Child Outcomes Summary Knowledge Check (COS-KC) User Manual for State Administrators

December 2022

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Acknowledgments:

The contents of this report were developed under grants from the U.S. Department of Education, #H373Z190002 and #H326P170001. However, those contents do not necessarily represent the policy of the U.S. Department of Education, and you should not assume endorsement by the Federal Government. Project Officers: Meredith Miceli, Amy Bae, and Julia Martin Eile.

December 2022

Suggested citation:

Porterfield, M. L., Barton, L., Hebbeler, K., & Rooney, R. (2022). *Child Outcomes Summary Knowledge Check (COS-KC) User Manual for State Administrators*. SRI International.

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Contents

Introduction

This user manual provides directions for states on how to get started with the Child Outcomes Summary Knowledge Check (COS-KC) system and how to produce reports within the COS-KC system. The main body of this document focuses on technical information and specific steps to get set up in the COS-KC system itself. The appendices offer additional information and tools for decision-making. See also the COS-KC webpage, including both pages with practitioner resources and state resources. Links to Frequently Asked Questions about the COS-KC for both practitioners and state administrators are available on the respective resource pages.

Getting Started With Technical Set-Up in the COS-KC System

The technical set-up in the COS-KC system involves (1) designating state administrators (hereafter called "State Admins") with permission to manage information and permissions within the system, (2) uploading local program locations, (3) and designating local administrators (hereafter called "Local Admins") with permission to see practitioner information and run reports.

Designating State Admins

General Information

The state must designate one or more staff members to serve as State Admins. The State Admins will be responsible for entering required information on local programs into the COS-KC system and will be able to run state- and local-level reports. The DaSy Center recommends that a state identifies no more than four people to serve as State Admins. See Appendix C for more information on State and Local Admin roles and responsibilities.

State Admins will:

- Upload local program location names and identification numbers in the initial set-up within the COS-KC system. This set-up will be a one-time activity. If local programs merge or split after this information is entered, State Admins will need to reach out to DaSy for guidance on updating the local program information.
- Upload the names and email addresses for any local staff designated as Local Admins and update the system with changes.
- Run and review state and local program data reports.
- Communicate with practitioners about taking the COS-KC or work with those designated to do so.
- Coordinate with local admins to access the system.

How to Designate State Admins

Email the DaSy team at COS-KCinfo@sri.com and provide the following information for the person or persons who will serve as the State Admins:

- Name
- Email address
- Permission level:

  1 = User management (able to add users, edit information, designate Local Admins)

  2 = Reporting (able to run reports, but limited access to user information)

  3 = Both user management and reporting (the default status assigned to most State Admins)

If the state designates multiple persons as State Admins, at least one must be identified as a State Admin with permission level 3. Within 3 business days, DaSy TA staff will enter each State Admin's name and email address into the COS-KC system.

What Happens Next

Once the State Admin information has been entered into the COS-KC system, it will send an automated email message from DaSy to each State Admin. The email will:

- Notify the State Admin that they have been added to the COS-KC system as an administrator.
- Direct the individual to activate their COS-KC account via a link embedded in the email.

Once the designated State Admin clicks on the link in the email message, accepts the terms and conditions, and sets a password, they can sign in into their COS-KC account. The account will open to the State Admin dashboard in the COS-KC system. The State Admin can also click on their name near in the top right section of the screen to complete their user profile in the system. This user manual provides step-by-step instructions for navigating the system and accomplishing key tasks.

Uploading Local Programs or Locations to the COS-KC System

Deciding on a List of Locations

The state identifies the list of local programs or locations that will be uploaded to the COS-KC system. This information populates the dropdown menu options from which practitioners select their answer to the registration question "Where is your work located?" A practitioner's answer to this question associates them with the selected program location in all reports and makes them visible in all user management lists. State education agencies might upload their list of school districts or local education agencies (LEAs). Early Intervention programs might upload the list of local programs or regional areas they use for Office of Special Education Programs

(OSEP) monitoring and reporting. See Appendix B for additional information about deciding on the list of local programs locations for the COS-KC.

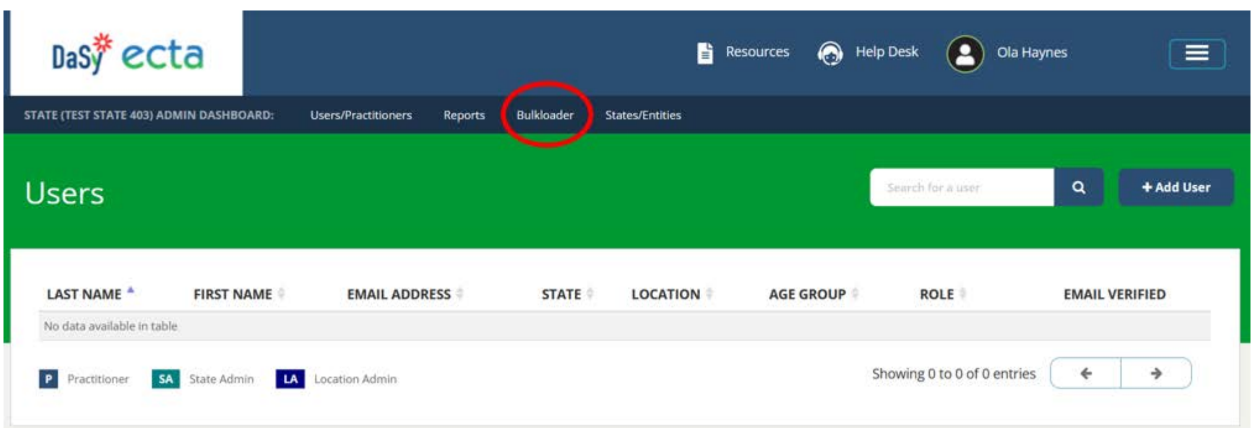
Steps to Upload Local Programs/Locations to the COS-KC System

The State Admin uploads the local program location names and identification (ID) numbers into the COS-KC system via the “bulkloader.” The steps for this process are listed below. State Admins also can access the COS-KC state resources page for more information about the bulkloading process.

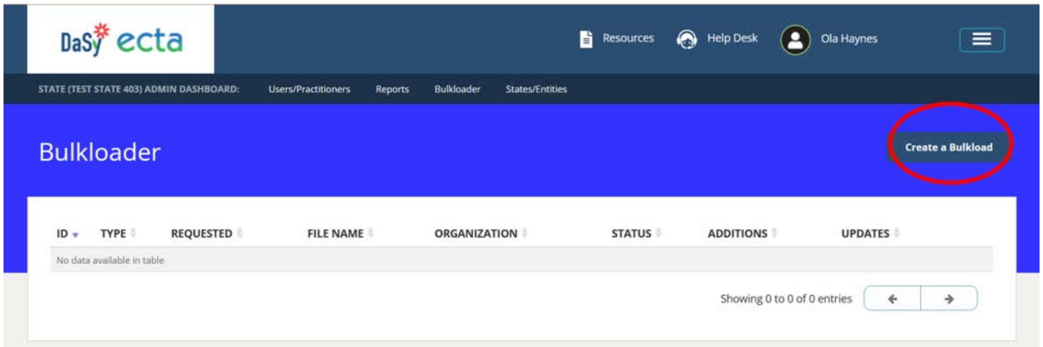
1. Prepare a CSV file using the template provided by DaSy**.** The file requires the state ID number (ID numbers are provided in the template as well as listed in Appendix D of this manual), location ID number, and location name for each program/location.

   Use a separate row for each program/location and make sure each location ID number and name is unique. The state ID number is the same for all local programs. The location ID number can be whatever the state wants to assign to a program, but each location ID number must be unique. If the state already has a unique ID number assigned to each local program, use those as the local ID numbers.

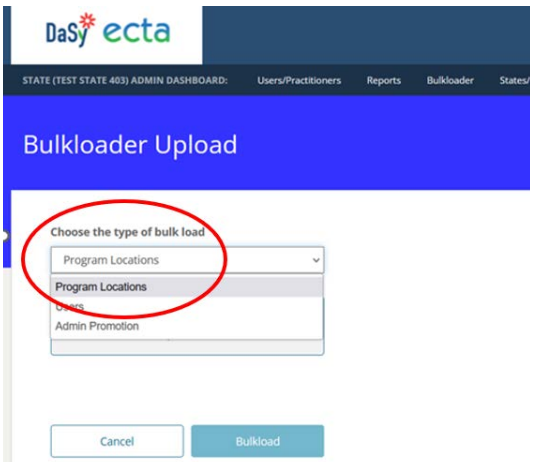
   Only input the required data in the CSV file. Do not make any changes to the file itself, such as adding, deleting, or reordering columns or changing the column headers. These types of changes will prevent the COS-KC system from correctly reading and importing the data.
2. Log into the COS-KC at https://coskc.dasyonline.org/**.**
3. Click the “Bulkloader” tab on the navy blue navigation bar near the top of the page.



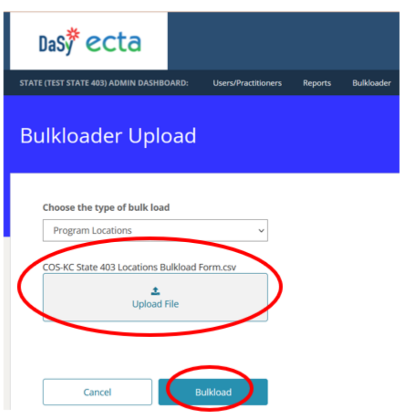
4. On the Bulkloader page, click the blue “Create a Bulkload” button in the top right corner.



5. Under “Choose the type of bulk load,” select “Program Locations” from the dropdown menu (if it is not already selected).

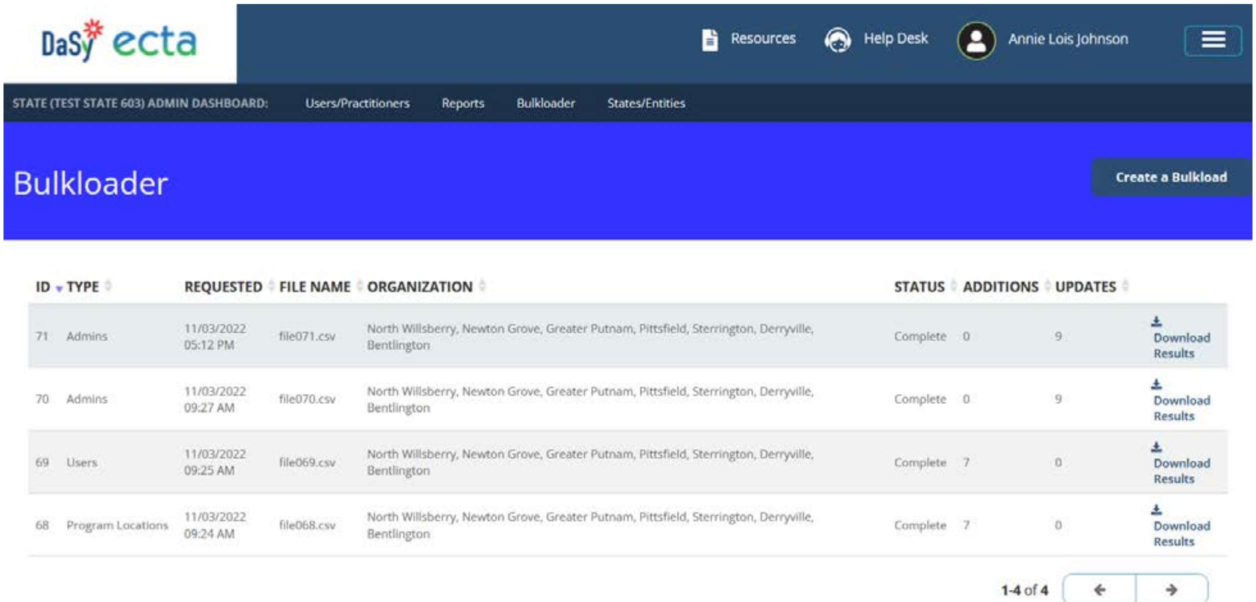


6. Click the “Upload File” button.
7. Find the CSV file that was created with the program location information. Make sure the file is a CSV file. Then click “Open.”



8. Click the “Bulkload” button to upload the CSV file into the system.
9. Review the results of the bulkload attempt on the Bulkloader table. In the “Status” column, a successful bulkload will show as “Complete.” An unsuccessful bulkload will show as “Error,” which means that the data did not upload to the system as intended.

The “Additions” column will display the number of newly added program locations. Finally, the “Updates” column will display the number program locations that already exist in the system, if any.



ID	TYPE	REQUESTED	FILE NAME	ORGANIZATION	STATUS	ADDITIONS	UPDATES	
71	Admins	11/03/2022 05:12 PM	file071.csv	North Willsberry, Newton Grove, Greater Putnam, Pittsfield, Sterrington, Derryville, Bentlington	Complete	0	9	Download Results
70	Admins	11/03/2022 09:27 AM	file070.csv	North Willsberry, Newton Grove, Greater Putnam, Pittsfield, Sterrington, Derryville, Bentlington	Complete	0	9	Download Results
69	Users	11/03/2022 09:25 AM	file069.csv	North Willsberry, Newton Grove, Greater Putnam, Pittsfield, Sterrington, Derryville, Bentlington	Complete	7	0	Download Results
68	Program Locations	11/03/2022 09:24 AM	file068.csv	North Willsberry, Newton Grove, Greater Putnam, Pittsfield, Sterrington, Derryville, Bentlington	Complete	7	0	Download Results

DaSy recommends that State Admins save the CSV files after uploading them to the COS-KC system, to refer back to them in the future.

Bulkloading the names and location ID numbers of local programs is a one-time activity that must be completed before the state starts to use the COS-KC. If program locations change in the future (e.g., multiple local programs merge into one, or one program splits into multiple programs), State Admins should contact DaSy for assistance in making changes in the COS-KC system.

Designating Local Admins

Most states will identify one or more individuals from each local program/location to serve as Local Admins. However, a state may elect to handle user management and reporting for some or all local program locations at the state level and to limit or not grant local administrative permissions.

Designating Local Admins is a two-step process. First, the individuals who will be designated as Local Admins are bulkloaded as users in the COS-KC system. Second, those users are “promoted” or assigned local administrative privileges using the same codes as those for State Admins: 1 = user management, 2 = reporting, and 3 = both user management and reports (the default). Local Admins will have access to user information and/or reports for their local programs only. The same individual can be assigned as Local Admin for multiple local program locations.

State Admins are encouraged to keep careful records about which users are assigned Local Admin permissions and for which program locations. State Admins can easily click on individual users to see what permissions are assigned. However, the system does **not** produce reports that list all Local Admins and their program locations.

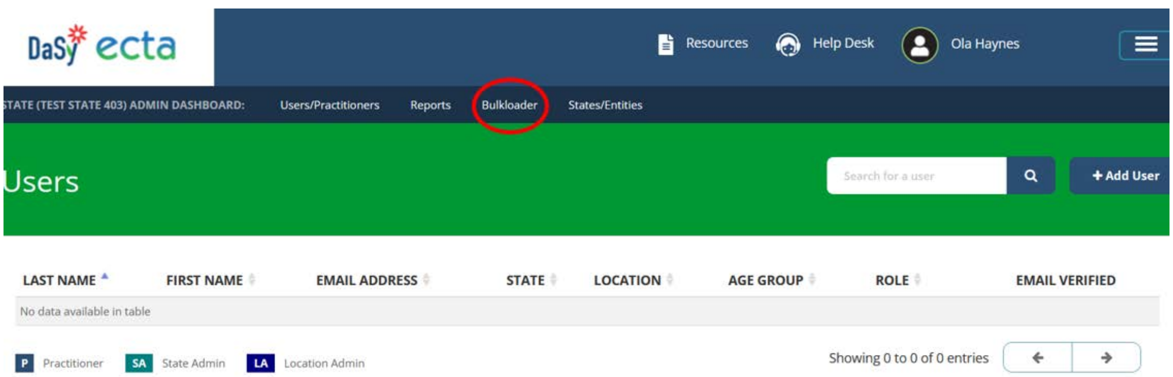
Steps to Bulkload Local Admins as Users in the COS-KC System

The first step in bulkloading Local Admins is bulkloading them as individual users. (State Admins will promote them from users to Local Admins in a subsequent step.)

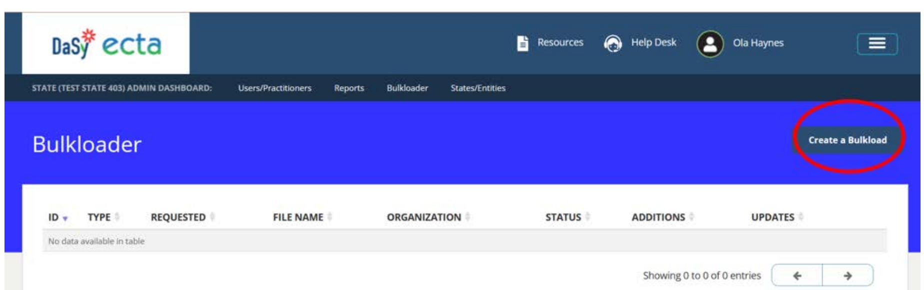
1. Prepare a CSV file using the template provided by DaSy**.** The file requires state ID number, location ID number for the primary program with which they are associated, first name, last name, and email address for each individual who will be designated as a Local Admin.

   Use a separate row for each individual. Please note that the state will need to carefully confirm that the location ID number is correct for each individual user. The program location name is not included in the CSV file.

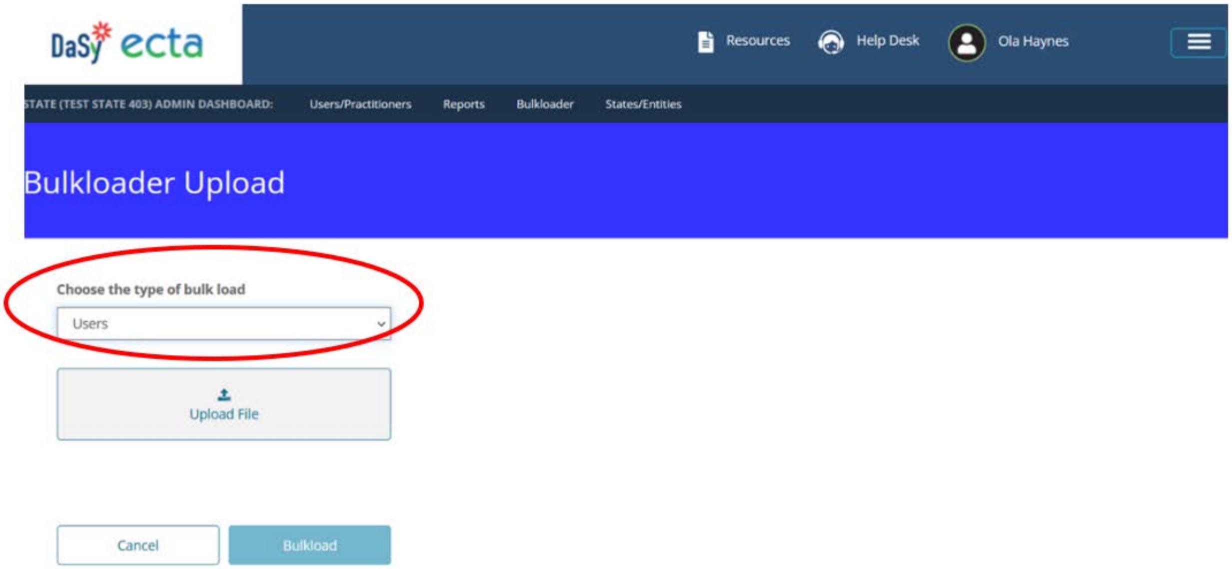
2. Log into the COS-KC system at https://coskc.dasyonline.org/.
3. Click the "Bulkloader" tab on the navy blue navigation bar near the top of the page.



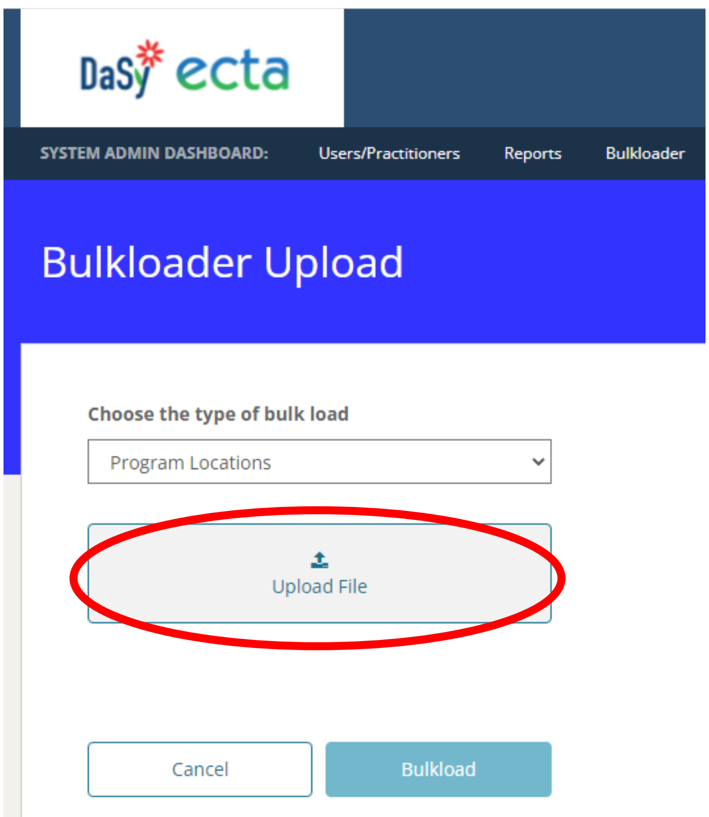
4. On the Bulkloader page, click the blue "Create a Bulkload" button in the top right corner.



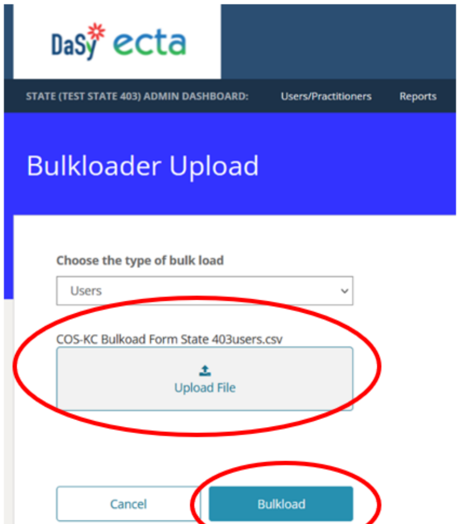
5. Under “Choose the type of bulk load,” select “Users” from the dropdown menu.



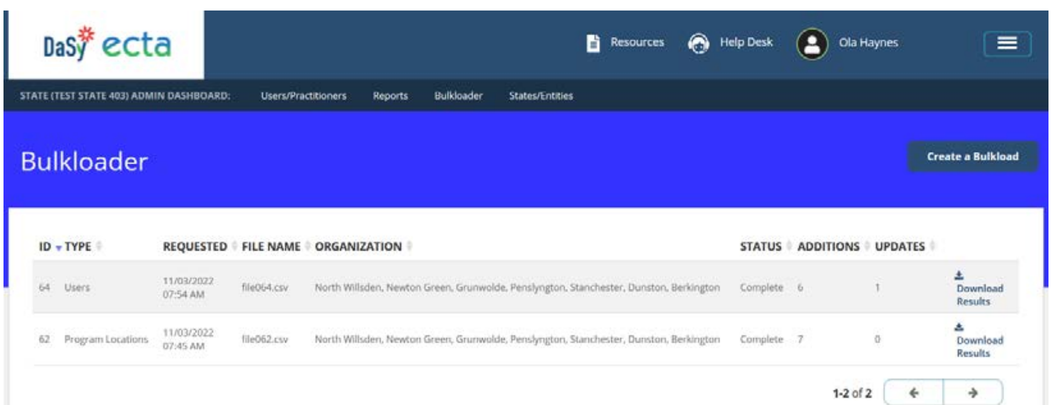
6. Click the “Upload File” button to select the CSV file.



7. Find the CSV file created with the Local Admin information. Make sure the file is in CSV format. Then click “Open.”
8. Click the “Bulkload” button to upload the CSV file to the system.



9. Review the results of the bulkload attempt on the Bulkloader table. In the “Status” column, a successful bulkload will show as “Complete.” An unsuccessful bulkload will show as “Error,” which means that the data did not upload to the system as intended. The “Additions” column will display the number of newly added individual users. The “Updates” column will display the number of existing individual users included in the bulkload, if any.



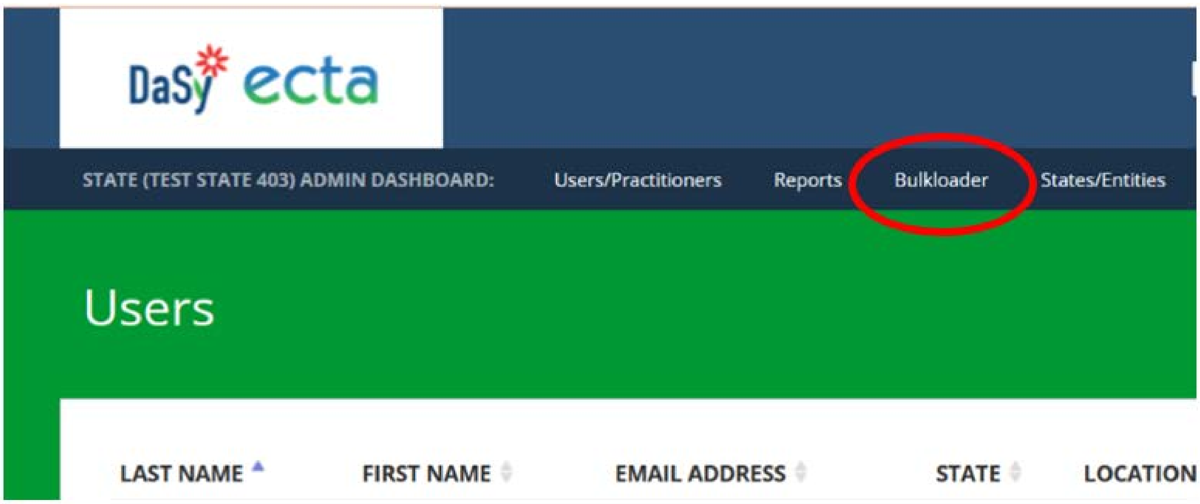
DaSy recommends that State Admins save the CSV files after uploading them to the COS-KC system, to refer back to them in the future.

When individual users are bulkloaded into the COS-KC system, it will generate and send an email message from DaSy to each Local Admin notifying them that they have been added as a user and providing a registration link.

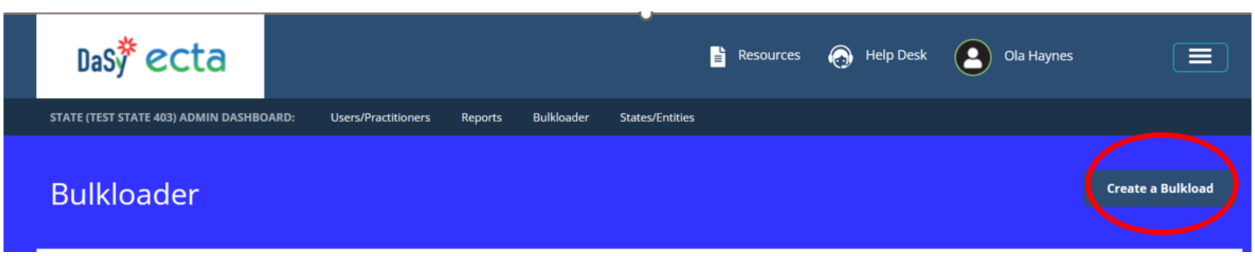
Steps to Bulkload Local Admin Privileges

1. Prepare a CSV file using the template provided by DaSy**.** The file requires first name, last name, email address, location ID number (“admin_location_id”), and permission level (1 = user management, 2 = reporting; 3 = both user management and reporting) for each individual being granted Local Admin privileges.

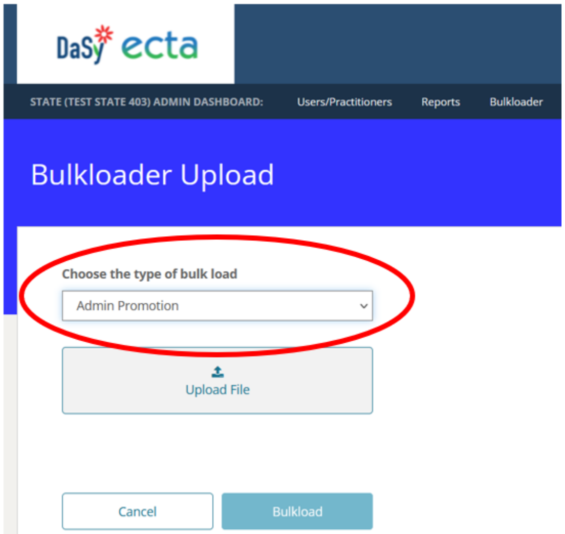
   Use a separate row for each individual user. Individual users may be granted Local Admin privileges for more than one program location. If assigning multiple program locations to the same user, use a separate row for each location assigned.
2. Log into the COS-KC system at https://coskc.dasyonline.org/.
3. Click the “Bulkloader” tab on the navy blue navigation bar near the top of the page.



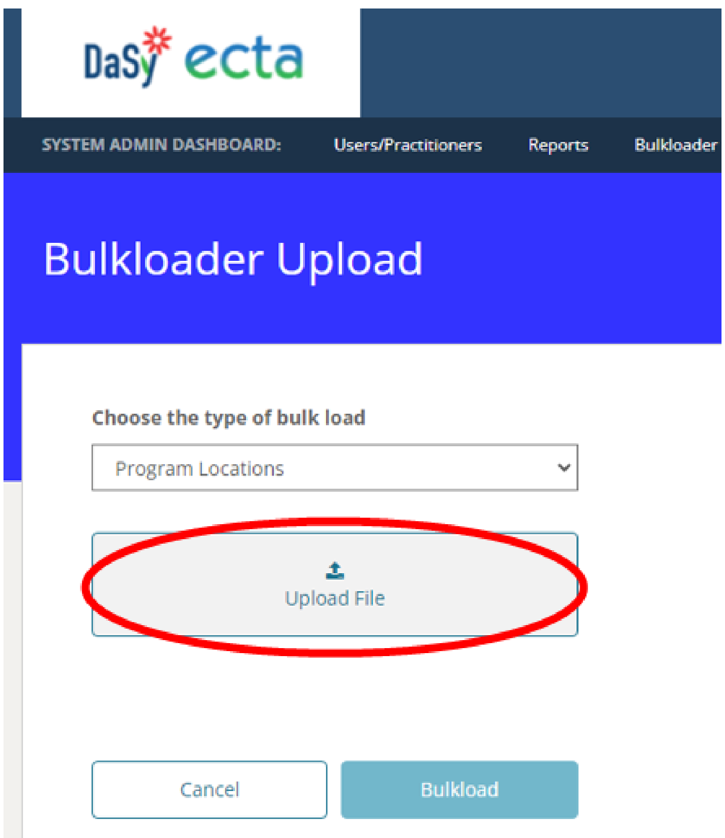
4. On the Bulkloader page, click the blue “Create a Bulkload” button in the top right corner.



5. Under “Choose the type of bulk load,” select “Admin Promotion” from the dropdown menu.

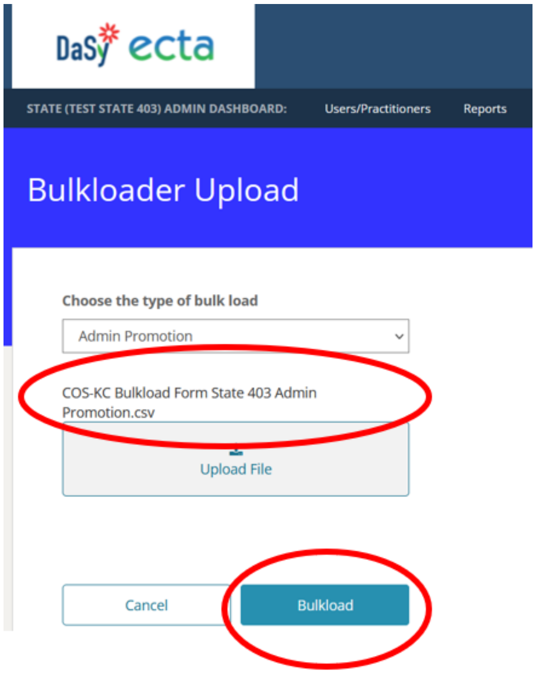


6. Click the “Upload File” button.

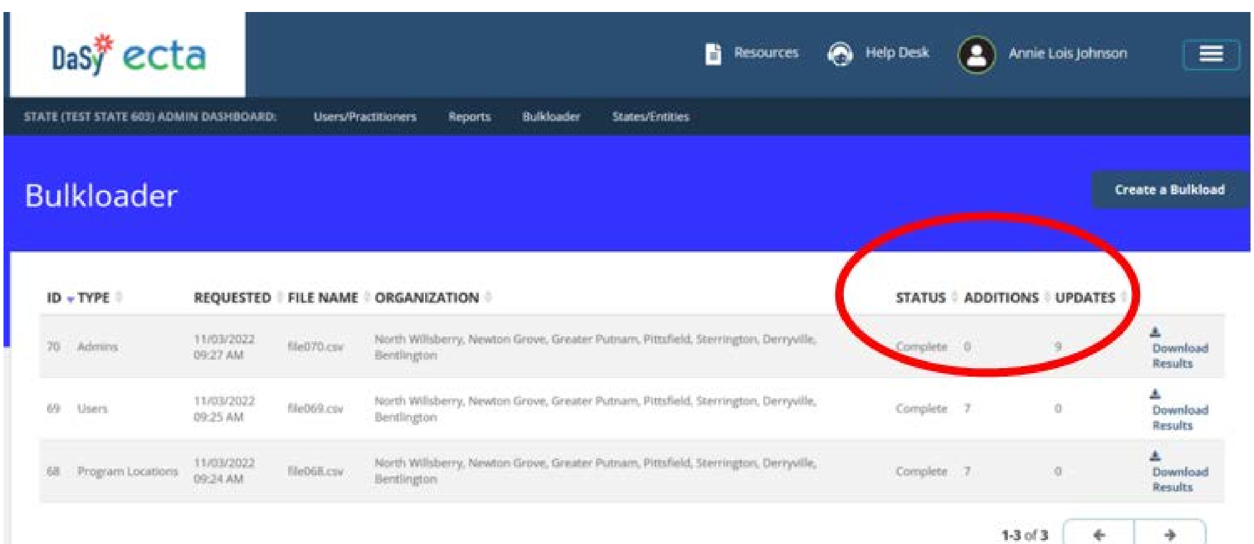


7. Find the CSV file created with the Local Admin privileges information. Make sure the file is in CSV format, then click “Open.”

8. Click "Bulkload" to upload the CSV file to the system.



9. Review the results of the bulkload attempt on the Bulkloader table. In the "Status" column, a successful bulkload will show as "Complete." An unsuccessful bulkload will show as "Error," which means that the data did not upload to the system as intended. The "Additions" column will display the number of newly added admins. The "Updates" column will display the number of existing users who were promoted to admins in the bulkload.



DaSy recommends that State Admins save the CSV files after uploading them to the COS-KC system, to refer back to them in the future.

When existing users are promoted to Local Admins, the COS-KC system will generate an email message to each Local Admin notifying them that they have been added to the system as an administrator. The email sender will appear as “DaSy Center <noreply@dasyonline.org>.” The automated email provides a link for the Local Admin to authenticate their email. When they follow that link, they must accept the privacy policy and terms of use, create a password, and then sign in to access their Local Admin dashboard.

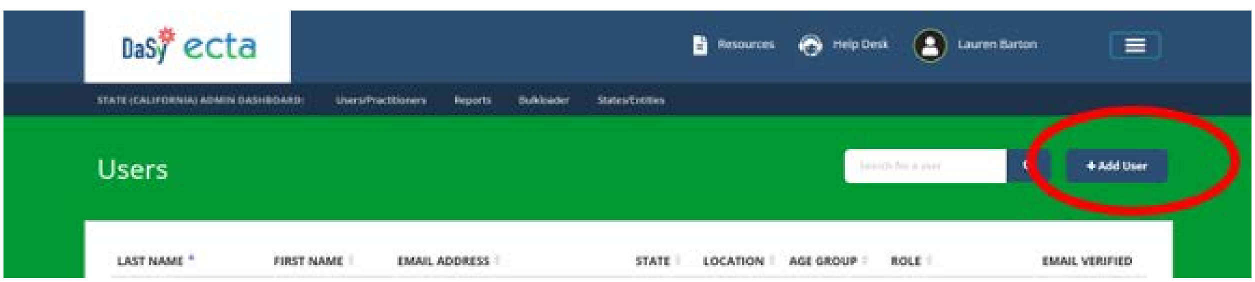
Changing or Assigning Local Admin Privileges After the Initial Bulkload

Bulkloading the list of users with administrative privileges into the COS-KC system is the most efficient way to add a large list of Local Admins to the system. However, changing individual or a small number of users’ privileges should be done manually.

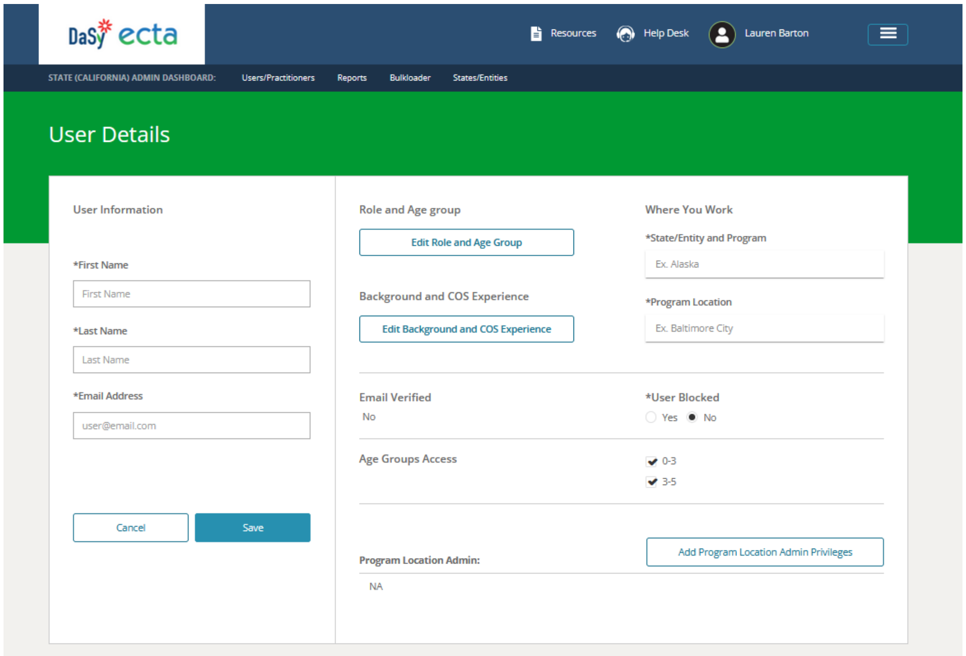
To assign Local Admin privileges, the State Admin must first determine if the person already has a COS-KC account (i.e., they are registered as a COS-KC user). In the white search box on the main State Admin dashboard, type the email address or name of the person to be assigned Local Admin privileges. If the search reveals “no matching records,” then proceed to create a new user.

Steps to Manually Create a New User With Local Admin Privileges

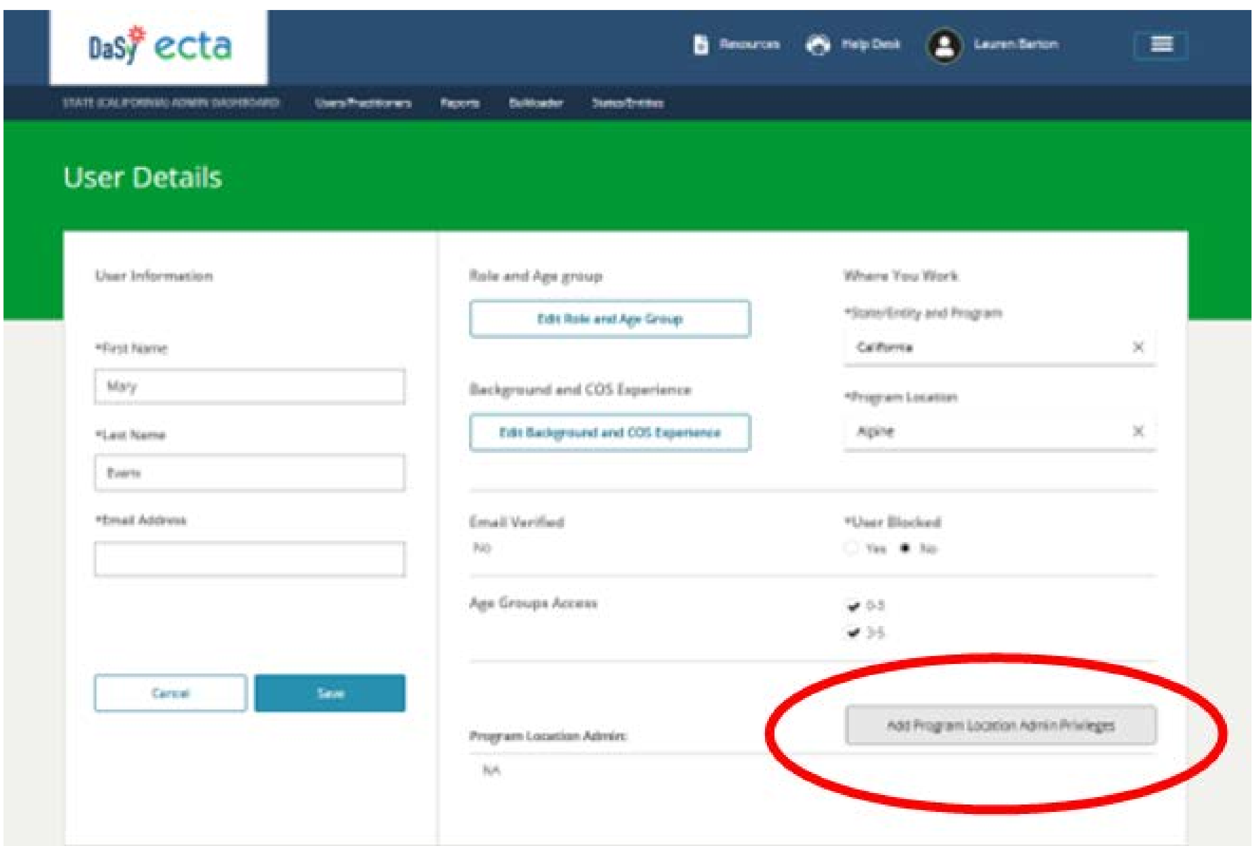
1. On the main State Admin dashboard, click the blue “+ Add User” button in the top right corner. This will open the User Details page.



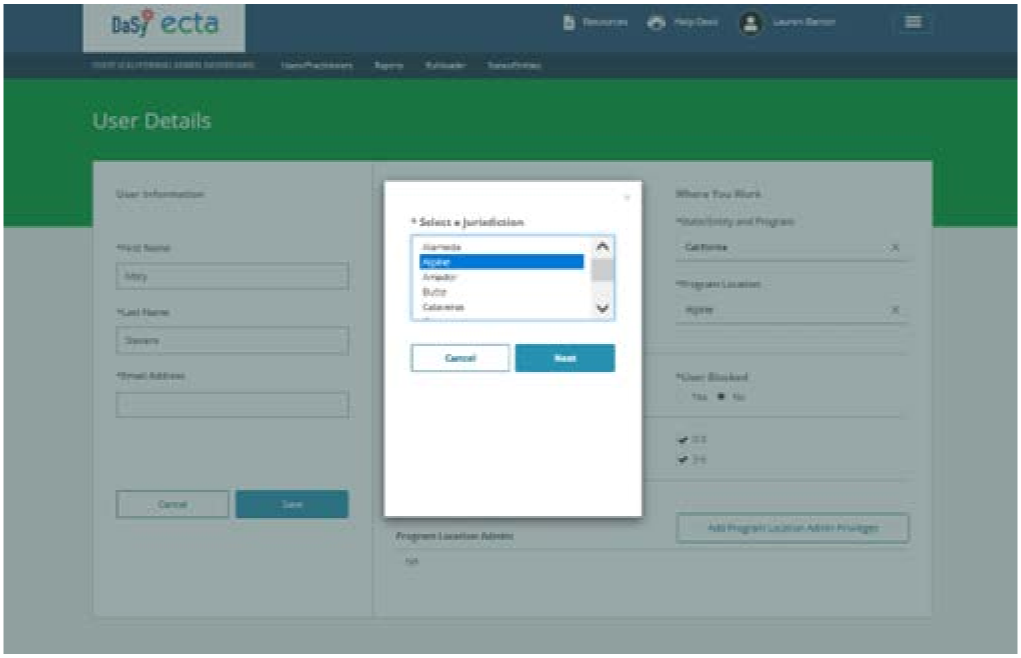
2. Complete the required user information on the User Details page: first name, last name, email address, state/entity, and program location. Leave the default marks in place: “No” for “User Blocked” and checks for both the 0-3 and 3-5 boxes for “Age Groups Access.”



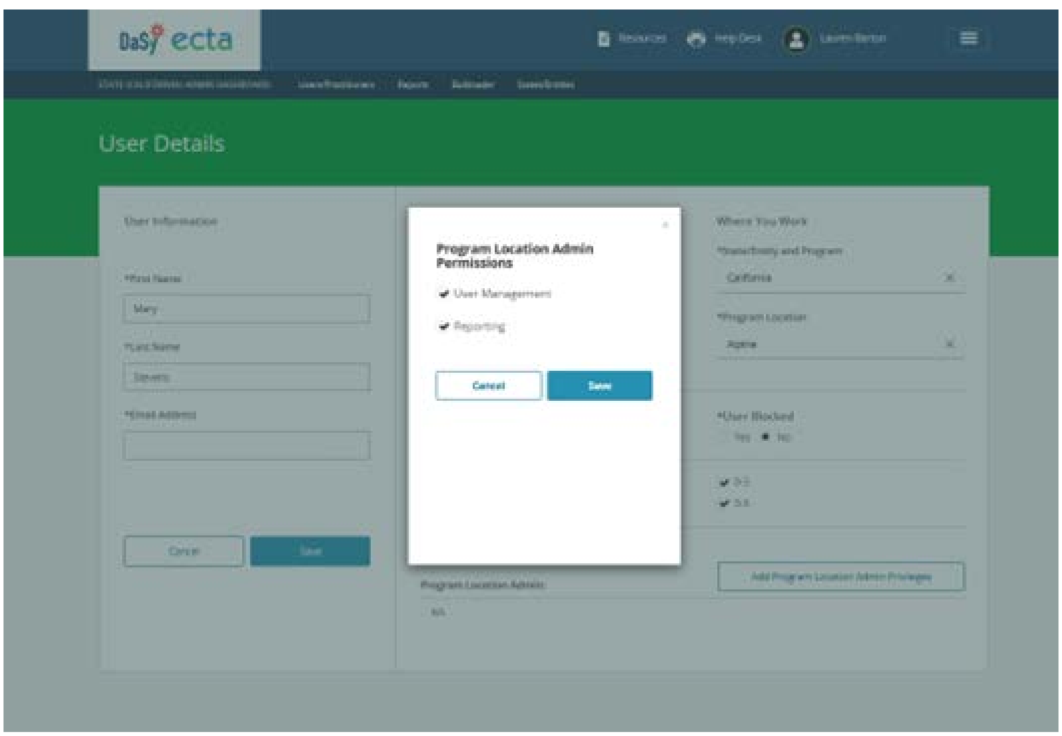
3. Click the “Add Program Location Admin Privileges” button.



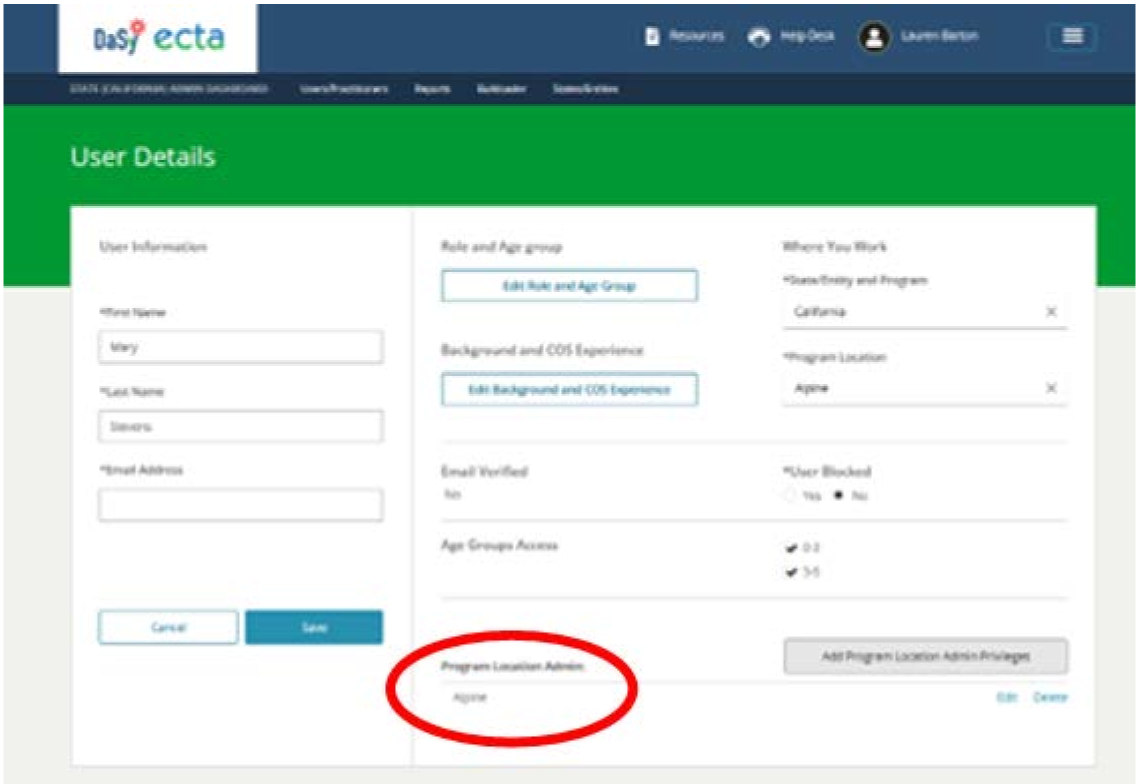
4. Select the location where the user should have Local Admin privileges and then click “Next.”



5. Check the boxes to indicate if you want the new Local Admin to have permissions for user management, reporting, or both. The default is for Local Admins to have permission for both. Then click “Save.”



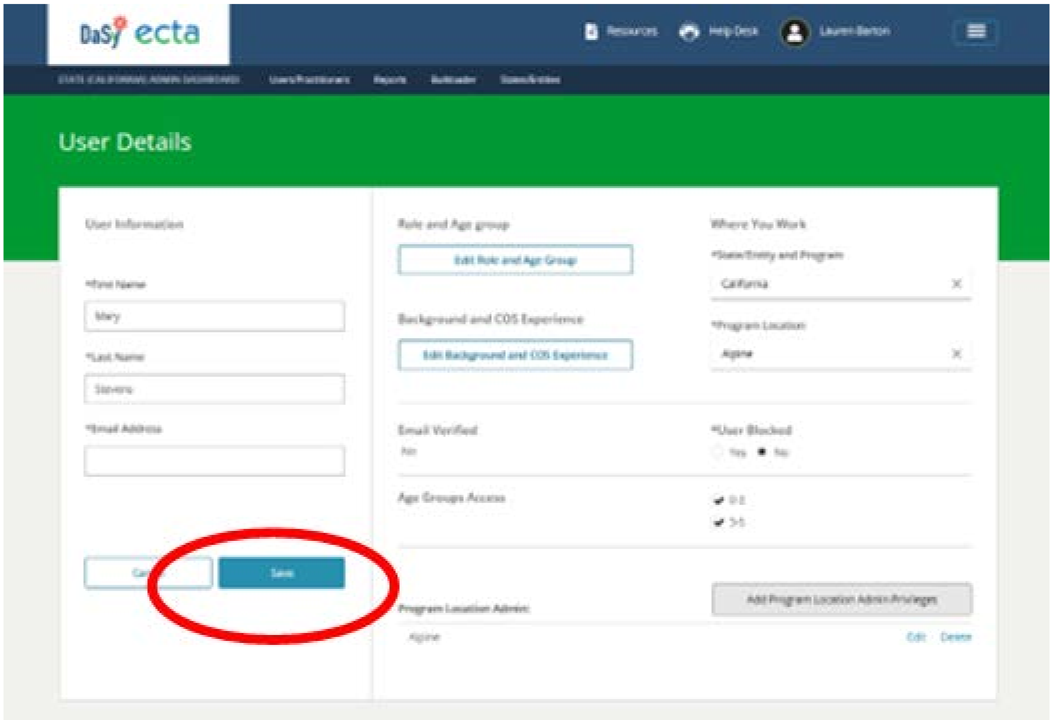
Notice that the user's account now lists the location "Alpine" under "Program Location Admin" to indicate those permissions as well as basic practitioner access in the user profile.



To grant a single user Local Admin access to more than one location, simply click "Add Program Location Admin Privileges" again and repeat Step 5 for the next location. Multiple locations will then be listed in under "Program Location Admin."

6. Click the "Save" button to save all the information you entered in the profile as well as the administrative permissions assigned.

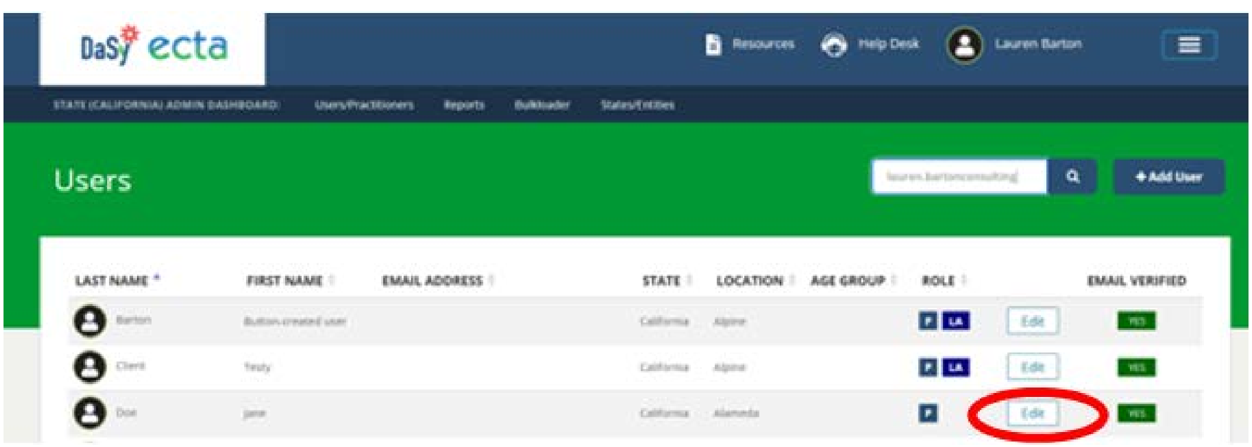
   Note: The system will **not** autosave the information. You must click "Save."



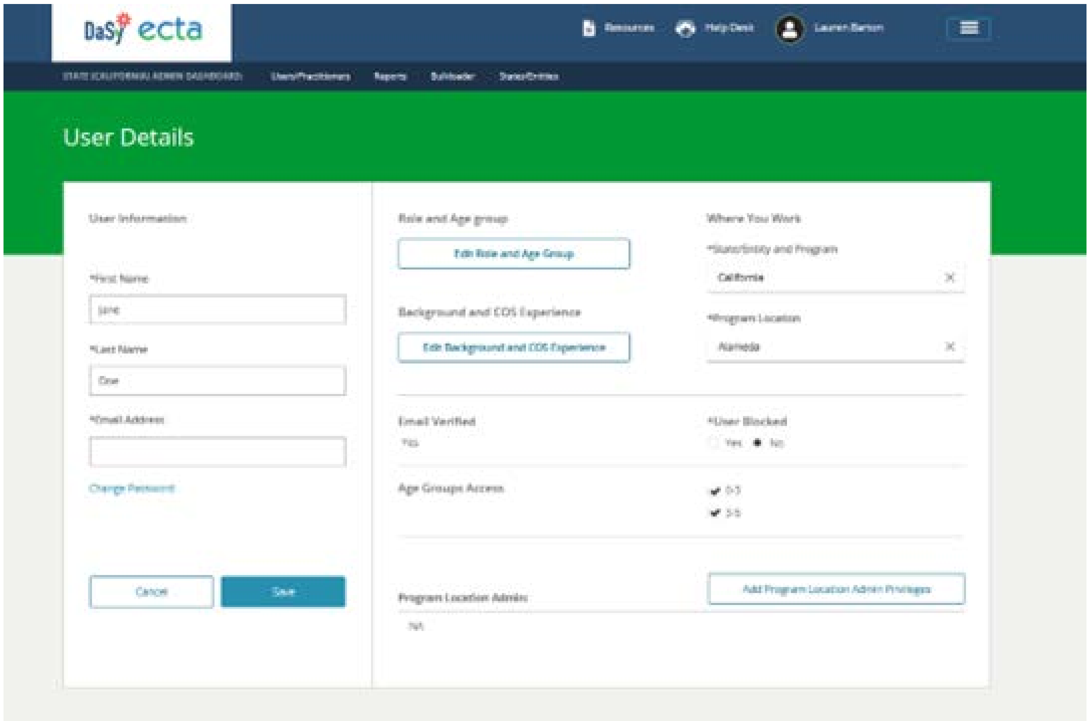
Once the information is saved, the COS-KC system will send an automated administrator email message from “DaSy Center <noreply@dasyonline.org>.” See Appendix E for more information about the automated emails generated by the COS-KC system as well as sample email templates that State Admins can send.

Steps to Manually Promote Existing Users to Local Admin Permissions

1. Click the “Users/Practitioners” tab in the navy blue navigation bar to view the “Users” page of the State Admin dashboard. Find the user and click the “Edit” button. This will open the “User Details” page.



2. Click the “Add Program Location Admin Privileges” button. Follow Steps 4–6 in the “Steps to Manually Create a New User with Local Admin Permissions” section above.



DaSy recommends that State Admins document information about which individuals are assigned Local Admin privileges whether manually or through bulkload, so they can refer back to them in the future.

User Management

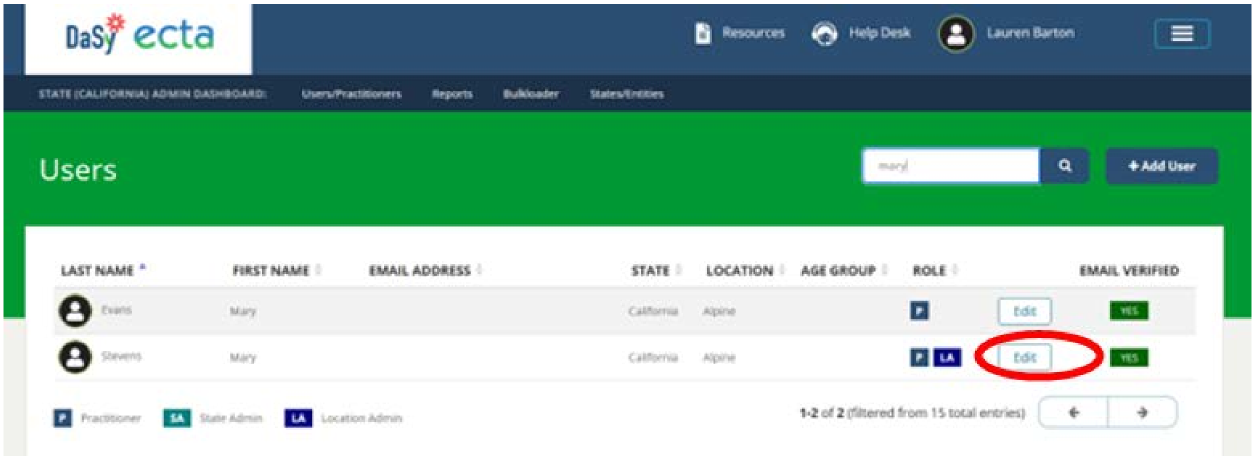
As states use the COS-KC, some practitioners and State and Local Admins will move locations or leave their roles. State Admins have permission to edit profiles, which is especially important if a user terminates employment.

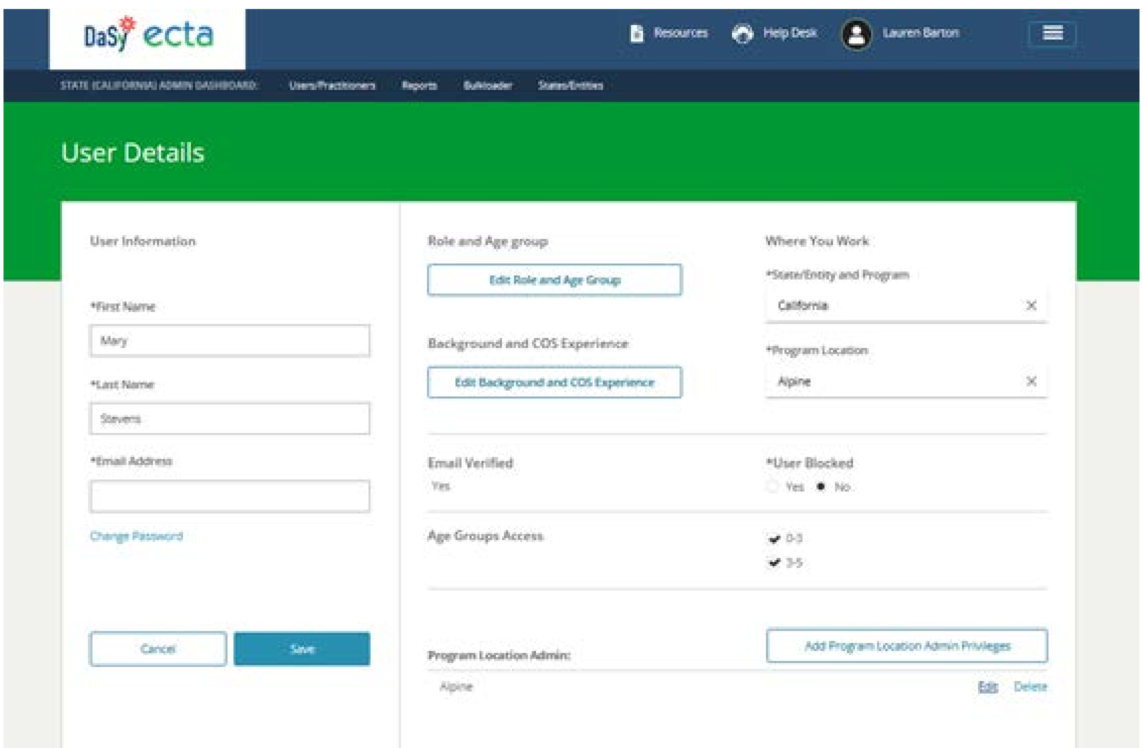
Editing Local Admin Permissions

Follow these steps to remove a Local Admin’s permissions:

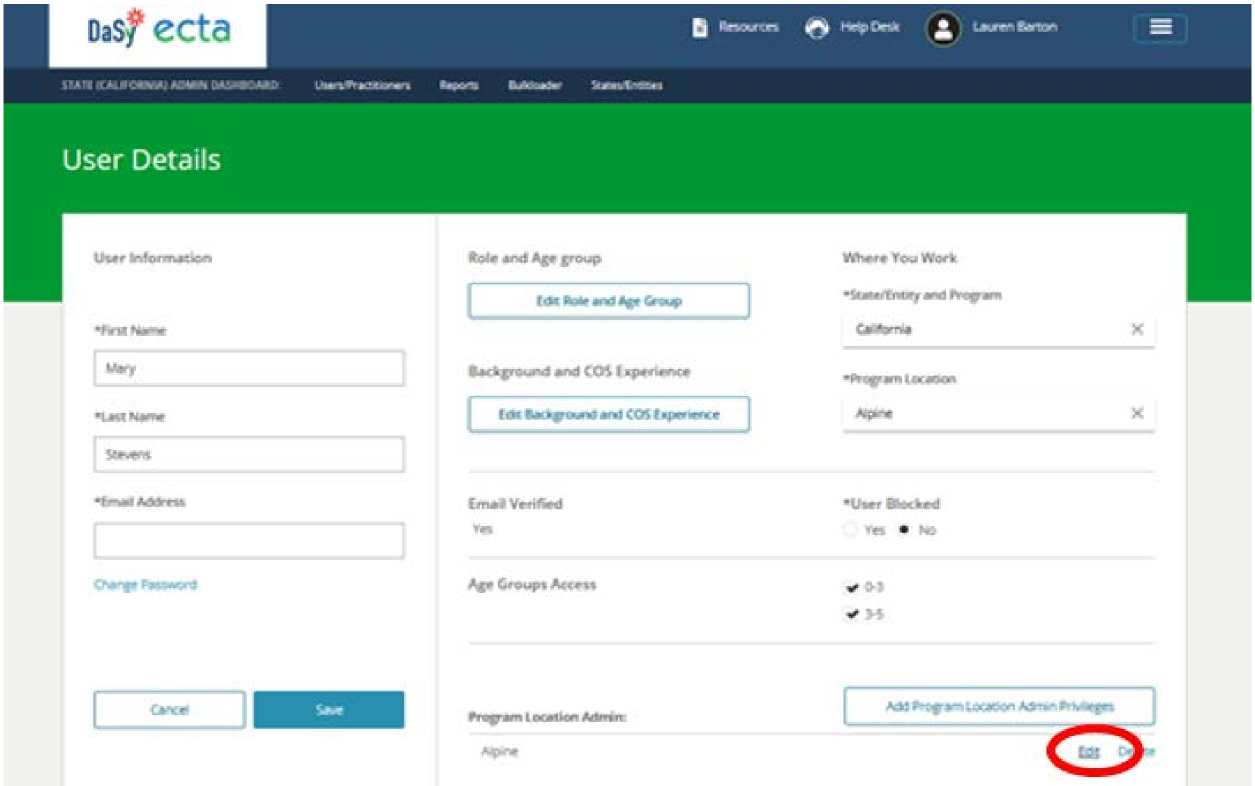
1. Click the “Users/Practitioners” tab in the navy blue navigation bar near the top.

2. On the “Users” page, find the Local Admin in the list and then click “Edit.” This opens the “User Details” page.

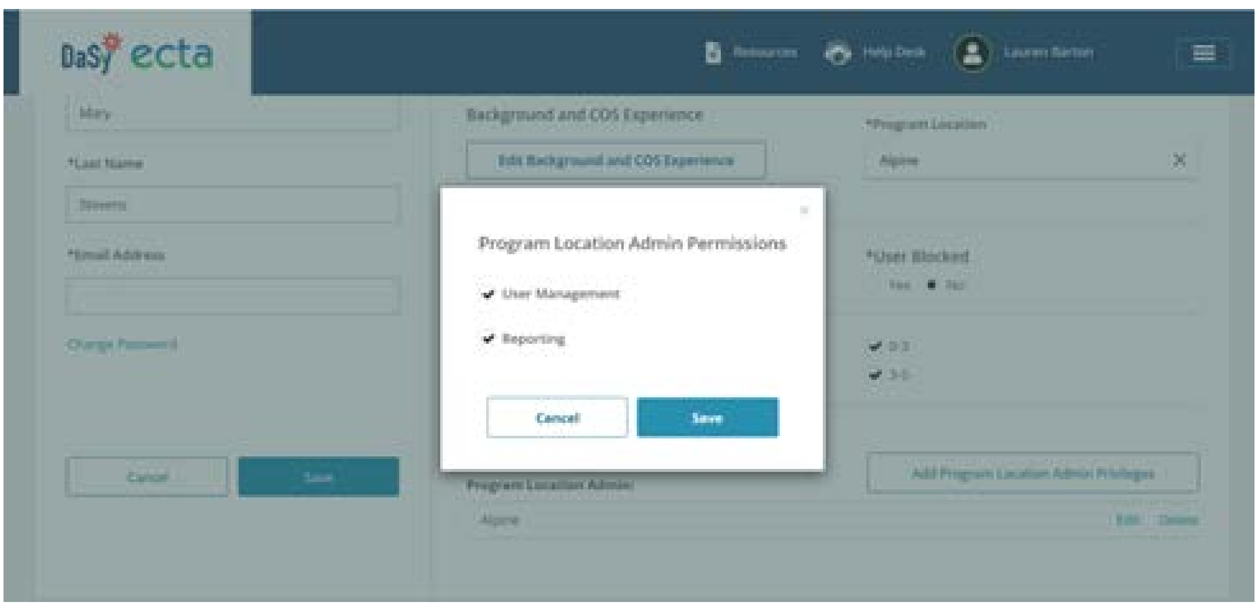




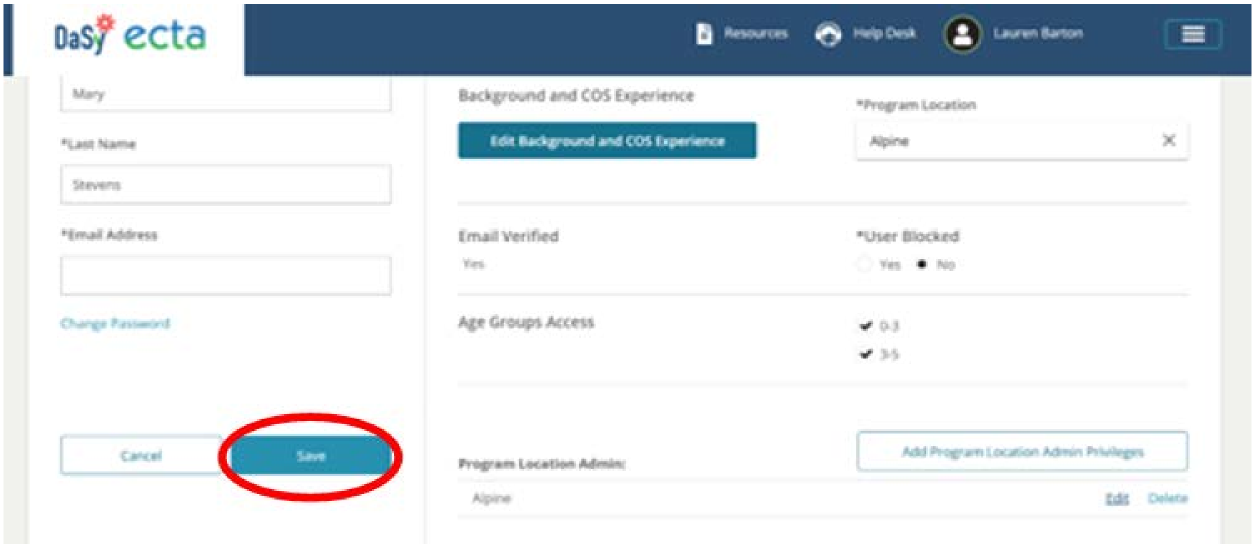
3. In the “Program Location Admin” section, click “Edit.”



4. Check or uncheck boxes to select the permissions to be assigned for the Local Admin in the program location (both boxes are checked by default). Then click “Save.”



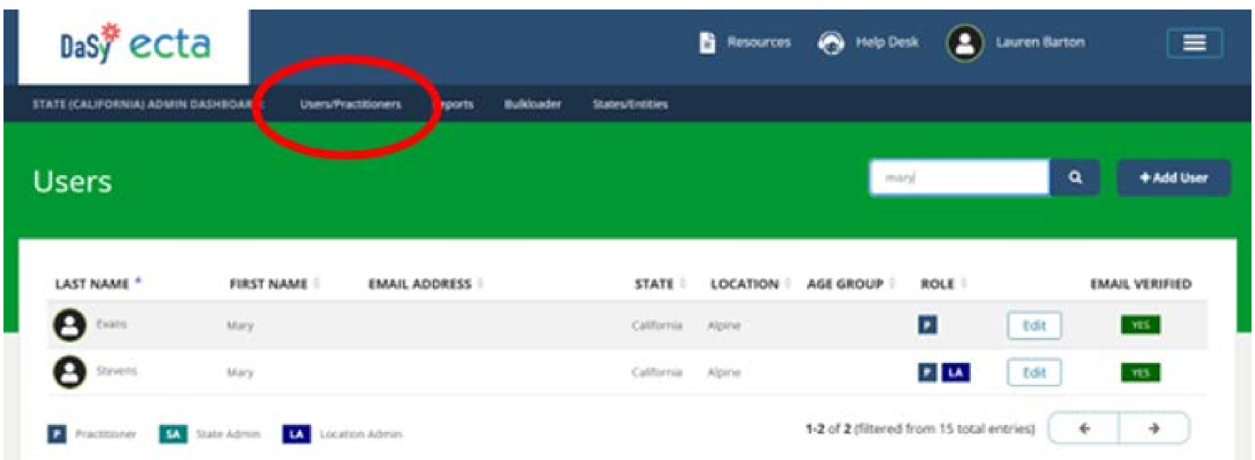
5. Click “Save” on the “User Details” page to confirm the changes.



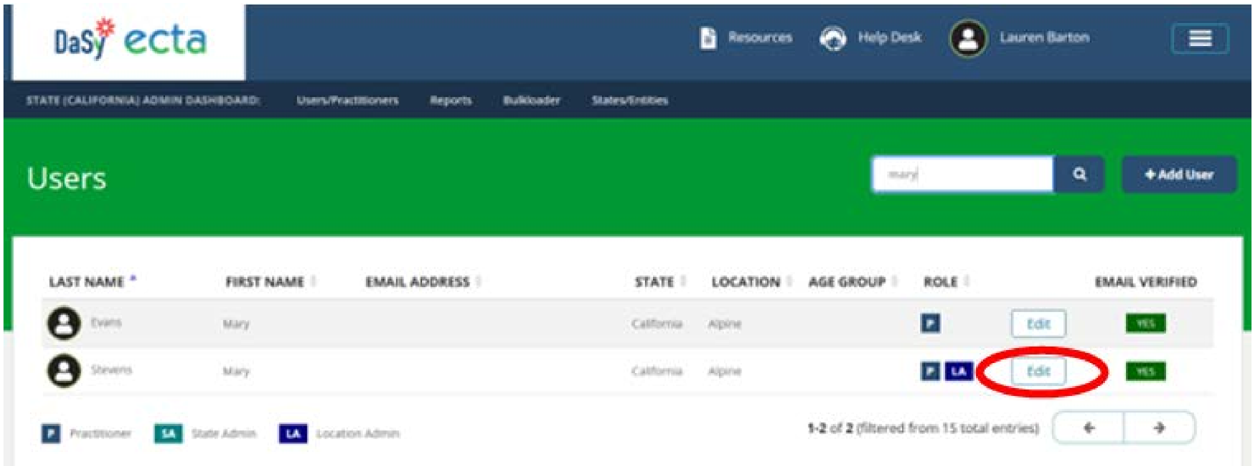
Deleting Local Admin Permissions

Follow these steps to remove a Local Admin’s permissions for a program location:

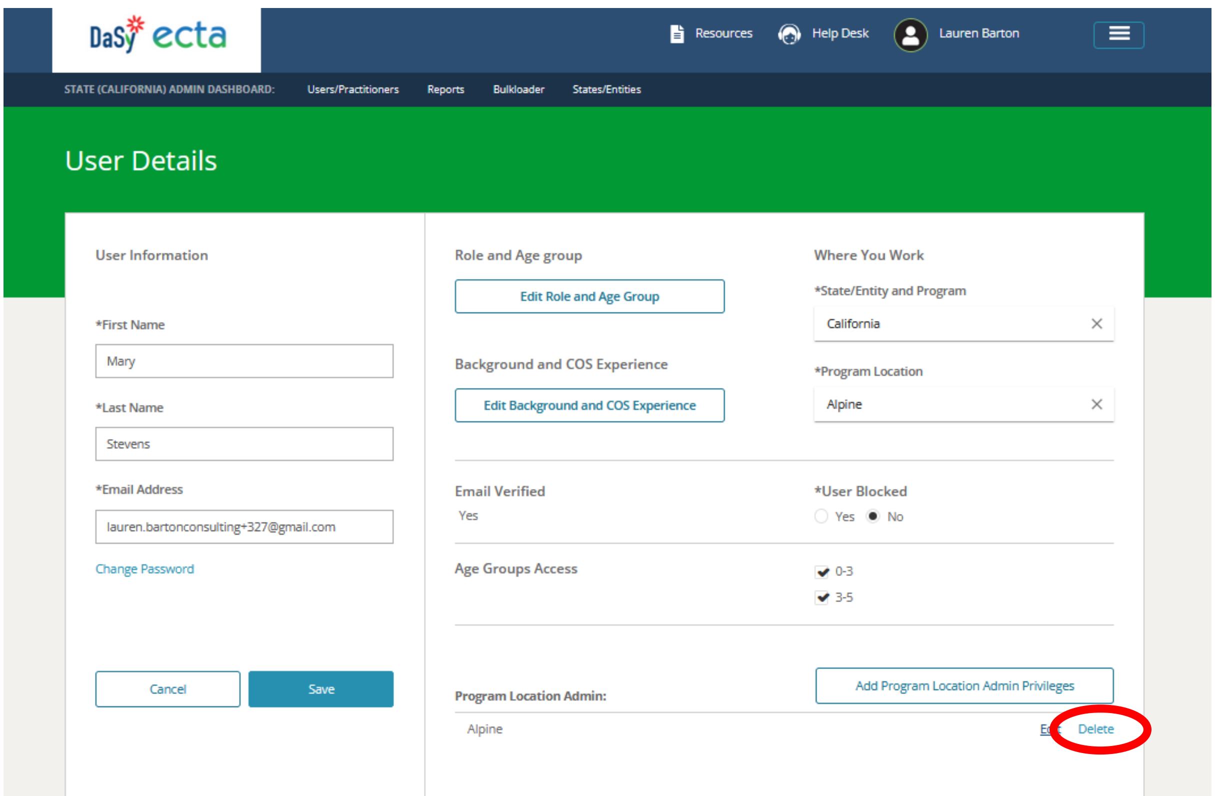
1. Click the “Users/Practitioners” tab in the navy blue navigation bar near the top of the page.



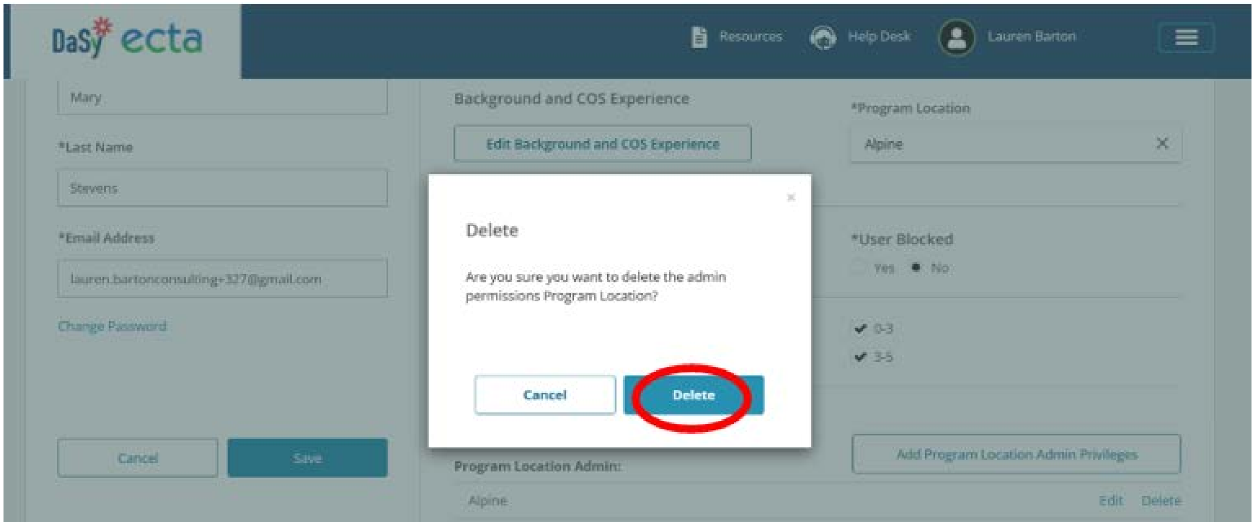
2. On the “Users” page, find the Local Admin in the list and click “Edit.” This opens the User Details page.



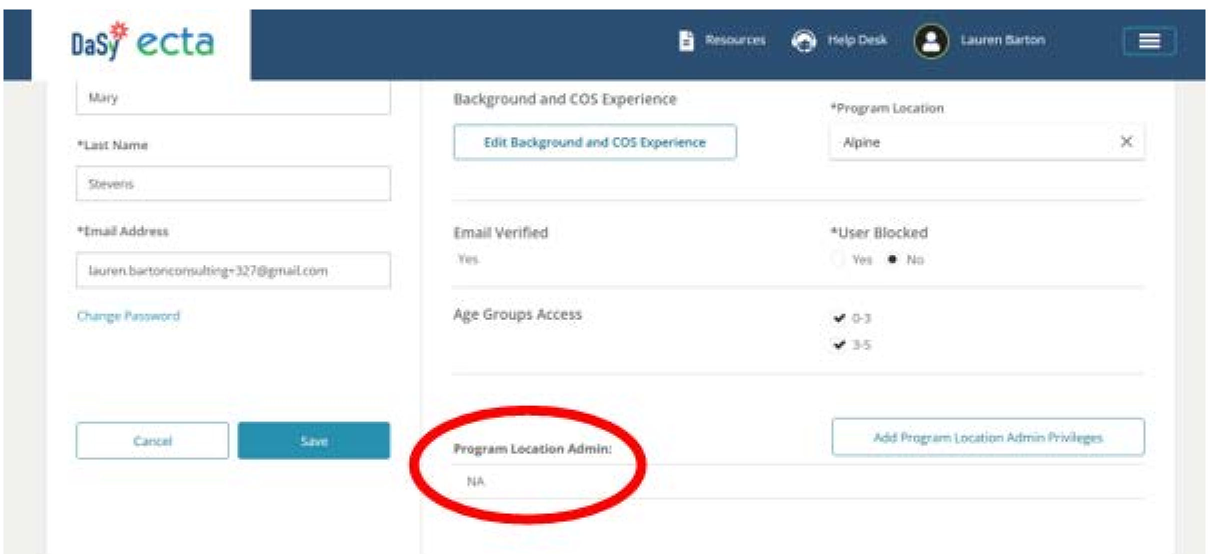
3. In the “Program Location Admin” section, click “Delete.”



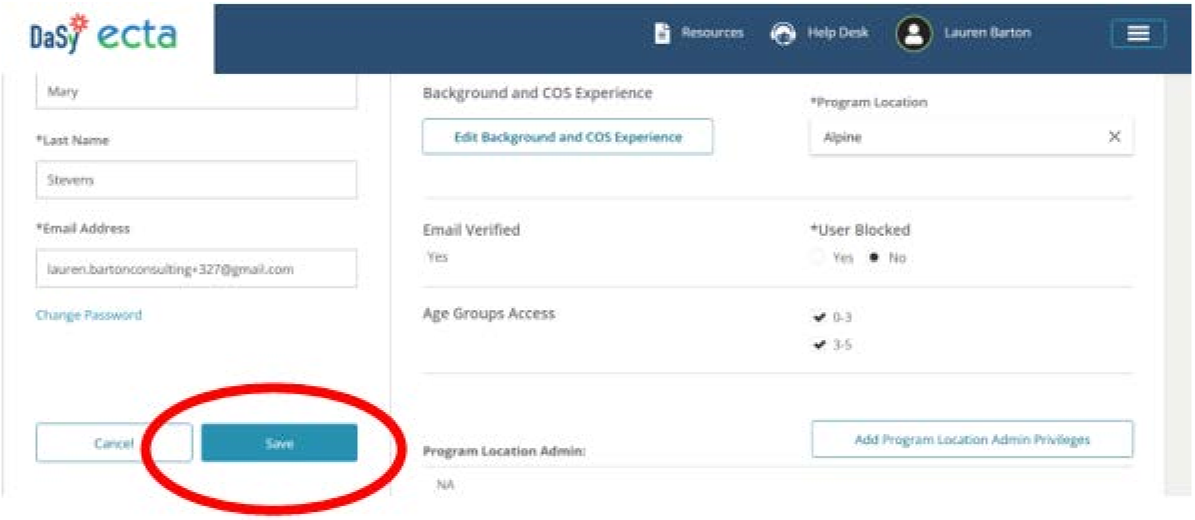
4. Confirm that you are sure you want to delete the Local Admin permissions for the program location by clicking "Delete." Note that the user will remain in the system but will no longer have Local Admin access to the COS-KC for that program location.



5. Review the "Program Location Admin" section to confirm changes to permissions. If the Local Admin had permissions for only the program location that was deleted, then the section will now list NA (not applicable).



6. Click “Save” to ensure changes to Local Admin permissions are saved in the profile.



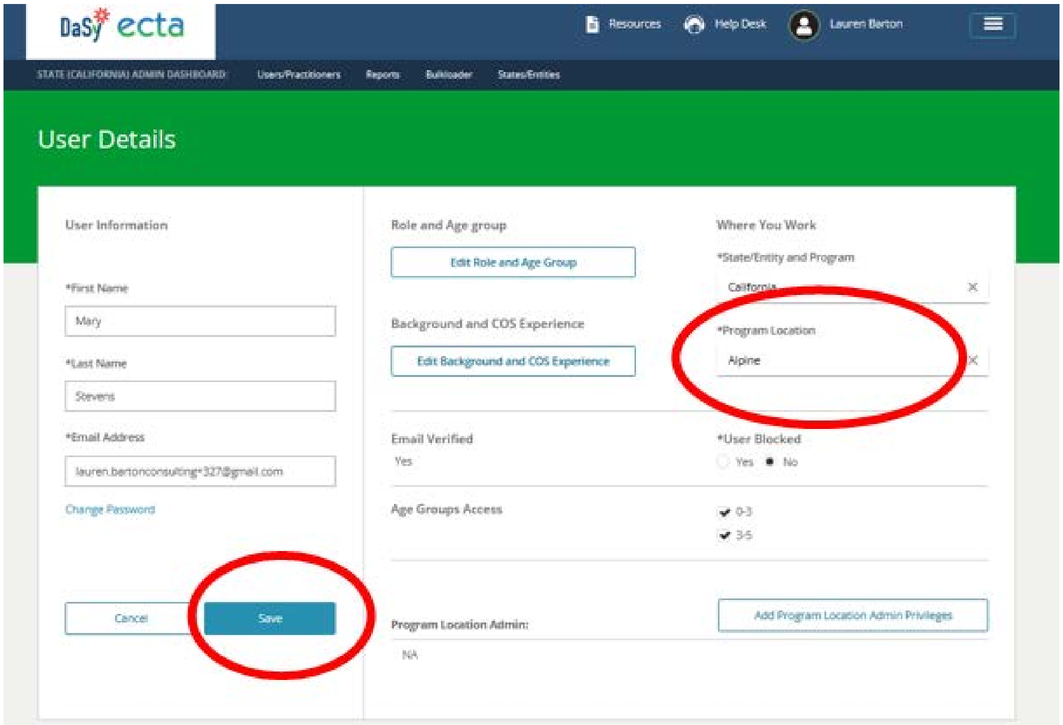
DaSy encourages State Admins to document status changes in their records to keep lists up to date.

Managing Users Leaving the Program Location

Users of all types are tied to a specific program location and will show up in reports for that location.

Users Changing Their Own Profiles

When a user leaves a program, they should be reminded to log into their COS-KC account, change the “Program Location” in their profile either to the new program location in the state or to “unaffiliated,” and click “Save.” Doing so will allow the user to continue to sign in and access their history and certificates without continuing to show up in program reports.



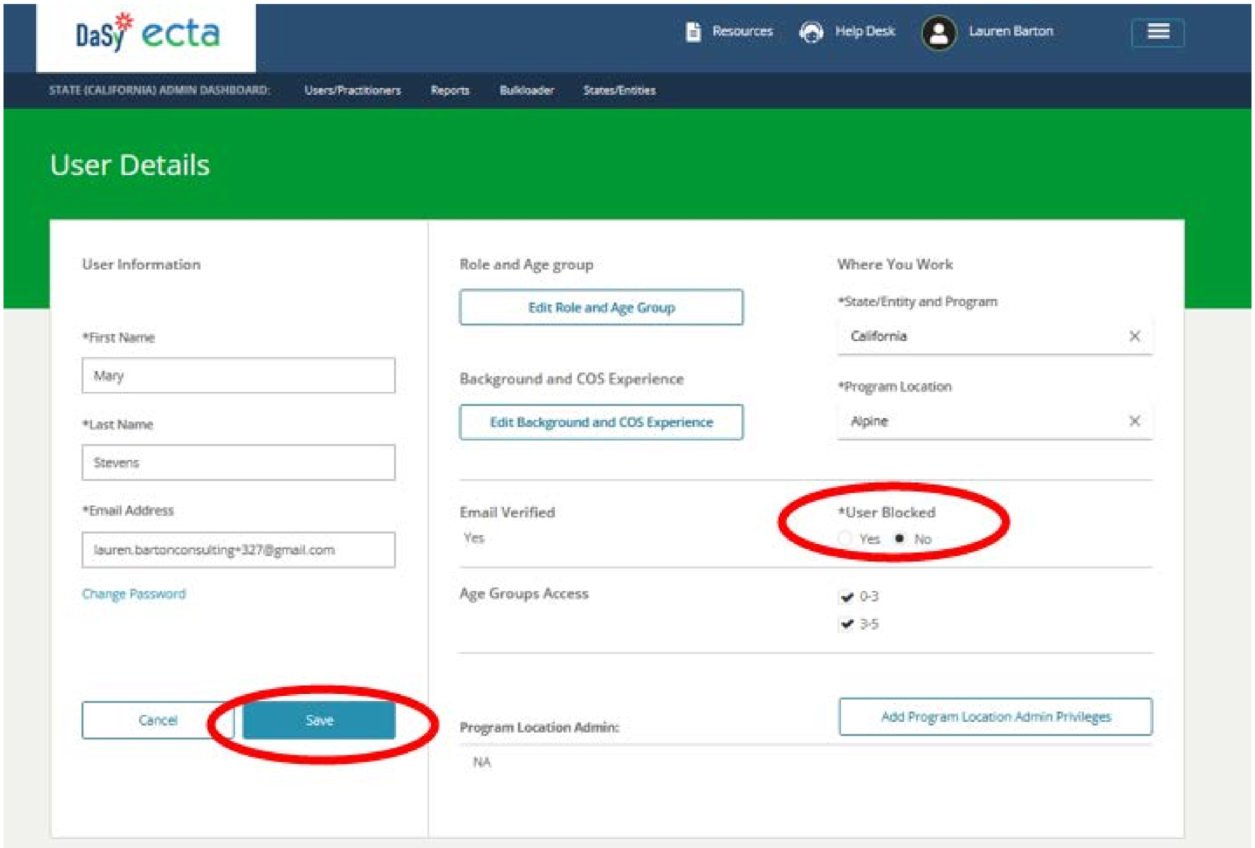
State Admins Changing Users' Profiles After Their Departure

If a user does not change their program location in their own profile, a State Admin can make the change by opening the list of users under the "Users/Practitioners" tab on their dashboard. Next, they click "Edit" by the user's name to open the "User Details" page shown above. The State Admin can change the program location to a new location or to "unaffiliated" and then click "Save." Local Admins do not have permission to make this change; only State Admins can.

Local Admins Blocking Users After Their Departure

Local Admins have the option to "block," or deactivate, a user if they leave and their program location remains unchanged for a significant period of time. Local Admins select the user from the list on their dashboard and click "Edit" to open the "User Details" page. They cannot change the user's program location, but they can change the "User Blocked" button from "No" to "Yes." After making the change, Local Admins must click on the "Save" button (see screenshot below).

Blocking a user is not recommended as a first response when a user leaves. Blocking a user will remove the user from local program reports, but it also will disable the user's log-in access unless the help desk is contacted to restore it. See Appendix G for more information on blocking users in the COS-KC system.



Running Data Reports

State Admins can run both state-level and local-level reports for any program location. Local Admins can run reports for any program location for which they have been assigned permissions. The available reports are listed in the table below.

Reports Available

Report Name	Contents
State	
Completion and Passing Report (CPR): State and Location	For each local program, number and percentage of individuals who are in progress, completed and did not pass, and completed and passed.
Practitioner Characteristics	Percentage of individuals who are in progress, completed and did not pass, and completed and passed by practitioner characteristics (role, length of time working with children with disabilities, etc.).
Completion and Passing Status for Individuals	List of individual users who have taken the assessment and their completion and passing status.

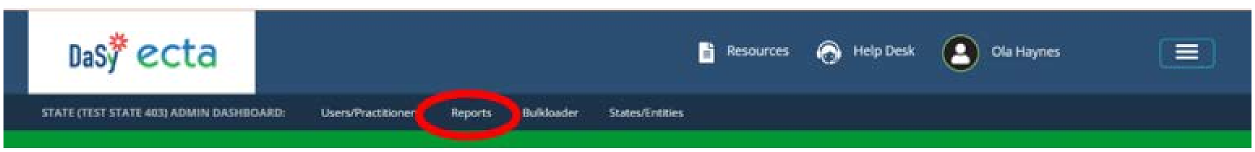
Report Name	Contents
All Data Report	File for additional analysis that includes all data on each individual in the state.[a]
Local	
Completion and Passing Report (CPR)	Number and percentage of individuals who are in progress, completed and did not pass, and completed and passed.
Practitioner Characteristics	Percentage of individuals who are in progress, completed and did not pass, and completed and passed by practitioner characteristics (role, length of time working with children with disabilities, etc.)
Completion and Passing Status for Individuals	List of users who have taken the assessment and their completion and passing status.
All Data Report	File for additional analysis that includes all data on each individual in the local program.

[a] *Information about content and codes in the All Data Report is included in the "Data Key" file. Administrators can find the Data Key file by clicking the button labeled "Data Key" located next to the button "Request a New Report" in the reports tab of the administrator dashboard.*

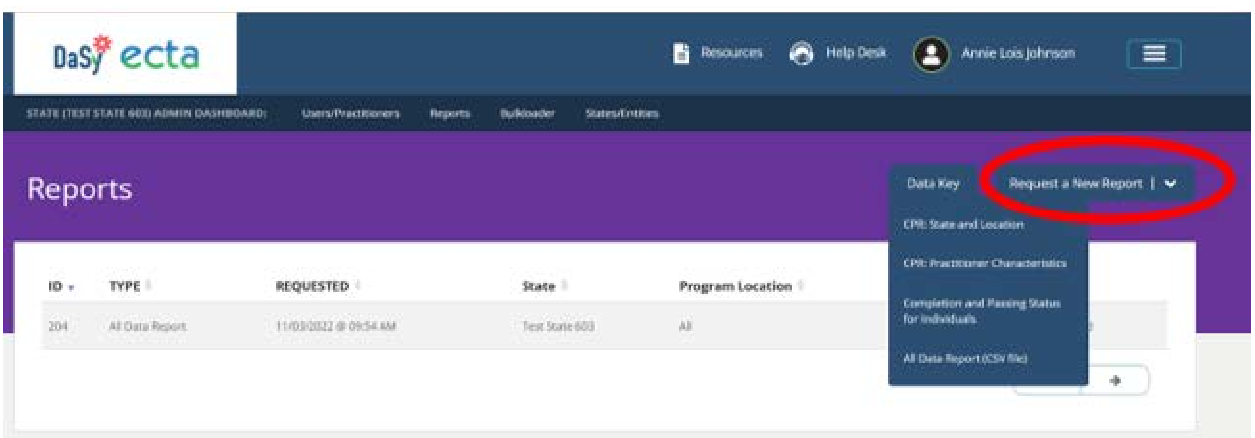
Running Reports

Follow these steps to run a report:

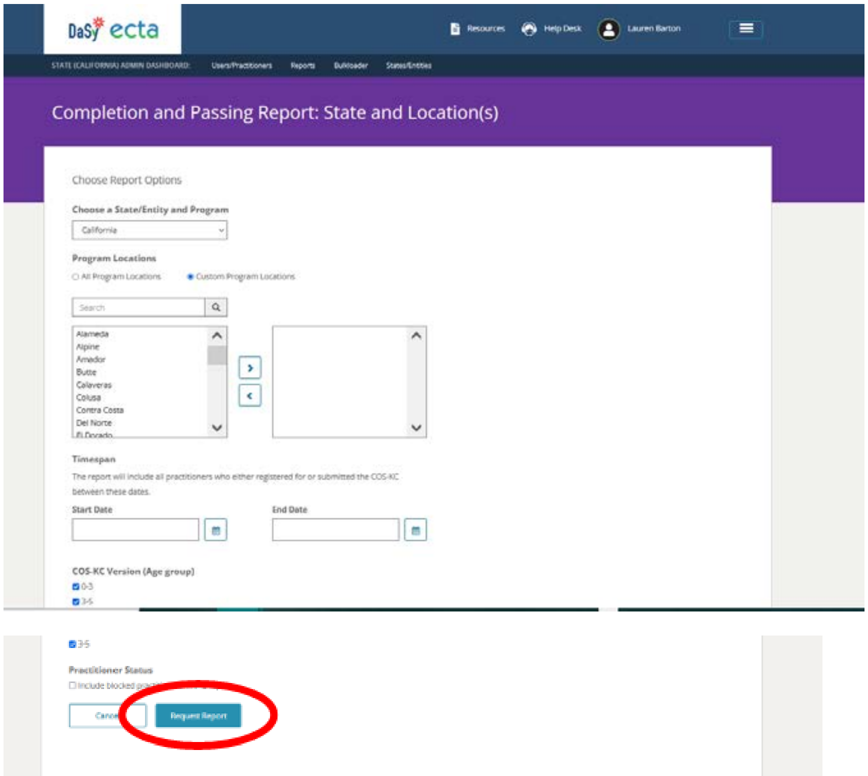
1. Click the "Reports" tab on the navy blue navigation bar near the top of the page.



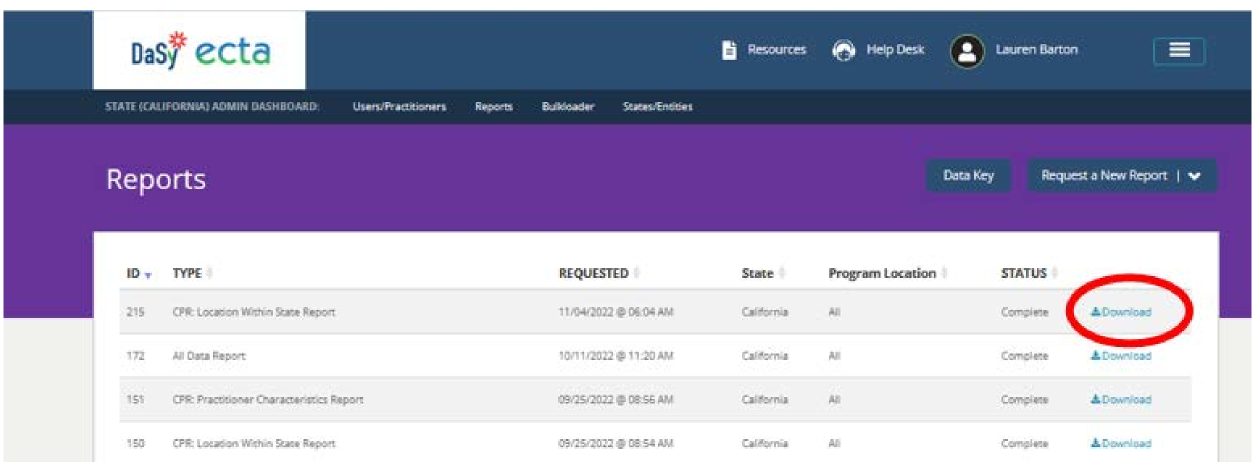
2. Click "Request a New Report" and select the type of report from the dropdown menu.



3. Select the parameters for the report and then click “Request Report.” The report will show up as a row in the list on the “Reports” page.



4. Click “Download” to open the report.



Conclusion

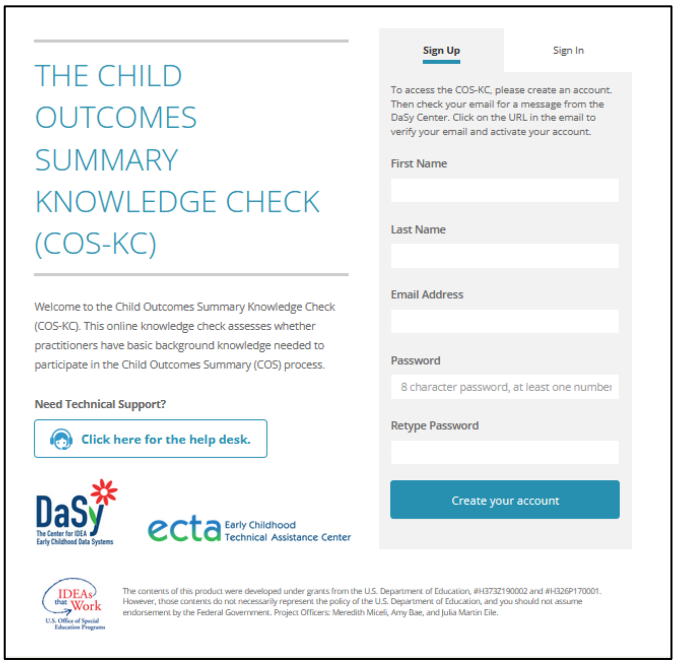
This user manual has provided the information State Admins need to accomplish key tasks in the COS-KC system. If you have further questions or would like to share feedback that can improve this manual for future users, please contact the DaSy team at COS-KCinfo@sri.com.

Content in Appendices

- Appendix A. COS-KC Big Picture Planning Worksheet
- Appendix B. Decisions About Locations in the COS-KC
- Appendix C. State and Local Admin Roles and Responsibilities
- Appendix D. State ID List
- Appendix E. Sample Email Communications
- Appendix F. Reports in the COS-KC System
- Appendix G. Blocking Users in the COS-KC System
- Appendix H. Links to COS-KC Webpages and Resources

Appendix A. COS-KC Big Picture Planning Worksheet

DRAFT Document, Revised 11-1-2022



While the Child Outcomes Summary Knowledge Check (COS-KC) is available and offers the same information to all states, the way in which each state implements the COS-KC as part of its system will vary. This worksheet is a tool to support state team discussions and documentation about their plans for using the COS-KC. The worksheet also helps TA providers target resources and relevant information most appropriate to address state uses for the COS-KC.

The contents of this document were developed under a cooperative agreement, #H326P170001, and a grant, #H373Z190002, from the Office of Special Education Programs, U.S. Department of Education. However, the content does not necessarily represent the policy of the U.S. Department of Education, and you should not assume endorsement by the Federal Government. ECTA Center Project Officer: Julia Martin Eile DaSy Center Project Officers: Meredith Miceli and Amy Bae

IDEAs that Work
Office of Special Education Programs
U.S. Department of Education

COS-KC Big Picture Planning Worksheet

State:	☐ **Part C** ☐ **619** ☐ **Both (0-5)**
Person Completing:	**Date:**

State Contact(s)

1a. Who is the primary contact about the COS-KC?

Name: ______________________________

Email: ______________________________

Phone: ______________________________

1b. Please provide the names and emails of anyone else who should be cc'd on COS-KC communications.

Notes:

Rollout of the COS-KC

2a. Who do you expect to take the COS-KC initially? (*Indicate all that apply.*)

- ○ All practitioners and/or contractors connected to our program in the state (go statewide immediately)
- ○ All practitioners and/or contractors from only a few specific local educational agencies (LEAs) or programs
- ○ Any practitioners and/or contractors who volunteer/show interest from only a few specific LEAs or programs
- ○ PD staff, trainers, and/or coaches
- ○ State staff
- ○ Local administrators/coordinators
- ○ Anyone who volunteers or shows interest
- ○ Other (*Please specify.*)

2b. How many different LEAs do you think will be involved in the initial rollout stage? (*Rough estimate is okay.*)

2c. How many individuals do you think will take the COS-KC assessment during the initial rollout stage? (*Rough* *estimate is okay.)*

2d. What best describes your state's plans for the initial rollout of the COS-KC?

- ○ A small number of people will be selected and encouraged to try it out to be sure we are comfortable with it before rolling it out statewide.
- ○ A gradual rollout with a few LEAs using it first before ramping it up to other LEAs and then fully statewide.
- ○ Encouragement for people to volunteer to take the COS-KC before implementing some kind of requirement for a group or all practitioners to take the assessment.
- ○ Rollout as a follow up mainly for people who have recently completed some kind of COS training or PD.
- ○ Rollout for new hires/new contractors as part of or following their orientation.
- ○ Immediate rollout as a required activity statewide.
- ○ Immediate rollout as a voluntary opportunity statewide.
- ○ Other (*Please describe.*)

2e. What dates would you like to target for the following activities?

__ __ - __ __ - __ __ Date to begin working with designated staff to set up the COS-KC system and prepare for rollout

__ __ - __ __ - __ __ Target date to send out first emails and announce that the COS-KC is ready for use and what people should do

__ __ - __ __ - __ __ or __N/A____ Target date to end initial rollout stage and refine state process before using the COS-KC statewide or with larger groups of people

2f. How much flexibility is there in the dates identified in 2e

for rollout stages?

- ◯ A lot of flexibility
- ◯ Some flexibility
- ◯ Very little or no flexibility

Comments:

2g. Please describe what you are looking for to know when to switch from an initial rollout to a broader rollout. (*Examples: after a certain number of people have tried it; after feedback confirms that the process works smoothly; after a period of time has elapsed or a certain date passes.*)

2h. Please describe any concerns you have about the rollout of the COS-KC.

2i. If you plan an initial rollout followed by a later rollout, how do you expect the later rollout to be different (who is involved, number of people, number of programs, voluntary vs. required, etc.)?

2j. Are there any issues with how COS is described or implemented in your state that cause you to wonder or worry about a smooth rollout of the COS-KC? If so, please

describe.

2k. Any other comments about the COS-KC rollout?

Messaging About the COS-KC

3a. How are you planning to describe the purpose for the COS-KC in your state and for LEAs?

3b. What questions do you think the COS-KC will help you answer?

3c. Describe any updated policy or guidance related to the COS-KC that is relevant for people to know about.

3d. Any other comments about COS-KC messaging or timing of communications?

Notes:

Locations in the COS-KC System

The COS-KC is set up to provide information about users and in reports at the state level and at one other level. The other level could be, for example, the program, school district, local education agency, county, regional area, or some other meaningful unit. The choice influences the way information is automatically combined in reports and who has permission to see information about practitioners associated with that program location.

4a. What entities will you designate as your program locations in the COS-KC?

4b. Approximately how many different program locations are there? _________

4c. Do these program locations already have unique identification numbers assigned to them in your state? If so, please share an example of what the program/location ID looks like.

- ○ No
- ○ Don't know
- ○ Yes, and an example ID looks like this ___________
- ○ Yes, but I don't know what an example ID looks like
- ○ Other (*Please explain.*)

4d. Do any of these program locations have the same name?

- ○ No, all the names are different
- ○ Yes, a few are identical to each other except for the IDs or geographic information
- ○ Don't know

Roles and Responsibilities (including assigning administrators)

5a. Which people should be assigned as "State Admins" for the following activities? (*The same person can have permissions for multiple categories.*)

Sending communications and answering state questions about the COS-KC

Uploading data files with program names and people with various levels of permission into the COS-KC system (called "bulkloading")

Running reports and sharing them with others, including discussing and interpreting findings in those reports

Managing users when there are updates to their status, answering user-specific questions

Other state-level roles described below along with names

Notes:

5b. Which people should be assigned as "Local Admins" for the following activities? (*The same person can have permissions for multiple categories.*)

Running reports and sharing them with others, including discussing and interpreting findings in those reports

Managing users, including addressing user-specific challenges with data entered and encouraging and following up about participation

Other local-level roles described below along with names

5b. Please describe any concerns (if any) that you have about Local Admin participation and access to information.

6. Please share anything else that is important to know or document related to all aspects of the COS-KC.

Notes:

Appendix B. Decisions About Locations in the COS-KC

Program Location Structure in the COS-KC

The COS-KC collects data from individual practitioners who sign up for accounts. However, the system is set up so that information can be reviewed as:

- statewide data,
- data at the level of some kind of local program location identified by the state, or
- individual user data.

Once the state determines the breakdown of meaningful programs or location units, users who sign up for an account will select one location from a dropdown menu of choices in response to the question "Where is your work located?" These locations also become the options that can be selected in reports or provide the segments for grouping the practitioner records that a particular admin has permission to see within the system.

Each state chooses how big or small to partition the program locations within the COS-KC. These levels could be, for example, the program, school district, local educational agency (LEA), county, regional area, or some other meaningful unit.

Importance of Program Location Decisions

Defining the most appropriate level of local programs to include in the dropdown menu is important because:

a. The local program locations listed are the smallest unit available to determine which reports administrators have permission to view about practitioner progress toward and completion of the COS-KC. The program locations determine the grouping of practitioners included in reports and which practitioner data the administrators can see. Program locations are the smallest unit that users can easily view in the system-produced reports.[1] Administrators can compare which local program locations need more technical assistance to help practitioners understand COS-KC concepts.
b. Practitioners signing up can affiliate with only one local program.
c. Changing the list of local program locations in the COS-KC system once it is in place is challenging, and making changes may mean losing some historical data.

Considerations for Making Decisions

States have the option to identify program locations that are as big or small as they wish. Most states end up using the same groups of program locations that are used for monitoring or in federal reporting. There is no single "right" or "wrong" answer. Some considerations for teams to discuss as they select the locations to include in the COS-KC include:

- How many locations are reasonable for state staff to monitor or review carefully? The smaller the partitions, the more distinct units to track.

[1] Admins in the state will have access to download a CSV file with key information about the local programs with which they are affiliated. For example, if there are 21 local programs in a region, individuals could download this file and cluster the 21 programs based on their program IDs or names and combine data from all these programs in Microsoft Excel to look at regional data. However, this requires more comfort with data analysis than running the system-produced reports about the data in each of the 21 programs individually.

- Does the location unit make sense for determining how to take action with the findings? For instance, if one discovers that practitioners in that location have a knowledge gap, do you have enough information to know where to provide more professional development or coaching? Or is the region too broad to know how to target supports?
- If reports show results from practitioners who take the COS-KC in that location, will there be enough people represented in the report to make the report useful? Smaller programs or regions may have reports with very few people in them.
- Do the location units match partitions where one might give a specific person administrative permission to see information about all the people in that group? If location units are larger, assigning an admin may mean that a coordinator has access to practitioner information about staff or related service providers outside their own program.
- Are the location units so small that when people sign up for a COS-KC account and are asked to select just one unit, many will find it difficult to only select one location?
- If the state has any requirements, recommendations, or policies that are associated with the COS-KC, is everyone in the local program or location unit expected to implement the COS-KC at the same time or subject to the same expectations?
- Are the units selected consistent with units used for other things (e.g., federal reporting LEAs, State Systemic Improvement Plan sites, units for professional development regions)?

Once each state has determined the program location units that make the most sense for the COS-KC, then these locations and their respective identification (ID) numbers are entered into the CSV template. State Admins then work with DaSy Center or ECTA Center TA staff to upload the information into the COS-KC system.

Appendix C. State and Local Administrator Roles and Responsibilities

Administrator Structure in the COS-KC

Participation in the COS-KC will require the leadership of at least one administrator at the state level (called a “State Admin”) who can upload into the COS-KC system the names of all local programs and access reports and information in the system. Most states also designate local administrators (called “Local Admins”) who monitor participation among practitioners affiliated with their own program locations and run reports about performance in their locations. Identifying which individuals are best suited to these roles is important both protect the information in the COS-KC system and to ensure that information is actually used to guide program improvement.

Considerations for Designating State Admins

Individuals with State Admin permissions should be designated after the state considers how it plans to implement the COS-KC and who will need access to the system. Examples of individuals often identified as State Admins are Part C or Part B 619 state coordinators, the data manager for the state program, state staff responsible for professional development or coaching, and state staff responsible for monitoring activities. The DaSy Center recommends that no more than four State Admins are designated for a state. Some considerations for designating individuals to be State Admins include:

- Will this person need to look at statewide information in the COS-KC system? How will they use that information to perform their expected role? How frequently will they need to access the information? Are there other ways they can get the same information?
- Is it appropriate for this person to have access to user-level detail about all people who take the COS-KC statewide? Consider this question especially if the person is a staff member or contractor and agreements are in place about confidentiality.
- Does this person have the data skills to effectively upload CSV information into the system? (At least one State Admin will need to upload this information.) Does this person have skills to pull Microsoft Excel reports out of the system for interpretation?
- Will this person run and use reports that include statewide information about the COS-KC? Is it important that they have access to run the reports themselves? Or might they be on a team that meets regularly to interpret reports pulled by someone else?
- How does the State Admin designation fit with other expectations for that person’s everyday role?

About Local Admins

One or more State Admins can designate one or more Local Admins for each program location entered in the COS-KC system. While a state may choose to coordinate things entirely from the state level without providing local access to the user management and reporting features, most states find it is helpful to provide access to more detailed information at the local level. Usually, Local Admins play an important role in encouraging practitioners in their locations to sign up for the COS-KC, deactivating participants as they leave the program, monitoring participant completion and passing rates, periodically running reports, and using reports to inform program improvement and training activities. This role is especially helpful in states with a strong culture of local control in which local coordinators bear much responsibility for training, coaching, and support on the COS process.

Considerations for Designating Local Admins

Often, individuals designated as Local Admins already coordinate personnel activities and services in place at their program locations. State Admins determine who to designate as Local Admins and how many Local Admins are appropriate for each location, based on the size of the location and structure of what the state expects for the Local Admin role. A few considerations in designating individuals to be Local Admins include:

- Will this person need to look at information about the specific locations in the COS-KC system? How will they use that information to perform their expected role? How frequently will they need to access the information? Are there other ways they can get the same information?
- Is it appropriate for this person to have access to user-level detail about all people who take the COS-KC in the assigned locations? Consider this question especially if the person is a staff member or contractor and agreements are in place about confidentiality.
- Does this person have skills to pull Microsoft Excel reports out of the system and use them for interpretation?
- Will this person run and use reports that include local information about the COS-KC? Is it important that they have access to run the reports themselves? Or might they be on a team that meets regularly to interpret reports pulled by someone else?
- How does the Local Admin designation fit with other expectations for that person's everyday role?
- If the COS-KC is required for staff and/or contractors, is the Local Admin the person who needs to monitor whether that requirement is met?
- How will the state coordinate with and support the Local Admin in responsibilities related to the COS-KC so that communication is smooth and activities are even across the state? Does the number of Local Admins to be designated ensure that supporting them effectively at the state level will be manageable?

Designating State and Local Admins is not necessarily a one-time activity. Although it may be easy to upload the names of Local Admins at the same time (called "bulkloading"), Local Admin permissions can be added or removed easily within the COS-KC system as needs change.

Appendix D. State ID List

This appendix provides the list of state identification (ID) numbers used in CSV files for uploading information to the COS-KC system, a process is called “bulkloading.” It is essential that the state ID number is correct when information is bulkloaded into the COS-KC system. **Contact DaSy Center TA staff at COS-KCinfo@sri.com to request the CSV templates** with all the relevant fields and formatting needed for bulkloading. DaSy staff will provide three files for bulkloading: one for program locations, one to promote users to Local Admins, and one to assign permissions to Local Admins. DaSy staff will connect virtually with you during the bulkloading process to help ensure the process goes smoothly.

State/Entity and Program	State ID
Alabama 0-3	101
Alabama 3-5	201
Alaska 0-3	102
Alaska 3-5	202
American Samoa 0-3	103
American Samoa 3-5	203
Arizona 0-3	104
Arizona 3-5	204
Arkansas 0-3	105
Arkansas 3-5	205
California 0-3	106
California 3-5	206
Colorado 0-3	107
Colorado 3-5	207
Connecticut 0-3	108
Connecticut 3-5	208
Delaware 0-3	109
Delaware 3-5	209
District of Columbia 0-3	110
District of Columbia 3-5	210
Fed. States of Micronesia 3-5	211
Florida 0-3	112
Florida 3-5	212
Georgia 0-3	113
Georgia 3-5	213
Guam 0-3	114
Guam 3-5	214
Hawaii 0-3	115
Hawaii 3-5	215
Idaho 0-3	116
Idaho 3-5	216
Illinois 0-3	117
Illinois 3-5	217
Indiana 0-3	118
Indiana 3-5	218
Iowa 0-3	119

State/Entity and Program	State ID
Iowa 3-5	219
Kansas 0-3	120
Kansas 3-5	220
Kentucky 0-3	121
Kentucky 3-5	221
Louisiana 0-3	122
Louisiana 3-5	222
Maine 0-3	123
Maine 3-5	223
Marshall Islands 3-5	224
Maryland 0-5	301
Massachusetts 0-3	125
Massachusetts 3-5	225
Michigan 0-3	126
Michigan 3-5	226
Minnesota 0-5	302
Mississippi 0-3	127
Mississippi 3-5	227
Missouri 0-3	128
Missouri 3-5	228
Montana 0-3	129
Montana 3-5	229
Nebraska 0-3	130
Nebraska 3-5	230
Nevada 0-3	131
Nevada 3-5	231
New Hampshire 0-3	132
New Hampshire 3-5	232
New Jersey 0-3	133
New Jersey 3-5	233
New Mexico 0-3	134
New Mexico 3-5	234
New York 0-3	135
New York 3-5	235
North Carolina 0-3	136
North Carolina 3-5	236
North Dakota 0-3	137
North Dakota 3-5	237
Northern Mariana Islands 0-3	138
Northern Mariana Islands 3-5	238
Ohio 0-3	139
Ohio 3-5	239
Oklahoma 0-3	140
Oklahoma 3-5	240
Oregon 0-3	141

State/Entity and Program	State ID
Oregon 3-5	241
Palau 3-5	242
Pennsylvania 0-5	303
Puerto Rico 0-3	143
Puerto Rico 3-5	243
Rhode Island 0-3	144
Rhode Island 3-5	244
South Carolina 0-3	145
South Carolina 3-5	245
South Dakota 0-3	146
South Dakota 3-5	246
Tennessee 0-3	147
Tennessee 3-5	247
Texas 0-3	148
Texas 3-5	248
Utah 0-3	149
Utah 3-5	249
Vermont 0-3	150
Vermont 3-5	250
Virgin Islands 0-3	151
Virgin Islands 3-5	251
Virginia 0-3	152
Virginia 3-5	252
Washington 0-3	153
Washington 3-5	253
West Virginia 0-3	154
West Virginia 3-5	254
Wisconsin 0-3	155
Wisconsin 3-5	255
Wyoming 0-3	156
Wyoming 3-5	256
International 0-3	157
International 3-5	257

Note. States in gray have been set up as Birth to Five programs. Contact DaSy Center TA staff at COS-KCinfo@sri.com if you represent one of these states and want to discuss using a different designation from Birth to Five for this purpose.

Appendix E. Sample Email Communications

Automated Messages Sent by the COS-KC System

It is important for states to communicate with practitioners and local administrators ("Local Admins") about what to expect with the COS-KC system. The system sends automated messages to users, with the sender as "DaSy Center <noreply@dasyonline.org>." The following key automated emails are sent:

- **New account emails.** When a user signs up for a new COS-KC account, a follow-up email is sent that welcomes them and says, "Thank you for creating a new account with the Child Outcomes Summary Knowledge Check (COS-KC)." The email includes a link for the user to finish activating their account with the message, "Once your account has been activated, you will be able to use your username and password to sign in to your account."
- **Practitioner added emails.** When a new user is uploaded (or "bulkloaded") to the COS-KC system or manually entered and saved, the system will send an automated practitioner email message. The follow-up email welcomes them and says, "You have been added as a practitioner. To finish activating your account click on the following link [it is a specific link for each user]. Once your account has been activated, you must accept our terms and conditions and set your password so you can sign in to the COS-KC. Regards, The COS-KC team."
- **Local Admin added emails.** When either a bulkload goes through to add administrative permissions or a user profile is manually created or edited to include Local Admin permissions and saved, the COS-KC system will send an automated administrator email message. The follow-up email for a manually created Local Admin profile welcomes them and says, "You have been added as an administrator. To finish activating your account click on the following link (it is a specific link for each user). Once your account has been activated, you must accept our terms and conditions and set your password so you can sign in to the COS-KC. Regards, The COS-KC team."

Sample State Email Message Providing Background About the COS-KC

Below is a sample email for states to send to local program coordinators to let them know that the state is beginning to use the COS-KC as well as when and how the state will provide more details about what that means. This message is phrased in terms of encouraging a "selected" program location to get involved. In this version, the recipient will be identified as a Local Admin unless they reach out with questions or concerns, rather than waiting for the recipient to actively respond and request Local Admin status.

States are encouraged to customize the email message for their audience and policy decisions. For example, changes to the content would be expected if a state is requiring participation in the COS-KC statewide. Final versions of this email might also include additional details, such as sharing more about the timing of the launch or the level of expected effort.

Suggested subject: Early adoption of the COS-KC starts now! **OR** Launching Use of the COS-KC in [state]!

Dear [Local Administrator]:

The Child Outcomes Summary Knowledge Check (COS-KC) has just launched, and we want [program location name] to be a part of our state's early adoption of the tool!

You may recall that the COS-KC was developed by the Center for IDEA Early Childhood Data Systems (DaSy) and the Early Childhood Technical Assistance Center (ECTA) as a **free, online, open-book assessment with 30 multiple choice items**. The COS-KC assesses practitioners' basic knowledge essential to participating effectively in the COS process and provides state and local program administrators with the results. Our state has agreed to participate in its early adoption. That means it's time for us to start using the COS-KC in local programs. We need your help!

Why early adoption? The COS-KC is an important tool for helping our state target professional development to areas where it is most needed and ensuring that our state has high-quality outcomes data for program improvement. Our early adoption of the COS-KC will give us validated pass/fail results for our practitioners after they answer just 30 multiple-choice questions. We'll have early access to the COS-KC assessment, receive support from the team who developed it, and be able to provide important feedback about our state's experience with the tool and how we use the data reports it generates.

What are we asking you to do? [Program location name] has been selected as an important location to begin rolling out the COS-KC. We are now finalizing local program administrators [or their designees] who will be a point of contact to support practitioners as they take the COS-KC. Those identified as a "Local Admins" will need to communicate with practitioners in your program about the COS-KC and monitor their registration and completion of the assessment. COS-KC Local Admins will have access to the COS-KC data reports showing pass/fail results for the practitioners in your program and how those relate to key practitioner characteristics. You also will have the opportunity to share feedback about guidance materials referenced and your experience with the COS-KC.

What are next steps? No action is required right now to move ahead as a COS-KC Local Admin. Soon, you will receive one or two automated emails from the DaSy Center that say, "You have been added as an administrator." Click on the link in that email to activate your account and set up a password. We also will send another email around the time those automated emails are sent and include additional resources. If you want to discuss the COS-KC further and learn more about what is involved in this exciting opportunity, then [Customize this section with your process—for example, you might invite them to join a webinar with details about when, attend office hours if they have questions, see a flyer for more information, etc.]. Many thanks!

[sign]

Sample State Email Message to Local Admins

Suggested subject: Activate and sign into the COS-KC as a Local Admin

Dear [Local Admin name]:

The Child Outcomes Summary Knowledge Check (COS-KC) has just launched in [state], and we have updated the system to give you Local Admin access to [program location(s)] information. This access will allow you to see who in the [program location] has set up an account, submitted answers, and passed the COS-KC. It also will give you access to reports.

Next steps:

- Look in your email for one or two automated emails from “DaSy Center <noreply@dasyonline.org>.” If you do not see the emails, please check your spam folder.
- Click on the link in the email. If you receive two emails, click on the link in the email that says, “You have been added as an administrator.” Then, follow the directions to review and accept the terms and conditions, create a password, and sign in to your COS-KC account.
- As you enter the COS-KC system, familiarize yourself with the Local Admin dashboard where users will show up and reports can be selected and run.
- Click on the three horizontal lines in the top right corner of the Local Admin dashboard to complete all the information in the "User Details” page. Also, if appropriate, go to the practitioner dashboard take the 30-item, open-book COS-KC assessment yourself. Please note that all data entered into this system is live. So, if you complete the assessment, please provide genuine answers rather than placeholders.
- Please review the attached COS-KC User Manual for Local Administrators. Do not be intimidated by having a user manual. Most admins find using the COS-KC system to be fairly intuitive. However, the manual is a reference that provides step-by-step instructions and screenshots about how to navigate the system and perform common tasks.

Practitioners are scheduled to receive emails inviting them to sign up for accounts on [date]. [For more information, contact the state or attend office hours or meeting.]

Thank you again for your important role in monitoring practitioner completion and performance on the COS-KC, as well as running reports to improve our outcomes data collection and program.

[sign]

Sample State Email Message to Practitioners

Suggested subject: Please register for the Child Outcomes Summary Knowledge Check (COS-KC)!

Dear [Practitioner]:

It's time for us to start using a great new tool to help us understand if practitioners have the background information they need to implement a high-quality Child Outcomes Summary (COS) process. We need your help! Answering some brief multiple-choice questions will help us plan and better support practitioners.

The Child Outcomes Summary Knowledge Check (COS-KC) is a national tool being launched by the Center for IDEA Early Childhood Data Systems Center (DaSy) and the Early Childhood Technical Assistance Center (ECTA). As you may know, the COS-KC is a free, online, open-book assessment with 30 multiple-choice items developed as a way for states and local programs to assess basic knowledge essential to participating effectively in the COS process.

All practitioners working with [local program location name] are being asked to complete the COS-KC. Before you start the assessment, we've summarized some key points so you know what to expect:

- You will be asked to create an account in order to access the assessment. Please sign up with and verify your email address to do so.
- The online assessment includes 30 multiple-choice items. We anticipate that participation will take around 45 minutes. Progress will be saved if you need to pause the assessment and return later.
- The assessment is "open book," so feel free to use any helpful resources or tools during the assessment. This link https://dasycenter.org/cos-kc/practitioners/resources/ provides recommended resources you can use while taking the COS-KC, as well as other resources for practitioners.
- Upon completion of the COS-KC, you will receive immediate feedback as to whether you passed the assessment. For those who pass, the system generates a Certificate of Achievement. Those who do not yet pass the first time may retake the COS-KC after a waiting period of 24 hours.
- Finally, when you are ready, you can access the COS-KC at https://coskc.dasyonline.org/.

Thank you so much for your time and participation. If you have any questions or concerns, please contact [fill in who and how to contact].

[sign]

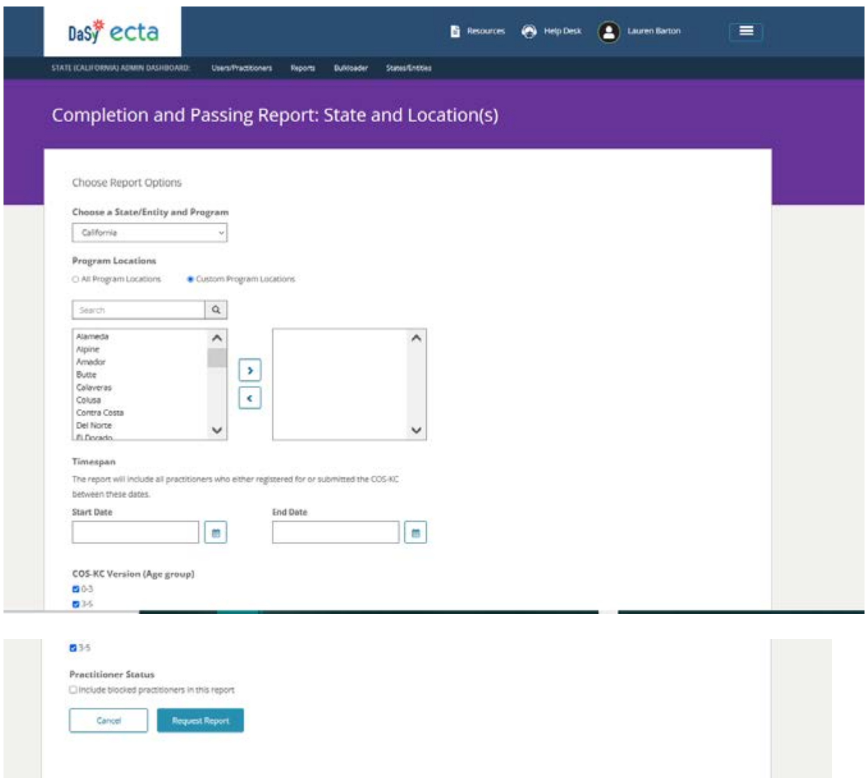
Appendix F. Reports in the COS-KC System

This appendix is a supplement to the instructions for running reports found in the main body of this manual. The purpose of this appendix is to explain what some of the choices mean when selecting parameters for reports.

Selection Parameters for Reports

Familiarize yourself with the “Running Data Reports” section of this user manual, which illustrates how to select a report.

First, state administrators (“State Admins”) click the “Reports” tab on the navy blue navigation bar near the top of their dashboard. Next, they click the “Request a New Report” button and select the type of report from the dropdown menu. They will then see a page that looks like the screenshot below.



Choose a State/Entity and Program. This option will be pre-populated with the state and the age group of the program (e.g., California 0-3). State Admins confirm that the information is correct and move on to the next field.

Program Locations. State Admins have the option to select “All Program Locations” or “Custom Locations” using a radio button.

- **All Program Locations.** This option will produce a report that provides information about all program locations in the state, with minor variations in how that information looks depending on the type of report.
    - On the completion and passing reports (CPR) for state and location: Each program location will show up as one row of data, so State Admins can scan them and look for patterns.

  - On the CPR with practitioner characteristics: Data from all program locations will be totaled, so State Admins can, for instance, see how many of the speech pathologists from all locations in the state have a status of “in progress,” “completed and not yet passed,” or “completed and passed” for the COS-KC.
  - On the completion and passing status for individuals report: Each individual user from all programs in the state is listed as one row of data.
  - On the all data report: Each individual user from all programs in the state is listed as one row of data.
- **Custom Locations.** Selecting this ratio button opens a widget where the names of all program locations in the state are listed in a box on the left side. The State Admin highlights the names of programs of interest and uses the arrows to move the names of selected programs of interest into a box on the right side. The same kinds of reports are run; however, the report only includes data from the program locations selected.

Timespan. State Admins complete the “Start date” and “End date” for the report by clicking on the little calendar image and clicking on the appropriate date. They must include both a start date and an end date. Reports will only include data from users with accounts active during those dates. This option is especially useful for reports to consider performance on the COS-KC during a specific period (e.g., after a major training activity) or to select dates for a particular school year or period when practitioners were expected to take the COS-KC as a requirement.

COS-KC Version (Age Group). The recommended setting for reports is to select both 0-3 and 3-5 in this field. This is because the report is already restricted to only those people associated with the program (e.g., California 0-3 or California 3-5). Forms across age groups are equivalent, and some practitioners may take a form with a different age group. For instance, if a related service provider contracted with a Part C program indicates that she works with children ages 0-8, she will be asked to select which version of the COS-KC she wants to take. She could select 3-5 and take the assessment using that version. However, her data will not be visible in the Part C program data unless both age group buttons are selected on this screen. Generally, State Admins would only generate reports limited to one or the other age group if they work in a state with a 0-5 program and want to restrict the data to only the subgroup of practitioners working primarily with children ages 0-3 or 3-5.

Practitioner Status. The default excludes blocked practitioners in reports. However, State Admins can change this radio button and include them, if desired. This would mean that the report includes information about people who are no longer associated with the program (e.g., who have moved or are no longer employed/contracted with the program location). Ideally, the system will have few blocked practitioners because the users themselves or State Admins will simply shift their program location to a new program or to “unaffiliated” when they leave a specific program location. However, sometimes Local Admins may block a user from their program as their only way to deactivate a user who leaves from their specific program location. This group of individuals is included or excluded from the report in this situation.

After identifying the detailed parameters of interest in the report, State Admins should click “Request Report.”

Appropriate Uses of Report Information

Reports have been designed to provide information for program improvement and to help target professional development activities effectively. Information from the COS-KC is not intended to be used punitively or as the basis for performance reviews.

Information Sources and Limited Historical User Information

Note that in all reports, information is based on the most recent characteristics noted in the user profile and registration information. So, for instance, a practitioner starts in the Alpine program location in 2021, moves from the Alpine to the Alameda program location in 2022, and changes their program location information in the COS-KC system before leaving. For reports run with dates selected after the practitioner's transition date in 2022, all of that practitioner's historical data will be tied to the new program location and show up in the new program's reports. Likewise, if a practitioner changes her last name and updates the new name in the "User Details" section of the system, then all of the assessment history and historical data for that person will show up under the new name. Only the new name will show up on the all data report. Admins at all levels are encouraged to document status changes in their records to keep lists up to date if more historical information is needed.

Source of COS-KC Status Information

The completion and status report for individuals shows the dates and outcomes of various COS-KC submissions for each individual. This allows Local Admins to see the progression of attempts and outcomes on the COS-KC for each practitioner across time. However, the two other completion and passing reports (the state and location one and the practitioner characteristics one) only count one status per individual. **These reports show counts based on the last outcome for that person within the dates set when the report was requested.** For example, consider a practitioner completes the COS-KC on March 14, 2023, and does not yet pass, and then studies and retakes the assessment on March 20 and passes. This practitioner will be represented in the completion and passing report for the period that includes March 10–31, 2023, as one person who completed and passed the COS-KC.

Additional Information

For more information about reports, contact your DaSy TA provider. TA staff will provide support and use the questions you ask and feedback you share to improve the user manual and guidance available to COS-KC system users.

Sample Reports

More information coming soon! Check with your DaSy TA provider to access examples of various reports produced by the COS-KC system.

Appendix G. Blocking Users in the COS-KC System

While "blocking," or deactivating, users from being tied to a program location is an available feature in the COS-KC system, it should be used infrequently. Blocking removes users who are no longer affiliated with the program from reports, but it also disrupts practitioner access to log into the COS-KC system without contacting the help desk. State and Local Admins can "block" any user that they have permission to see on lists. However, blocking users should be a last resort undertaken only after less extreme actions have been attempted or if a practitioner is deemed to be a security threat.

Given the system defaults around blocking users, the following approach is recommended:

- If a practitioner knows that they are leaving a position and going to work in a different program location within the state, encourage the practitioner to log into their COS-KC account, click on their name in the navigation bar to open their user profile, and change their program location to the new program location name. This action effectively moves all of their data to appear in the new program's reports and records. The data will no longer show up in the old program's records.
- If the practitioner is not hired by the new program before leaving the old program, any State Admin can update the practitioner's program location as well. This approach will also move the data to the new program without blocking the practitioner.
- If after a period, neither the practitioner nor any State Admin updates the program location, a Local Admin may block the user. (The Local Admin does not have permission to change a practitioner's program location status unless they have administrative permissions for both the old and the new locations.) Once a practitioner is blocked, their data remain archived but are not tied to a specific program. If the practitioner attempts to sign in, they will receive the error message, "Your account has been blocked. Contact the help desk." Upon contacting the help desk, the practitioner can be associated with the proper new program location or provided with any certificates they earned via email.

DaSy Center TA providers at the help desk will assist practitioners who move across state lines and want their accounts to move with them. Admins at all levels are encouraged to document status changes in their records to keep lists up to date.

Appendix H. COS-KC Webpages and Resources

For more information about the COS-KC:

See https://dasycenter.org/cos-kc/ or contact COS-KCinfo@sri.com.

Key COS-KC resources are available at:

https://dasycenter.org/cos-kc/practitioners/resources/

https://dasycenter.org/cos-kc/states/resources/

Questions about accessibility of the COS-KC:

For assistance with accessible use of the COS-KC, please reach out to COS-KCinfo@sri.com.

About Us

The contents of this document were developed under a grant, #H373Z190002, and a cooperative agreement, #H326P170001, from the Office of Special Education Programs, U.S. Department of Education. However, the content does not necessarily represent the policy of the U.S. Department of Education, and you should not assume endorsement by the Federal Government. DaSy Center Project Officers: Meredith Miceli and Amy Bae. ECTA Center Project Officer: Julia Martin Eile.

Find out more at dasycenter.org and ectacenter.org.