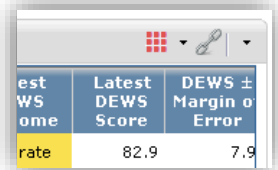**Cohorts** inside WISEdash for Districts lets you create groups of students or schools to follow. Cohorts are an excellent tool during data inquiry. Early in the school year, a whole classroom cohort could be established to monitor its members' progress. During year-end data investigations, a cohort could be created to provide evidence for instructional or school improvements.

- Cohorts can be built **Manually** (student search or copy/paste) or by **Drill-and-Click** (selecting students from the detail list).
- Cohorts can either have **Student** members or **School** members (groups of similar school types).
- Cohorts can be shared among users with similar authorizations.

NOTE: Your **security role** always applies while viewing a cohort. If your security role disallows access to sensitive student information, you will not see senstive data—even if the cohort is public.

①   **Create a Cohort Manually Using the Student Search Tool**

1. Use the "Student Search" in WISEdash under the Tools menu to identify the students for the cohort. Then select students by clicking the students' checkbox. A cohort must contain at least ONE student.

2. Scroll right on Student List window and click the red user applications button ⚏ and choose "New Cohort".

3. Type a unique and meaningful cohort name. Do not name them *Cohort 1* or *My Cohort* because the saved name will appear in dropdown fields, metrics and reports.

4. Continue searching and adding students to your new cohort as needed.

5. When done adding students, complete the cohort definition:

   a. Click the red user applications button ⚏ on the green Student Search bar. Choose "Cohort Manager"

   b. Click the edit button ✎ to open the Editing window.

   c. Complete all the fields, plus observe these tips:

      i. **EFFECTIVE DATES**: Set the From-To dates to the expected dates the cohort will be relevant or its members will exit the class, grade, or condition.

      ii. **AVAILABLE MEMBERS**: An alternative method to search for more students. Type at least 3-4 characters of the student name. Please be patient. The application searches all students you are authorized to view.

      iii. **FILTER MEMBERS**: Type 3-4 letters to filter a long Current Members list. You can then select filtered students to more easily delete them from a cohort.

      iv. **CURRENT MEMBERS**. Cohorts must have at least 1 student member. Deleting all the members will void the editing session when you close the window.
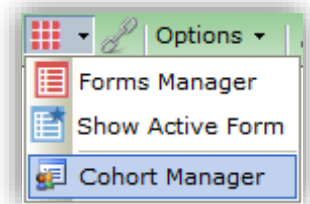
1

Editing Sample Student Cohort

Name	Sample Student Cohort	Active Inactive
Effective From	06/25/2018 to 06/25/2019	
Description		
Owner	Public Private	
Type	Students	
Cohort Origin	Manual Dynamic from Rules External Source	
Available Members	Type here to find new members for your cohort...	+ Add Multiple
Member Filtering	Filter your existing cohort members...	
Current Members		

✧ Select All   🗑 Remove Selected

✖ Cancel   ✔ Submit

2 **Create a Cohort by Copy/Pasting a List of WISEids**

1. Click the red user applications button on the green header of any dashboard. Choose "Cohort Manager".

2. Create a new cohort by clicking New Cohort or edit an existing cohort to add additional students.

3. Fill in Name, Effective Dates, and Description and select Type: Students.

4. Locate and copy (Ctrl-C) the list of WISEids for the students you wish to include in the cohort. This may be from a spreadsheet or text file with each ID on a new line.

5. Click the Add Multiple button to the right of the Available Members field and paste the list (Ctrl-V). Any WISEids that could not be matched will be displayed for correction. You can correct the WISEids and Submit or bypass the unmatched IDs by clicking Cancel.

6. When your list is complete, click Submit at the bottom of the Adding New Cohort panel.

Note: The Cohort Manager application opens multiple browser windows during its process. For security, please make sure to close all pop-up browser windows when finished with WISEdash.

**❸** **Create a Cohort by Selecting Students from Inquiry (drill and click)**

1. Set any dashboard filters and groups to show the topic or attributes of interest (such as primary disability, achievement gap, attendance rate, etc.)

2. Drill into the chart to see the student detail.

3. Select the students to include in the cohort.

4. Click the red user applications button

5. If adding a "New Cohort"
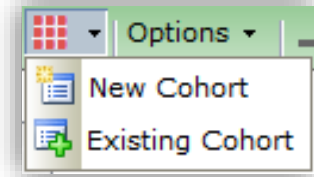
   a. Type a unique and meaningful short name > Submit

   b. Remember to finish the Cohort Definition Editor
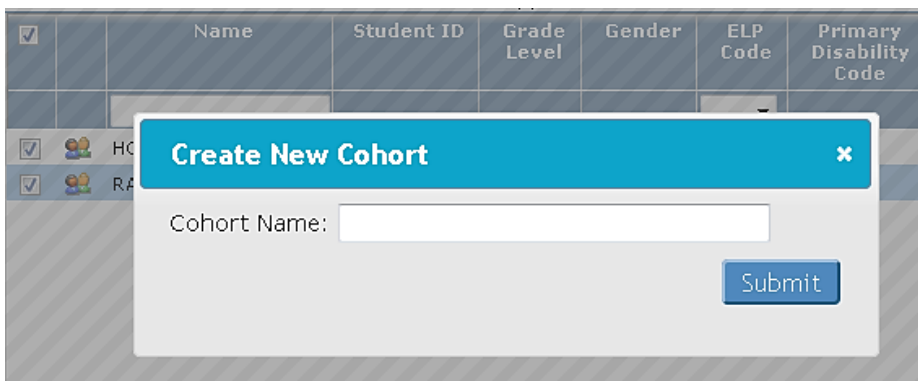
6. If adding students to an "Existing Cohort"

   a. Choose the cohort name then > Submit
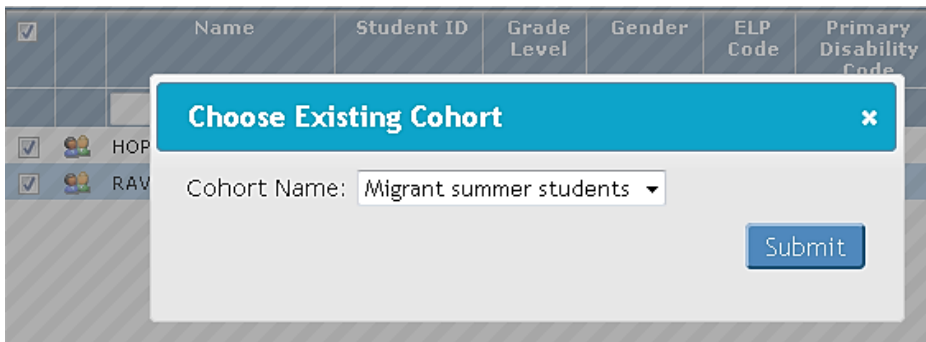
4 Using Cohorts: Filter by a Student Cohort

The Student Cohort applies a predefined list of students to the dashboard results. All of the other dashboard filters are also applied.

Note: if you just created a new student cohort from this same dashboard, you may need to refresh the dashboard for the new cohort to appear in the list of cohorts. Click the dashboard name from the Related Dashboards on the left menu or the top menu to refresh.

1. Clear any dashboard filters that you do not want to be applied.
2. Select the desired student cohort and click Apply Filter Changes.

The results of the query will be restricted to the list of students in the student cohort that also match the other selected dashboard filters and that appear in the query results.

5 **Using Cohorts: Filter by a School Cohort (similar school types)**

The School Cohort filter lets you see data and students associated with that school type. The School Cohort groupings are created by DPI.

3. Select a school district(s)

4. Choose the School Cohort of interest. Shared cohorts will display either the owner's name or 'Public' to the right of the cohort name.
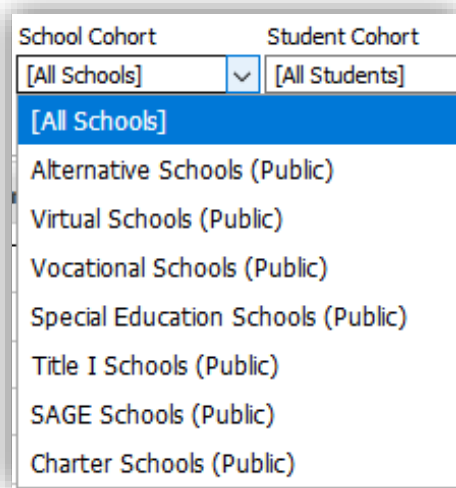

5. Click Apply Filter Changes.

6. Apply more filters and groups as required.
   a. Choosing a school outside the cohort type will result in a "No Data Found" message.
   b. Selecting a Student Cohort will further FILTER the data and display those students within the larger School Cohort group.

6 **Managing your Cohorts**

The red user applications button ⊞ > Cohort Manager lets you manage effective dates, membership, and existence of student and school cohorts.

1. Select "Cohort Manager"

2. Click EDIT button to start the cohort definition editor.

3. Click DELETE button to remove a whole cohort definition and its membership names. Once removed, it cannot be recovered.

4. **+ NEW COHORT** creates a blank cohort. You must search and at least 1 member to the new cohort.

5. SELECT ALL selects the current total membership list.

6. REMOVE SELECTED will delete the member from the cohort.

7. Cohorts that exist but are temporarily INACTIVE will display a shaded background and an information icon.
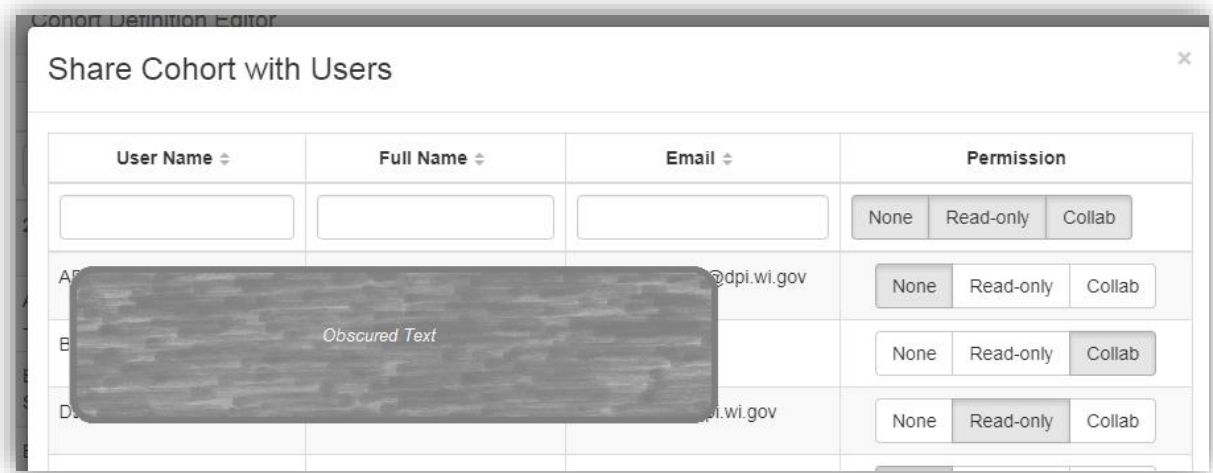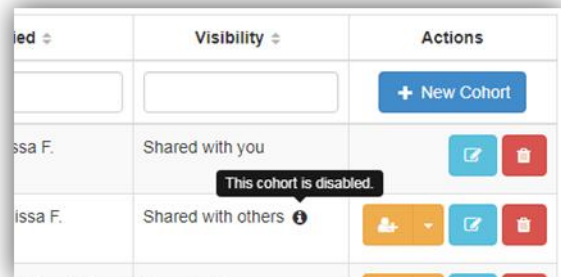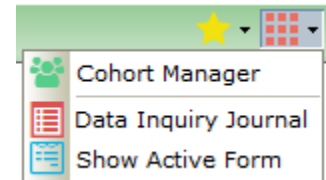
As a cohort approaches the end date a red warning message will display. An active cohort will automatically become inactive on the end date specified in the cohort manager and the end date will be extended one year. If no action is taken, the inactive cohort will be deleted when the end date is reached. If you wish to retain the cohort, extend the end date sufficiently and/or reactivate the cohort.

7 **Sharing your Cohorts**

The orange share button [icon] within the Cohort Manager lets you share your student and school cohorts with individuals within your agency by WAMS ID. To collaborate you share the ability to edit the students included in the cohort and the effective dates. Read only allows other individuals to use your cohort, but not edit it. Only the cohort owner may modify individuals with whom the cohort is shared.

1. Open the Cohort Manager as shown in 4 – Managing your Cohorts.

2. Click the share button [icon] to display a list of all users and groups with whom you may share the cohort. The arrow on the right side of the bottom will filter by individual user or groups.


3. If adding a user, under the "Permission" column in the row of a user or group, click "Read-only', or 'Collab'.

4. To remove sharing from a user or group, click "None" under the "Permission" column.

5. Click SUBMIT.

For an individual to be available from the search function, the user must have previously signed in to WISEdash. Newly authorized users that have not yet signed in will not be searchable.

8 **Creating a Group with which to share your Cohorts**

Within the Cohort Manager, the "Share with Group" option allows you to create or modify a group. To collaborate with an entire group you share the ability to edit the students included in the cohort and the effective dates. Read only allows anyone in the group to use your cohort, but not edit it. Only the group owner may modify individuals within the group.

1. Open the Cohort Manager as shown in 4 – Managing your Cohorts.

2. Click the right side of the orange share button [icon] and select "Share with Group" from the dropdown.
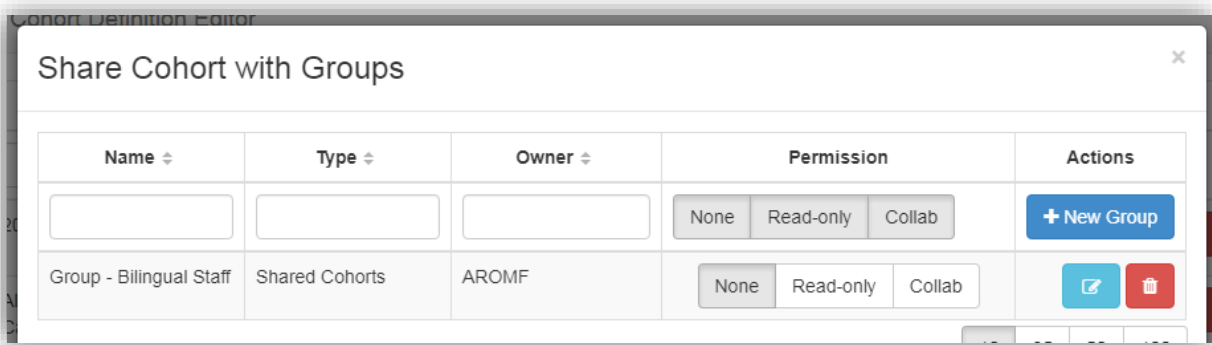
3. To modify an existing group for which you are the owner, click the edit button [icon] .

4. To create a new group, click the new group button [+ New Group] .
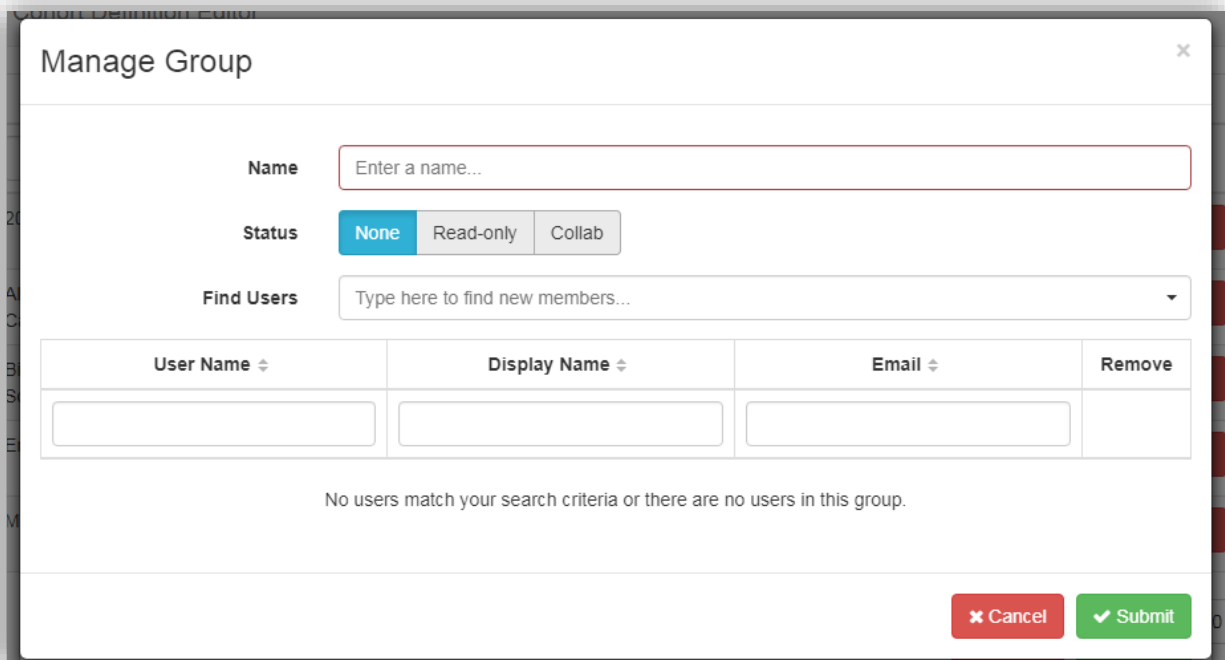
5. Type a unique and meaningful group name. Do use the *My Group* or *Group A* because there is no additional description for groups. Place the detail of group composition in the group name.

6. Add members by typing the staff name. A minimum of 3 letters must be provided for the search to return.

7. Click SUBMIT.

<div style="border: 3px solid red; padding: 10px;">

<mark>Cohorts may identify students by their membership in groups or contain protected information regarding students. Cohort data should be handled as sensitive student data.</mark>

Data Disclaimer
The Department of Public Instruction (DPI) has made a reasonable effort to ensure that the attached data/records are up-to-date, accurate, complete, and comprehensive at the time of disclosure. These records reflect data as reported to this agency by the educational community we serve for the reporting period indicated. These records are a true and accurate representation of the data on file at the DPI. Authenticated information is accurate only as of the time of validation and verification. The DPI is not responsible for data that is misinterpreted or altered in any way. Derived conclusions and analyses generated from this data are not to be considered attributable to the DPI. Willful intent to alter and intentional tampering with public records is punishable under s. 946.72, Wis. Stats. Offenses against computer data and programs are punishable under s. 943.70 (2), Wis. Stats.

</div>