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# Chapter 1. Adding and Managing Users

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CALIFORNIA

Assessment of Student Performance and Progress

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## Test Operations Management System Pre-Administration Guide for CAASPP Testing

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- ◆ Adding and Managing Users
  - ◆ Passwords, Access, and Logon
  - ◆ Test Administration Setup
  - ◆ Student Test Assignment
  - ◆ Student Test Settings
  - ◆ Score Status
  - ◆ Uploads
  - ◆ Reports
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Smarter Balanced Summative and Interim Assessments

California Science Tests

California Alternate Assessments

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Measuring the Power of Learning.™




California Assessment of  
Student Performance and Progress




# Adding and Managing Users in the Test Operations Management System (TOMS)

## Additional Resources:

- 
- California Assessment of Student Performance and Progress (CAASPP) Portal Web site—<http://www.caaspp.org/>
  - CAASPP Interim Assessment User Guide—<http://www.caaspp.org/rsc/pdfs/CAASPP.interim-assessment-guide.2017-18.pdf>
  - CAASPP Forms Web page—<http://www.caaspp.org/administration/forms/>
  - CAASPP Test Operations Management System (TOMS) Resources Web page—<http://www.caaspp.org/administration/toms/>

## Notes:

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- Information about how to add and manage users in the Smarter Balanced Administration and Registration Tools system for interim assessments is found in the [CAASPP Interim Assessment User Guide](#).
  - These instructions pertain to user roles and assignments for the CAASPP System only.
  - CAASPP test site coordinators should contact their local educational agency (LEA) CAASPP coordinators if they have questions about accessing or using the Test Operations Management System (TOMS). Test administrators, test examiners, test administrators & test examiners, and other school staff should contact their CAASPP test site coordinator if they have questions about accessing or using TOMS.

## Module Overview


LEA CAASPP coordinators must add CAASPP test site coordinators and may add other user roles to TOMS to enable the designated users to administer, monitor, and manage the online Smarter Balanced summative and interim assessments. Table 2 on page 16 contains a list of definitions for the user roles. You should refer to the LEA's privacy policy regarding student information when making decisions about user roles.

Users may be added either individually in the TOMS user interface or in the batch upload of a .csv file.

CAASPP test site coordinators may add Test Administrators, Test Examiners, Test Administrators & Test Examiners, Interim Assessment Administrators, and Educators at the test site to TOMS.

### User Roles Assigned in TOMS

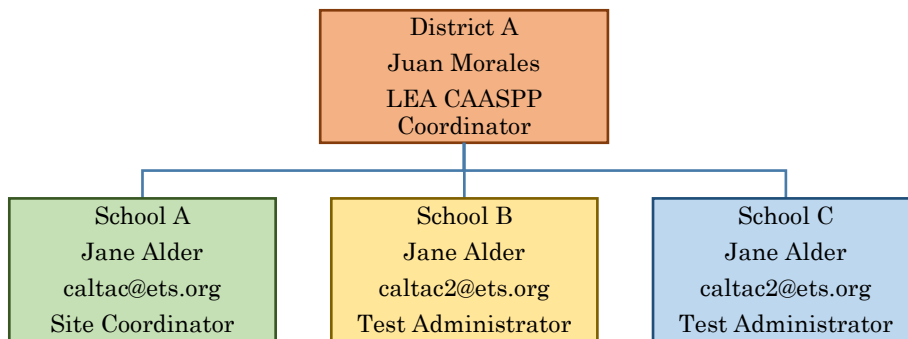
- LEA CAASPP Coordinator
- Test Site Coordinator
- Test Administrator
- Test Examiner
- Test Administrator & Test Examiner
- IA Administrator Only
- Educator – District
- Educator – Test Site
- Educator – Roster


**Note:** Persons occupying the roles of Test Examiner and Test Administrator & Test Examiner must be licensed or credentialed employees.

Note the following about assigning users in TOMS:

- ① A user with multiple roles across different LEAs or test sites (“sites”) must use one e-mail account **per role**.
- ① Each user can be assigned one CAASPP TOMS account, no matter how many different LEAs or sites he or she is associated with as long as the user level of access is the same across all the sites.
- ① Additional roles for a single user can be added using the TOMS user interface or through the batch upload process.
- ① If a user is to be assigned roles that have different levels of access at multiple sites, **he or she must use a unique e-mail address at each site**.
- ① Assigning different levels of access at each site would also prevent a Test Site Coordinator from creating a subordinate that has the same user role he or she has been assigned at a different site—for example, an individual who is a Test Site Coordinator at School 1 and a Test Examiner at School 2 cannot assign another individual as a Test Examiner at School 1.
- ① **You should not assign** an individual user to multiple roles at a single site; instead, grant the user the highest level of access among those roles at the site. For example, if Jane Adler is both Test Site Coordinator and Test Examiner at School 1, assign Ms. Adler only to the Test Site Coordinator role at School 1.

Figure 1 shows an example of a hierarchy in which one user (i.e., Jane Alder) has different roles at three locations.



**Figure 1. Sample multiple-role assignment**

The LEA superintendent may add additional personnel within the LEA who will be granted LEA CAASPP coordinator–level access to TOMS by completing the *Superintendent Designation of LEA CAASPP Coordinator* Web form. The secondary LEA CAASPP coordinator(s) will be added as a user after he or she submits the electronic *CAASPP Test Security Agreement for LEA CAASPP Coordinators and CAASPP Test Site Coordinators* Web form. The primary LEA CAASPP coordinator will bear overall responsibility for all of the added users within his or her LEA.

The appointment of a secondary LEA CAASPP coordinator affords extended TOMS access only. Secondary LEA CAASPP coordinators do not have additional responsibilities with the California Department of Education or the California Technical Assistance Center (CaITAC).

## Manage Security

It is the responsibility of the LEA CAASPP coordinators to have, on file at the LEA, a signed *CAASPP Test Security Agreement for LEA CAASPP Coordinators and Test Site Coordinators* Web form from each CAASPP test site coordinator to whom access has been granted.

It is the responsibility of each CAASPP test site coordinator to have, on file at the school, a *CAASPP Test Security Affidavit* from each test administrator, test examiner, or other staff member to whom access to systems has been granted.

These forms are accessed on the CAASPP [Forms](#) Web page.

## Reset Passwords

LEA CAASPP coordinators can reset passwords for their CAASPP test site coordinators. CAASPP test site coordinators should contact their LEA CAASPP coordinators directly for this service.

CAASPP test site coordinators can reset passwords for the test administrators, test examiners, and other staff at their schools. Staff should contact their CAASPP test site coordinators directly for this service. Note that all users can reset their own existing passwords by following the instructions in the "[Passwords, Access, and Logon](#)" section.

## Adding Users

LEA CAASPP coordinators must add test site users to TOMS to enable the designated users to administer, monitor, and manage the online CAASPP assessments.

Once CAASPP test site coordinators are added by their LEA CAASPP coordinator and receive access to TOMS, they will have the ability to add test administrators, test examiners, and other school staff members for their assigned site using the same methods in this section.

There are two methods LEA CAASPP coordinators and CAASPP test site coordinators can use to add users to TOMS:

1. One by one
2. Using a template (either blank or modifying a file of previous users)

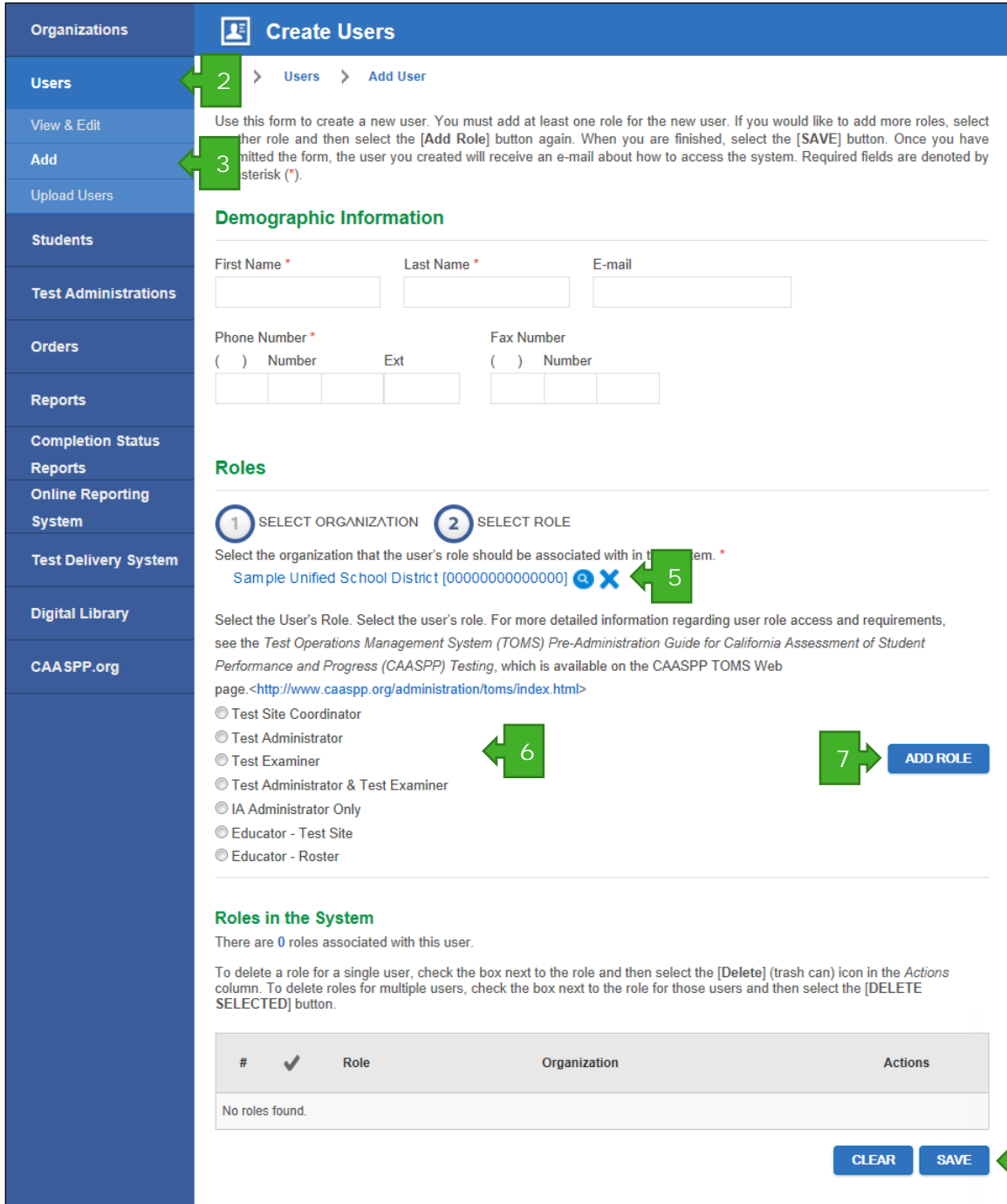
### Method 1—One by One



#### Notes:

- When you are reactivating an existing user, you must select the **[Reset Password]** button. This will cause the system to send the reset password e-mail to reactivated user.
- When you are adding users to TOMS using the one-by-one method, please allow up to **two hours** for the system to process the request and grant access to the added user.

1. Use an Internet browser to go to the [CAASPP Portal](#) and select the **[Test Operations Management System (TOMS)]** button to access the TOMS Logon Web form to open TOMS.
2. When TOMS has opened, select the **[Users]** button—shown in Figure 2—in the left navigation bar to open the Create Users Web form.



**Organizations** **Create Users**

**Users** > Users > Add User

Use this form to create a new user. You must add at least one role for the new user. If you would like to add more roles, select another role and then select the **[Add Role]** button again. When you are finished, select the **[SAVE]** button. Once you have submitted the form, the user you created will receive an e-mail about how to access the system. Required fields are denoted by an asterisk (\*).

**Demographic Information**

First Name \* Last Name \* E-mail

Phone Number \* Fax Number

( ) Number Ext ( ) Number

**Roles**

1 SELECT ORGANIZATION 2 SELECT ROLE

Select the organization that the user's role should be associated with in the system. \*

Sample Unified School District [00000000000000] X

Select the User's Role. Select the user's role. For more detailed information regarding user role access and requirements, see the *Test Operations Management System (TOMS) Pre-Administration Guide for California Assessment of Student Performance and Progress (CAASPP) Testing*, which is available on the CAASPP TOMS Web page. <<http://www.caaspp.org/administration/toms/index.html>>

Test Site Coordinator  
 Test Administrator  
 Test Examiner  
 Test Administrator & Test Examiner  
 IA Administrator Only  
 Educator - Test Site  
 Educator - Roster

**Roles in the System**

There are 0 roles associated with this user.

To delete a role for a single user, check the box next to the role and then select the **[Delete]** (trash can) icon in the **Actions** column. To delete roles for multiple users, check the box next to the role for those users and then select the **[DELETE SELECTED]** button.

#	✓	Role	Organization	Actions
No roles found.				

**CLEAR** **SAVE**

**Figure 2. Create Users Web form**

3. Select the **[Add]** button.

4. In the “Demographic Information” section, enter the following information for the user being added:
  - first name
  - last name
  - e-mail address
  - phone number
  - fax number (optional)

Note that the e-mail domain extension portion of an e-mail address—the portion after the dot, (e.g., “.edu” or “.org”)—is limited to 10 characters.

5. Select the LEA or school the user is associated with by selecting the [Select Organization] link. You also can perform this step as step 5.
  - a. To view the LEA’s information, type at least five characters of the LEA’s name (including spaces) or the County-District-School (CDS) code for the LEA.
  - b. To view a school’s information that is in your organization, type at least five characters of the school’s name (including spaces) or the CDS code of the school.
6. Based on the selected organization, select the radio button corresponding with the user’s role; roles are shown in Table 2. All of these roles can be set by the LEA CAASPP coordinator. Some of these roles can also be set by CAASPP test site coordinators.

**Table 2. User Roles in TOMS**

Role	Description
Test Site Coordinator	Identifies and trains all relevant site staff, assigns and manages the site user roles of Test Administrator and Test Examiner, assigns and verifies student test settings and condition codes, and coordinates test site security. Manages the Interim Assessment Hand Scoring System, accesses Completion Status Reports, and accesses the Online Reporting System (ORS) for assessment results for all the students in that site. Creates and assigns ORS rosters to site users and able to administer all summative, interim, practice, and training tests.
Test Administrator	Administers standard summative, interim, practice, and training tests to students, confirms student test settings in the Test Administrator Interface, and ensures test session security. Accesses the Interim Assessment Hand Scoring System, Completion Status Reports, and ORS assessment results for students in an associated student roster. Rosters of students are created and assigned to the test administrator user by the LEA CAASPP coordinator or test site coordinator. Note that unless the test administrator has been assigned to a student roster, he or she cannot see any student results in the ORS.
Test Examiner (must be a credentialed or licensed employee)	Administers alternate summative assessments and interim, practice, and training tests to students, confirms student test settings in the Test Administrator Interface, and ensures test session security. Accesses the Interim Assessment Hand Scoring System, Completion Status Reports, and ORS assessment results for students in an associated student roster. Rosters of students are created and assigned to the test examiner user by the LEA CAASPP coordinator or test site coordinator. Note that unless the test examiner has been assigned to a student roster, he or she cannot see any results in the ORS.

Role	Description
Test Administrator & Test Examiner (must be a credentialed or licensed employee)	Administers both standard and alternate summative assessments and interim, practice, and training tests to students, confirms student test settings in the Test Administrator Interface, and ensures test session security. Accesses the Interim Assessment Hand Scoring System, accesses Completion Status Reports, and ORS assessment results for students in an associated student roster. Rosters of students are created and assigned to the test administrator/test examiner by the LEA CAASPP coordinator or test site coordinator. Note that unless the test administrator/test examiner has been assigned to a student roster, he or she cannot see any results in the ORS. May administer practice and training tests to students.
IA Administrator Only	Administers only the interim assessments to students. Includes access to Interim Assessment Hand Scoring System and Interim Assessment Completion Status Reports. (Note: Access to Interim Assessment results are available through the Interim Assessment Reporting System logon.)
Educator – District	Allows access to assessment results in the ORS for the entire LEA. This role is assigned by the LEA CAASPP coordinator.
Educator – Test Site	Allows access to assessment results in the ORS for the entire school. This role is created and assigned to the user by the LEA CAASPP coordinator or test site coordinator.
Educator – Roster	Allows access to assessment results for students in an associated student roster in the ORS. Rosters of students are created and assigned to the user by the LEA CAASPP coordinator or test site coordinator. Note that unless this user has been assigned to a student roster, he or she cannot see any results in the ORS.

7. Select **[Add Role]**. You must add a role to successfully create a new user profile.
8. Select **[Close]** on the *Save User* confirmation box.
9. Select **[Save]** when you are finished adding users.
10. Select **[Close]** on the *Add a user* confirmation box.

## Method 2—Adding Users via Template Upload

LEA CAASPP coordinators and CAASPP test site coordinators also have the option to upload TOMS users via batch upload of a file in .csv format. These users can either edit the file of assigned users from the previous-year’s CAASPP administration or download a template from TOMS and then manually enter users.

A file of your organization’s users assigned during the previous CAASPP administration is available for download. You can manually add, update, and delete users from it and then upload the updated file into TOMS. These users, while included in the previous-year’s version of TOMS, are considered inactive after TOMS transitions from one school year test administration to the next until you activate them either via batch upload or using the one-by-one method.

### Notes:



1. **LEA CAASPP coordinators should coordinate with CAASPP test site coordinators to decide who will be uploading user information because if a user has already been assigned a role or made an active user within an organization, that role may be overridden in a subsequent upload of users within that organization.**
2. **When you are adding staff to TOMS using the template upload method, please allow up to two business days for the system to process the file and grant access to the added users.**
3. **Users who were assigned to two roles associated with one user account during the previous administration are included on the template twice. You must remove one of the user roles (lines) for the user or enter another user e-mail address for one of the user roles or else the file will not validate. For example, if an LEA CAASPP coordinator uploads a file in which active School B test site coordinator Jane Alder (in Figure 1) is assigned a test administrator role at School A, the file will not validate. Either delete one of the lines for Ms. Adler or enter a different e-mail address for one of her user roles.**
4. **LEA CAASPP coordinators can submit only user information for schools within their LEA. CAASPP test site coordinators can submit only user information for their school.**

## Step 1. Access TOMS.

1. Open an Internet browser.
2. Go to the [CAASPP Portal](#) and select the **[Test Operations Management System (TOMS)]** button to access the TOMS Logon Web form to open TOMS.

## Step 2. Download a file.

Download the file of past users or a blank template in TOMS. Note that the blank template includes a worksheet that contains the file specifications. See the “[LEA User List Report](#)” section of this manual for more information about the file of past users.


### ***Download the previous year’s file***

1. Open TOMS.
2. Select the **[Reports]** button in the left navigation bar to open the LEA Reports Web form.
3. In the “LEA User List Report” section, select your organization and *Previous School Year* from the *School Year* drop-down list.
4. Select the **[DOWNLOAD REPORT]** button in this section. You will be prompted to open or download the .csv file and save it locally.

### ***Download the blank template***

1. Open TOMS.
2. Select the **[Users]** button in the left navigation bar.



3. Select the **[Upload Users]** button in the left navigation bar.
  4. Select the **[Download Spreadsheet Template]** down-arrow  icon to download the Excel template.
- or
5. Download the TOMS user upload .csv template from the [TOMS Resources](#) Web page.
  6. Save the template locally.


### Step 3. Edit the users.

While the downloaded .csv file is best updated using Notepad or another plain-text editor, you can update it in Microsoft Excel provided you:

1. either copy the contents of the downloaded file into a different spreadsheet or save the .csv file into an Excel format such as .xlsx, and then
2. save it as a .csv file when you are finished editing your user information.

When you are going to create the list of users in a blank template, you can copy or enter the user information into the template. The specifications for each record in the template, including maximum length, required or not, and acceptable value for the field, are described in the **[User Upload File Specifications]** tab of the user upload template. You must enter data in every field, columns A–F.

#### Notes:

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- If you choose to copy the contents of a .csv file into a spreadsheet, make sure that the format applied to the *CDS Code* column in the alternate spreadsheet is “Number with no decimal places or else the contents may show in scientific notation (e.g., 1.2408E+12).
  - If you choose to edit the contents of the .csv file in a plain-text editor, be careful that your data do not include commas, which are used to separate data fields within comma-delimited records.

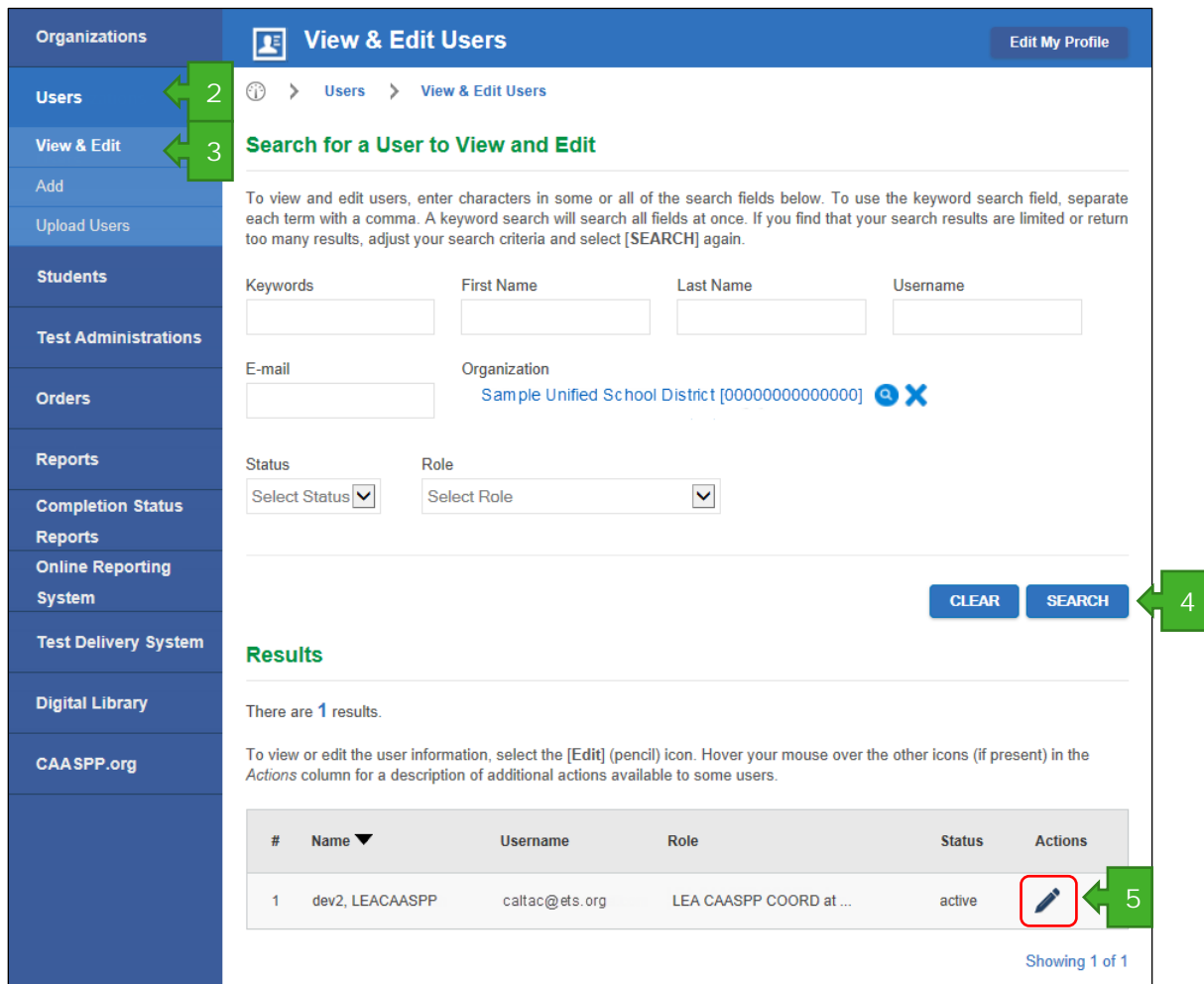
### Step 4. Upload the file.

When you are finished, save as a .csv file, validate the file, and upload the file using the processes in Chapter 8 File Uploads.


## Viewing and Editing Users

On the View & Edit Users Web form, shown in Figure 3, you can search, view, edit, and deactivate roles from other users.

1. Open TOMS.
2. Select the **[Users]** button in the left navigation bar.
3. Select the **[View& Edit]** button in the left navigation bar.



**Figure 3. Search for a User Web form**

- To find a user, enter criteria in the different search fields in the “Search for a User to View and Edit” section and select [**SEARCH**]; or just select [**SEARCH**].
- To edit a user, select the [**Edit**] pencil  icon in the *Actions* column in the row for the user (circled in Figure 3). The Demographic Information (User) Web form, shown in Figure 4, appears.

Organizations

Users

View & Edit

Add

Upload Users

Students

Test Administrations

Orders

Reports


Completion Status Reports

Online Reporting System

Test Delivery System

Digital Library

CAASPP.org

 View & Edit Users
Back to Results

Info > Users > View & Edit Users

**CAASPP User (caltac@ets.org)**

### Demographic Information

Edit a user's information and then select [SAVE] when you are finished.

First Name \*  Last Name \*  E-mail

Phone Number \*      Fax Number

**SAVE**

Select the appropriate button to deactivate (suspend the account for) a user or reset the user's password. Before you deactivate the user, you can enter a comment in the *Deactivation Comment* field. This comment will be visible when you review the deactivated user's profile.

Deactivation Comment  This account is active.



**DEACTIVATE**

**RESET PASSWORD**

### Roles

**1** SELECT ORGANIZATION **2** SELECT ROLE

Select the organization that the user's role should be associated with in the system. \*


Sample Unified School District [00000000000000]  

**ADD ROLE**

### Roles in the System

There are 1 roles associated with this user.


To delete a role for a single user, check the box next to the role and then select the [Delete] (trash can) icon in the *Actions* column. To delete roles for multiple users, check the box next to the role for those users and then select the [DELETE SELECTED] button.

#	<input checked="" type="checkbox"/>	Role	Organization	Actions
1	<input type="checkbox"/>	Test Site Coordinator	0000000000000000 Park Elementary	

**DELETE SELECTED**

Figure 4. Edit Demographic Information (User) Web form

6. You can take the following actions on the Demographic Information Web form:

Action	Select....
Edit the user's Demographic Information; you must select [ <b>SAVE</b> ] to save updated information	[ <b>SAVE</b> ]
Deactivate a user	[ <b>DEACTIVATE</b> ]
Reset a user's password (which activates an inactive user)	[ <b>RESET PASSWORD</b> ]
Add a user (follow the instructions in the " <a href="#">Adding Users One by One</a> " subsection)	[ <b>ADD ROLE</b> ]
Remove a role from a user's profile	[ <b>DELETE SELECTED</b> ]
Remove a user	[ <b>DELETE</b> ] 

## Reactivating a User

You can reactivate a user by either including that user in the .csv file using the [batch upload process](#), following the steps to add a user using the [one-by-one process](#), or, if the user is present but with a status of "inactive," assigning a role and selecting the [**Reset Password**] button on the Edit Demographic Information (User) Web form (Figure 4).

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## Resetting a User's Password

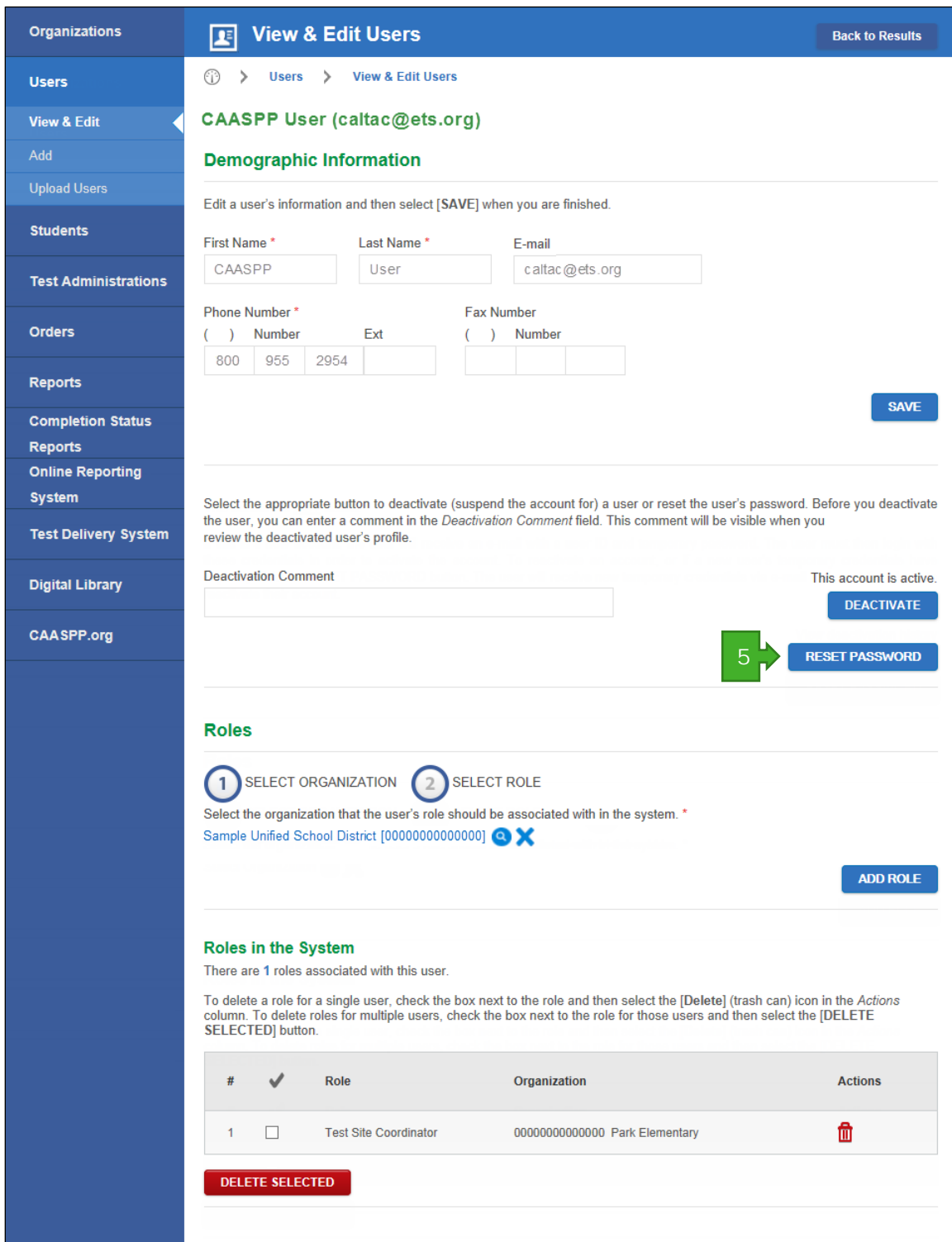
Local educational agency (LEA) California Assessment of Student Performance and Progress (CAASPP) coordinators can reset any temporary or existing password for CAASPP test site coordinators and other LEA and school staff. CAASPP test site coordinators can reset passwords for school staff. Additionally, a password reset for an inactive user reactivates that user. Active users can also reset their own password on the Logon Web form.



**Note:** Users will receive an e-mail with a link to a secure Web site where they can create a new password. The link expires in 15 minutes.

To reset a password in the Test Operations Management System (TOMS):

1. Open TOMS.
2. Select the **[Users]** button in the left navigation bar to open the Search for a User to View and Edit Web form.
3. Follow the instructions in the "[Viewing and Editing Users](#)" subsection of this manual.  
*or*  
Scroll to the bottom of the Web form to the "Results" section to see a list of users with whom you are associated.
4. Select the **[Edit]** pencil icon  in the *Actions* column in the row of the user whose password you will be resetting. The Demographic Information (User) Web form, shown in Figure 5, opens.



**Organizations** | **View & Edit Users** | [Back to Results](#)

Users > View & Edit Users

**CAASPP User (caltac@ets.org)**

**Demographic Information**

Edit a user's information and then select [SAVE] when you are finished.

First Name \*  Last Name \*  E-mail

Phone Number \* ( ) Number Ext ( ) Number Fax Number

Select the appropriate button to deactivate (suspend the account for) a user or reset the user's password. Before you deactivate the user, you can enter a comment in the *Deactivation Comment* field. This comment will be visible when you review the deactivated user's profile.

Deactivation Comment

This account is active.

**5** →

**Roles**

1 SELECT ORGANIZATION 2 SELECT ROLE

Select the organization that the user's role should be associated with in the system. \*

Sample Unified School District [00000000000000] 🔍 ✕

**Roles in the System**

There are 1 roles associated with this user.

To delete a role for a single user, check the box next to the role and then select the [Delete] (trash can) icon in the *Actions* column. To delete roles for multiple users, check the box next to the role for those users and then select the [DELETE SELECTED] button.

#	✓	Role	Organization	Actions
1	<input type="checkbox"/>	Test Site Coordinator	00000000000000 Park Elementary	

**Figure 5. Demographic Information (User) Web form**

5. Select the **[RESET PASSWORD]** button to reset the password; select **[Close]** to confirm.

The user will receive an e-mail with a secure link to the Reset Password Web form.