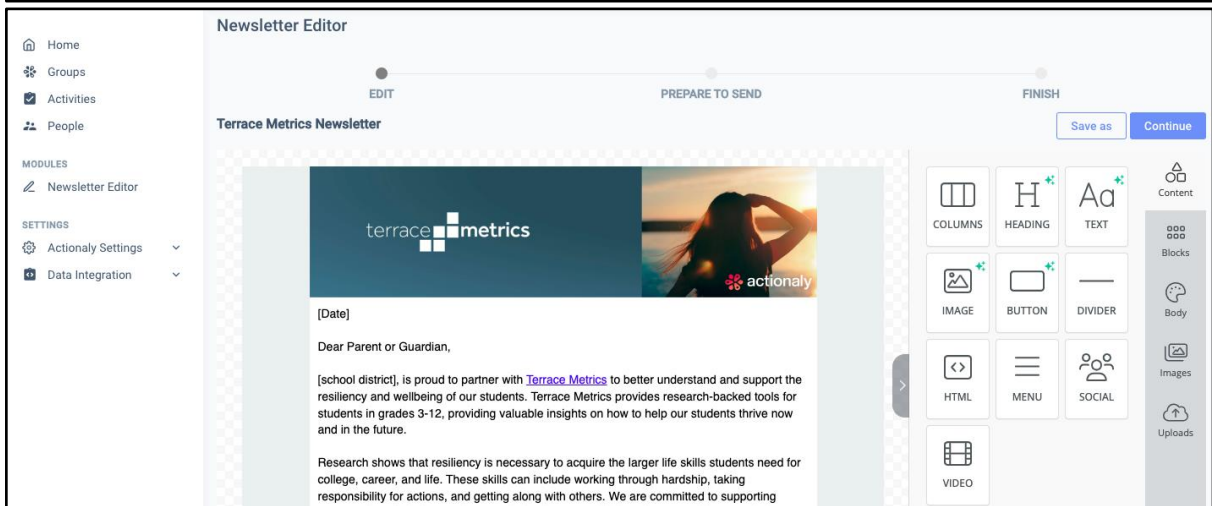
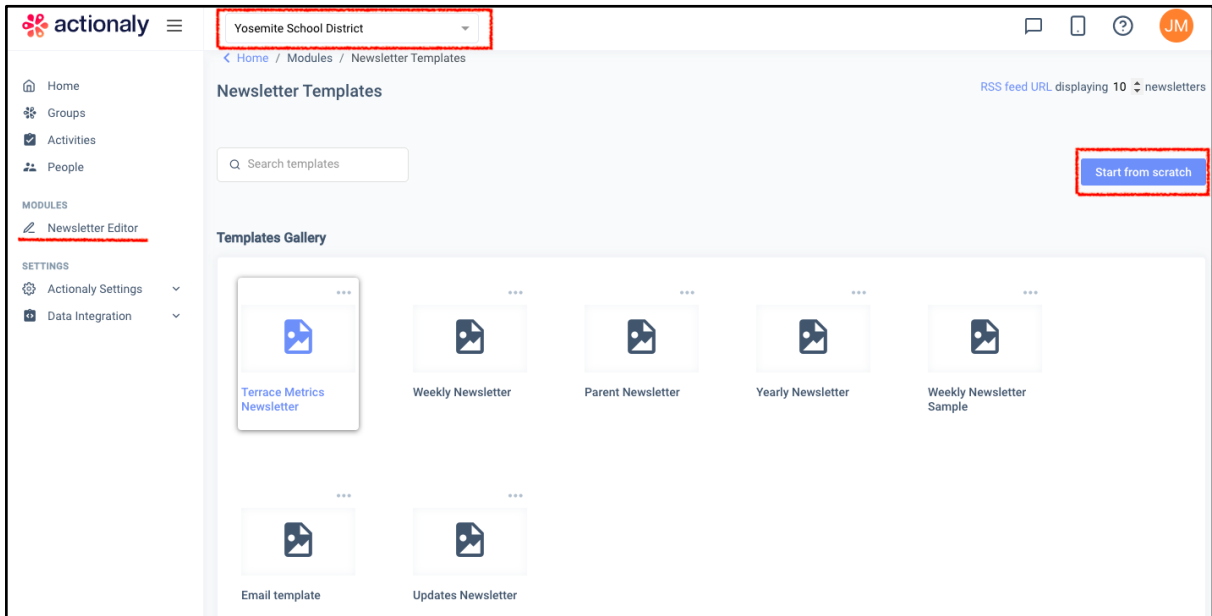
Send a newsletter or communication piece that provides detailed information about the Terrace Metrics Behavioral and Wellness Assessments. For your convenience, there is a Terrace Metrics Newsletter with suggested language which includes the purpose of the assessments, benefits, and how it will help support students' well-being and outlines instructions on the next steps for parents to give consent for their child's participation.

Send a Newsletter (Optional)

Create your own or use the sample Terrace Metrics Newsletter in the Newsletter Editor Templates Gallery.

To send/create a Newsletter:

- *Select School District Page from the dropdown*
- *Click Newsletter Editor*
- *Click Start from Scratch OR choose from the template gallery*
- *You can customize the newsletter by adding your district logo, signatures, and other district information.*



Create an Assessment & Consent Form

Champions use the Terrace Metrics module within Actionaly to create and schedule the consent form and to create an assessment based on the indicators to be tested at the same time using the Create Assessment button. The champion is guided through each of the four steps with on-screen prompts and must complete each section before moving to the next step. The steps are

- Step 1: Assessment title and schedule consent
- Step 2: Choose indicators
- Step 3: Choose participants
- Step 4: Review

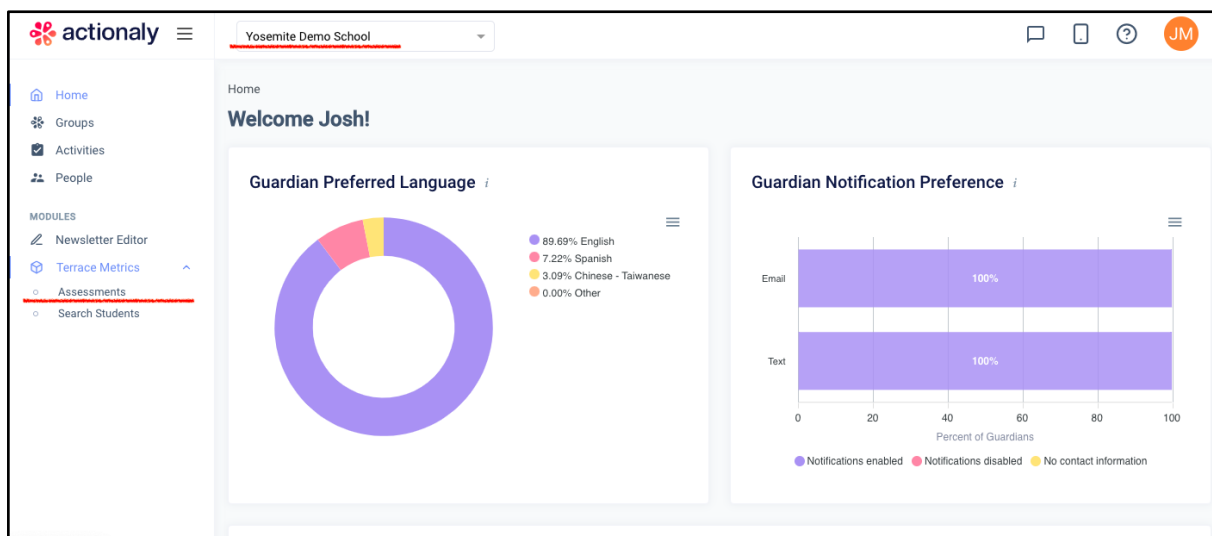
Prior to creating an assessment champions need to determine:

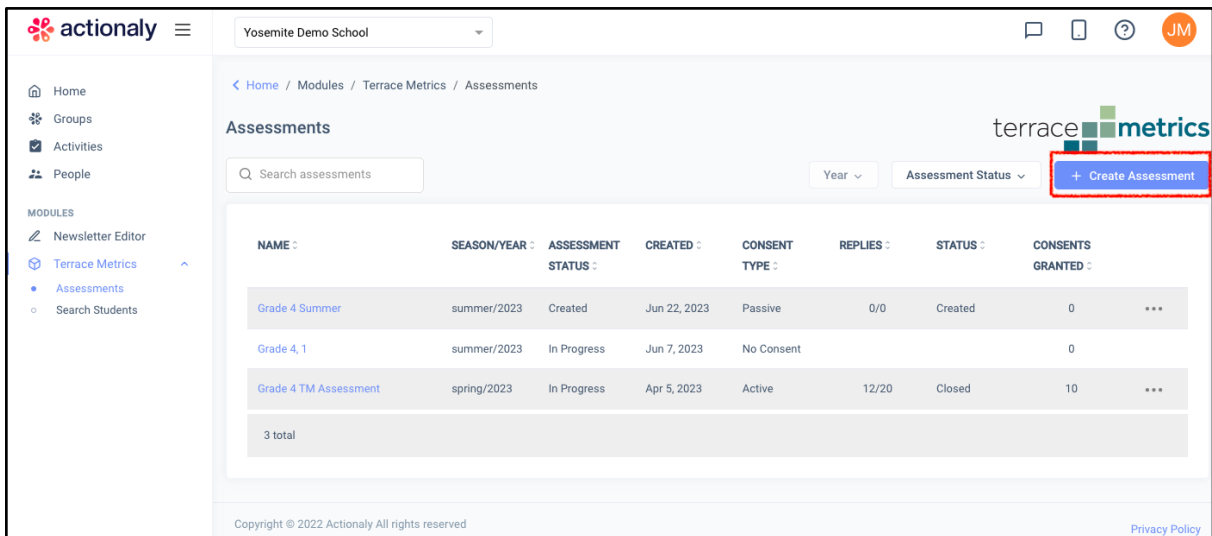
- ✓ Passive or active consent
- ✓ Grades to be assessed
- ✓ Assessment Indicators
- ✓ Designated recipients if using the self-harm and depression indicators
- ✓ Date & Time Consent to be sent
- ✓ Date & Time for a reminder (optional)
- ✓ Date consent to be closed

1. Create Assessment & Consent Form

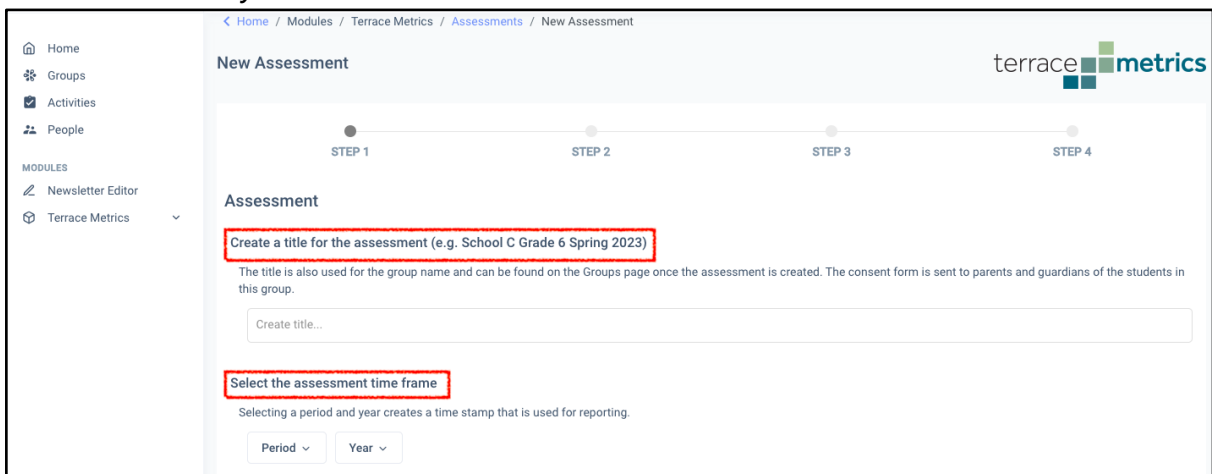
To create an Assessment

- *Select Individual School Page from the dropdown*
- *Click Terrace Metrics*
- *Click Assessments*
- *Click Create Assessment*





- Create a title for the Assessment
Note* The **title** entered will be used as the **subject** of the **consent email** sent out to **parents**, asking for their consent regarding the assessment.
- Select the assessment time frame: fall, winter, spring, or summer
- Select the year.



Create the Consent Form

Choose the type of Consent

Each of these forms use default language which can be modified by an administrator in the systems settings page. The type of consent is determined by the district administration and may need to adhere to state legislative mandates.

Active Consent

- Parents must reply yes for their child to participate.
- Parent options are: Yes or Opt Out. An electronic signature will be required by the parent/guardian if yes is selected.

Passive Consent

- Parents must provide consent for their child NOT to participate.

- Parent options are: Yes or Opt Out. An electronic signature is required for Opt Out only.

To view how parents will interact with Active and Passive Consent please [click here](#) to review in the addendum.

No Consent

- Consent has already been provided in another capacity by the district and/or your consent form is yearly, and you are assessing students multiple times a year.

Update Consent Form Title

This title also becomes the **subject of the email that is sent to parents and guardians.** You can edit the title to what meets your needs.

Note You will use this title after sending it to monitor consent status. This title becomes the title of the Consent Activity and can be found on the Activities page once the assessment is created.*

Review Consent Form Language

It is possible District Champions have already updated the default consent language. If you need to make additional changes by grade you can do so by editing the email you see in the box.

The screenshot shows the Actionally interface for editing a consent form. The sidebar on the left contains navigation options: Home, Groups, Activities, People, and Modules (Newsletter Editor, Terrace Metrics). The main content area is titled 'Create a title for the consent form' and includes a text box with the title 'Consent Request for Terrace Metrics Assessment (Due: ___)'. Below this is a red-bordered box with the text 'Review and update the consent form description'. The description field contains the following text:

Dear Parent or Guardian,

Our district in partnership with Terrace Metrics, Inc., is proud to provide an innovative assessment service to students and families. This assessment is designed to examine the social/emotional strengths and needs of participating students in grades 3-12.

For more information, you can refer to the Actionally newsletter or click this [link](#) to read more about indicators and what parents and guardians need to know about the service. You can also view this short video: <https://www.terracemetrics.org/consent-form/>

This year, your child will have the opportunity to participate in the administration of the survey. Areas of assessment are determined by your child's grade and the wishes of the school and school district.

As a reminder, your child's responses are confidential and secure. Each student accesses the screener using none of their personal information. Further, teachers will not have access to your child's responses, and the raw data will be stored separately from other educational records.

Set Date and Time

When should we send the consent form?

mm/dd/yyyy --:--

When should we send the consent reminder?

mm/dd/yyyy --:--

You cannot continue until all fields are populated except the *consent reminder*

Back Continue

Set a Reminder (Optional)

Sending a consent reminder is not mandated, but highly recommended. Reminders only go to people who have NOT completed the consent form. You will be able to send reminders after the consent has been sent. (See below under 'Things to Consider')

If using active consent, we recommend sending multiple reminders to get as close to 100% participation as possible. Schedule your first reminder 2 days after the initial consent email has been sent.

If using passive consent, send the reminder email the day before you close consent.

Things to Consider:

Send out your reminder at a different time of day from the initial consent email. Think about parent availability. Are they more likely to check emails during the day, early morning, or evening?

Subsequent reminders can be sent from the Activity page if desired. *The title of the activity will be the Title of the consent title.*

To send a Consent Reminder After Consent has Been Sent

- *Select the Individual School Page*
- *Click Activities*
- *Click (...)*
- *Click Send a Reminder*

TITLE	GROUP	TYPE	REPLIES	STATUS	SENT ON	SENT BY
Consent Request for Terrace Metrics Assess...	Grade 3 Assessment Active ...	TM Consent	1/10	Open	06/28/2023	Actionaly A... Send A Reminder Close
Your personal invitation to access Terrace M...	Grade 3 Assessment Active ...	TM Wellness	0/0	Open	06/28/2023	Actionaly A...
Consent Request for Terrace Metrics Assess...	Grade 2 Assessment Passiv...	TM Consent	1/10	Open	06/28/2023	Actionaly A...
Your personal invitation to access Terrace M...	Grade 2 Assessment Passiv...	TM Wellness	0/0	Open	06/28/2023	Actionaly A...
Consent Request for Terrace Metrics Assess...	Grade 4	TM Consent	1/36	Open	06/26/2023	Josh Mung
Your personal invitation to access Terrace M...	Grade 4	TM Wellness	0/0	Open	06/26/2023	Josh Mung
Consent Request for Terrace Metrics Assess...	Grade 4 Summer	TM Consent	1/20	Open	06/26/2023	Josh Mung

2. Choose Indicators

Select Indicators

- *Select the Indicators that you will be using to assess the students. Indicators may vary from grade to grade.*
- *Click Continue*

Timesaver Select all “Core Indicators” and then unselect the ones you are not using.*

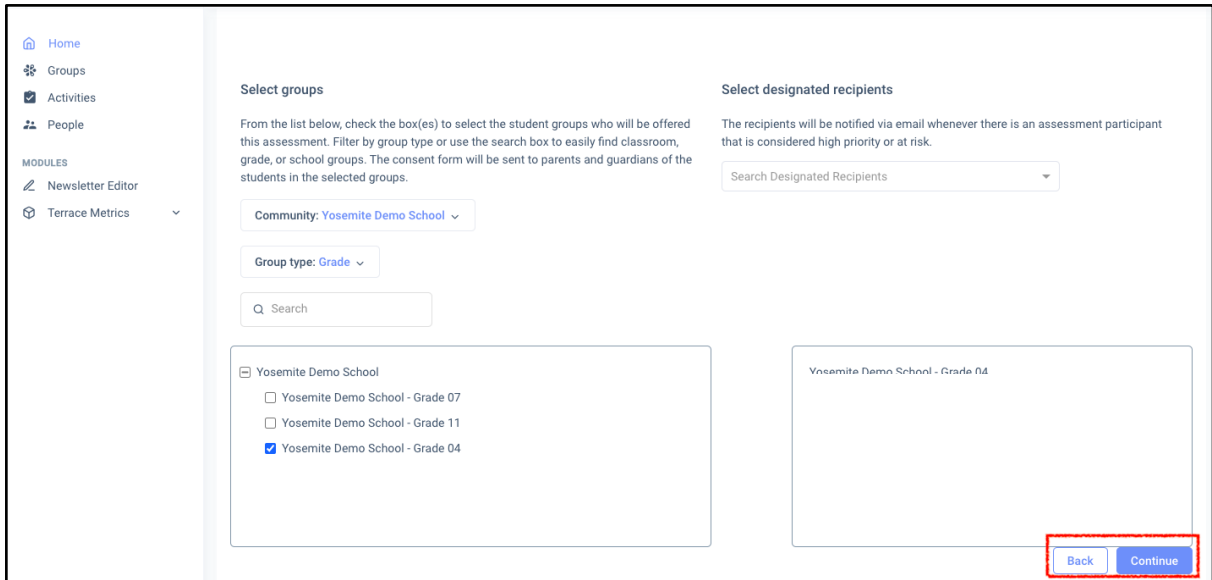
The screenshot displays the 'Choose Indicators' screen. At the top, there are three filter buttons: 'Adult', 'Elementary', and 'Uppergrades' (which is highlighted in green). Below the filters, there are two checkboxes: 'Core Indicators' and 'Supplemental Indicators', both of which are highlighted with red boxes. The main content area is divided into three columns: 'Resilience', 'Risk', and 'Other'. Each column contains several indicator buttons. The 'Resilience' column includes: Grit, Resiliency, Positive School Experiences, Global Satisfaction, Personal Standards, Hope, and Leadership. The 'Risk' column includes: Ostracism, Bullying Others, Depression, Self-Harm, Anxiety, Getting Bullied, and Self Criticism. The 'Other' column includes: Trauma, School Violence, and Drug / Alcohol. At the bottom right, there are 'Back' and 'Continue' buttons.

3. Choose Participants

Select Groups

- *Community: School Name*
 - *Assessment is sent at the School Level. Use the dropdown menu to select the school name.*
- *Group Type: Grade*
 - *We recommend sending by grade level. Select groups who will be offered the assessment. Use group type to filter by grade, homerooms, etc.*

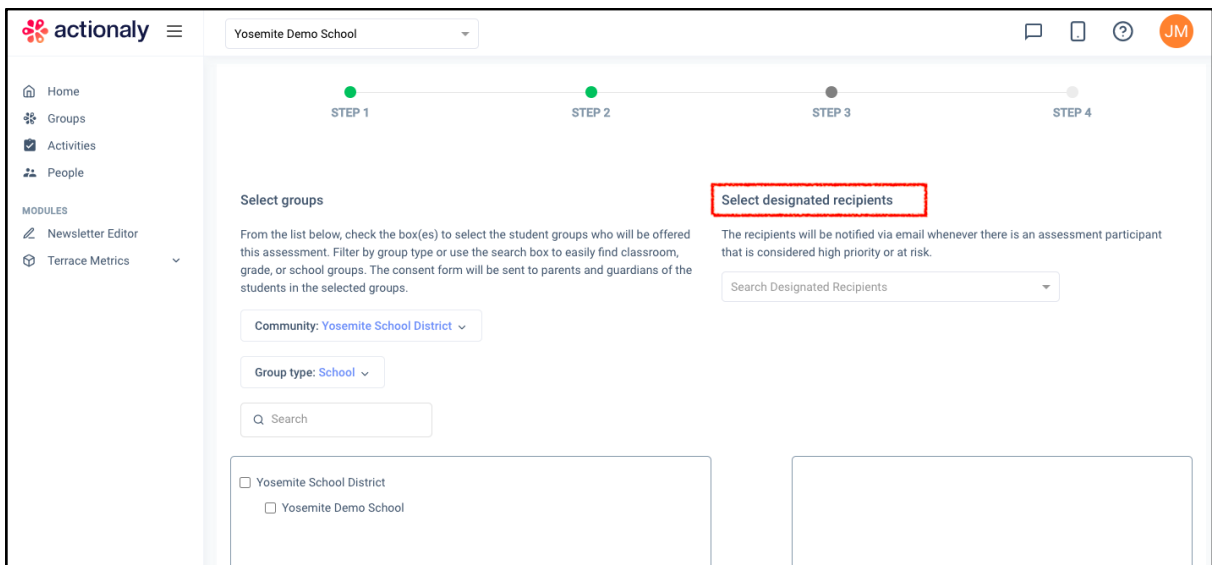
Consent forms will be sent to parents and guardians of the students in the selected group(s).



Set Designated Recipients

The designated recipients will be notified via email about any students that are considered high-risk. Your response team can be comprised of district and/or school champions that can be added to this section. Unlike designated recipients, district and/or school champions will be able to see the results but will not receive an email. Multiple recipients can be used.

- *From the dropdown menu, start to type the name designated recipient*
- *Select the name*
- *Continue the process until all names are selected*



4. Review

- *Carefully review all information*
 - ***It is not possible to make edits after clicking the Create Assessment button.***
- *Click Create Assessment*

Review details

Carefully review all information before creating the assessment. It is not possible to make edits after clicking the Create Assessment button.

Assessment Name	Type of Consent	Send Consent Form On	# of Participants
Grade 4	Passive Consent	2023-06-26 16:25	36

Assessments Question Indicators	Designated Recipients	To Students In Groups
Grit Resiliency Positive School Experiences Global Satisfaction Personal Standards Hope Leadership Ostracism Bullying Others Depression Self-Harm Anxiety Getting Bullied Self Criticism Trauma		Yosemite Demo School - Grade 07 Yosemite Demo School - Grade 04

Once you've reviewed the information click create assessment

[Back](#) [Create Assessment](#)

Monitoring Consent Responses

Check Consent Activity Responses

To see who received the consent, who has responded, and who has not.

To Check Consent Responses

- *Select Individual School Page*
- *Click Activities*
- *Choose the Consent Title you want to open*

TITLE	GROUP	TYPE	REPLIES	STATUS	SENT ON	SENT BY
Consent Request for Terrace Metrics Assess...	Grade 3 Assessment Active ...	TM Consent	1/10	Open	06/28/2023	Actionaly A...
Your personal invitation to access Terrace M...	Grade 3 Assessment Active ...	TM Wellness	0/0	Open	06/28/2023	Actionaly A...
Consent Request for Terrace Metrics Assess...	Grade 2 Assessment Passiv...	TM Consent	1/10	Open	06/28/2023	Actionaly A...
Your personal invitation to access Terrace M...	Grade 2 Assessment Passiv...	TM Wellness	0/0	Open	06/28/2023	Actionaly A...
Consent Request for Terrace Metrics Assess...	Grade 4	TM Consent	1/36	Open	06/26/2023	Josh Mung
Your personal invitation to access Terrace M...	Grade 4	TM Wellness	0/0	Open	06/26/2023	Josh Mung
Consent Request for Terrace Metrics Assess...	Grade 4 Summer	TM Consent	1/20	Open	06/26/2023	Josh Mung
Your personal invitation to access Terrace M...	Grade 4 Summer	TM Wellness	0/0	Open	06/22/2023	Josh Mung
Your personal invitation to access Terrace M...	Grade 4	TM Wellness	0/5	Open	06/07/2023	Josh Mung
Consent Request for Terrace Metrics Assess...	Grade 4 TM Assessment	TM Consent	12/20	Closed	04/05/2023	Josh Mung

Consent Request for Terrace Metrics Assessment (Due: April 14)

Activity Overview

- All 20
- Replied 12
- No Reply 8

Group: Grade 4 TM Assessment

Status: CLOSE

Sent To: Guardians on behalf of students

Sent By: Josh Mung

Sent On: 4/5/23 10:39 AM

Send Additional Reminders

Reminders ONLY GO to people who have NOT completed the consent form. If using an active consent, plan on sending out one or more reminders to increase consent rates.

- Find the title of the activity Title
- Click three dots at the end of the row
- Send Reminder

Day of Closing Consent

Export Consent Results

Before closing consent. Export the replies from your parents. Keep this CSV file for your records. You will have one per assessment/grade.

- Go to Terrace Metrics Module
- Click Assessments
- Find the title of the activity you want to export
- Click three dots at the end of the row
- Send Export Consent Activity Replies

NAME	SEASON/YEAR	ASSESSMENT STATUS	CREATED	CONSENT TYPE	REPLIES	STATUS	CONSENTS GRANTED	
Grade 4 Assessment, 2	fall/2023	Created	Jul 13, 2023	Active	0/20	Open	0	...
sdsd	fall/2023	In Progress	Jun 8, 2023	No Consent			0	
Grade 4, 5	summer/2024	Created	Jun 8, 2023	Active	0/20	Open	0	<ul style="list-style-type: none"> Export consent activity replies Go to consent activity
Grade 7 TM Spring Assessment	spring/2023	In Progress	May 3, 2023	No Consent			0	
Grade 6 Test	spring/2023	In Progress	Mar 30, 2023	No Consent			0	
Grade 4 TM Assessment, 1	spring/2023	Created	Mar 22, 2023	No Consent			0	
Grade 7 Assessment	spring/2024	Created	Mar 15, 2023	No Consent			0	
Grade 4 Assessment Test	spring/2023	In Progress	Mar 13, 2023	No Consent			0	
Test Grade 4 Assessment	spring/2023	Created	Mar 13, 2023	No Consent			0	

Close Consent

Once the consent deadline has passed the champion will close the consent form from the Activities page. Once closed, students become available to add to the assessment.

To close Consent

- Select Individual School Page
- Click Activities
- Choose TM Consent in Type
- Find the title of the activity you want to close
- Click (...)
- Select Close

TITLE	GROUP	TYPE	REPLIES	STATUS	SENT ON	SENT BY	
Consent Request for Terrace Metrics Assess...	Grade 3 Assessment Active ...	TM Consent	5/10	Open	06/28/2023	Actionaly A...	<ul style="list-style-type: none"> Send A Reminder Close
Consent Request for Terrace Metrics Assess...	Grade 2 Assessment Passiv...	TM Consent	5/10	Open	06/28/2023		...
Consent Request for Terrace Metrics Assess...	Grade 4	TM Consent	2/36	Open	06/26/2023	Josh Mung	...
Consent Request for Terrace Metrics Assess...	Grade 4 Summer	TM Consent	2/20	Open	06/26/2023	Josh Mung	...
Consent Request for Terrace Metrics Assess...	Grade 4 TM Assessment	TM Consent	12/20	Closed	04/05/2023	Josh Mung	...

The Assessment Process

Once the parent consent form has been closed you are now able to administer the Terrace Metrics assessment. In this section we will review what is recommended you do.

1. Add Students to the Assessment
2. Invite Students to Take the Assessment
3. Proctoring the Assessment
4. Understanding Student Results
5. Close Assessment
6. Download Assessment Summary
7. Send the Assessment Results

1. Add Students to the Assessment

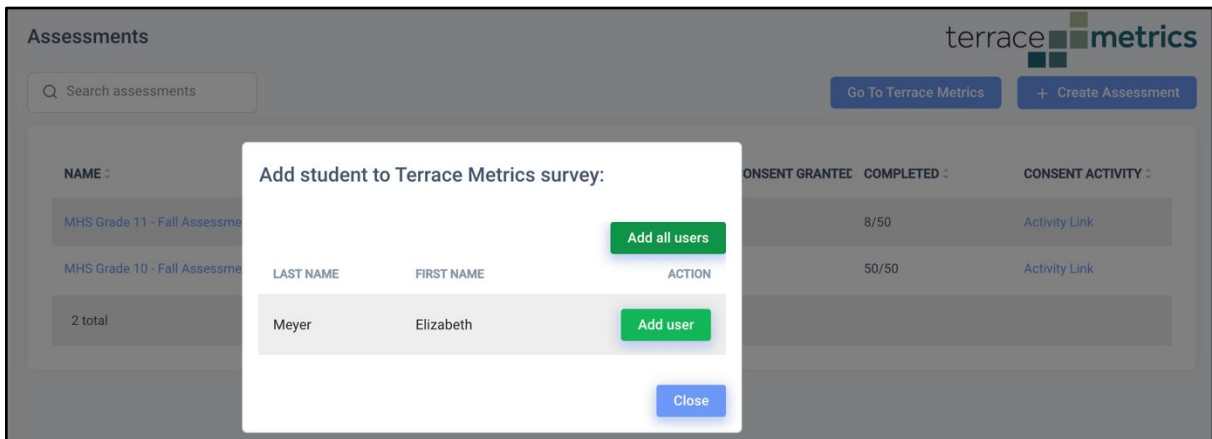
Students are available to be added to the assessment once the **consent activity has been closed**. This can be done by either the district or school champion.

- *From the admin panel*
- *Go to Terrace Metrics in the left sidebar menu*
- *Click Assessment*
- *Click the blue hyperlinked number from the Consent Granted column*

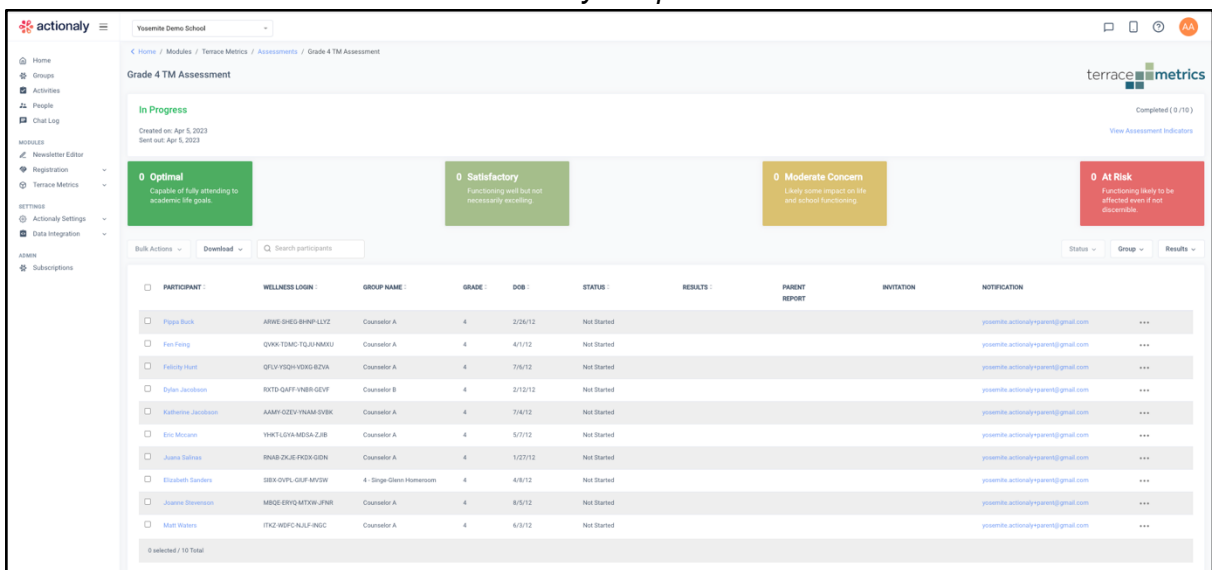


FM Assessment A Mi Mar 30 from...	fall/2025	Created	Mar 30, 2023	Active	5/9	Closed	3	...

- *A popup window will appear displaying a list of students who are available to be added.*
- *Click Add all Users*
 - *Or click Add User to add a single student*



- *When you open the assessment, you will now see students have been added. Prior to this step, when opening the assessment, no participants will appear.*
*Note*The best place for school counselors to monitor assessments, see above “Check Consent Activity Responses”.*



2. Invite Students to Take the Assessment

To Invite Students:

- *Select Individual School*
- *Click Terrace Metrics*
- *Click Assessment*
- *Click on the assessment name to view the student assessment list*
- *Select one or more students you wish to send the assessment to*
- *From Bulk Actions dropdown*
- *Click Assessment from the Terrace Metrics dropdown in the left sidebar menu*
- *Click on the assessment name to view the student assessment list*
 - *Select one or more students you wish to send the assessment to*
 - *OR From the Bulk Actions dropdown, click Send Assessment Invitation*

Yosemite Demo School

Created on: Apr 5, 2023
Sent out: Apr 5, 2023

View Assessment Indicators

0 Optimal
Capable of fully attending to academic life goals.

0 Satisfactory
Functioning well but not necessarily excelling.

0 Moderate Concern
Likely some impact on life and school functioning.

0 At Risk
Functioning likely to be affected even if not discernible.

Bulk Actions | Download | Search participants

Status | Group | Results

	WELLNESS LOGIN	GROUP NAME	GRADE	DOB	STATUS	RESULTS	PARENT REPORT	INVITATION	NO.
	ARWE-SHEG-BHNP-LL...	Counselor A	4	2/26/12	Not Started				yes
	QVKK-TDMC-TQJU-N...	Counselor A	4	4/1/12	Not Started				yes
<input checked="" type="checkbox"/>	Felicity Hunt	QLFY-YSQH-VDXG-BZVA	Counselor A	4	7/6/12	Not Started			yes
<input checked="" type="checkbox"/>	Dylan Jacobson	RXTD-QAFF-VNBR-GEVF	Counselor B	4	2/12/12	Not Started			yes
<input checked="" type="checkbox"/>	Katherine Jacobson	AAMY-OZEV-YNAM-SV...	Counselor A	4	7/4/12	Not Started			yes
<input checked="" type="checkbox"/>	Eric Mccann	YHKT-LGYA-MDSA-ZJIB	Counselor A	4	5/7/12	Not Started			yes

Note* If a student does not have an email or does not receive the assessment, the student will need to take the assessment with their **wellness login**. If students do not have a school email, they can go to the Terrace Metrics website by typing this address: <https://vendor.assessment.terracemetrics.org/survey>

Once the assessment has been sent to a student(s), a green envelope will appear in the Invitation column, and the student will be sent an email with a personalized link to their assessment (you may need to refresh your screen to see the green envelope).

Students that have an email address will receive an email which includes a personalized link to their assessment. For districts using Clever or ClassLink, those students can also access their assessment by clicking on the Actionaly app.

3. Proctoring the Assessment

On the day of administering the assessment, the proctor (typically the teacher) can read the instructions or show the proctor video before students start the assessment. Approximately 95% of all students complete the assessment within 15 minutes (97% complete it within 20 minutes). We recommend that you prepare your proctors in advance, by utilizing the materials below.

TM Proctor Video

- <https://www.terracemetrics.org/operational-videos/>
- Password: TMSchools

TM Proctor Script

- [Click here](#) to go to the addendum for examples of proctoring scripts

4. Understanding Student Results

Student Assessment Results

Results are available immediately after the student has completed the assessment and champions can easily see the overall risk status for each student and view or download the corresponding assessment report.

Overall Assessment Status

On the assessments page, student reports are shown in order of category and priority so that champions can quickly discern which students are struggling and should be contacted sooner than others. Students in the **May Need Assistance** category will always appear first, followed by students in the **Some Concern**, **Satisfactory**, and **Optimal** ranges.

Assessment Scores

May Need Assistance: Priority 1

- Priority 1 scores are given only if the depression indicator and/or self-harm item is selected. Schools follow district and state mandates, which in most cases is meeting with the student within 24 hours.

May Need Assistance: Priority 2

- Priority 2 scores are given if multiple indicators are in the *may need assessment category* but depression/self-harm is not endorsed. Most schools choose to meet with these students within the next 2-3 days.

Some Concern: Priority 3

- Priority 3 scores mean that any supplemental indicator and/or frequent victimization was in the *may need assistance category*. These students will benefit from further strategies that can be provided either at school or in the community.

Satisfactory: Priority 4

- These students reported anxiety and/or ostracism in the *may need assistance category* but have other protective factors in place. These students could benefit from the curriculum provided by Terrace Metrics.

Optimal: Priority 5

- These students have multiple resiliency indicators in the *may need assistance category* but show little evidence of adversity. These students could benefit from the Tier I or Tier II curriculum provided by Terrace Metrics.

Invalid Assessment

- This can occur if the student completes the assessment too quickly.



Student Report

Once the assessment has been completed, champions can download the assessment report. The assessment report can also be downloaded from the 3-dot (...) menu on the summary assessments page.

Download Student Reports

- *Select Individual School*
- *Click Terrace Metrics*
- *Click Assessments*
- *Click on the assessment name to view the list of students.*
- *Select the check box next to the participant name*
- *Select Download*
- *Select Student Report*

5. Close Assessment

To generate the school report, ALL grade-level assessments must be closed.

- The assessment will automatically close if/when the status of ALL student assessments is marked "Completed".
- If the status of any student assessment(s) is marked "Not Started" the assessment will remain open.
- In order to manually close the assessment, a district or school champion must bulk update the "Not Started" status to "Not Completed". Once all student status has either "Completed" or "Not Completed" the assessment will close.

Note that **the assessment cannot be reopened once it has been closed.** If you need to reassess a student once closed you can do so by creating a new group. [Click here](#) to see more information in the Appendix, "Creating a new group". Then you would follow the above to create a new assessment. You would select "with no consent" because consent has already been granted.*

To close the Assessment in bulk:

- *Select Assessment*
- *Filter Status- Not Started*
- *Select All*
- *Bulk Action*
- *Edit Assessment Status*

actionaly Yosemite Demo School

Created on: Apr 5, 2023
Sent out: Apr 5, 2023

0 Optimal
Capable of fully attending to academic life goals.

0 Satisfactory
Functioning well but not necessarily excelling.

0 Moderate Concern
Likely some impact on life and school functioning.

0 At Risk
Functioning likely to be affected even if not discernible.

Bulk Actions Download Search participants

Status Group Results

Edit Group Name
Edit Assessment Status
Send Assessment Invitation

	WELLNESS LOGIN	GROUP NAME	GRADE	DOB	STATUS	RESULTS	PARENT REPORT	INVITATION	NOTIFICATION
Download Parent Reports	ARWE-SHEG-BHNP-LL...	Counselor A	4	2/26/12	Not Started				yosemite.actionaly+parent@
Download Student Reports	QVKK-TDMC-TQJU-N...	Counselor A	4	4/1/12	Not Started				yosemite.actionaly+parent@
<input checked="" type="checkbox"/> Felicity Hunt	QFLV-YSQH-VDXG-BZVA	Counselor A	4	7/6/12	Not Started				yosemite.actionaly+parent@
<input checked="" type="checkbox"/> Dylan Jacobson	RXTD-QAFF-VNBR-GEVF	Counselor B	4	2/12/12	Not Started				yosemite.actionaly+parent@
<input checked="" type="checkbox"/> Katherine Jacob...	AAMY-OZEV-VNAM-SV...	Counselor A	4	7/4/12	Not Started				yosemite.actionaly+parent@
<input checked="" type="checkbox"/> Eric Mccann	YHKT-LGYA-MDSA-ZJIB	Counselor A	4	5/7/12	Not Started				yosemite.actionaly+parent@
<input checked="" type="checkbox"/> Juana Salinas	RNAB-ZKJE-FKDX-GIDN	Counselor A	4	1/27/12	Not Started				yosemite.actionaly+parent@

actionaly Yosemite Demo School ID: 642c8c82968664353aad19a Admin Mode

Bulk Actions Download Search participants

Status: Not Started Group Results

	PARTICIPANT	WELLNESS LOGIN	GROUP NAME	GRADE	DOB	STATUS	RESULTS	PARENT REPORT	INVITATION	NOTIFICATION
<input checked="" type="checkbox"/>	Leonard Cowan	LOG...								yosemi
<input checked="" type="checkbox"/>	Ryan Everett	GLU...								yosemi
<input checked="" type="checkbox"/>	Fen Feing	CH...								yosemi
<input checked="" type="checkbox"/>	Dylan Jacobson	DHSU-AEGY-SWLW-PD...	4 - Singe-Glenn Homer...	4	2/12/12	Not Started				yosemi
<input checked="" type="checkbox"/>	Katherine Jacob...	CLDC-QPJC-EWKE-SG...	4 - Pittman Tuesday	4	7/4/12	Not Started				yosemi
<input checked="" type="checkbox"/>	Lillian Macken	AIRK-UJOO-KAWQ-BD...	4 - Singe-Glenn Homer...	4	3/13/12	Not Started				yosemi
<input checked="" type="checkbox"/>	Eric Mccann	ALLL-VAWQ-WVSR-TN...	4 - Pittman Tuesday	4	5/7/12	Not Started				yosemi
<input checked="" type="checkbox"/>	Graciela Molina	PCSL-WSSK-VNFD-OW...	4 - Singe-Glenn Homer...	4	4/14/12	Not Started				yosemi
<input checked="" type="checkbox"/>	Edward Penningt...	NMRX-JBXA-ZVQM-N...	4 - Singe-Glenn Homer...	4	7/17/12	Not Started				yosemi

Edit status

All selected participant's status will be set to "Not Completed".

No Yes

NAME :	SEASON/YEAR :	ASSESSMENT STATUS :	CREATED :	CONSENT TYPE :	REPLIES :	STATUS :	CONSENTS GRANTED :	
Grade 4 Assessment, 2	fall/2023	Created	Jul 13, 2023	Active	0/20	Open	0	...
sssd	fall/2023	In Progress	Jun 8, 2023	No Consent			0	
Grade 4, 5	summer/2024	Created	Jun 8, 2023	Active	0/20	Open	0	...
Grade 7 TM Spring Assessment	spring/2023	In Progress	May 3, 2023	No Consent			0	
Grade 6 Test	spring/2023	In Progress	Mar 30, 2023	No Consent			0	
Grade 4 TM Assessment, 1	spring/2023	Created	Mar 22, 2023	No Consent			0	
Grade 7 Assessment	spring/2024	Created	Mar 15, 2023	No Consent			0	
Grade 4 Assessment Test	spring/2023	In Progress	Mar 13, 2023	No Consent			0	
Test Grade 4 Assessment	spring/2023	Created	Mar 13, 2023	No Consent			0	
Grade 7 TM Assessment	spring/2023	Created	Mar 13, 2023	No Consent			0	
Grade 4, 1	spring/2023	In Progress	Mar 8, 2023	No Consent			0	
Grade 4 TM Assessment	spring/2023	Created	Feb 15, 2023	No Consent			0	
Grade 04 Spring Assessment	spring/2023	In Progress	Feb 13, 2023	No Consent			0	
Grade 07 Spring 2023	spring/2023	In Progress	Feb 13, 2023	No Consent			0	
Grade 11 Spring 2023	spring/2023	Completed	Feb 13, 2023	No Consent			0	...
15 total								

6. Summary Assessment Report

Once the assessment is closed you can download the assessment report for the class.

To download the Assessment Report:

- *Select Individual School*
- *Click Terrace Metrics*
- *Click Assessments*
- *Choose the Assessment you want to download*
- *Click the (...) at the right of the assessment*
- *Click Download Assessment Report*

The screenshot shows the Actionally interface for Orchid Demo School. The left sidebar contains navigation options: Home, Groups, Activities, People, MODULES (Newsletter Editor, Terrace Metrics, Assessments, Search Students), and SETTINGS (Actionally Settings, Data Integration). The main area displays a list of assessments with columns for name, term, status, date, consent, and a count. A red box highlights the 'Download Assessment Report' button at the bottom right of the list.

Assessment Name	Term	Status	Date	Consent	Count
Grade 4, 5	summer/2024	Created	Jun 8, 2023	Active	0/20
Grade 7 TM Spring Assessment	spring/2023	In Progress	May 3, 2023	No Consent	0
Grade 6 Test	spring/2023	In Progress	Mar 30, 2023	No Consent	0
Grade 4 TM Assessment , 1	spring/2023	Created	Mar 22, 2023	No Consent	0
Grade 7 Assessment	spring/2024	Created	Mar 15, 2023	No Consent	0
Grade 4 Assessment Test	spring/2023	In Progress	Mar 13, 2023	No Consent	0
Test Grade 4 Assessment	spring/2023	Created	Mar 13, 2023	No Consent	0
Grade 7 TM Assessment	spring/2023	Created	Mar 13, 2023	No Consent	0
Grade 4, 1	spring/2023	In Progress	Mar 8, 2023	No Consent	0
Grade 4 TM Assessment	spring/2023	Created	Feb 15, 2023	No Consent	0
Grade 04 Spring Assessment	spring/2023	In Progress	Feb 13, 2023	No Consent	0
Grade 07 Spring 2023	spring/2023	In Progress	Feb 13, 2023	No Consent	0
Grade 11 Spring 2023	spring/2023	Completed	Feb 13, 2023	No Consent	0

15 total

Download Assessment Report

7. Send Assessment Results to Parents

Results are immediately available as soon as a student has completed their assessment. Prepare a summary report or individual reports for each student. Share the results with parents via email or a secure online portal, ensuring confidentiality and privacy.

To send Parent Reports:

- *Select Individual School Page*
- *Click Terrace Metrics*
- *Select name of Assessment*
- *Select Bulk Actions or one Participant*
- *Click Send Parent Report*

The screenshot shows the Actionally interface for Yosemite Demo School. The top section displays four status categories: 0 Optimal, 0 Satisfactory, 0 Moderate Concern, and 1 At Risk. Below this, there are filters for Bulk Actions, Download, and Search participants. The 'Bulk Actions' menu is open, showing options like 'Send Parent Report', 'Download Parent Reports', and 'Download Student Reports'. A red arrow points to the 'Send Parent Report' option. Below the menu is a table of participants with columns for Wellness Login, Group Name, Grade, DOB, Status, Results, Parent Report, and Invitatic.

WELLNESS LOGIN	GROUP NAME	GRADE	DOB	STATUS	RESULTS	PARENT REPORT	INVITATIC	NO
GSAC-QNKY-WPVE-GL...	Smith- Thursday	4	1/11/12	Completed	At Risk			yes
ESQD-XOSZ-RRDZ-LJEJ	Smith- Thursday	4	3/9/12	Not Completed				yes
Felicity Hunt	FPRJ-SXUV-CXBG-MF...	4- Pittman Tuesday	7/6/12	Not Completed				yes
Pippa Buck	YOFU-HHXV-OEQV-OW...	Smith- Thursday	2/26/12	Not Completed				yes
Leonard Cowan	LOQQ-THRY-DMOV-ZH...	Smith- Thursday	3/28/12	Not Started				yes
Ryan Everett	GUBP-HFVV-VAHB-AO...	Smith- Thursday	2/10/12	Not Started				yes

Managing Participant Results and Assessments in the Dashboard

Managing Participant Details

You have the option to enhance the student's information by adding status, results, or add notes.

To Edit Participant Details:

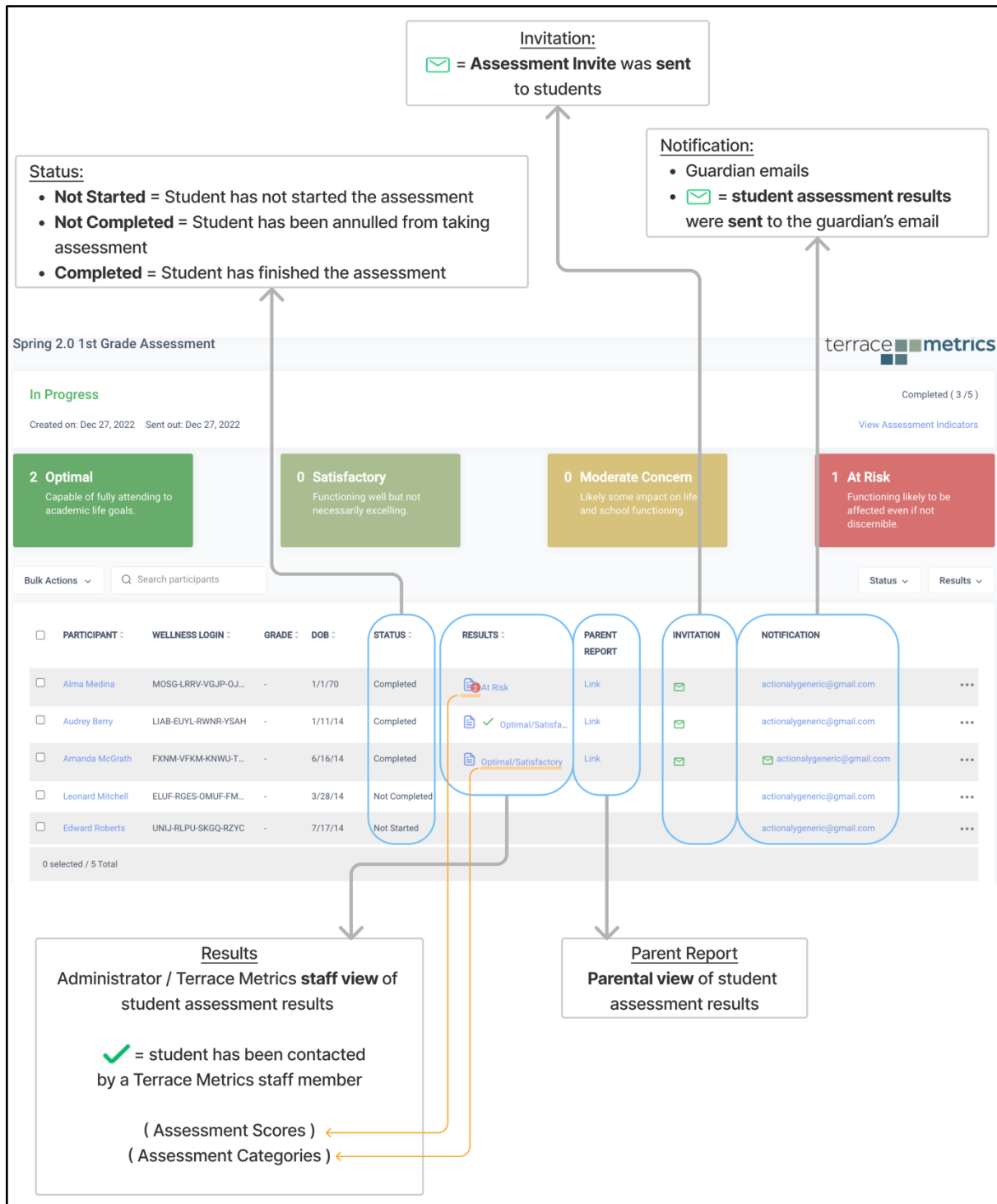
- *Select Individual School*
- *Click Terrace Metrics*
- *Click Assessments*
- *Choose the Assessment*
- *Choose the student you wish to edit*
- *Click on (...)* on the right-hand side of the student
- *Click Save when finished*

The screenshot shows the 'Edit Participant' form in the Actionaly dashboard. The form is overlaid on a dashboard showing assessment results for 'Grade 4, 1'. The form fields include:

- Participant Name: Audrey Blackberry
- Grade: 4
- Date Of Birth: 1/11/12
- Student ID: 14014
- Priority: 1
- Wellness Code: GSAC-QNKY-WPYE-GIDZ
- Notification Email: yosemite.actionaly+parent@
- Notification Mobile: (415) 569-2008
- Status: Completed
- Results: Participant has been contacted and result validated
- Group Name: Smith-Thursday
- Participant Email: yosemite.actionaly+student@
- Gender: F
- Notes: Met with Parents on 6/3

A 'Save' button is highlighted in red at the bottom right of the form. A note at the bottom of the form states: "Note: Typically a participant's status should only be manually updated in case of illness, inability to complete the survey, etc. 'Participant has been contacted and result validated' is typically used to denote a member of the response team has contacted a participant flagged with a positive priority concern. This will only unlock a survey to complete."

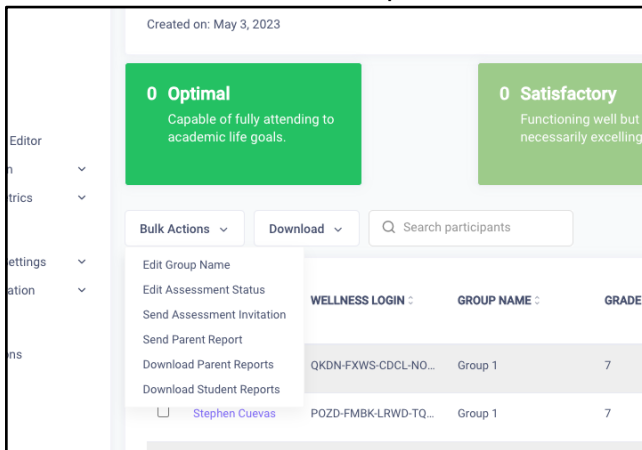
Managing Assessments



Bulk Actions

When more than one participant is selected, the following actions can be done in bulk:

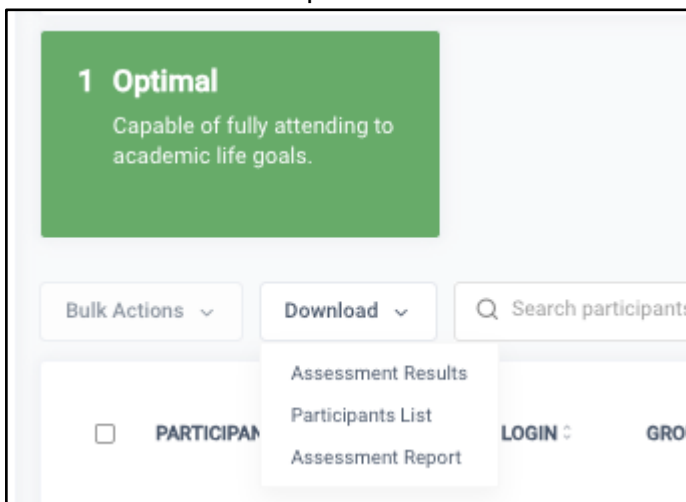
- Edit Group Name
- Edit Assessment Status
- Send Assessment Invitation
- Send Parent Report
- Download Parent Reports
- Download Student Reports



Download

Once the assessment is created you have access to:

- Assessment Result
- Participant List
- Assessment Report



Appendix

Benefits of Using Actionaly

Automated Consent Process

Save time by scheduling and sending consent forms from Actionaly to efficiently get parent permission. Use the pre-populated active or passive consent forms or change the language to suit your district's needs. Monitor parent replies, send reminders, and add approved students to an assessment at the click of a button.

Single Sign-On

Invite students to take their assessment by email or via Actionaly. Students simply click on the Actionaly app to access their assessment from their ClassLink launchpad or Clever portal. Actionaly also allows administrators to log into the Admin Panel using Google Single Sign-On.

Assessment Progress Tracking

Track assessment progress from the integrated Terrace Metrics module. Counselors can filter and sort real-time assessment results enabling them to provide the appropriate personalized response to students.

Family Engagement

By using the range of communication tools available in Actionaly your district can drive better family engagement through newsletters, announcements, direct chat, and more.


Translation

Actionaly uses Google Translate to communicate with parents in their preferred language. Districts have the option to send their preferred language if it is included in the roster data.

1. If the data that is passed to Actionaly includes the preferred language of the parent data, Actionaly will be able to have the parent account set to the preferred language.
2. If they are not passing the preferred language of parent data, the parent has the option to go into their account and change language.

Visual of Active and Passive Consent

Active Consent



For Chloe Sanders

Consent Request for Terrace Metrics Assessment July 11

Dear Parent or Guardian,

Our district in partnership with Terrace Metrics, Inc., is proud to provide an innovative assessment service to students and families. This assessment is designed to examine the social/emotional strengths and needs of participating students in grades 3-12. For more information, you can refer to the Actionally newsletter or click this [link](#) to read more about indicators and what parents and guardians need to know about the service.

You can also view this short video: <https://www.terracemetrics.org/consent-form/>

This year, your child will have the opportunity to participate in the administration of the survey. Areas of assessment are determined by your child's grade and the wishes of the school and school district.

As a reminder, your child's responses are confidential and secure. Each student accesses the screener using none of their personal information. Further, teachers will not have access to your child's responses, and the raw data will be stored separately from other educational records.

*** If you wish for your child to have the opportunity to participate in the upcoming administration of the survey, then please select Yes.**

Yes

Opt Out

If a parent chooses yes, they must sign and give permission.

I, Dorothy Banks, am the parent/guardian of Li Banks and give permission for my student to participate in the Terrace Metrics survey. My consent shall be granted until such time as I provide written notice for my student not to participate.


I give permission

Please type: Dorothy Banks
Dorothy Banks

SUBMIT

Passive Consent

Grade 2 Assessment Passive Consent



For Felicity Roth

Consent Request for Terrace Metrics Assessment Due July 8th


Dear Parent or Guardian,

Our district in partnership with Terrace Metrics, Inc., is proud to provide an innovative assessment service to students and families. This assessment is designed to examine the social/emotional strengths and needs of participating students in grades 3-12. For more information, you can refer to the Actionally newsletter or click this [link](#) to read more about indicators and what parents and guardians need to know about the service.

You can also view this short video: <https://www.terracemetrics.org/consent-form/>

Your child will have the opportunity to participate in the administration of the survey throughout the 2023-20024 school year. Areas of assessment are determined by your child's grade and the wishes of the school and school district.

As a reminder, your child's responses are confidential and secure. Each student accesses the screener using none of their personal information. Further, teachers will not have access to your child's responses, and the raw data will be stored separately from other educational records.

 Select opt-out if you do not want your student to participate in the assessment. On the next screen you will be asked to check the box, sign and submit the form to release your student from participating in this program. Click yes if you have no objections to your child participating in this program and we thank you for your support.

If the parent chooses to opt-out they must sign and refuse consent

Grade 2 Assessment Passive Consent

I, Dorothy Banks, am the parent/guardian of Li Banks and refuse permission for my student to participate in the Terrace Metrics survey. My consent shall be refused until such time as I provide written consent for my student to participate.

I refuse permission

Please type: Dorothy Banks

Dorothy Banks

Proctor Scripts

Clever Script

Good morning/afternoon! My name is (insert name) and I am here to help administer the Terrace Metrics screener that students at (name of school) will take within the next few weeks. Please watch this brief video explaining the assessment. I can answer questions after the video is completed.

Show Video <https://www.terracemetrics.org/wp-content/uploads/2019/08/TM-VIDEO-1B.mp4>

Like the video said this assessment tool will ask you questions about many areas of your life. Your responses are confidential; teachers and other staff will not see your responses. However, the wellness team at your school will receive a copy of your report.

Read the directions very closely. Unless the directions say differently, think of how you have been over the past month. To repeat, in the past month. We want to know how you are doing now, not how you were in the past. Please take this assessment very seriously and answer all questions honestly. You will not be in trouble for any responses you provide, and your responses will not be a part of your record. There are no right or wrong answers, and many questions will be asking you about how you feel most of the time, not just today. Although the video stated it is designed to take one class period, it should take about 15-20 minutes maximum. Take your time when reading each item, and again, answer each item on how you feel, not how you think others would want you to respond. Do not discuss your responses with others while taking the survey. Please do not discuss this survey after you are finished. There are many other students who have yet to take it, and we don't want to influence their responses. Are there any questions?

Now, I need everyone to open their Clever dashboard and look for the icon called "Terrace Metrics". If you are unable to access the link, please don't be concerned as some students did opt out by the specified date. Please click on that icon and answer the questions. I will remain here until all of you have completed the assessment. If any follow up is needed, we will contact you.

Thank you and please feel free to contact any of us in wellness or guidance if you have any questions or concerns.
Sample provided by Broward County School District

Non-Clever Script

This assessment tool will ask you questions about many areas of your life. Your responses are confidential; teachers and other staff will not see your responses. However, your counselor will receive a copy of your report.

Why are we doing this? A big part of our school is evaluating data to make sure our students are progressing toward success. We have a lot of academic data to monitor your progress, but your social and emotional well-being is equally important to us. Your honest responses help us understand you to make sure that we are meeting the needs of all of our students.

Please listen very carefully: Read the directions very closely. Unless the directions say differently, think of how you have been over the past month. To repeat, in the past month. We want to know how you are doing now, not how you were in the past.

Please take this assessment very seriously and answer all questions honestly. You will not be in trouble for any responses you provide, and your responses will not be a part of your record. There are no right or wrong answers, and many questions will be asking you about how you feel most of the time, not just today.

Finally, while this survey is designed to last one class period, most of you will finish much sooner. There is no reward for finishing early. Take your time when reading each item, and again, answer each item on how you feel, not how you think others would want you to respond. Second, do not discuss your responses with others while taking the survey. Keep your eyes on your own screen. We are interested in understanding you. Finally, please do not discuss this survey after you are finished. There are many other students who have yet to take it, and we don't want to influence their responses.

Any questions?

Great. Please access the survey and you can begin. If you have any questions, please raise your hand and I/one of my team will help you.

Creating a new Group

This is used when you would like to have additional groups that are not coming from your SIS and or data files shared with Actionaly. If counselors have groups that are not determined by grade, homeroom, etc. An example could be students with invalid protocols.

Create a new group

- *Click Groups in the left menu*
- *Click on + Create Group at the top right*
- *Type the Group Name*
- *Select a Menu Type from the available list or start typing to create a new menu type, such as Sport or Health.*
- *Click Create*

[https://actionaly.zendesk.com/hc/en-us/articles/6806156846861-Create-and-
Manage-a-New-Group](https://actionaly.zendesk.com/hc/en-us/articles/6806156846861-Create-and-Manage-a-New-Group)

Once the group has been created, you will land in the Manage People screen and can start building your distribution list.

Note Adding a student automatically adds the guardians. Adding a guardian does NOT automatically add the student.*