

admin, admin essential, report cards, transcripts, webinar wednesday, video

# Customization of Report Cards, Progress Reports, and Rubrics

[2017-02-08\\_10.04\\_webinar\\_-\\_customization\\_of\\_report\\_cards\\_progress\\_reports\\_rubrics\\_kb\\_gtm\\_.mp4](https://schoolpathways.com/knowledgebase/2017-02-08_10.04_webinar_-_customization_of_report_cards_progress_reports_rubrics_kb_gtm_.mp4)

This manual will show users how to customize report cards / progress reports to meet the needs of various school models. Within this area users can create Classic Reports Cards, Rubric Style Report Cards, Progress Reports, and combined Classic/Rubric report cards.

To begin the customization process go to **Admin > Transcripts > Transcript/Report Cards**. Working in this area requires permissions to be set for user.

The screenshot shows the 'Transcripts and Course Categories' section of the Admin interface. A red circle highlights the 'Set Transcript Credit Requirements' link. A yellow box highlights a list of tabs of interest: **RC Types**, **RC Lockouts**, **Rubrics**, **Keys**, and **Comments**. An arrow points from the 'Report Card Settings' tab to the 'Tabs of interest' list.

**Transcripts and Course Categories**

- Set Transcript Credit Requirements
- Set Transcript Options
- Define Transcript Modifiers
- Define Transcript GPA Scales
- Set CSIS Transcript Codes
- Set Requirements for Automated Academic Plan (AAP)

**Corrective Actions**

- Enrollment / Gradtype Anomaly Report

**Data Import**

- RC Grade Import

**Report Card Settings**

- Set Class Modifiers
- Report Card Settings
- Define Comments (optional)
- Define Rubrics (optional)
- Report Card Lockouts

**Grade Scale Settings**

- Set Assignment-level Marks and Grading Methods (optional)

The area you will be working in is “Report Card Settings” which you can access through the links or tabs.

## A. ARE THE “SCHOOL TYPES” SET-UP FOR YOUR SCHOOL?

It is important to make sure that there are “School Types” set-up in your school as this area affects graduation requirements, grade weights, course modifiers, and how grades are posted in report cards. Make sure School Type(s) are set-up as the templates will be attached to School type once it is created.

To verify that School Types are set up for your school:

1. Click on “Set Transcript Credit Requirements”

Start Credits Mods Mods & Marks GPA Types

## Transcripts and Course Categories

[Set Transcript Credit Requirements](#)   
[Set Printed Transcript Options](#)  
[Define Transcript Modifiers](#)  
[Define Transcript GPA Scales](#)  
[Set CSIS Transcript Codes](#)  
[Set Requirements for Automated Academic Plan \(AAP\)](#)

## Corrective Actions

2. View the various School Types set within your school

 Elementary Tk-5  
[Hide](#)  
Add a new course category  
Add a new graduation type  
Export credit requirements from Elementary Tk-5  
Import credit requirements to Elementary Tk-5

Hide	Report Sequence	General Education
Language Arts	1	0
Mathematics	2	0
Social Studies	3	0
Science	4	0
Art	5	0
Music	6	0
Technology	7	0
PE	8	0
Electives	9	0
Credit Totals		0

3. Click on the name of the School Type (Example: "Elementary TK-8")
4. If needed, you have the ability to create separate and distinct templates for:
  - **Report Card**
  - **Progress Report** (based on a "Progress Report Sub Period")
  - **Withdrawal Progress Report** (based on a "Progress Report Sub Period")This allows you to have different information on each report.
5. Choose ONE of the following:

**Option 1:** Once you create templates, attach under the **Default** location using the appropriate drop down box and click SAVE. Templates already in use will be populated in the Default location.

Edit School Type

Name: <input type="text" value="TK-5"/>	<input type="checkbox"/> UU <input type="checkbox"/> AD <input type="checkbox"/> US <input type="checkbox"/> UE <input type="checkbox"/> IN <input type="checkbox"/> TD <input checked="" type="checkbox"/> TK <input type="checkbox"/> PG																																				
Applicable Gradelevels:	<input checked="" type="checkbox"/> K1V <input type="checkbox"/> 01 <input type="checkbox"/> 02 <input type="checkbox"/> 03 <input type="checkbox"/> 04 <input type="checkbox"/> 05 <input type="checkbox"/> 06 <input type="checkbox"/> 07 <input type="checkbox"/> 08 <input type="checkbox"/> 09 <input type="checkbox"/> 10 <input type="checkbox"/> 11																																				
Calculate Credits	<input type="button" value="Select All"/> <input type="button" value="Select K-8"/> <input type="button" value="Select 7-8"/> <input type="button" value="Select 9-12"/> <input type="button" value="Deselect All"/>																																				
Report Card Templates:	<table border="1"><thead><tr><th>Grade Level</th><th>Report Card</th><th>Progress Report</th><th>Withdrawal Report</th></tr></thead><tbody><tr><td>Default:</td><td>sis_repcard8</td><td>sis_repcard8Withdrawal</td><td>sis_repcard8Withdrawal</td></tr><tr><td>TK</td><td></td><td>sis_repcardK1V</td><td>sis_repcardK1VWithdrawal</td></tr><tr><td>K1V</td><td></td><td>sis_repcard01</td><td>sis_repcard01Withdrawal</td></tr><tr><td>01</td><td></td><td>sis_repcard01</td><td>sis_repcard01Withdrawal</td></tr><tr><td>02</td><td></td><td>sis_repcard02</td><td>sis_repcard02Withdrawal</td></tr><tr><td>03</td><td></td><td>sis_repcard03</td><td>sis_repcard03Withdrawal</td></tr><tr><td>04</td><td></td><td>sis_repcard04</td><td>sis_repcard04Withdrawal</td></tr><tr><td>05</td><td></td><td>sis_repcard05</td><td>sis_repcard05Withdrawal</td></tr></tbody></table> <p><i>Specific templates must be attached for reports to populate</i></p>	Grade Level	Report Card	Progress Report	Withdrawal Report	Default:	sis_repcard8	sis_repcard8Withdrawal	sis_repcard8Withdrawal	TK		sis_repcardK1V	sis_repcardK1VWithdrawal	K1V		sis_repcard01	sis_repcard01Withdrawal	01		sis_repcard01	sis_repcard01Withdrawal	02		sis_repcard02	sis_repcard02Withdrawal	03		sis_repcard03	sis_repcard03Withdrawal	04		sis_repcard04	sis_repcard04Withdrawal	05		sis_repcard05	sis_repcard05Withdrawal
Grade Level	Report Card	Progress Report	Withdrawal Report																																		
Default:	sis_repcard8	sis_repcard8Withdrawal	sis_repcard8Withdrawal																																		
TK		sis_repcardK1V	sis_repcardK1VWithdrawal																																		
K1V		sis_repcard01	sis_repcard01Withdrawal																																		
01		sis_repcard01	sis_repcard01Withdrawal																																		
02		sis_repcard02	sis_repcard02Withdrawal																																		
03		sis_repcard03	sis_repcard03Withdrawal																																		
04		sis_repcard04	sis_repcard04Withdrawal																																		
05		sis_repcard05	sis_repcard05Withdrawal																																		

**Option 2: \*NEW\* Ability to create a TEMPLATE per grade level for a single school**

**Type** - For example, students enrolled in the TK-8 Grad Type, you can create a unique report card template for each individual grade and attach it to the appropriate grade level.

## B. HOW DO I CREATE A REPORT CARD, PROGRESS REPORT, WITHDRAWAL TEMPLATE (RC Type)?

1. Click on the “RC Types” tab
2. Choose “Create new report card template” to create new RC Type OR to edit an existing template, by selecting the name of template from the drop down box.
3. If you are creating separate templates for Report Card, Progress Report, and Withdrawal Report, make sure clearly label the templates. Example: High School Progress Report template should be clearly labeled with HSPR so the RC Type name will be “**sis\_reprchSPR**”

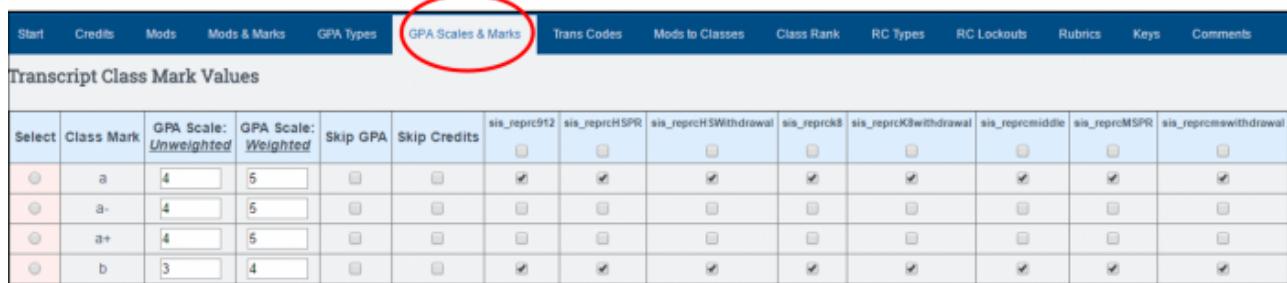
4. Scroll down and select the settings to customize the look of the template
5. “Save Template” or “Save Template and Print Preview”
6. Once the rubric, rubric key, and comments have been created you will return to the template and attach appropriate items to the template.
7. **\*NEW\* - Ability to create rubric sets per grade level within one report card template (rctype).**

School types using this template	
School types are defined at <a href="#">Set Transcript Options and Credit Requirements</a>	
TK-5	
TK (Default)	
KN (Default)	
01 (Default)	
02 (Default)	
03 (Default)	
04 (Default)	
05 (Default)	

2. Comment set	None																		
3. Rubrics set	<table border="1"> <thead> <tr> <th>Grade Level</th> <th>Rubrics Set</th> </tr> </thead> <tbody> <tr> <td>Default</td> <td></td> </tr> <tr> <td>TK</td> <td></td> </tr> <tr> <td>KN</td> <td></td> </tr> <tr> <td>01</td> <td></td> </tr> <tr> <td>02</td> <td></td> </tr> <tr> <td>03</td> <td></td> </tr> <tr> <td>04</td> <td></td> </tr> <tr> <td>05</td> <td></td> </tr> </tbody> </table>	Grade Level	Rubrics Set	Default		TK		KN		01		02		03		04		05	
Grade Level	Rubrics Set																		
Default																			
TK																			
KN																			
01																			
02																			
03																			
04																			
05																			
4. Homeroom rubrics set	None																		
5. Rubrics keys set	Meets/Exceeds																		

For example, if you have students enrolled in the K-5 School Type, you would create one K-5 Report Card Template, and within that template you can attach a rubric set that is unique to each grade level. You no longer have to create multiple school types per grade level to use grade specific rubrics.

**8. IMPORTANT** - When you set up a new template make sure to set the acceptable grading marks per template under the **GPA Scales & Marks**

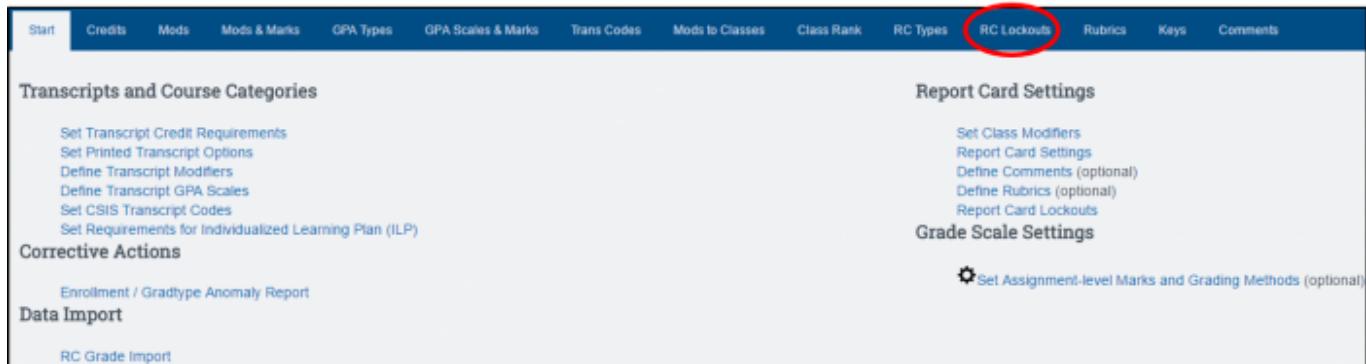


The screenshot shows a table with 12 columns representing different GPA scales and marks. The columns are: Select, Class Mark, GPA Scale: Unweighted, GPA Scale: Weighted, Skip GPA, Skip Credits, sis\_reprc912, sis\_reprcHSPR, sis\_reprcHSWithdrawal, sis\_reprck8, sis\_reprck8Withdrawal, sis\_reprcmiddle, sis\_reprcMSPR, and sis\_reprcmWithdrawal. Each row contains a radio button, a class mark (a, a-, a+, b), and a 4 or 5 in the 'GPA Scale: Unweighted' and 'GPA Scale: Weighted' columns. The 'GPA Scales & Marks' tab is highlighted with a red circle.

Select	Class Mark	GPA Scale: Unweighted	GPA Scale: Weighted	Skip GPA	Skip Credits	sis_reprc912	sis_reprcHSPR	sis_reprcHSWithdrawal	sis_reprck8	sis_reprck8Withdrawal	sis_reprcmiddle	sis_reprcMSPR	sis_reprcmWithdrawal
<input type="radio"/>	a	4	5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>							
<input type="radio"/>	a-	4	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/>	a+	4	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/>	b	3	4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>							

## C. WHAT IS THE PURPOSE OF “RC LOCKOUTS”?

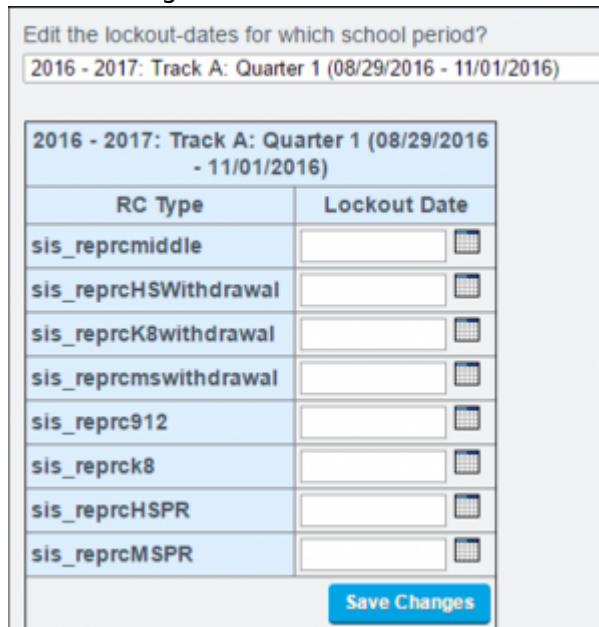
You can lock teachers out of the report card area for a specific reporting period as of a certain date so grades cannot be changed once RC's are submitted.



The screenshot shows the 'Report Card Settings' section with the 'RC Lockouts' tab highlighted with a red circle. It includes sections for 'Transcripts and Course Categories' (with links to Set Transcript Credit Requirements, Set Printed Transcript Options, Define Transcript Modifiers, Define Transcript GPA Scales, Set CSIS Transcript Codes, Set Requirements for Individualized Learning Plan (ILP)), 'Corrective Actions' (with a link to Enrollment / Gradtype Anomaly Report), 'Data Import' (with a link to RC Grade Import), 'Report Card Settings' (with links to Set Class Modifiers, Report Card Settings, Define Comments (optional), Define Rubrics (optional), Report Card Lockouts), and 'Grade Scale Settings' (with a link to Set Assignment-level Marks and Grading Methods (optional)).

Start	Credits	Mods	Mods & Marks	GPA Types	GPA Scales & Marks	Trans Codes	Mods to Classes	Class Rank	RC Types	RC Lockouts	Rubrics	Keys	Comments
Transcripts and Course Categories													
Set Transcript Credit Requirements													
Set Printed Transcript Options													
Define Transcript Modifiers													
Define Transcript GPA Scales													
Set CSIS Transcript Codes													
Set Requirements for Individualized Learning Plan (ILP)													
Corrective Actions													
Enrollment / Gradtype Anomaly Report													
Data Import													
RC Grade Import													
Report Card Settings													
Set Class Modifiers													
Report Card Settings													
Define Comments (optional)													
Define Rubrics (optional)													
Report Card Lockouts													
Grade Scale Settings													
 Set Assignment-level Marks and Grading Methods (optional)													

1. Choose the Reporting Period and click SHOW. Set the date for each report card type then SAVE CHANGES. Once set, only administration has the ability (set permissions) to change a report card/rubric grade.



The screenshot shows a table with columns 'RC Type' and 'Lockout Date'. The rows list various report card types: sis\_reprcmiddle, sis\_reprcHSPR, sis\_reprck8, sis\_reprcmWithdrawal, sis\_reprc912, sis\_reprck8, sis\_reprcHSPR, and sis\_reprcMSPR. Each row has a text input field for the lockout date and a calendar icon. A 'Save Changes' button is at the bottom.

RC Type	Lockout Date
sis_reprcmiddle	<input type="text"/> 
sis_reprcHSPR	<input type="text"/> 
sis_reprck8	<input type="text"/> 
sis_reprcmWithdrawal	<input type="text"/> 
sis_reprc912	<input type="text"/> 
sis_reprck8	<input type="text"/> 
sis_reprcHSPR	<input type="text"/> 
sis_reprcMSPR	<input type="text"/> 

## D. CREATING RUBRICS

## 1. Select “Add New Rubric Set”

Define Rubric Sets

- [Add New Rubric Set](#)
- 4th grade rubric Common Core
- 6-8 Rubric Set
- 8th Grade Tests
- Citizenship Requirement

## 2. Title your Rubric

New Rubric Set

Title: <input type="text"/>	<input type="checkbox"/> Disabled
Type	Disabled
Order	

## 3. Add a Category

Add Category Save Rubric Set

## 4. Add an Item by clicking the green icon

Editing Rubric Set

Type	<input type="checkbox"/> Disabled	Order	Title	Options
Category	<input type="checkbox"/>		CCSS English Language Arts	
Item	<input type="checkbox"/>		Overall ELA Mark	
Item	<input type="checkbox"/>		Intervention/s or curriculum modifications are currently being implemented for ELA	
Category	<input type="checkbox"/>		Reading - Literature	
Item	<input type="checkbox"/>		RI. 8.1 Cite strong evidence to analyze what text says explicitly and what it infers	
Item	<input type="checkbox"/>		RI. 8.2 Determine a themes or central idea; provide and objective summary	

You may reorder items or categories using the arrows

## 5. Keep adding Categories and Items for all your rubric areas. SAVE DATA.

**E. CREATING KEYS**

Your report card can have multiple keys to explain your grading marks and citizenship marks.

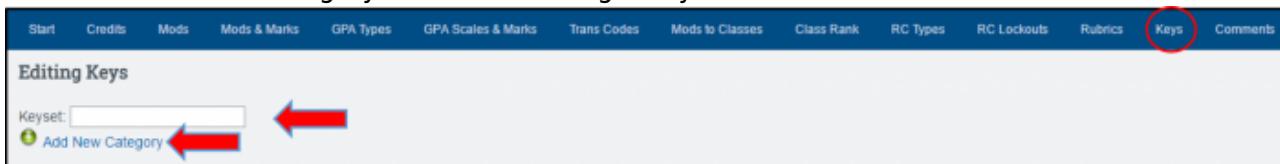
## 1. Click on “Add New Keyset” OR “Edit Existing Key Set”

Define Keys

- 8th Grade
- 9-12 Key 2009/2010
- Common Core
- K-3 Keyset 2009/2010
- K-6 Standards Proficiency
- K-8 Grading Marks 2013/2014
- KN
- LVCS 4th Grade CC Rubric
- Milestone CCSS Proficiency Rubric
- Reason Codes
- Standards Achievement
- [Add New Keyset](#)

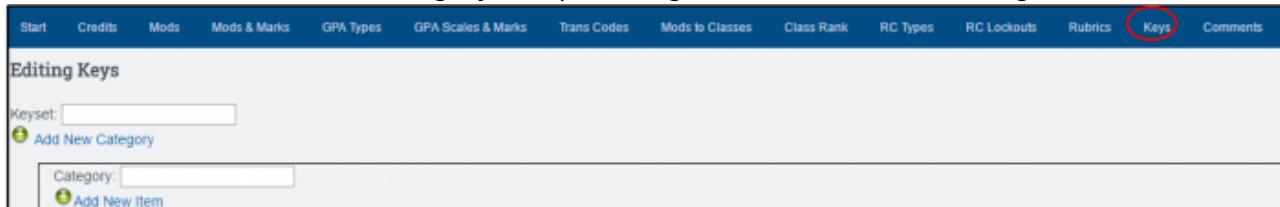
## 2. Add title to your key set

3. Click on “Add New Category” to start creating a key set.



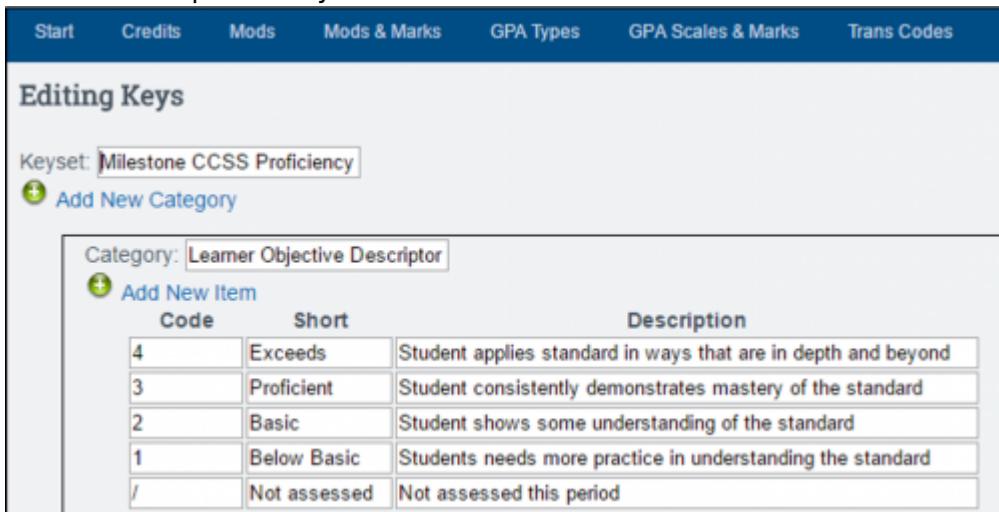
The screenshot shows a navigation bar with tabs: Start, Credits, Mods, Mods & Marks, GPA Types, GPA Scales & Marks, Trans Codes, Mods to Classes, Class Rank, RC Types, RC Lockouts, Rubrics, **Keys** (circled in red), and Comments. Below the navigation bar, the page title is "Editing Keys". There is a "Keyset:" input field and a "Add New Category" button with a plus icon. A red arrow points to the "Add New Category" button.

4. Click “Add New Items” to a Category. Keep clicking the “Add New Items” to get more blanks.



The screenshot shows the same "Editing Keys" page. The "Keyset:" field contains "Milestone CCSS Proficiency". Below it, a "Category:" input field contains "Learner Objective Descriptor" and has a "Add New Item" button with a plus icon. A red arrow points to the "Add New Item" button.

5. SAVE the completed Keyset

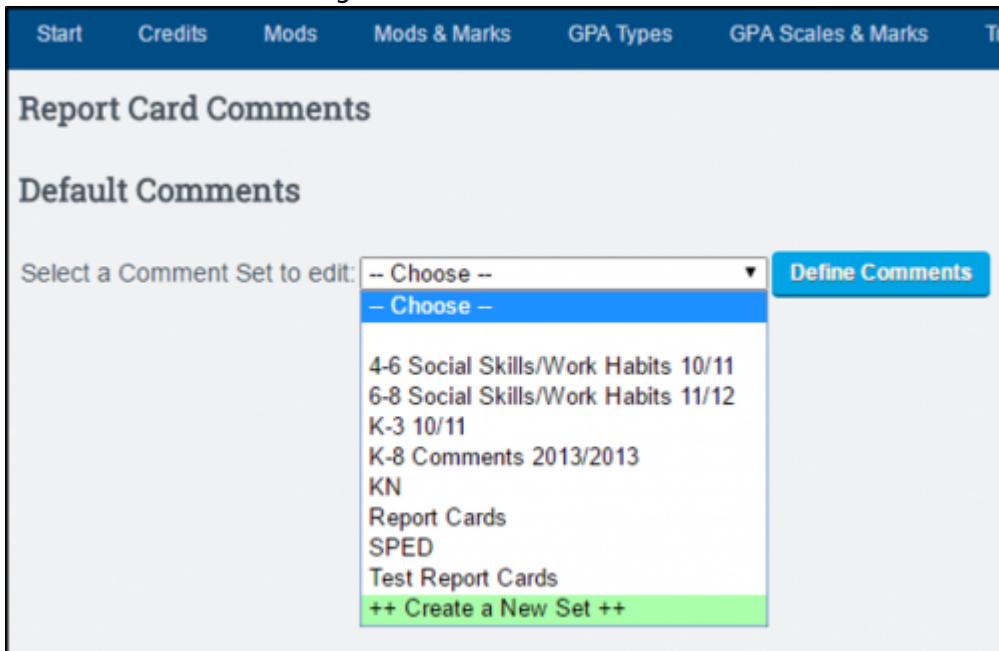


The screenshot shows the "Editing Keys" page with the completed key set. The "Keyset:" field is "Milestone CCSS Proficiency". The "Category:" field is "Learner Objective Descriptor". Below these, a table lists items with columns: Code, Short, and Description. The items are: 4 (Exceeds), 3 (Proficient), 2 (Basic), 1 (Below Basic), and / (Not assessed). The "Description" column provides a detailed explanation for each code.

Code	Short	Description
4	Exceeds	Student applies standard in ways that are in depth and beyond
3	Proficient	Student consistently demonstrates mastery of the standard
2	Basic	Student shows some understanding of the standard
1	Below Basic	Students needs more practice in understanding the standard
/	Not assessed	Not assessed this period

## F. CREATING COMMENTS

1. Click the ++Create a New Set ++ and then DEFINE COMMENTS button OR select from the drop down box a list of existing comments to Edit



The screenshot shows the "Report Card Comments" page. The "Default Comments" section is visible. Below it, a dropdown menu titled "Select a Comment Set to edit:" shows a list of comment sets. The list includes: "4-6 Social Skills/Work Habits 10/11", "6-8 Social Skills/Work Habits 11/12", "K-3 10/11", "K-8 Comments 2013/2013", "KN", "Report Cards", "SPED", "Test Report Cards", and a highlighted option "++ Create a New Set ++". To the right of the dropdown is a blue "Define Comments" button.

2. Title your Comments. Make the title VERY descriptive so that if you want to change the

comments next school year, you don't lose the current ones. This is important if you need to come back and print a past report card. **You can disable comments but they are never deleted because they may have been used in the past.**

The screenshot shows the 'Report Card Comments' section. At the top, there are tabs: Start, Credits, Mods, Mods & Marks, GPA Types, GPA Scales & Marks, and Trans. Below the tabs, the title 'Report Card Comments' is displayed. Under 'Default Comments', there is a list of four items: 'Good Classroom Effort', 'Effort Needs Improved', 'Works Independently', and 'Fulfils Homework Requirements'. Each item has a checkbox next to it. Below this list, there is a section titled 'Disable Number Comment' with a dropdown menu containing the numbers 1, 2, 3, and 4, each associated with a comment.

3. SAVE CHANGES: To save your list of comments. After this save, you can define another comment set for another report card type

## G. ATTACHING RUBRIC, KEY SET, COMMENTS to TEMPLATE

Once you have created your Rubrics and Key Sets you have to attach them to the appropriate template, and then attach template to School Type.

1. Click on the "RC Types" tab
2. Choose the template that needs to have the Rubric and Key Set attached

The screenshot shows the 'Edit report card templates' section. At the top, there are tabs: Start, Credits, Mods, Mods & Marks, GPA Types, GPA Scales & Marks, Trans Codes, Mods to Classes, Class Rank, **RC Types** (which is circled in red), and RC Lockouts. Below the tabs, the title 'Edit report card templates' is displayed. A dropdown menu is open, showing a list of template names: 'Choose', 'sis\_reprc912', 'sis\_reprcHSPR', 'sis\_reprcHSWithdrawal', 'sis\_reprck8withdrawal', 'sis\_reprcmSPR', 'sis\_reprck8', 'sis\_reprcmiddle', and 'sis\_reprcmwithdrawal'. A 'Create new report card template' button is also visible.

3. Choose the settings regarding rubrics, key set, and comments:
  - o 2. No Comment Set has been created
  - o 3. Rubric Set
    - If the same rubric is being used for all grade levels in the template, attach rubric in the **Default** location
    - If you have a rubric specific to each grade level within template (**sis\_reprck8**), use dropdown to attach rubric **per grade level**
      - Example below:
        - School Type: **TK-5** (includes grades TK-5)

- Using report card template **sis\_reprck8**
- Each grade level is populated that is included in School Type to attach grade specific rubrics to one template
- 4. No Homeroom Rubric Set has been created (for marks specific to a homeroom only)
- 5. Rubric Keys Set – Choose the Key to be used with rubrics
- 6. RC Comments Style – none created but if you create customized comments for report cards, you can choose to have teachers use them by a code or by full text.

Settings for report card template: *sis\_reprck8*

School types using this template	TK-5																		
School types are defined at <a href="#">Set Transcript Options and Credit Requirements</a>																			
2. Comment set	– None –																		
3. Rubrics set	<table border="1"><thead><tr><th>Grade Level</th><th>Rubrics Set</th></tr></thead><tbody><tr><td>Default</td><td>Default</td></tr><tr><td>TK</td><td>TK</td></tr><tr><td>K4</td><td>K4</td></tr><tr><td>01</td><td>01</td></tr><tr><td>02</td><td>02</td></tr><tr><td>03</td><td>03</td></tr><tr><td>04</td><td>04</td></tr><tr><td>05</td><td>05</td></tr></tbody></table>	Grade Level	Rubrics Set	Default	Default	TK	TK	K4	K4	01	01	02	02	03	03	04	04	05	05
Grade Level	Rubrics Set																		
Default	Default																		
TK	TK																		
K4	K4																		
01	01																		
02	02																		
03	03																		
04	04																		
05	05																		
4. Homeroom rubrics set	– None –																		
5. Rubrics keys set	Meets/Exceeds																		

#### 4. SAVE Report Card Data

#### 5. Once rubric(s) are attached to the template (**sis\_reprck8**), the report card template **must be attached** to specific School Type

- Admin > Transcripts > Transcript/Report Cards

Start Credits Mods Mods & Marks GPA Types

Transcripts and Course Categories

[Set Transcript Credit Requirements](#) (circled in red)

[Set Printed Transcript Options](#)

[Define Transcript Modifiers](#)

[Define Transcript GPA Scales](#)

[Set CSIS Transcript Codes](#)

[Set Requirements for Automated Academic Plan \(AAP\)](#)

**Corrective Actions**

- Click on “Set Transcript Credit Requirements”
- Click on “TK-5” School Type
- Attach report card template: **sis\_reprck8**
- If you have templates for Progress Report or Withdrawal Report you will also attach
- SAVE

TK-5

Add a new course category  
Add a new graduation type

Export credit requirements from TK-5  
Import credit requirements to TK-5

Edit School Type

Name: TK-5

Applicable Gradelevels:  KN  01  02  03  04  05  06  07  08  09  10  11  12

Select All Select K-6 Select 7-8 Select 9-12 Deselect All

Calculate Credits

Grade Level	Report Card	Progress Report	Withdrawal Report
Default	sis_reprck8		sis_reprck8Withdrawal

Attach report card template sis\_reprck8

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