PaCT User guide

A step by step guide for working with the Progress and Consistency Tool (PaCT)

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Key audiences are identified throughout the guide using these icons:

A  PaCT Administrators  T  Teachers  P  Principals/PaCT Leaders
How to use this guide

This user guide is split into chapters that represent the functionality of the tool. The different chapters will provide an overview of the key points about the topic followed by flow diagrams explaining key tasks and key aspects that are introduced by the PaCT.

Symbol library

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Term/Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td><img src="" alt="School PaCT Administrator (PA)" /></td>
<td>School PaCT Administrator (PA)</td>
<td>This symbol in the document represents the School PaCT Administrator. The PaCT Administrator sets up the PaCT for the school and manages the student profile data within the PaCT.</td>
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<tr>
<td><img src="principal.png" alt="Principal or PaCT Leader" /></td>
<td>Principal or PaCT Leader</td>
<td>This symbol in the document represents a Principal or PaCT Leader.</td>
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<td><img src="teacher.png" alt="Teachers" /></td>
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<td>This symbol in the document represents school teachers.</td>
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<td><img src="report.png" alt="Student level PaCT reports" /></td>
<td>Student level PaCT reports</td>
<td>This symbol in the document represents student level PaCT reports.</td>
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<tr>
<td><img src="group.png" alt="Groups" /></td>
<td>Groups</td>
<td>These symbols in the document represent groups, for example, teachers and leaders, parents/whānau.</td>
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PaCT Set up
On-boarding my school to the PaCT

During the process of planning to implement the PaCT, your school's Principal and Leadership Team will have nominated a School PaCT Administrator. The PaCT Administrator plays an instrumental role in configuring the school's settings in the PaCT.

In the planning phase your school will have considered a number of ways to use the PaCT. For example:

- You may choose to start with one or two frameworks instead of three.
- You may decide to start with a small number of teachers using the tool.
- You may decide to use the PaCT for a small number of students in each group.

This chapter will take you through the initial set up of the PaCT for your school.

Check your school's plan, or check with your Principal or PaCT Leader, to see what options your school has chosen.

The set up process is a one off task that the nominated School PaCT Administrator will complete the first time they log into the PaCT.
Here is a handy checklist of things to consider or complete before you begin the PaCT set up process

☐ The School PaCT Administrator has had their Education Sector Logon account updated with the PaCT entitlement.

☐ The School PaCT Administrator has rung the MoE Service Desk and requested to on-board the school to PaCT.

💡 Before completing this step, ensure ENROL is up to date for your school. Once the MoE Service Desk sends the invitation, the PaCT will automatically import student data from ENROL.

☐ The level of access teachers will have in the PaCT has been determined.

☐ The decision whether to use your school’s SMS data has been decided.

☐ How the PaCT will be used by the school has been decided.

☐ The school’s reporting cycles have been decided.

☐ All teachers that will use the PaCT have had their Education Sector Logon account updated with the PaCT entitlement.

☐ A list of all teachers’ email addresses is on-hand.

💡 Implementing the PaCT into your school can be done in a number of different ways. There are some handy tips through this chapter on how to set up the PaCT.
The PaCT Set up wizard

PaCT Administrator receives PaCT invitation via email and logs on to PaCT

PA completes set up wizard and sets access options

PA selects SMS or no SMS import

SMS? Automaton ✓

PA chooses automation or no automation

SMS Import ✓

PA chooses SMS import or no SMS import

PA starts PaCT

GO

SMS Import ✗

PA invites teachers and leaders to PaCT via email

PA maintains student data

PA manages groups

PA reviews reporting cycle

Automation ✗

Reporting cycle

Finish
Stepping through the wizard

The School PaCT Administrator has received the PaCT invitation email. This email is from the Progress and Consistency Tool sent by the MoE Service Desk.

1. Log into the PaCT through the Education Sector Logon.

The PaCT imports the list of students at your school according to what is in ENROL. You can import the latest information from ENROL at anytime.

2. Select the Continue button to move to the set up wizard.
The PaCT will recognise that your school has not yet been set up and will display the set up wizard.

3. Select which curriculum is taught at your School (National Standards English, Ngā Whanaketanga Rumaki Māori)

4. Select the **Continue** button to move to step 2.

5. Select the access control you want to apply to all teachers using the PaCT at your school.

6. Select the **Continue** button to move to step 3.

Select each option to find out more about the different access levels:

- Full access, all teachers can see and do Overall Teacher Judgments (OTJs) for any student at the school.
- Restricted judgments means teachers can only make OTJs for students who are in the same homegroup as the teacher.
- Restricted judgments and reports means teachers can only make OTJs and view judgments for students who are in the same homegroup as the teacher.
7. Select if you will use the data from your school’s SMS.

8. If you are using the data from the school’s SMS, select your **SMS provider** from the drop down list.

To find out more about the benefits of using your school’s SMS, click on **Why is using an SMS recommended?** (See screen above)

If your school doesn’t use an SMS or you opt not to use the data from the school’s SMS, you can change this setting at a later point if you need to.

(Refer to Chapter 2 – PaCT Administration for information on using SMS with the PaCT, creating and maintaining groups and teachers.)
Most school SMS providers offer an automated IDE file upload. If you provider offers this option, the PaCT will display the option to generate a secret code.

9. Click the Get secret button to see the code. You will need to copy this code (by selecting the Copy secret key button) and paste this to your school’s SMS.

10. Select the Continue button to move to the last step of the wizard.

The secret code allows your SMS and the PaCT to automate the upload process. Note: The upload won’t work until you complete the settings in the PaCT by selecting the Continue button.

At step 4 of the wizard you have completed configuring your school’s settings.

11. Print out the information displayed on the page which tells you the next steps of setting up your school to use the PaCT.

12. If you are ready to go into the PaCT and continue with the rest of the set up process, click Start PaCT.
Once you leave the wizard you cannot get back to it, so it's best to print the instructions now.

You can exit out of the wizard at any stage. When you next return to the PaCT you will be returned to the step where you left. No-one else at your school can use the PaCT until the wizard has been completed.

Import data from your school’s SMS

Are you using data from your school’s SMS in the PaCT?

If you are, we recommend you set up the SMS and load the first SMS file into the PaCT before progressing with the set up process any further.

If your SMS has an ‘automated file upload to the PaCT’ feature, you would have been presented with a secret ‘code’ to copy. Now is the time to set up the automated SMS upload using the secret code. Refer to your SMS’s user guide.

If your SMS does not offer an automated file upload, please follow the manual upload process below.

1. From the Manage | Settings page, click the **Import IDE file** button to begin the process.
2. Click **Choose File** to select the IDE file (that you have downloaded from your SMS).

From your computer directory, select the IDE file and click **Open**.

3. When the file has been selected, click **Process IDE file**. Your SMS data will upload to the PaCT.

View the Manage | Updates page to see if the upload has completed.
Inviting teachers and maintaining data

Inviting teachers

After the first upload of data from ENROL (and your SMS if it is being used), the School PaCT Administrator sends a PaCT invitation to teachers and school leaders that will be using the PaCT.

Teachers and school leaders (at the school) can only use the PaCT after they have accepted the invitation.

Using the SMS import will speed up this process and reduce the manual work for the School PaCT Administrator.

1. From the menu bar, select **Manage | Invitations | New invitations**.

2. From the list, identify those teachers that will play a school leader role in the PaCT and tick the **School leader** box.

3. There may be staff members that you do not want to invite to use the PaCT. Select these invitations and click **Hide** or **Delete**.

4. Once you have your list of invitations ready (email, names are valid), click **Send all invitations**.

If you have used an import from your SMS, the invitation page will be pre-populated with your school’s teachers. If the teacher has an email address in your SMS, their email address (along with their first and last name) will be pre-populated in the PaCT invitation screen.

School leaders can report at a school level and view reports for all students.
Tip Station – Inviting teachers

1. If a teacher has been invited to use the PaCT from an invitation pre-populated by your SMS, a link is created between the SMS and the PaCT. This link keeps the teacher account (and any group membership(s)) in the PaCT up to date with any changes that may occur as a result of future imports from your SMS.

2. If you manually invited your teachers to use the PaCT to start with and you are now using your school’s SMS, you can link the teacher in the PaCT with the teacher in SMS by resending the invitation (pre-populated by the SMS upload). The teacher must accept this second invitation to create the link between their existing PaCT and SMS accounts.

3. If you haven’t used an SMS import, or if some data has not been pre-populated, you will need to manually enter the details (e.g. email address and/or first and last name) of all the teachers at your school that need to be invited to use the PaCT.

4. You may not want to send some teacher invitations pre-populated by the SMS. If so, you are recommended to hide them not delete them. Deleted invitations will be re-populated after the next SMS upload; invitations that are hidden will not. Hidden invitations can be activated again at any time.

5. If you notice that a teacher’s details (and groups) are not automatically updated in the PaCT in line with changes in SMS, then this probably means the teacher has only accepted a manual invitation. Refer to point 2 above on how to automate the teacher changes between SMS and the PaCT.
Maintaining data

After the PaCT has received the initial data upload from ENROL and your SMS, some of the common prompts you may be asked to review are:

› Students with questionable ‘first started school’ dates. This is likely to occur for students who began their schooling in a country that starts school later than New Zealand.
› Students who exist in the ENROL upload but are not in the SMS upload or vice versa.
› Homegroups without teachers will occur if your school is not using SMS data in the PaCT or if a teacher has not accepted their PaCT invitation.

You will need to manually check that the year level the PaCT received from ENROL agrees with your expectation; the PaCT will not prompt you. If the year level doesn’t agree, you will need to correct this information in ENROL.

1. To view any prompts to review data, click Manage then Updates on the menu bar.

2. The PaCT will prompt you about any data for review from the ENROL upload on the screen (under the ENROL update heading).

   To view the data in more detail, select the link next to the item.

3. Select fix first started school dates. The PaCT will redirect you to a list of all students at your school.
4. Select the link **Questionable first started school dates**.

The PaCT displays a list of students for you to review and/or update.

5. Select one (or more) students from the list and click **Edit**.

It is recommended that you select one student at a time. If you select more than one student but only update the list partially, when you click save, the PaCT will consider the ‘questionable’ date to be correct and no longer display the student for you to review.
6. You can click the ? icon for more information on what needs to be entered here.

7. Once you have corrected the selected student(s), click Save all.

The PaCT will highlight a first started school date as questionable if it does not fall between a student’s fifth and sixth birthday. The most common cause for this is that the student started their schooling in a country that starts school later than New Zealand.

Your school will need to decide how to make judgments against these students and this decision will determine the correct start date to use:

**Option A:** adjust the first started school date to fall between the student’s fifth and sixth birthday. This means that the child will be judged at the level of Year 2 or 3 (i.e. in line with their peers in their group) even though they have not been in schooling that long.

**OR**

**Option B:** let the date reflect the student started school on their 7th birthday and although they are not in Year 1, they will be judged against the National Standards for Year 1.
8. You will be returned to the list of students, select the link **No homegroups** to view any students without a homegroup.

9. Select one or more students from the list and click **Edit**.

Only select more than one student if the students belong to the same homegroup or groups.

Your school may decide to initially use the PaCT for a limited number of students. If so, you may need to hide homegroups for students that are not involved. See page 1.16 for more information.

Note: Expect to receive (as the School Pact Administrator) prompts from the PaCT for any student who is not in an active homegroup.

10. From the Groups drop down menu, select the appropriate groups the student should be linked to.
Tip Station – Maintaining data

1. If a student appears in a Year level in the PaCT that is not the same as their Year level in your school, you will need to correct this information in ENROL and refresh your ENROL data in the PaCT.

2. The data prompts the PaCT displays to you will change slightly after your first ENROL and SMS uploads. Some of the prompts you may see after SMS/ENROL uploads (over time) are:
   › Teachers are no longer in your SMS and so have been suspended in the PaCT.
   › New invitations generated for new teachers in the SMS file.
   › New groups created where groups have been renamed in SMS or new groups have been added to SMS.
   › Ongoing, students who exist in ENROL but not in SMS and vice versa.
     - If the student exists in ENROL but not in SMS, fix your SMS.
     - If the student exists in SMS but not in ENROL, fix your ENROL (‘roll on’ or ‘roll off’ if new students have been added to the school or have left the school).
Manage SMS/ENROL groups

After the initial data loads from your SMS, a number of groups will be created as pending. You will need to work through the groups and determine what groups need to be activated for use.

By default the PaCT will create and activate groups from ENROL based on ENROL year levels. These groups are set as homegroups.

1. Go to Manage | Groups on the menu bar.
2. All groups created from the SMS in the PaCT will initially be Pending, go to the Pending groups list.
3. Highlight the groups from the list you wish to activate (this may only be a subset of groups) and select Activate.

You may want to hide groups that have come from your SMS that you will not be using (or aren’t relevant to the PaCT). This is a handy option if the implementation of the PaCT at your school is for a small number of teachers.

The 🏠 icon represents the group is a homegroup. A homegroup refers to the homeroom or class a student belongs to. Teachers assigned to a homegroup are responsible for managing the completion of OTJs for students in that group.
4. Once the group has been activated, you can validate the group settings are correct. Go to the **Active groups** tab.

5. Click **Edit** (next to a group).

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If you activate a group before the group’s teacher accepts their PaCT invitation, the PaCT will highlight, there is **no teacher** linked to the group. Once the teacher accepts the invitation, the link will automatically be made.

Before progressing to the next steps, you can pause and wait for teachers to accept their invitations. This will reduce the data that the PaCT will prompt you to review.

It is recommended that, if you do pause for teachers to accept invitations to join the PaCT, you should upload a new SMS file before continuing. This will clear prompts that are no longer valid.
The Group details will display.

6. Is the homegroup status correct? Tick the appropriate option.

7. Is the correct teacher(s) linked to the group? No? Click the drop down arrow to add the correct teacher(s).

8. Once you have checked the group details are correct, click **Save Group**.

If the group is an SMS group, you cannot change the homegroup setting in the PaCT.

If a teacher has not accepted their PaCT invitation, their name will not appear in the drop down list.
9. You can create your own group. Click **Create new group**.

10. Select **Yes**, if this is a homegroup, link the correct teacher(s) to the group and select students for this group.

11. Click **Save group**.
You can only add/remove students to/from a group that has been created by the School PaCT Administrator. You cannot change the student list in groups created by SMS or ENROL (in the PaCT).

**Tip Station – Maintaining groups**

1. If you are using the groups from your SMS you may want to hide the ENROL groups. ENROL groups can only be hidden, they cannot be deleted.

2. Any group that has been hidden can be activated again at any time.

3. If a teacher has not accepted their PaCT invitation, you cannot add them to a group. Their name will not appear on the selection list UNTIL they have accepted the PaCT invitation.

4. We recommend that any unused SMS groups are hidden in the PaCT instead of deleted. If they are deleted they will reappear in the pending folder after the next SMS update.
Reporting cycles

Most schools report to parents twice a year. Judgments supported by the PaCT will help teachers to give specific and constructive feedback to students and parents.

The PaCT provides a reporting workflow (based on the set reporting cycles) that assist teachers of Year 4 - 8 students to make judgments for all their students.

Your school may wish to use Overall Teacher Judgments (OTJs), supported by the PaCT, to inform reporting to parents, school management and the Board of Trustees. You may need to adjust the PaCT’s default reporting cycle to ensure the information is available.

The equivalent for students in Years 1 through 3 is anniversary dates, again twice per year but calculated from the date each student first started school.

1. Go to **Manage | Reporting Cycles** on the menu bar.

   The PaCT has default reporting cycles already set up.

   If your school reports on a different schedule, you can adjust the reporting cycles.

2. Select if you want to adjust the reporting cycles for this year or next year.

3. Change the reporting cycle using the calendar icons in the start and/or end fields.

4. To save the reporting cycles click **Save**.