Assessment

Teaching Strategies

GOLD® Online
Guide for Administrators
Welcome to GOLD® online!

Welcome to GOLD® online! It’s easy to start using the system. One of your duties as an administrator is to enter information into the system. That includes entering sites, teachers/administrators, classes, and children. This guide explains how to enter that information as well as how to start using each of the other GOLD® tabs.

To begin, you will first need to log into the system. Make sure that you have the username and password that you received by e-mail from Implementation@TeachingStrategies.com. You will need them to sign in.

Let’s get started!
4 Getting Started
This section explains how to set up your login information and profile and navigate GOLD®.

8 Administration
This section shows how to manage administrators, teachers, and children in the program, site, or class for which you are an administrator.

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This section introduces the reports that administrators can generate.
Section 1: Getting Started
Signing Into Your GOLD® Account

Steps:
Access the Teaching Strategies Web site (www.teachingstrategies.com).
Click the GOLD Quick Access button or the Member Sign In button.

Sign in by using the username and password provided in the e-mail you received.
If you sign in by using the Member Sign In button, you will be taken to your Dashboard.

If you ever forget your username or password, use the links to have a reminder e-mailed to you.

If you sign in by using the GOLD Quick Access button, you will bypass the Dashboard and go straight to your GOLD® Home Page.

Tip. From the Dashboard, you can access professional development tools and manage your profile.
Refer to the Teacher’s Quick-Start Guide for more information about the Dashboard. From the Dashboard, click the GOLD® logo to access your GOLD® home page.
Tip. Refer to the Home Page for GOLD® highlights and updates. The information displayed depends on your organization and the role in which you signed in (i.e., Administrator, Teacher, or TeamCentral user).

When you sign in, you may see the box pictured below, which asks you to set your site preferences. You can make and submit a selection, or you can ignore the question and close the box.
Common GOLD® Features

As you navigate GOLD®, you will notice features that provide extra options and helpful resources. These usually appear at the top of or on the right side of the screen you are viewing.

Dashboard

Clicking the Teaching Strategies® Dashboard logo will take you to your Dashboard.

Change Role
Enables you to toggle between the Administrator, Teacher, and Family sites.

Help
The Help link is always displayed at the top of the page. Click the link to search for "Help" articles and to access the Help Library.

Support and Resources
These options are links to “Help” articles that pertain to the page you are currently using.

Dashboard Image:
- Change View: Use this menu to select the information you want to display. The options depend on the purpose of the page you are viewing.
- Print: Displays a printer-friendly version of the page.
- PDF: Displays the page as a PDF file that you can save or print. We recommend creating a PDF first if you are printing the display to share with others. It will be easier to read than a screenshot.
- Excel®: Displays the search results as an Excel® file that you can save or print.

Action Menu

This menu (located at the top right of many GOLD® screens) lists more actions you can take. Like the choices offered under the Change View button, the Action options depend on the page. Below are examples from different pages:

- Edit Details
- Transfer User
- Access Site as this User
- Manage Linked Accounts
- Disable Account
- Add Class
- Show History
- View Classes
- View Children
- Delete

Support:
- View Sites
- Add or Edit a Site
- Deleting a Site
- Contact Us

Resources:
- Getting Started Guide for Administrators
GOLD® Online
Guide for Administrators

Section 2: Administration
Administration

GOLD\textsuperscript{®} is organized to give administrators different levels of access according to their roles in their organizations. Administrators may be granted access at the organizational, program, or site level. An organizational level administrator will have access to all of the data for his or her entire organization. A program or site administrator only has access to the data for his or her respective program or site.

The ADMINISTRATION tab is where you set up programs, sites, and classes; add children; add users; and manage license settings.

\textit{Note}. Depending on your level of access, you may not see the Program or Site links in the first menu option.

Place your cursor on the ADMINISTRATION tab to view the options.

Programs, Sites & Classes

The ADMINISTRATION tab’s drop-down menu gives you access for managing programs, sites, and classes. You also have tools to manage administrators, teachers, and children in the program, site, or class with which you work.

\textbf{Steps}:

From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to get started.
Programs

Adding a Program

*Note.* This option is only available to administrators with organizational level access.

**Steps:**

From the **ADMINISTRATION** tab’s drop-down menu, select **Programs, Sites & Classes** to display the submenu.

Click **Programs** to display a list of programs in your organization.

Click the **Add New Program** button.

On the Add Program screen, fill in the required program information.

When you are finished, click **SUBMIT**.

---

**Sample Admin Org — View Programs**

Filter by Program: GO

<table>
<thead>
<tr>
<th>Program</th>
<th>Number of Sites</th>
<th>Default Contact Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Sandbox Program 1</td>
<td>2</td>
<td>Bonnie Program 1 Admin</td>
</tr>
<tr>
<td>Admin Sandbox Program 2</td>
<td>2</td>
<td>Evelyn Program 2 Admin</td>
</tr>
</tbody>
</table>

---

**Sample Admin Org — Add Program**

To add a program to Sample Admin Org, fill out the form below and click the Add button.

*Indicates required field

**Name** *

☐ Pre-fill contact information with organization information

**Address 1** *

**Address 2**

**City** *

**State** *

**Zip/Postal Code** *
Managing/Editing a Program

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Programs to display a list of programs in your organization.

You can search the list of programs, or you can filter it by entering a program’s name into the “Filter by Program” field and clicking GO. Search results will be displayed below the box in which you typed the program’s name.

Whether you are viewing the full list or you have already filtered the list, click GO to the right of a program’s row to view/edit the program details.

Tip. The Change View button enables you to change the columns that appear on this list. Print, PDF, and Excel® enable you to see the entire list in various formats.

Once you are on the View screen for a selected program, use the Action menu to perform functions such as viewing teachers and children, adding new sites, and viewing reports specific to that program.
Sites

Adding a Site

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.
Click Sites to display a list of sites in your program or organization.
On the View Sites screen, click the Add New Site button.

Select the Program that the site is to be set up under and click SUBMIT.
On the Add Site screen, fill in the required information.
When you are finished, click SUBMIT.

Managing a Site
There are many more options for administrators at the site level than at any other level of administrative access. If you are an organizational- or program-level administrator, it is important to have administrators assigned at the site level to manage all of the functions and options at that level. (See the “Manage Users” section on page 24 of this guide for help in setting up users’ accounts.)
Site Info Action Menu

Accessed from the Site Info screen for a selected site (or the License Settings screen if you are a site-level administrator), the Action menu includes several useful options not found elsewhere in GOLD®. Use this section to learn more about some of these features.

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Sites to display the list of sites within your program or organization.
You can search the list, or you can filter it by entering the site’s name into the “Filter by Site” field and clicking GO.

The results will be displayed below the box in which you typed the site’s name.

Click GO to the right of a site’s row to view/edit the site details.

Click the Action menu to view options.
Managing Children (Site Level)

This feature enables you to manage the data for a group of children in one site all at once. You have options to transfer, archive, or delete the data for a group of children.

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Sites to display a list of sites in your program or organization.

You can search the list, or you can filter it by entering the site’s name into the “Filter by Site” field and clicking GO.

Identify the site you are managing.

Click GO to the right of a site’s row to view/edit the site details.

Click the Action menu to view options.

From the Action menu, select Manage Children.

Select the group of children for whom you want to transfer, archive, or delete data. Then click the appropriate orange TRANSFER, ARCHIVE, or DELETE button at the bottom.

Managing Archived Children (Site Level)

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Sites to display a list of sites in your program or organization.

You can search the list, or you can filter it by entering the site’s name into the “Filter by Site” field and clicking GO.

Identify the site you are managing.

Click GO to the right of the site’s row to view/edit the site details.

Click the Action menu to view options.

From the Action menu, select Manage Archived Children.

Select the group of children for whom you want to change the site, reactivate records, or delete records. Then click the appropriate orange CHANGE SITE, REACTIVATE, or DELETE button at the bottom.
Managing Deleted Children (Site Level)

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Sites to display a list of sites in your program or organization.

You can search the list, or filter it by entering the site’s name into the “Filter by Site” field and clicking GO.

Identify the site you are managing.

Click GO to the right of the site’s row to view/edit the site details.

Click the Action menu to view options.

From the Action menu, select Manage Deleted Children.

Select the group of children for whom you want to reactivate records, transfer records to archives, or delete records. Then click the appropriate orange REACTIVATE, TRANSFER, or DELETE button at the bottom.

### Admin Sandbox Site 2A — Manage Deleted Children

Listed below are all children slated for deletion from Admin Sandbox Site 2A. Deleted children are stored here for 90 days before being permanently removed from the system.

Use the checkboxes below to reactivate children, transfer them to archives, or permanently delete their data now. This will bypass the 90 day standard grace period.

<table>
<thead>
<tr>
<th>Child's Name</th>
<th>Birthdate</th>
<th>Date Deleted</th>
<th>Reactivate</th>
<th>Transfer To Archives</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robyn, 4 years old</td>
<td>1/24/2006</td>
<td>2/15/2013</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Wyatt, 4 years old</td>
<td>3/3/2006</td>
<td>2/15/2013</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

[Buttons: REACTIVATE, TRANSFER, DELETE]
Managing Exited Children From IDEA Part B or Part C (Site Level)

Steps:
From the **ADMINISTRATION** tab’s drop-down menu, select **Programs, Sites & Classes** to display the submenu.
Click **Sites** to display a list of sites in your program or organization.
You can search the list or filter by name by entering the site name into the filter field and clicking **GO**.
Identify the site you are managing.
Click **GO** to the right of the site’s row to view/edit the site details.
Click the **Action** menu to view options.
From the **Action** menu, select **Manage Exited Children from IDEA Part B or Part C**.
Select the child whose records you want to reactivate. Then click **Reactivate**.
A pop-up option will ask you to confirm your choice to reactivate this child’s record.
Select **OK** to reactivate the child’s record or select **Cancel** to keep the child as exited.

Site 2 — Manage Exited Children from IDEA Part B Preschool (3-5)

This screen lists all active children who have been exited from an IDEA Part B Preschool (3 to 5) Program.

To reactivate a child to IDEA Part B Preschool (3 to 5), click the REACTIVATE link. This will mark the child as currently enrolled in Part B.

<table>
<thead>
<tr>
<th>Child</th>
<th>Entry Date</th>
<th>Exit Date</th>
<th>Reactivate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wendy Gaar / Blue Bears / Britany Miller</td>
<td>09/01/2010</td>
<td>02/13/2011</td>
<td>Reactivate</td>
</tr>
<tr>
<td>Wendy Gaar / Blue Bears / Dan Atman</td>
<td>09/01/2010</td>
<td>02/13/2011</td>
<td>Reactivate</td>
</tr>
<tr>
<td>Wendy Gaar / Blue Bears / Jamal Bryant</td>
<td>09/01/2010</td>
<td>02/13/2011</td>
<td>Reactivate</td>
</tr>
<tr>
<td>Wendy Gaar / Blue Bears / Kate Endrelunas</td>
<td>09/01/2010</td>
<td>02/14/2011</td>
<td>Reactivate</td>
</tr>
<tr>
<td>Wendy Gaar / Preschool Class / Brandon Jones</td>
<td>09/15/2010</td>
<td>04/26/2012</td>
<td>Reactivate</td>
</tr>
</tbody>
</table>

Are you sure you would like to reactivate this child to OSEP Part B. This will mark the child as currently in Part B.

[OK] [Cancel]
Managing Interrater Reliability (Site Level)

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Sites to display a list of sites in your program or organization.

You can search the list, or you can filter by entering the site’s name into the “Filter by Site” field and clicking GO.

Identify the site you are managing.

Click GO at the right of the site’s row to view/edit the site details.

Click the Action menu to view options.

From the Action menu, select Manage Interrater Reliability.

The screen below will appear. It lists all users in your account.

Check the box in the “Add” column to assign the interrater reliability certification process to a user.

Click SAVE.

<table>
<thead>
<tr>
<th>User</th>
<th>Status</th>
<th>Add</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aaryn Richard</td>
<td>Not Yet Assigned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beth Sampson</td>
<td>Assigned to complete Interrater Reliability Certification on 04/11/2012.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bob Administrator</td>
<td>Started Interrater Reliability Certification on 10/25/2011.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Florence Hernandez</td>
<td>Not Yet Assigned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Susi Soder</td>
<td>Assigned to complete Interrater Reliability Certification on 04/11/2012.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tennesse Trial</td>
<td>Not Yet Assigned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wendy Gaar</td>
<td>Not Yet Assigned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wendy Gaar</td>
<td>Started Interrater Reliability Certification on 10/18/2010.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wendy Teacher</td>
<td>Not Yet Assigned</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note that an email will automatically be sent to each user you selected confirming enrollment or withdrawal from the Interrater Reliability Certification test.

SAVE

Each user will receive an e-mail notification that you have assigned the interrater reliability certification process to him or her. The message will include instructions for getting started.

Each user can then access the interrater reliability certification process through the PROFESSIONAL DEVELOPMENT tab on the Dashboard.

Use this screen to monitor/manage each user’s progress throughout the interrater reliability certification process.

Note. You cannot assign more than one test to users at the site level. Use the “Manage Interrater Reliability” feature described in the “Manage Users” section on page 31 of this guide to add additional tests for a single user.
Classes
Adding a Class

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.
Click Classes to display a list of classes in your program or organization.
On the View Classes screen, click the Add New Class button.

Select the Program, Site, and Teacher for which the class is to be set up. Then click SUBMIT.

On the Add New Class screen, fill in the required information for the class.
When you are finished, click ADD.

Tip. For more information about each field on the Add New Class screen, see the “Support” articles on the right-hand side of the screen.

Editing a Class

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.
Click Classes to display a list of classes in your program or organization.
On the View Classes screen, click the GO button for the class you need to view/edit.
On the Class Info screen, select Edit to change the information about the class or to add assistant/co-teachers.
OSEP Exit Status Form (Class Level)

Teachers usually complete the “OSEP Exit Status Form,” but you can also do it from your administrator site.

**Steps:**
From the **ADMINISTRATION** tab’s drop-down menu, select **Programs, Sites & Classes** to display the submenu.

Click **Classes** to display a list of classes in your program or organization.

On the View Classes screen, click the **GO** button for the class you need to view/edit.

From the **Action** menu on the Class Info screen, select **OSEP Exit Status Form**.

Review the status of children in Part B or Part C. Complete checkpoint data in the entry and exit checkpoint periods are required for exiting.

If the child has complete information and is ready to be exited, select **Exit**.

---

**AM Class — OSEP Exit Status Form**

The following children require additional checkpoint data before they are eligible for transition or exit. Note that you can exit children in this area if they are in Part B for less than 6 months.

<table>
<thead>
<tr>
<th>Name</th>
<th>Part B Entry Date</th>
<th>Preschool Entry Assessment Tool</th>
<th>Preschool Exit Assessment Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ana Perez</td>
<td>12/12/2012</td>
<td>Teaching Strategies GOLD</td>
<td>Teaching Strategies GOLD Exit</td>
</tr>
</tbody>
</table>
Changing the Primary Teacher

To change the primary teacher for a class, first make sure that an account has already been added for the new primary teacher. (See “Adding User Accounts for Teachers and Administrators” in the “Manage Users” section on page 24 of this guide.)

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Classes to display a list of classes in your program or organization.

On the View Classes screen, click the GO button for the class for which you need to change the primary teacher.

From the Action menu on the Class Info screen, select Change Primary Teacher.

Select the New Primary Teacher from the drop-down list.

Click CHANGE.

Assigning and Changing Assistant/Co-Teachers

First make sure that an account has been added for the assistant/co-teacher. (See “Adding User Accounts for Teachers and Administrators” in the “Manage Users” section on page 24 of this guide.)

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Programs, Sites & Classes to display the submenu.

Click Classes to display a list of classes in your program or organization.

On the View Classes screen, click the GO button for the class for which you need to add/change assistant or co-teachers.

Click the Edit button on the Class Info screen.

Select the new assistant teacher from the drop-down list.

Check the box below the “Assistant Teacher” field if he or she has co-teacher status.

Click UPDATE.

Tip. Co-teachers are given the ability to add and edit checkpoint data. Assistant teachers may add documentation but may only view checkpoint levels without editing or finalizing them.
Managing Children

The ADMINISTRATION tab’s Manage Children submenu enables you to add and search for children’s records, manage children’s profile data, and transfer them from class to class.

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Children to display the submenu.

Click Children or Add/Edit Funding Sources to get started.

Adding a Child

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Children to display a submenu.

Click Children.

On the View Children screen, click the Add New Child button.

On the Add Child screen, select a program, site, teacher, and class. Then click SUBMIT.

On the next screen, enter the necessary child data and click ADD.

Tip. On the Add Child screen, use “Support” and “Resources” to find details about each field and how to designate an age or class/grade.

If the child has an IEP or IFSP, click the box near the bottom to display fields for entering the child’s entry date and the entry assessment tool.

Tip. A child should only be assessed by using the Spanish language and literacy objectives if the child speaks Spanish AND a teacher in the classroom speaks Spanish well enough to assess the child’s Spanish language and literacy skills.
Searching for a Child

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Children to display the submenu.
Click Children to display the search page.
Enter the child’s name in the “Filter by child” field. Then click GO.
The result will be displayed below the box in which you typed the child’s name.
Click GO to the right of the child’s row to view details.

Tip. Use the Action menu on the View Child screen to edit, transfer, archive, or delete a child’s record.
Adding/Editing Funding Sources

The “Add/Edit Funding Sources” feature enables you to indicate funding sources for each child in your organization, program, or site by using one screen. This screen also enables you to quickly review and check child funding sources for accuracy.

**Steps:**

From the **ADMINISTRATION** tab’s drop-down menu, select **Manage Children** to display the submenu.

Click **Add/Edit Funding Sources**. A new screen will display the names of all of the children whose records you may access, and it will show their funding sources.

Use the **Change View** menu on the top right to filter the data. One option is to show only children “Without funding sources assigned.”

Select a funding source by clicking on the corresponding checkbox.

When you are finished, click **UPDATE** to save your changes.

**Tip.** For information about adding funding sources to this screen, refer to “Adding Custom Funding Sources” in the “License Settings” section of page 37 of this guide.
Managing Users

The Manage Users menu enables you to add users, reset their passwords, manage their profile data, and access the site as the user.

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.
Click Teachers & Administrators, Families, or TeamCentral Users to get started.

Adding User Accounts for Teachers and Administrators

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.
Click Teachers & Administrators.

On the View Teachers & Administrators screen, click the Add New Teacher or Administrator button.

On the Add Teacher/Administrator screen, enter all required information.

First Name and Last Name:
Enter the user’s name as you would like it to appear in the system.

E-mail:
Enter the e-mail address you would like to use for this account.

Note. It is recommended that each user have a separate e-mail address to which he or she has easy access. All GOLD® communications will be sent to the user at this e-mail address, including messages about forgotten passwords.

Phone:
This is not required, but the number is useful when an administrator who does not work directly with the teacher needs contact information.

Username:
The username must be different from all other usernames in the GOLD® online system, not just in your program. If the username is already taken, an alert at the top of the page will appear after you click Save: “Username already taken. Please try again.” If it appears, simply edit the username and click Save again.

Tip. Do not enter a password for the user. Users will receive a temporary password by e-mail.

From the drop-down menus, select the program and site for which you want to add user accounts. Click SUBMIT.
Class:
You may select either to add the user to an existing class or create a new class for this user.

If you choose **Add to an existing Class**, a drop-down menu will appear from which you select the class to which you are adding the teacher. After submitting the user information, the next screen will ask you to identify the user as the primary teacher, a co-teacher, or an assistant teacher in that class.

If you choose **Create a new Class** and submit the user information, the next screen directs you to enter the new class information. The user will be identified as the primary teacher.

Curriculum Types:
Depending on your license settings, you may select one or both types: **Infants, Toddlers & Twos** and/or **Preschool, Pre-K, K**. This determines the types of classes that the teacher will be able to create.

Identifier:
Some programs may have an ID number or similar identifier that they would like to enter for their teachers. It can be entered here.

The form ends with several fields with drop-down choices for providing additional information about the user. Providing the information is optional.

Click **Save**. Login directions will be sent to the specified e-mail address.
Granting Administrative Access to a User

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.
Click Teachers & Administrators.
On the View Teachers & Administrators screen, click the Add New Teacher or Administrator button.
Select the appropriate program and site from the drop-down menus. Click SUBMIT.
On the Add Teacher/Administrator screen, click the checkbox captioned “Give this user access to all children within specific Programs or Sites.”
To establish the user’s access level, select an Admin Type.
Select the organization, program, or site to which the user should have administrative access.
(Clicking the plus sign [+] expands the section.)

Tip. Refer to the “Support” and “Resources” on the right side of the Add Teacher/Administrator screen to get more information and guidance about granting administrative access.
Managing Teachers and Administrators

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.

Click Teachers & Administrators to display the search page.

Enter the teacher’s or administrator’s name, e-mail, or username in the filter field. Then click GO.

View All | Filter by name, email, or username: [Administrators, Teachers] GO

In the Teachers & Administrators search results, click the arrow next to “Access Site as this User” to see a drop-down list of options.

Tip. To access the list of options, you can also choose View Details from the drop-down list and click GO. Then choose the Action menu on the View Teacher/Administrator screen.

Note. The Delete option will appear in this list only if the user is not associated in GOLD with children or classes. Before deleting a user, first reassign all children in the teacher’s class to a different teacher. Then delete classes for which the teacher was a primary teacher.
Transferring a User

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu. Click Teachers & Administrators to display the search page.
Search for the person you wish to transfer. You can do that by using the filter option or by finding the person’s name in the full list.
In the search results, click the drop-down list in the row for the person you wish to transfer.
Select Transfer User and then click GO.
Select the new site.
Click TRANSFER.

Access Site as a User

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu. Click Teachers & Administrators to display the search page.
Search for the person whose account you would like to view. You can use the filter option or find the person’s name in the full list.
In the search results, click the drop-down list in the row for the person whose account you would like to view.
Select Access Site as this User and then click GO.
You will then be logged in as that user, so you can see screens exactly as that user sees them. This will help you troubleshoot problems.
To go back to your administrator’s account, look at the top right corner of the screen. Select Change Role and then Back to My Login.
**Link User Accounts**

This feature is helpful when a teacher or TeamCentral user works at two or more sites. The user will need a user account for each site, but the accounts can be linked so that only one username and password configuration is needed. The user can then toggle between accounts.

**Steps:**

From the **ADMINISTRATION** tab’s drop-down menu, select **Manage Users** to display the submenu.

Click **Teachers & Administrators** (or **TeamCentral Users** if you are linking accounts for a TeamCentral user).

Search for the user for whom you want to link accounts.

From the search results, write down the usernames for all accounts that you will be linking. You will need them later in the linking process.

In the search results, click the **Action** drop-down list next to one account for that user.

Select **Manage Linked Accounts** and then click **GO**.

Click **Create New Link**.

Enter another of the user’s usernames and click **SUBMIT**.

If linking more than two accounts, click **Create New Link**, and repeat the step above.

The user will receive an e-mail to approve the linked accounts.
Show Login History for a User

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.
Click Teachers & Administrators to display the search page.
Search for the person whose history you would like to view. You can use the filter option or find the person’s name in the full list.
In the search results, click the drop-down list in the row for the person whose history you want to view.
Select Show History and then click GO.

Changing/Resetting User Passwords

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.
Click Teachers & Administrators to display the search page.
Search for the person for whom you need to reset the password. You can use the filter option or find the name of the person in the full list.
In the search results, click the drop-down list in the row for the person whose password you want to reset.
Select View Details and then click GO.
On the View Teacher/Administrator screen, click the Change Password button.
Manage Interrater Reliability Access for a Single User

Steps:

From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.

Click Teachers & Administrators to display the search page.

Search for the teacher for whom you want to manage access to the interrater reliability certification process. You can use the filter option or find the name of the teacher in the full list.

In the search results, click the drop-down list in the row for the teacher for whom you want to manage access to the process.

Select View Details and then click GO.

On the View Teacher/Administrator screen, select the Manage Interrater Reliability Access button.

Manage Interrater Reliability Access

On the Interrater Reliability Access screen, click the Add Interrater Reliability Certification Access button.

To assign the user to an additional interrater reliability test, click the Add Interrater Reliability Certification Access button again.

To remove the user’s access to a test, click the Remove Interrater Reliability Certification Access button.

Tip. You can only remove access before the user has started the test. Once the test is in progress, you cannot remove access. You can also manage interrater reliability access at the site level (see page 17). Refer to the “Support” and “Resources” options on the right side of the Interrater Reliability Access screen to get more information and guidance on the interrater reliability certification process.
Managing Families

Teachers invite families to use many features of GOLD®. Administrators will see a list of families who have accepted each teacher’s invitation. Administrators can reset a family member’s password, view login history, disable the account, and access the site as the family member.

Steps:

From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.

Click Families to display the list of family site users in your program or site.

Search for a particular family site user by using the filter option at the top of the screen.

To view/edit details of a particular user, click GO to the right of the user’s information.

Sample Admin Org — View Families

<table>
<thead>
<tr>
<th>Name</th>
<th>Username</th>
<th>Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rosemary Test</td>
<td>rosemarytest</td>
<td>Alicia</td>
</tr>
</tbody>
</table>

Showing 1 to 1 of 1 entries

Tip. If a family has two or more children in the program, they may use the same family account to view the records of all of their children. The teacher of the second child will use the “Invite Families” feature under the COMMUNICATION tab of the teacher site. Families will have the option of creating a new account or linking the child to an existing account.
Managing TeamCentral Users

When an organization uses the optional TeamCentral feature, the child’s teacher invites team members to use GOLD®. Administrators will see a list of team members who have accepted the teacher’s invitation. Administrators can approve or reject a team member’s invitation, reset a team member’s password, view login history, and disable the account.

Steps:

From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.

Click TeamCentral Users to display the list of TeamCentral users in your program.

You can search for a particular TeamCentral user by using the filter option at the top of the screen.

To view/edit details of a particular user, click GO to the right of the user’s information.

**Tip.** Only approved TeamCentral users will appear on the list under TeamCentral Users in the ADMINISTRATION tab. To approve TeamCentral user requests, see the instructions for doing so in the “Communication” section on page 53 of this guide.

Reset the user’s password by choosing Change Password.

Use the Action menu to manage linked accounts, disable the account, or view the history of this user.

Tip. TeamCentral members who work in multiple sites need a user account for each site. The accounts can be linked, so only one username and password configuration is needed. To link TeamCentral member accounts, see the “Link User Accounts” section on page 29 of this guide.
Deleting a Child Association

Administrators can disassociate children from a TeamCentral member’s profile. Once a team member discontinues providing services for a child, you should disassociate that user from the child’s portfolio.

Steps:
From the ADMINISTRATION tab’s drop-down menu, select Manage Users to display the submenu.
Click TeamCentral Users to display the list of TeamCentral users in your program.
Search for the team member for whom you want to delete association with a child.
In the search results, click GO to the right of the user information.
View the list of associated children at the bottom of the View Team Member screen.
Click Disassociate Child.
A pop-up box appears, asking you to confirm the action.
Click OK.

The disassociated child’s name will no longer displayed in the ASSOCIATED CHILDREN list for the team member. The member will no longer have access to the particular child’s profile or other information.
License Settings

The license settings View screen provides you with tools to manage the organization, program, or site for which you are an administrator. You will view different options, depending on your level of access. Not all options are always displayed.

Steps:
From the ADMINISTRATION tab’s drop-down menu, select License Settings to display the license settings View screen.
Click the Edit button to make changes in the GENERAL INFORMATION section or the license settings View screen.

Tip. Don’t forget to click the Action button for more options! The Action menu choices vary according to the license settings for each organization, program, and site.
License Information

**View License History:** This screen lists all license activity for your organization.

**Manage Portfolio Allocation:** This screen enables you to cap the number of active and archived children for each program in your organization. Using this feature is optional, not required.

**Manage Custom Funding Sources:** This screen enables you to add, edit, and delete custom funding sources for your organization. See the “Adding Custom Funding Sources” section on page 37 of this guide for more detailed instructions.

**Manage Custom Quality Indicators:** This screen enables you to add, edit, and delete customized quality indicators for your organization.

**Manage Custom Progress Checkpoint Periods:** This screen enables you to customize checkpoint periods for your organization. See the “Changing Checkpoint Due Dates” section on page 38 of this guide for more detailed instructions.

**Manage Custom Period Titles:** This screen enables you to customize period titles for your organization.

**Manage Custom Weekly Planning Form:** This screen enables you to add a customized **Time of Day** field and customized **Notes** field to the “Weekly Planning Form.”

The **LICENSE INFORMATION** section of the screen also shows the details of your subscription.

<table>
<thead>
<tr>
<th>License Started on</th>
<th>02/03/2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>License Expires on</td>
<td>02/02/2018</td>
</tr>
<tr>
<td>Trial License</td>
<td>No</td>
</tr>
<tr>
<td>Assess Content Areas</td>
<td>No</td>
</tr>
<tr>
<td>TeamCentral Enabled</td>
<td>Yes</td>
</tr>
<tr>
<td>OSEP Enabled</td>
<td>Yes</td>
</tr>
<tr>
<td>Allow Other Assessments</td>
<td>Yes</td>
</tr>
<tr>
<td>Teacher Views Enabled</td>
<td>Teaching Strategies GOLD with OSEP Reports Functionality and OSEP Reports Functionality Only</td>
</tr>
<tr>
<td>Child Licensees</td>
<td>1,000</td>
</tr>
<tr>
<td>Archive Limit</td>
<td>250</td>
</tr>
<tr>
<td>Expanded PD Limit</td>
<td>0</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Alice Admin</td>
</tr>
<tr>
<td>Contact E-mail</td>
<td><a href="mailto:admin@teachingstrategies.com">admin@teachingstrategies.com</a></td>
</tr>
</tbody>
</table>

**LICENSE USAGE**

<table>
<thead>
<tr>
<th>Number of Programs</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Sites</td>
<td>4</td>
</tr>
<tr>
<td>Active Children</td>
<td>35</td>
</tr>
<tr>
<td>Archived Children</td>
<td>0</td>
</tr>
</tbody>
</table>

**Organization Administrators**

<table>
<thead>
<tr>
<th>Username</th>
<th>Name</th>
<th>E-mail</th>
<th>Default Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>mesandbox</td>
<td>Alice Admin</td>
<td><a href="mailto:admin@teachingstrategies.com">admin@teachingstrategies.com</a></td>
<td>Y</td>
</tr>
</tbody>
</table>

At a glance, this screen shows the total number of portfolios you have purchased and how many children’s records are active.
Adding Custom Funding Sources

Steps:
From the ADMINISTRATION tab's drop-down menu, select License Settings.
Under LICENSE INFORMATION on the license settings View screen, click Manage Custom Funding Sources.

View the default and custom funding sources for your organization on the Funding Sources screen.
Click the Add a Custom Funding Source button at the bottom of the screen.

Enter the name of the new funding source and click SUBMIT.
Changing Checkpoint Due Dates

Steps:
From the Administration tab’s drop-down menu, select License Settings.

Under License Information on the license settings View screen, click Manage Custom Progress Checkpoint Periods.

Choose the year you want to customize and whether you want to customize the dates for Infants, Toddlers, and Twos; Preschool; or Both.

Enter the Start Date and End Date for each documentation collection period.

Enter the Checkpoint Due Date for each checkpoint period. This is the date by which you expect teachers to have entered and finalized checkpoint levels.

When you have finished, click Submit.

Note. There must not be gaps between checkpoint periods. Most programs set the same date as the End Date and Checkpoint Due Date.

Tip. To add a fourth checkpoint period, contact us at Implementation@TeachingStrategies.com. An added checkpoint period cannot be changed.
Section 3: Documentation
Documentation

In the DOCUMENTATION tab, you can view documentation entered by teachers, create a “Documentation Report,” and search documentation.

Place your cursor on the DOCUMENTATION tab to view the options.

Viewing Documentation

Steps:

From the DOCUMENTATION tab’s drop-down menu, select View Documentation.

Click the Change View menu in the top right corner of the screen to begin a documentation search.

Select the class for which you want to access the documentation.

From the Change View menu, choose the checkpoint period and year you would like to view, the documentation type, and the supporting file type (defaults to all types). You can choose to narrow your view by program, site, teacher, class, or children.

Click SUBMIT.
Documentation Report

This report shows how many documentation items teachers have entered.

Steps:

From the DOCUMENTATION tab’s drop-down menu, select Documentation Report to display options.

You can choose to narrow your view by Program, Site, Class, Teacher, and Children.

Choose to search by Period or Date Range.

When searching by Period, select the period and year from the drop-down menus.

When searching by Date Range, enter the date range during which the observation was made (not the date the documentation item was entered).

Choose the Display Type.

Documentation by Area: Shows the number of documentation items associated with each developmental area and the total number of documentation items entered.

Documentation by Month: Shows the number of documentation items entered each month and the total number of documentation items entered.

Documentation Tally: Shows the total number of documentation items entered.

Choose your Output preference: HTML, PDF, or Excel®.

Click SHOW REPORT.

Tip. For more information about the “Documentation Report,” click the corresponding “Support” link on the right-hand side of the screen.
Searching Documentation

Steps:
From the DOCUMENTATION tab’s drop-down menu, select Search Documentation.

Enter your filter choices and click SUBMIT to search for documentation items that meet your selected criteria.

There are many criteria with which to narrow your search for particular items. The more criteria you select, the fewer documentation items will be displayed from the search.

Search Filters:
Keyword enables you to search for all documentation containing a specified word.
Period enables you to search for items from a different checkpoint period.
Date Observed enables you to search a specified date range during which the teacher observed children.
Date Entered tracks the date on which the teacher entered the documentation item into GOLD®, regardless of the date it was created in the classroom.

Documentation Type can narrow the search among types of documentation. The default setting yields all types.

Tip. To learn more about each type, hover your cursor over the icon on the Add Documentation screen of the teacher site.

With Supporting Files enables you to search for documentation of particular file types. The default setting yields all types.

Has Associated Objective/Dimension? enables you to search for documentation with which the teacher associated objectives/dimensions and for documentation with which the teacher has not yet associated objectives/dimensions.

Has Associated Preliminary Levels? enables you to search for documentation with which the teacher associated preliminary levels and documentation with which the teacher has not yet associated preliminary levels.

Program, Site, Teacher, Class, and Children also enable you to narrow your search.

Objectives/Dimensions enables you to narrow the search by specifying objectives or dimensions. Click the plus sign [+] to expand each area. Then select checkboxes to include particular objectives or dimensions.

Tip. Searching by Objectives/Dimensions is helpful when you want to focus coaching on a particular area. You can review all documentation the teacher has entered in relation to that area.

Author enables you to filter documentation by author. Enter the teacher’s first or last name to search for documentation that he or she entered.
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Section 4: Checkpoints
Checkpoints

The “Assessment Status Report” feature is accessed under the CHECKPOINT tab. Administrators use this report to check teachers’ progress in entering checkpoint evaluations.

Assessment Status Report

Steps:
From the CHECKPOINT tab’s drop-down menu, select Assessment Status Report.
Choose the Program, Site, Teacher, Classroom, Children, Period, Checkpoints, and Output from the various menus.
To create this report for all teachers in one site, leave the Teacher field as “Select Teacher.”
To create this report for all classes for one teacher, select the teacher’s name and leave the Class field as “Select Class.”
If you choose to include all teachers at the program or site level, choose to view the report at either the site level or teacher level.
When you have made your selections, click GENERATE REPORT.
Report Details

Site-level view: The percentages show the completion of checkpoint data entry for all children in each site, for each area of development and learning.

<table>
<thead>
<tr>
<th>Program A — Assessment Status Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently Viewing:</td>
</tr>
<tr>
<td>Period: Fall 2010/2011</td>
</tr>
<tr>
<td>Checkpoints: Preliminary and Finalized</td>
</tr>
<tr>
<td>Program: Program A</td>
</tr>
<tr>
<td>Site 1</td>
</tr>
<tr>
<td>Number of Children</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>41</td>
</tr>
<tr>
<td>Site 2</td>
</tr>
<tr>
<td>76</td>
</tr>
</tbody>
</table>

Teacher-level view: The percentages show the completion of checkpoint data entry for all children in each site and classroom, for each area of development and learning. If you select the HTML output option, you can click on each classroom name in the report to see the view for a single teacher (a list of all children in the classroom and the status of data entry for each child).

<table>
<thead>
<tr>
<th>Program A — Assessment Status Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently Viewing:</td>
</tr>
<tr>
<td>Period: Fall 2010/2011</td>
</tr>
<tr>
<td>Checkpoints: Preliminary and Finalized</td>
</tr>
<tr>
<td>Program: Program A</td>
</tr>
<tr>
<td>Teacher</td>
</tr>
<tr>
<td>Number of Children</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Teachers at Site 1</td>
</tr>
<tr>
<td>41</td>
</tr>
<tr>
<td>Allie Corners</td>
</tr>
<tr>
<td>Claudia White</td>
</tr>
<tr>
<td>Jessica Green</td>
</tr>
<tr>
<td>Teachers at Site 2</td>
</tr>
<tr>
<td>76</td>
</tr>
<tr>
<td>Beth Sampson</td>
</tr>
<tr>
<td>Bob Administrator</td>
</tr>
<tr>
<td>Susi Soder</td>
</tr>
<tr>
<td>Wendy Gae</td>
</tr>
</tbody>
</table>

Single-teacher view: The percentages show the completion of checkpoint data entry for each child, for each area of development and learning.

<table>
<thead>
<tr>
<th>Blue Bears — Assessment Status Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currently Viewing:</td>
</tr>
<tr>
<td>Period: Fall 2010/2011</td>
</tr>
<tr>
<td>Checkpoints: Preliminary and Finalized</td>
</tr>
<tr>
<td>Blue Bears</td>
</tr>
<tr>
<td>Alma Robinson</td>
</tr>
<tr>
<td>Brad Allen</td>
</tr>
<tr>
<td>Brittany Miller</td>
</tr>
<tr>
<td>Brynn Smith</td>
</tr>
<tr>
<td>Craig LaDernos</td>
</tr>
<tr>
<td>Dan Atman</td>
</tr>
<tr>
<td>Emily Labrava</td>
</tr>
<tr>
<td>Hunter Browers</td>
</tr>
<tr>
<td>Jamal Bryant</td>
</tr>
<tr>
<td>Kate Endresma</td>
</tr>
<tr>
<td>Lizi Bondi</td>
</tr>
<tr>
<td>Maria Lopez</td>
</tr>
<tr>
<td>Molly Parker</td>
</tr>
<tr>
<td>Scott Hendrick</td>
</tr>
<tr>
<td>Sokinda Mahomes</td>
</tr>
<tr>
<td>Tocin Williams</td>
</tr>
</tbody>
</table>
GOLD® Online
Guide for Administrators

Section 5: Planning
Planning

In the **PLANNING** tab, you can view “Weekly Planning” forms and add planning fields to customize the form for your site or program.

Place your cursor on the **PLANNING** tab to view the options.

### Reviewing a Submitted “Weekly Planning Form”

**Steps:**

From the **PLANNING** tab’s drop-down menu, select **Submitted Weekly Planning Forms**.

From the list of submitted forms, select **View/Print Form** from the drop-down menu in line with the form you want to review.

Click **GO** to display the form.

To approve the plan, click **Change View** and then click **Approve**.

To change the screen display of that form, click the **Action** menu, select the items you want to view, and then click **SUBMIT**.
Searching for a Particular “Weekly Planning Form”

Steps:
From the PLANNING tab’s drop-down menu, select Search Weekly Planning Forms.
Enter the filters with which you would like to search.
Click GO.

Adding a Custom Time of Day to “Weekly Planning” Forms

Steps:
From the PLANNING tab’s drop-down menu, select Custom Weekly Planning Form.
Click Add Time of Day to Preschool, Pre-K, K or Add Time of Day to Infant, Toddlers & Twos.

Enter a title for Time of Day.
Select a Type (select Daily or Notes).

Tip. Daily will show a planning box for each day. Notes will show one section for the week.

Click SUBMIT. The new Time of Day will be added to your weekly planning forms.
Section 6: Communication
Communication

The **COMMUNICATION** tab includes the communication features of GOLD®. You can create and view newsletters and calendars, and approve individuals’ access as TeamCentral members.

Place your cursor on the **COMMUNICATION** tab to view the options.

**Creating a Newsletter**

**Steps:**

From the **COMMUNICATION** tab’s drop-down menu, select **Newsletters**.

Click **Create New Newsletter**.

Click the blue calendar icon to select the **Date**.

Enter a **Newsletter Title**.

Select an **Audience** by clicking the appropriate boxes (multiple selections can be made). Remember to choose the program, site, or classroom.

Choose an **Input Method**.

To use an existing PDF or Word document as your newsletter, choose **Upload PDF or Word Document**. Then click **Browse** to choose your newsletter file.
Creating a Newsletter, continued

To create a newsletter by using GOLD® options, choose Create Newsletter Online.

Click Add Article to show an article entry box.

Enter an article title.

Enter text in the “Article Body” box.

Click Browse if you would like to add an image to your article.

Note. Images must be JPEG or GIF format.

Click Add Article again to title and write another article. You may include as many articles in the newsletter as you would like.

Click Delete to remove an article from the newsletter.

When finished, click SUBMIT.

To view comments and edit, view, print, send, or delete a newsletter you have created, click the drop-down menu in line with the newsletter. Choose the option you want and then click GO.
Submitted Newsletters

This option enables you to view newsletters created by other users in your organization, offer comments, and approve them before they are shared with others.

Steps:
From the COMMUNICATION tab’s drop-down menu, select Submitted Newsletters to open the screen showing all of the newsletters that were submitted to you.

Track across the row of the newsletter you want to see. Click the drop-down menu next to the GO button in that row. Select the action you would like to take with that newsletter.

Click GO.

Note. Select View/Print Newsletter to see what the newsletter will look like when it is sent. Select Approve to bring up an approval window.

If you chose the option to approve the newsletter, click OK.

Note. Select View/Add Comments to see existing comments and to enter your own comments.
Manage Team Central Invitations

Teachers can invite a specialist to TeamCentral in order to share information about an individual child or a group of children. An administrator must approve the invitation before it is sent to the specialist.

Steps:
From the **COMMUNICATION** tab’s drop-down menu, select **TeamCentral** to view a list of pending invitations.

As the administrator, you are able to approve or reject an invitation.

![Manage Team Central Invitations](image)

To approve or reject the invitation to an individual, click the **Approve** or **Reject** radio button next to the individual’s name.

To approve or reject the complete list, click the **Approve All** or **Reject All** button.

Click **Submit**. This approves or rejects the invitation(s).

Approved team members will receive login directions in an e-mail message from Implementation@TeachingStrategies.com. They will be able to add documentation, review checkpoint levels, access activities, and send messages to teachers and family members.

**Tip.** You can add comments about each invitation. Your comments are sent to the teacher who initiated the invitation.
Calendar

Steps:
From the COMMUNICATION tab’s drop-down menu, select Calendar to display the submenu. Select View Calendar or Add Event to get started.

Viewing a Calendar

Steps:
From the COMMUNICATION tab’s drop-down menu, select Calendar to display the submenu.
Select View Calendar.
Click to view past or future months.
Click the Month, Week, or Day buttons to change the calendar view.
Click Print in the top right corner of the screen to print the calendar in the current view.
Adding an Event to the Calendar

Steps:
From the **COMMUNICATION** tab’s drop-down menu, select **Calendar** to display the submenu.
Select **Add Event**.
Alternatively, you can click the **Add Event** button on the View Calendar screen.
Enter the **Event Name** and **Description**.

**Add Event**

**Event Name:**

**Description:**

Attach files to an event by clicking the **BROWSE** button.

Enter the **Start Date/Time** of the event.

Enter the **End Date/Time** of the event.

**Attach Files:**

**Start Date/Time:**

**End Date/Time:**

Check the box under **Private** if you want the event to appear only on your private calendar. The **Audience Type** and **Audience** sections will be hidden.
Adding an Event to the Calendar, continued

Uncheck Private to share the event with others.

Check Audience Type and Audience to share with individuals, programs, or sites.

Select the Reminder drop-down menu to set a reminder, which will be sent to you by e-mail according to your settings.

Click SAVE to add the event to the calendar.
Section 7: Reports
Reports

The **REPORTS** tab includes tools for creating and sharing a variety of standard and customized reports that show child and staff data in various formats for a variety of purposes.

Place your cursor on the **REPORTS** tab to view the options.

**The “Growth Report”**

The “Growth Report” shows child outcomes over time. Administrators use the “Growth Report” to compare the levels of children’s knowledge, skills, and behaviors at two checkpoint periods.

**Steps:**

From the **REPORTS** tab’s drop-down menu, select Growth Report.

Select the criteria to include in your report. The default setting includes all options in each section.

Use the options under Areas of Development: Programs, Sites, and Children, and Demographics to narrow your report criteria.

Choose whether to include the **Widely Held Expectations**.

Select an age or class/grade from Age or Class/Grade at Fall Checkpoint Period.
Select two Checkpoint Periods.

Select the use of only finalized checkpoint data or the use of both finalized and unfinalized checkpoint data.

**Comparison of Progress Between Two Checkpoint Periods:**

- Select Starting Checkpoint
- Select Starting Checkpoint First
- Unfinalized and Finalized Checkpoint Levels
- Only Finalized Checkpoint Levels

**Tip.** Using unfinalized data enables you to examine progress during a checkpoint period and possibly increase your data pool, but you run the risk of using data on which a teacher is still working.

The default score format is **Raw Score.**

**Raw Score:** To calculate an area raw score for a child’s knowledge, skills, and behaviors, GOLD® sums the ratings for each child, based on his or her skills, knowledge, and behaviors for each item (objectives/dimensions) in that area.

**Tip.** For more detailed information about the “Growth Report,” refer to the video tutorial and support documents listed on the right side of the screen.
Growth Export (Raw Data)

The “Growth Export (Raw Data)” feature enables you to export raw growth data at the organization, program, teacher, and classroom levels. The output is available in HTML or Excel® format, but it is not available in PDF (print) format.

Steps:
From the REPORTS tab’s drop-down menu, select Growth to view a submenu. Then click Growth Export (Raw Data).

Use the options under Programs, Sites, and Children and Demographics to narrow your export criteria.

Select two Checkpoint Periods to examine growth.

Select the use of only finalized checkpoint data or the use of both finalized and unfinalized checkpoint data.

Tip. Using unfinalized data enables you to check progress during a checkpoint period and possibly increase your data pool, but you run the risk of using data on which a teacher is still working.

From the Display Type choices, select the detail with which you would like the data to be presented. If you select either By Objective or By Dimension, you can only export the data for one area at a time.

Select which children to include in the report. Select Only Children With Ratings in Both Checkpoint Periods to report data only for children who have ratings in both checkpoint periods. Select All Children With Ratings in Either Checkpoint Period to report data for children who have ratings in either or both checkpoint periods.

Tip. Including only children with data from both checkpoint periods may give you a better idea of their growth, but the report might not include all of the children in the program.
The “Individual Child Report”

This report enables you to see how individual children are performing during one or more checkpoint periods. By checking multiple checkpoint periods, you can track each child’s development and learning over time.

Steps:

From the REPORTS tab’s drop-down menu, select Individual Child.

Select the Program, Site, Teacher, Class, Children, and Period for which you would like to generate this report. Select specific Objectives/Dimensions to choose items for inclusion in the report.

Select the Checkpoint Levels to include from All Levels, Only Checkpoint Levels, and Only Finalized Checkpoint Levels.

Select the Language in which you want the report to be generated.

Select an Output to choose a format.

Click GENERATE REPORT.
The “Snapshot Report”

The “Snapshot Report” displays child outcomes data at a given time. It enables you to see the data by area, objective, and dimension. You can also report important demographic information.

Steps:

From the REPORTS tab’s drop-down menu, select Snapshot.

Use the options under Standards and Measures: Programs, Sites, and Children; and Demographics to specify the types of data to be included in your report. (To see the options, click the plus signs [+] to the left of the headings. Click the minus signs [-] to hide the lists.)

Select a Checkpoint Period.

Select the use of only finalized checkpoint data or the use of both finalized and unfinalized checkpoint data.

Use the options under Format to select information for inclusion in the report output.

The “Alignment Report” feature included in the “Snapshot Report” shows how the skills of children in preschool and pre-K are developing in relation to the expectations in state early learning standards or the Head Start Child Development & Early Learning Framework.

The report output is based on the state standards or Head Start alignment selected under Standards and Measures.

Click VIEW AS HTML, VIEW AS PDF, or VIEW AS EXCEL® to generate the report as the file type you prefer.

Tip. For more detailed information, watch the video tutorial linked in the “Support” section of the screen.
Forms
Alphabet Knowledge

Steps:
From the REPORTS tab’s drop-down menu, select Forms to view a submenu.

Click Alphabet Knowledge.
Click the plus signs [+ ] to see options for changing the settings.

Select a Report Type. You have the option of seeing a “Report by Class” or seeing at least one “Report by Child.”

Tip. You can only run one of these report types at a time. If you decide to run the others, simply close the report that was created, return to this screen, and select a different report type.

Use the options under Programs, Sites, and Children and Demographics to specify the data to be included in your report.

Select a checkpoint Period.
Select an Output.
After making all selections, click GENERATE REPORT.
Spanish Alphabet Knowledge

**Steps:**
From the REPORTS tab’s drop-down menu, select Forms to view a submenu.

Click **Spanish Alphabet Knowledge**.

To generate the report, follow the steps listed above for the “Alphabet Knowledge Form”.

“Spanish Alphabet Knowledge” reports should be used when the Spanish language and literacy objectives are enabled for particular children.

Number Concepts

**Steps:**
From the REPORTS tab’s drop-down menu, select Forms to view a submenu.

Click **Number Concepts**.

Click the plus signs [+] to see options for changing the settings.

Select a **Report Type**.

Use the options under Children, Demographics, Period, and Output to specify the data to be included in your report.

Click **GENERATE REPORT**.

Shapes

**Steps:**
From the REPORTS tab’s drop-down menu, click Forms to view a submenu.

Click **Shapes**.

Click the plus signs [+] to see options for changing the settings.

Select a **Report Type**.

Use the options under Children, Demographics, Period, and Output to specify the data to be included in your report.

Click **GENERATE REPORT**.
The “Interrater Reliability Certification Report”

Use this report to monitor the completion status of staff members who are authorized to undertake the interrater reliability certification process.

**Steps:**

- From the **REPORTS** tab’s drop-down menu, select **Interrater Reliability**.
- Select **All Programs** and **All Sites** or specify a program and site from the drop-down list.
- Select a **Date Filter**.
- Select your **Options**.
- Select your **Output** preference.
- Click **SHOW REPORT**.

The “Professional Development Course Completion Report”

Use this report to monitor staff members’ status with regard to the completion of **GOLD**® online professional development courses.

**Steps:**

- From the **REPORTS** tab’s drop-down menu, select **Professional Development Courses**.
- You can select **All Programs** and **All Sites** or select a specific program and site.
- Select whether you want to **Include** users who have completed, are making progress in completing, and/or have not started the course.
- Select your **Output** preference.
- Select **SHOW REPORT** to generate the report.
OSEP Reports

If these reports are enabled on your account, you can create a series of them for the Office of Special Education Programs (OSEP). These reports fall into three categories: “Entry Status” reports, “Federally Mandated Year-End” reports, and “Exit Status Summary” reports. Each report can be created at the organization, program, site, or child level, for the preschool children (ages 3–5) or the early intervention children (ages 0–3) in your program.

Steps:

From the REPORTS tab’s drop-down menu, select OSEP.

Select the report that you would like to create.

“Entry Status” Reports

The “Entry Status Report” shows the number and percentage of children with an IEP or IFSP whose knowledge, skills, and behaviors were or were not functioning at typical levels. It also shows entry status COSF scores for individual children. There are several ways to generate these reports, depending on what you need to analyze. It is useful to create “Entry Status” reports at the child level to make sure that data are complete for all the children involved.

Preschool Special Education Outcomes - Entry Status Report (child level)

This report features user-defined fields that can be exported into an Excel® file. For each child, the report lists whether he or she is functioning at not typical/typical levels for each of the three OSEP outcomes and the child’s category (1–7) on the “ECO Center Child Outcomes Summary Form” for each outcome. This report is to be used for children ages 3–5 served in preschool special education programs.

Preschool Special Education Outcomes - Entry Status Report (program level)

The “Entry Status Report” is used to meet 2007 federal reporting requirements under IDEA 2004 State Performance Plan Indicator #7. This report lists the number and percentage of children who are functioning at not typical/typical levels for each of the three OSEP outcomes. In addition, it lists the number and percentage of children who are not functioning at a typical level for at least one outcome. This report is to be used for children ages 3–5 served in preschool special education programs.

Early Intervention - Entry Status Report (child level)

This report features user-defined fields that can be exported into an Excel® file. For each child, the report lists whether they are functioning at not typical/typical levels for each of the three OSEP outcomes and the child’s category (1–7) on the “ECO Center Child Outcomes Summary Form” for each outcome. This report is to be used for children ages birth to 3 served in early intervention programs.

Early Intervention - Entry Status Report (program level)

The “Entry Status Report” is used to meet 2007 federal reporting requirements under IDEA 2004 State Performance Plan Indicator #3. This report lists the number and percentage of children who are functioning at not typical/typical levels for each of the three OSEP outcomes. In addition, it lists the number and percentage of children who are not functioning at a typical level for at least one outcome. This report is to be used for children ages birth to 3 served in early intervention programs.
Steps:
From the **REPORTS** tab’s drop-down menu, select **OSEP**.
Select the “Entry Status Report” that you would like to create.
On the first screen, select options to specify children’s demographics.

If you want to include all children whose records you may access, click the gray button (at the top):
**I want to include all children. Go to next screen >.**

On the next screen, set filters for teacher demographics. If you want to use all the criteria, click the gray button (at the top): **I want to include all options. Go to next screen >>.**
On the third screen, set **Report Inclusion Criteria** to choose programs and sites for inclusion in the report. To include data for all children whose records you may access, click the gray button (at the top):

I want to include all options. Go to next screen >>.

On the final screen, enter a range of entry dates and select a **Report View**.

Click **SUBMIT**.

<table>
<thead>
<tr>
<th>IDEA Part B Preschool (3-5) Entry Date</th>
<th>from</th>
<th>to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report View*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[ ] Federal Entry Status Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[ ] Program Analysis Entry Status Report</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note.** The “Federal Entry Status Report” view gives you a very high overview of all the children included in the report. The “Program Analysis Entry Status Report” view gives the breakdown for each program included in the report.

For “Child Level Entry Status” reports, you can adjust column display options after the report has been generated. Just check the boxes you need as columns and then click **UPDATE**.

**Tip.** To choose another display type (HTML, PDF, Excel®), use the links that follow the table.
“Federally Mandated Year-End” Reports

This set of reports shows the five outcome categories for each of the three OSEP outcomes. The “Federally Mandated” reports are usually created at the end of the school year. They can be created for an individual child or for all children. Before you create final OSEP reports, the child-level reports can help you determine whether any information is missing.

Tip. “Federally Mandated” reports only include data for children who have been receiving services for 6 months or longer and who have entry and exit scores.

Preschool Special Education Outcomes - Federally Mandated Year End Report (child level)

This report features user-defined fields that can be exported into an Excel® file. For each child, the report lists entry scores, exit scores, and overall progress scores for each of the three OSEP outcomes and the child’s category (1–7) on the “ECO Center Child Outcomes Summary Form” for each outcome. This report is to be used for children ages 3–5 served in preschool special education programs.

Preschool Special Education Outcomes - Federally Mandated Year-End Report (program level)

This consolidated report will meet 2008 and beyond federal reporting requirements under IDEA 2004 State Performance Plan Indicator #7. This report lists the number and percentage of children who fall within each of the five outcomes categories for each of the three OSEP outcomes. This report compares a child’s progress from entry to exit in the program to that of a “typical” child of the same age. This report is to be used for children ages 3–5 served in preschool special education programs.

Early Intervention - Federally Mandated Year-End Report (child level)

This report features user-defined fields that can be exported into an Excel® file. For each child, the report lists entry scores, exit scores, and overall progress scores for each of the three OSEP outcomes and the child’s category (1–7) on the “ECO Center Child Outcomes Summary Form” for each outcome. This report is to be used for children ages birth to 3 served in early intervention programs.

Early Intervention - Federally Mandated Year-End Report (program level)

This consolidated report will meet 2008 and beyond federal reporting requirements under IDEA 2004 State Performance Plan Indicator #3. This report lists the number and percentage of children who fall within each of the five outcomes categories for each of the three OSEP outcomes. This report compares a child’s progress from entry to exit in the program to that of a “typical” child of the same age. This report is to be used for children ages birth to 3 served in early intervention programs.

Steps:

From the REPORTS tab’s drop-down menu, select OSEP.

Select the “Federally Mandated Report” that you would like to create.

On the first screen, select options to specify children’s demographics. If you want to include all children whose records you may access, click the gray button (at the top): I want to include all children. Go to next screen >>.
On the next screen, select options to specify teacher demographics. If you want to use all the criteria, click the gray button (at the top): **I want to include all options. Go to next screen >>.**

![Demographic Selection Criteria](image)

On the third screen, set **Report Inclusion Criteria** to choose programs and sites for inclusion in the report. To run the report for all children whose records you may access, click the gray button (at the top): **I want to include all options. Go to next screen >>.**

![Report Inclusion Criteria](image)

On the Report Format screen, you may change the formatting if you want to. However, the current year will auto-fill, so you can just click **SUBMIT.**

![Report Format](image)
“Exit Status Summary” Reports (Child-Level Only)

The “Exit Status Summary” reports show the entry and exit scores of children who have or have had an IEP or IFSP in your program. This is a good report for seeing which children’s OSEP status in GOLD® should be adjusted because they have stopped receiving services. It also helps you check whether the data are correct. You can adjust columns and filter by entry and exit dates.

Preschool Special Education Outcomes - Exit Status Summary Report (child level)

This report features user-defined fields that can be exported into an Excel® file. For each child, the report lists the exit status of the child and the length of time in your program. The report also lists entry scores, exit scores, and overall progress scores for each of the three OSEP outcomes and the child’s category (1–7) on the “ECO Center Child Outcomes Summary Form” for each outcome. This report is to be used for children ages 3–5 served in preschool special education programs.

Early Intervention - Exit Status Summary Report (child level)

This report features user-defined fields that can be exported into an Excel® file. For each child, the report lists the exit status of the child and the length of time in your program. The report also lists entry scores, exit scores, and overall progress scores for each of the three OSEP outcomes and the child’s category (1–7) on the “ECO Center Child Outcomes Summary Form” for each outcome. This report is to be used for children ages birth to 3 served in early intervention programs.

Steps:

From the REPORTS tab’s drop-down menu, select OSEP.

Select the “Exit Status Summary Report” that you want to create.

Select the display columns and any date ranges you would like to specify. Then click UPDATE.

The report will appear below the filtering options.

Tip. To export the data to an Excel® file, click the link under the report table.
The “Comparative Report”

In GOLD®, children’s skill levels are scored for each objective or dimension. The “Comparative Report” enables users to compare children’s scores to widely held expectations, to a nationally representative sample of children who have been assessed with GOLD®, or to a readiness benchmark for a child’s readiness as he or she moves from pre-K toward kindergarten entry.

Steps:

From the REPORTS tab’s drop-down menu, select Comparative Report.

Select the criteria to include in your report. The default setting includes all options in each section.

Use the options under Areas of Development: Programs, Sites, and Children; and Demographics to narrow your report criteria.

Choose whether to compare children’s data to Widely Held Expectations, National Normative Sample, or GOLD Readiness.

Choosing Widely Held Expectations enables users to compare data for a group of children to determine if the children’s skills, knowledge, and behavior are below, meeting, or exceeding widely held expectations.

Choosing National Normative Sample enables users to compare children’s data to a nationally representative sample.

Choosing GOLD Readiness enables users to measure a child’s readiness as he or she moves from pre-K toward kindergarten entry.

Once you have selected an option under Compare to, an additional selection option appears. Options will be dependent on what you select under Compare to.

- **Widely Held Expectations for**:
  - Birth to 1 year (Red)
  - 1 to 2 years (Orange)
  - 2 to 3 years (Yellow)
  - Preschool 3 class/grade (Green)
  - Pre-K 4 class/grade (Blue)
  - Kindergarten (Purple)

- **National Normative Sample for**:
  - Preschool 3 class/grade (Green)
  - Pre-K 4 class/grade (Blue)
  - Kindergarten (Purple)

- **GOLD Readiness for**:
  - Kindergarten Entry

Any single age or class/grade can be selected when you choose Widely Held Expectations.

Select Preschool 3 class/grade (Green), Pre-K 4 class/grade (Blue), or Kindergarten (Purple) when you choose National Normative Sample.

The default selection is Kindergarten Entry when you choose GOLD Readiness.
Select one or more **Checkpoint Periods**.

Select the use of only finalized checkpoint data or the use of both finalized and unfinalized checkpoint data. To select more than one checkpoint period, hold down the “control” key on your keyboard and use your mouse to select which periods you would like to report on.

**Tip.** Using unfinalized data enables you to examine comparative data during a checkpoint period and possibly increase your data pool, but you run the risk of using data on which a teacher is still working.

Choose which children to include in the report. Select **Only Children With Ratings in All Checkpoint Periods** to report data only for children who have ratings in both checkpoint periods. Select **All Children With Ratings in Any Checkpoint Period** to report data for children who have ratings in either or both checkpoint periods.

**Tip.** Including only children with ratings from both checkpoint periods may give you a better idea of the growth in your program, but the report might not include results for all children in your program.

Select an option under **Display Type** to choose which display to include.

When selecting **Widely Held Expectations** or **National Normative Scores**, the user can choose to include tables or charts.

When selecting **GOLD Readiness**, the user’s only display type option is tables.

When the user chooses **Tables** as the display type, an additional report criteria selection appears: **Report Level**.

Select an option under **Report Level** to choose which license level to include.

When the user chooses **GOLD Readiness** under **Compare to**, an additional report criteria selection appears: **Report Type**.

Select an option under **Report Type**. Selecting **Detailed** will include the following data in the report output: a widely held expectation range for each area; widely held expectations data; the Readiness Benchmark for each area; and Readiness data. Selecting **Summary** will include the following data in the report output: a widely held expectation range for each area; the Readiness Benchmark for each area; and Readiness data.

**Tip.** For more detailed information about the “Comparative Report,” refer to the support documents listed on the right side of the screen.
We hope that you found this Guide to be useful and informative. If you have further questions or require additional support, just e-mail us at Implementation@TeachingStrategies.com or call GOLD® support at 866.736.5913.

Thank you for using GOLD®!