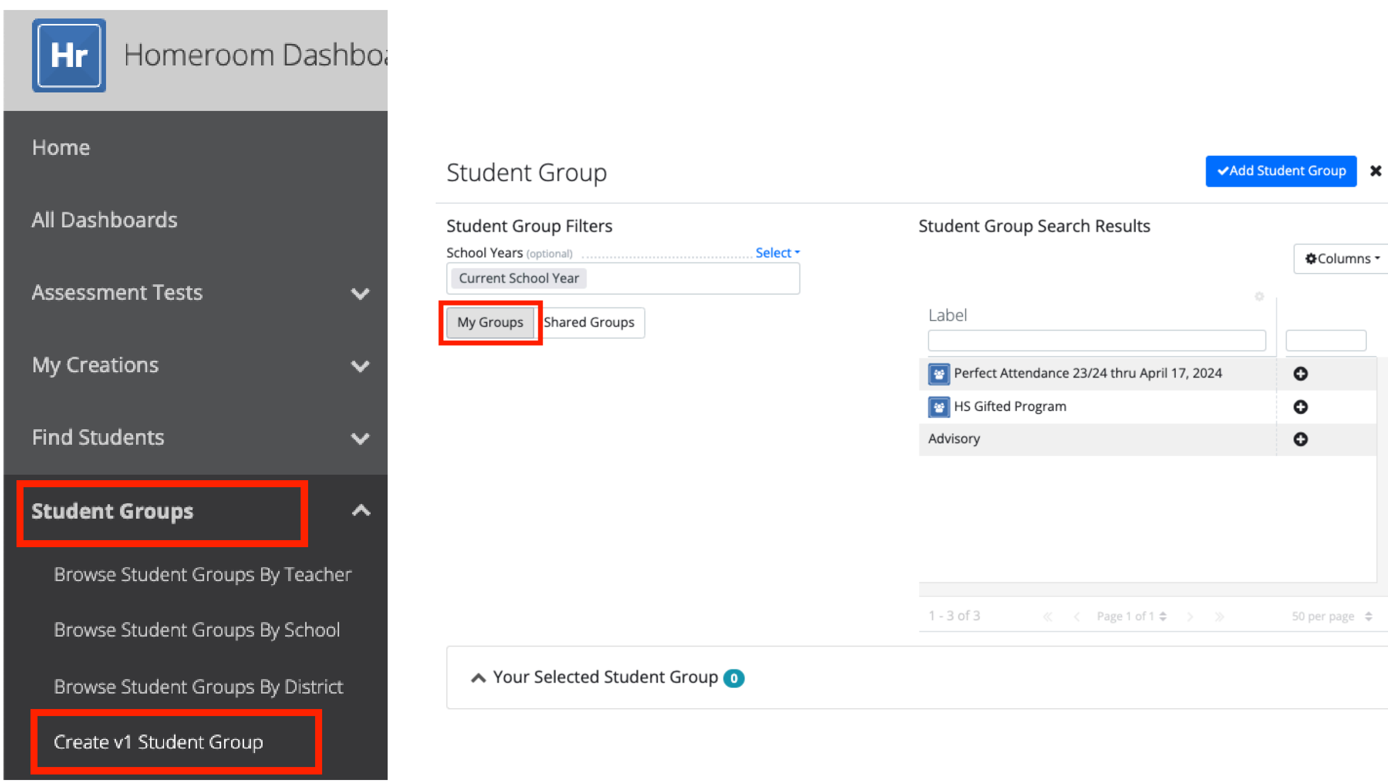
Create and Manage a Smart Student Group

A smart student is a dynamic group that updates nightly based on defined filter criteria. This requires setting filter criteria (e.g., demographic, enrollment, and behavior) to populate the group automatically. It is ideal for creating groups that need to adjust dynamically based on changing conditions.

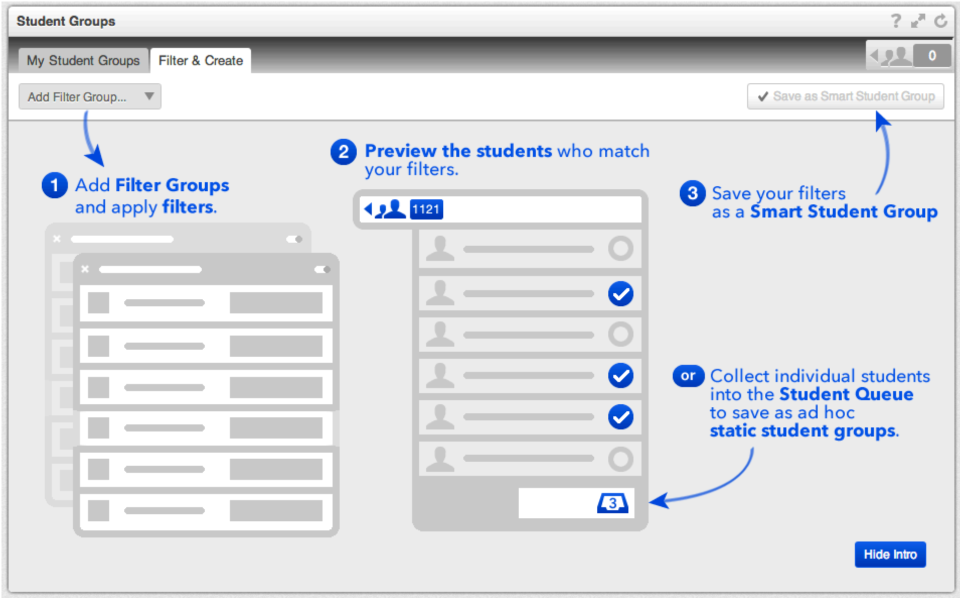
[Creating Smart Group Video]

[Creating User-Defined Smart Groups Video]

1. Start under **Student Groups** in the left navigation menu and choose **Create v1 Student Group**.
2. Here, you can add members individually to create a smart group, which you can access anywhere you see a **My Groups** list.



3. Click the **Filter & Create tab**. If it is your first time, please review the steps necessary to create a smart student group. You can hide these instructions by selecting the **Hide Intro** button in the lower right corner.



4. Click **Add Filter Group** and choose one or more filters from the dropdown menu. As filter groups are added, they will appear to the right of the Add Filter Group dropdown menu. The more options you select, the smaller your student group will become
    - We recommend your first filter group be **Enrollment**. Using this filter first will significantly reduce the number of students collected in the Preview Panel.
    - Currently, you can only add a filter group only once.
    - Click the **Match (Any/All) toggle**. If you want to see students who have met one or more options, set the Match toggle to **Any**. If you want to see students who have met one condition AND another, set the Match toggle to **All.**
    - Click the **"X"** to remove a filter group.

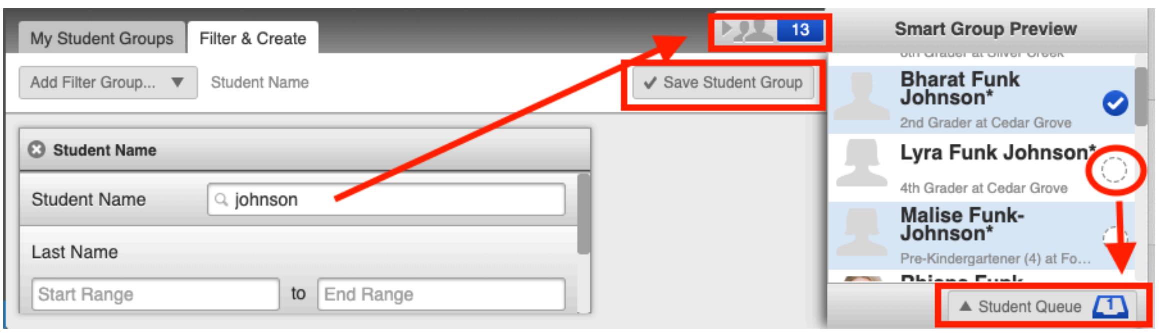
Available Filter Groups:

- **Activities:** Select a School Year, Schools, and Activities.
- **Assessments:**
    - Select the **Match (Any/All) toggle**.
    - Select the Assessment and Performance Level.
    - Click **Add Assessment** at the bottom left of the filter group to add more assessments.

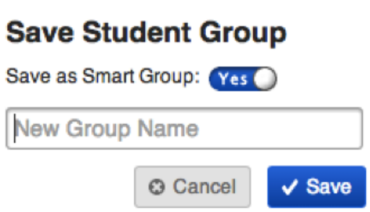
- **Behaviors (Discipline/Attendance):** This filter uses migrate**d** Student Information System (SIS) data. Select Absences, Discipline, Incident Statuses (Offense/Referral), Participant Roles (Involved Student), Incident Types, and Incident Codes.
- **Demographic:** Select Gender, Federal Ethnicity/Race Code, Native Language, and Home Language.
- **Enrollments:**
  - Click the **toggle (Yes/No)** to Include Withdrawn Students or Use Student Predominant School.
  - Select School Year, Enrolled in District as of month and day, Schools, Grade Levels, Content Areas, and Classes.
- **504 Plan (SchoolData.net):** Select Impairments, Accommodation Types, and Accommodations.
- **Grades & Credits:** Select Current Cumulative GPA (range), Credits Earned (range), Term Grades, and Gradebook Grades.
- **Interventions:** Select On a Student Learning Plan and Interventions.
- **Migrant Program:** Select the Time Period and whether it Is a Priority.
- **Requirements:** This filter only applies to the middle and high grades 7-12.
  - Select the **Match (Any/All) toggle**.
  - Select Credit Deficiency, Reading, Writing, Math, Science, EOC Math Yr1, EOC Math Yr2, and SBA ELA.
- **Referrals:** This filter uses migrated SWIS data. Select Discipline, Severity, Problem Behaviors, Perceived Motivations, Day of Week, Hour of Day, Locations, Referral Person, and Involvement Types.
- **Risk:** Your district determines the risks listed in this filter.
  - Select the **Match (Any/All) toggle**.
  - Click **Add Risks** at the bottom left of the filter group to add more.
- **Services:** Your district determines the services listed in this filter, which come directly from your Student Information System (SIS).
  - Select the **Match (Any/All) toggle**.
  - Click **Add Service** at the bottom left of the filter group to add more.
- **Student Attributes:** Select the attribute. Click **Add Attribute** at the bottom left of the filter group to add more.
- **Student Accomplishments:**
  - Select the **Match (Any/All) toggle**.
  - Select Accomplishments
  - To add more, click Add Accomplishment at the bottom left of the filter group.

- **Student Categories:** Select Categories. To add more, click Add Student Category from the dropdown menu in the top right of the filter group.
- **Student Name:** Select Student Name, Last Name, and Current Advisors.

5. Anytime a filter is updated, a count of the current number of students matching the filter is updated. Click the **arrow** in the top right corner to open the **Preview Panel** to view the students in the group. **Please Note:** Your role and permissions will define the students you can view.
6. Click the **dashed circle** to the right of the name to collect students into a temporary **Student Queue** at the bottom of the column. The queue remains persistent as you search, add or remove filters, and add names as needed.
7. When finished, click the **Student Queue** button to review the names.
8. Click **Save Student Group** just below the Preview Pane arrow.



9. Select the **Save as Smart Group toggle** in the Save Student Group window to reflect **Yes.** This will save the group as a Smart Group.
10. Fill in a **New Group Name** and click **Save**.

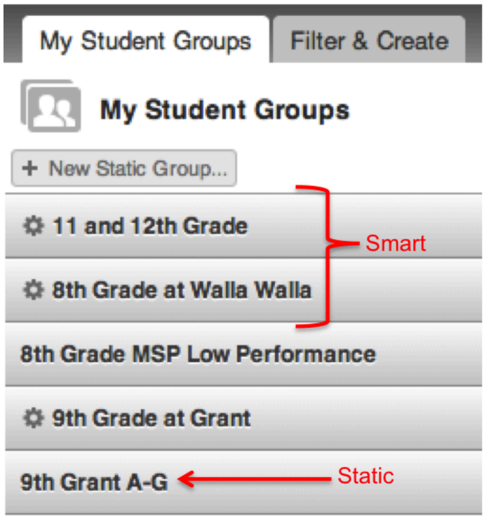


11. **Note:** The **Gear** to the left of the Student Group name identifies it as a Smart Student Group.

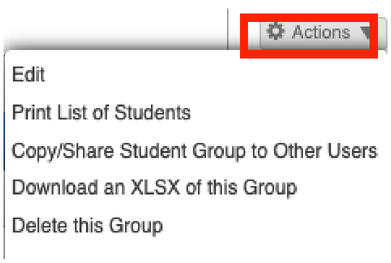
Manage a Student Group

1. Start under **Student Groups** in the left navigation menu and choose **Create v1 Student Group**.

2. Select a Static or Smart group from the **My Student Groups** tab. The **gear** to the left of the student group name identifies it as a Smart Student Group.



3. The group will be displayed to the right. Below the name, select the **Actions** Gear and choose an option.



Edit: This will display the filter parameters for creating the smart group. Modify as necessary, then select the **Options** button to **Save, Save As,** or **Edit Name**.

Print List of Students: A print preview window will open with the students listed alphabetically. Select **Print**.

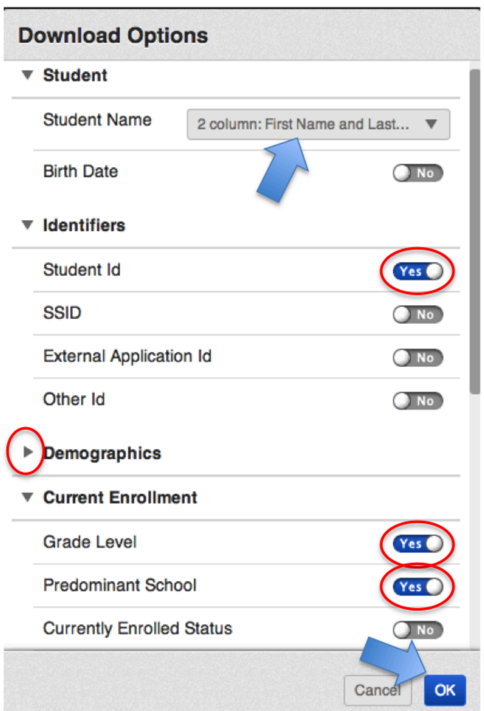
Copy/Share Student Group to Other Users: See article for further information: Copy/Share Student Groups To Other Users.

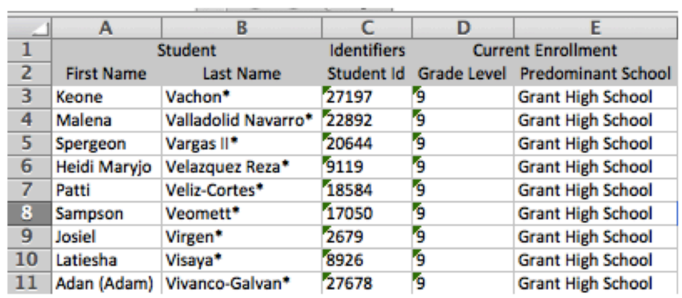
- **Copy:** Here, the recipient(s) will have their copy of the group that they may edit/delete without impacting the originator's copy.
- **Share:** Here, the recipients will have a shared group that, if edited/deleted, will affect the originator's group.

Download an XLSX of this Group:

1. Click the **arrow** to the left to open/close the category. (Student, Identifiers, Current Enrollment, Demographics, Services, Risk, Student Categories)

2. Select the **student name** version from the dropdown menu.
3. Set any **value** using the **Yes/No toggle**. Selecting Yes denotes the column included in the download, and No will be hidden. Previous selections will be retained.
4. Click **OK** in the bottom right when finished.





	A	B	C	D	E
1	Student		Identifiers	Current Enrollment	
2	First Name	Last Name	Student Id	Grade Level	Predominant School
3	Keone	Vachon*	27197	9	Grant High School
4	Malena	Valladolid Navarro*	22892	9	Grant High School
5	Spergeon	Vargas II*	20644	9	Grant High School
6	Heidi Maryjo	Velazquez Reza*	9119	9	Grant High School
7	Patti	Veliz-Cortes*	18584	9	Grant High School
8	Sampson	Veomett*	17050	9	Grant High School
9	Josiel	Virgen*	2679	9	Grant High School
10	Latiesha	Visaya*	8926	9	Grant High School
11	Adan (Adam)	Vivanco-Galvan*	27678	9	Grant High School

Delete this Group: A confirmation window will open; confirm by selecting **OK**.