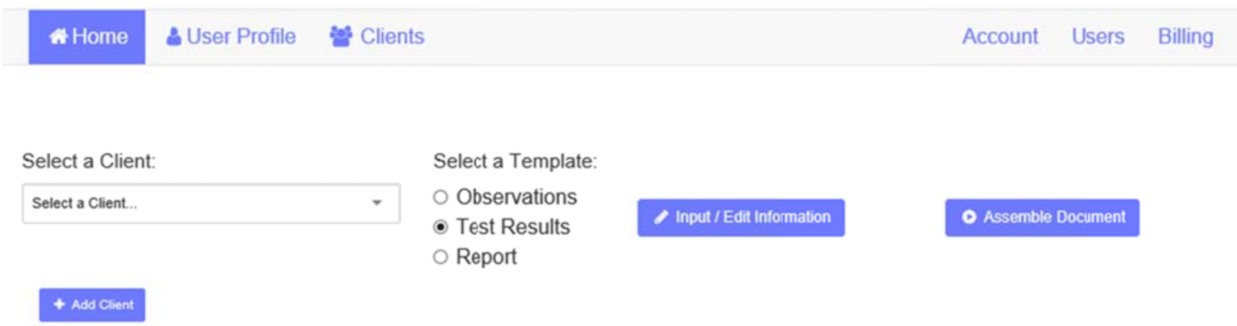
Preparing an Appendix of Test Results

We recommend using the "back-to-front" approach for writing assessment reports. By this we mean that you should enter the data needed to prepare the Appendix of Test Results, then enter Observations, and then prepare the Report. By entering the Tests in the Test Results template you will also be populating the list of Tests on the front page of the Report. The Appendix of Test Results that is generated by the InsightFill system organizes and highlights information that you will use when writing the report. You can create the Appendix of Test Results as follows:

1. If you are not already on the **Home** page, click on the **Home** option in the Navigation menu.

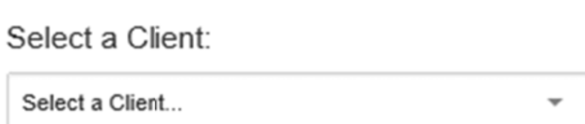


The **Home Page** is the place where you will spend the most time. From this page you can create a new client, complete an interview or assemble a document. There are typically 4 steps:

a. Either add a client **or** select an existing client
b. Choose one of three templates
c. Input/edit information about the selected template
d. Assemble a document

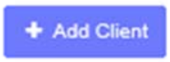
The fields on the **Home Page** are organized, left-to-right in the order that you might work on a document.

On the left side of the Home Page is a field that allows you to select a Client if you wish to re-use the data for that client.



You can select a client by clicking on the down arrow to the right of the field or by clicking into the field and typing the last name of the client. The names are sorted by last name. Usually you only need to type a few characters of the last name to hone in on the name you are looking for, but you can also use the scroll bar to navigate to other items in the list. Note that underneath the client name it displays the date and time that the information for that client was last updated.

2. If you want to add a new client to the list of available clients, simply click on the **Add Client** button that appears below the **Select a Client** field.

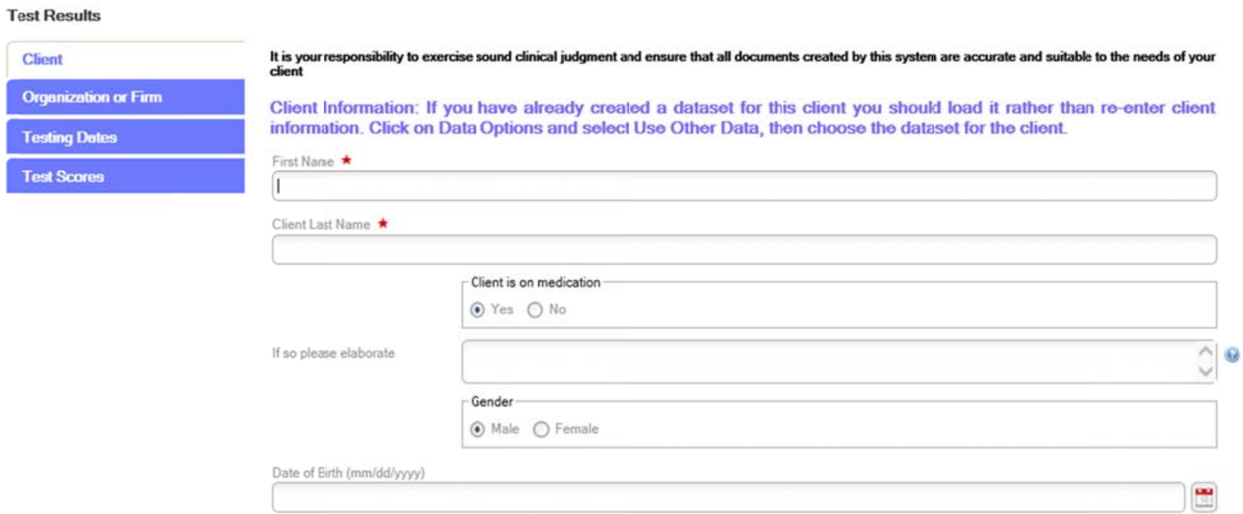


When you do that, a new page appears that allows you to enter the client's first and last name and a short description of what you are doing for the client (e.g. an assessment for July 2014).

After entering the first and last name of the client and a brief description, click on the **Save** button. The **Home Page** will be redisplayed and the client that you just created will be preselected in the **Select a Client** dropdown

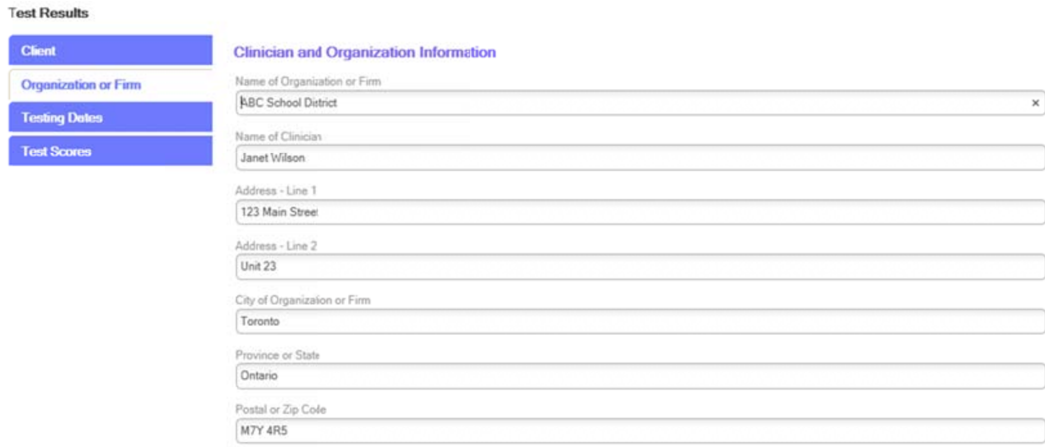
3. Choose one of the three radio button options from the **Select a Template** field: **Observations**, **Test Results** and **Report**. The default option is **Test Results**. Select **Test Results** if it is not already selected.
4. Click on the button labeled "Input/Edit Information": 

5. The **Appendix of Test Results** interview is displayed. The interview uses a wizard style that has a series of tabs in a column on the left. You can navigate through the interview using **Next** and **Back** buttons that appear near the bottom of each page or by clicking on one of the tabs on the left. The first tab of the Test Results interview is the Client tab.
6. You should start by entering information on the **Client** tab. If that tab is not already selected, please click on the **Client** tab.



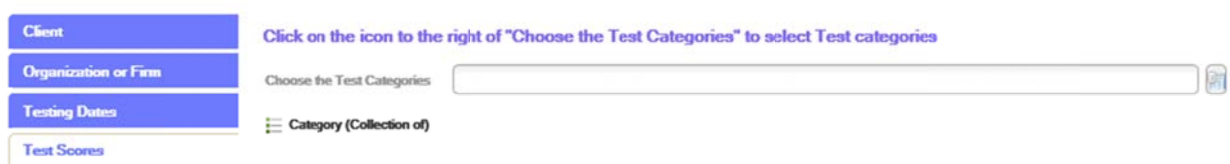
7. If you have previously entered information for the same client, that information will be displayed on the screen.
   TIP: You can tell whether the information has been loaded for a client by clicking on the Client tab. If the client's first name and last name fields are blank, then it means that you have not loaded the existing client data. The asterisks beside the last name and first name fields mean that those two fields must be filled in before you can assemble a document. If the first and last name fields are filled in, it means that you have already loaded the information or you have typed in values.
8. Complete the information about the Client. For the Client's **date of birth** you can either type the date in "mm/dd/yyyy" format in the field or use the calendar icon on the right. Some of the information about the client's gender, age and school information is used to control language and options that are made available when preparing other documents, so you should endeavor to fill in as much information as possible on the Client.
9. As you work your way through the interview, please note that the system automatically saves your answers periodically (once every minute). If you are entering a substantial amount of data, you can also save data by clicking on the **Save Data** button located near the bottom of your page:
   Save Data
10. Complete the information in fields on this interview. You can navigate through the interview by completing the information on each tab. You can move to the next tab by clicking on the Next button at the bottom right and you can go to the previous tab (if there is one) by clicking on the Back button at the bottom left of the page. You can also click on any tab to move directly to that tab. Notice that your profile information has been entered automatically from the User Profile that you completed earlier.

11. You can either click on the **Next** button or click on the **Organization or Firm** tab to go to Organization or Firm page. Usually, you don't need to change anything on this page since it shows you the information that was entered in your User Profile.

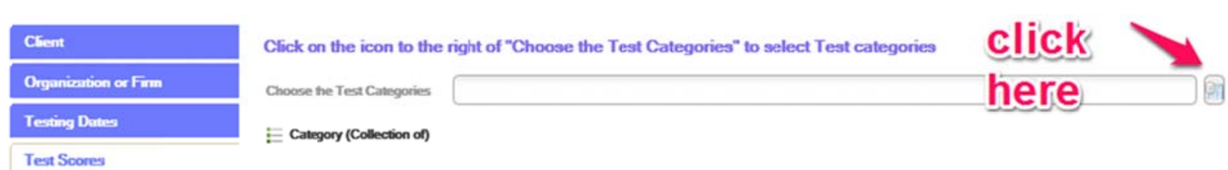


12. Click on the **Next** button or on the **Testing Dates** tab to move to the next tab. Enter the date(s) when testing was performed.

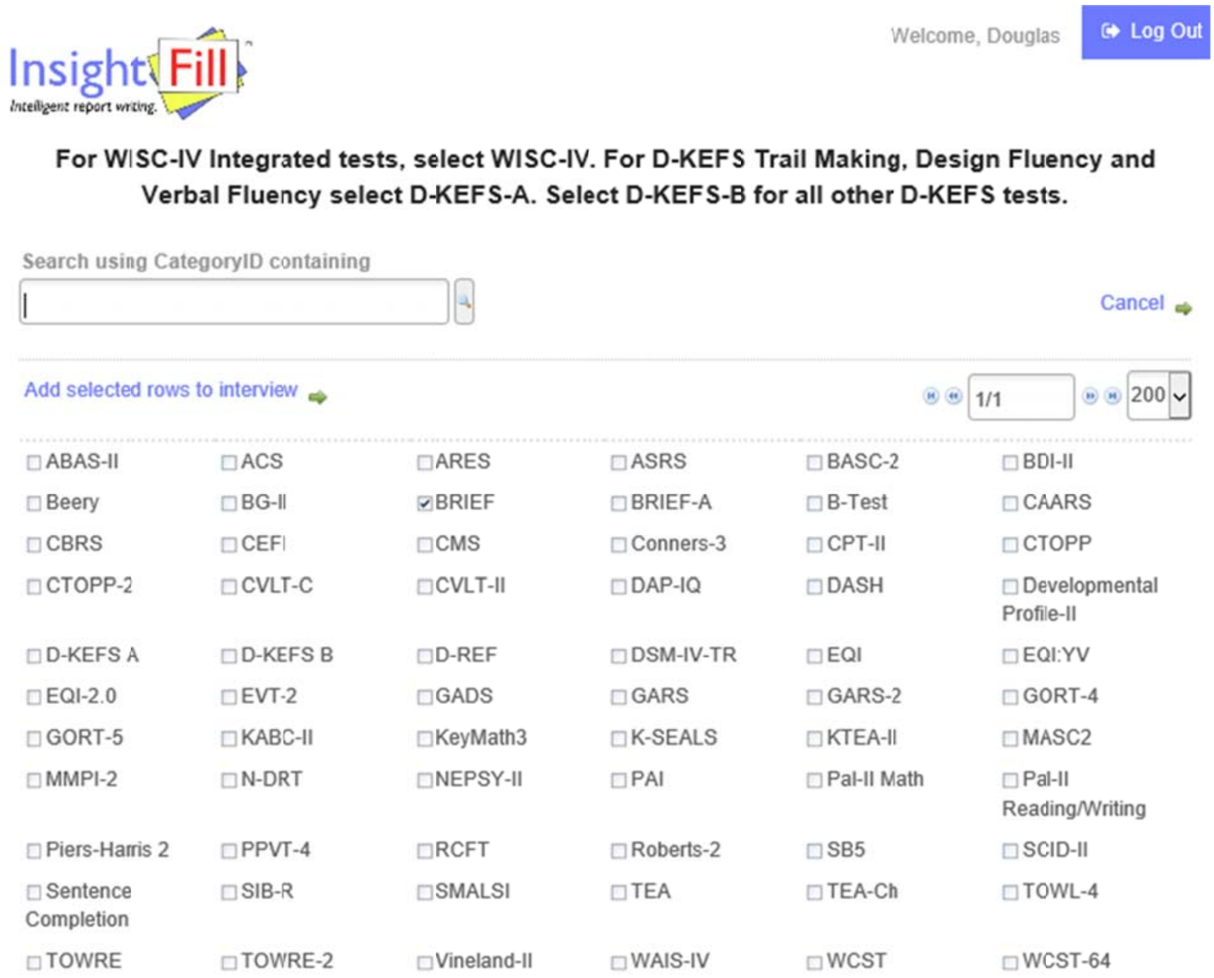
13. When you are finished entering information on the **Testing Dates** tab, either click on the **Test Scores** tab or click on the **Next** button.



14. You will enter Test Scores by first selecting the main categories (e.g. NEPSY, WISC-IV) and then entering a table for the sub-tests that were administered within that category. To choose the Test categories click on the icon ( ) that appears to the right of the "Choose the Test Categories" field.



15. The following dialog appears allowing you to select the Test categories:

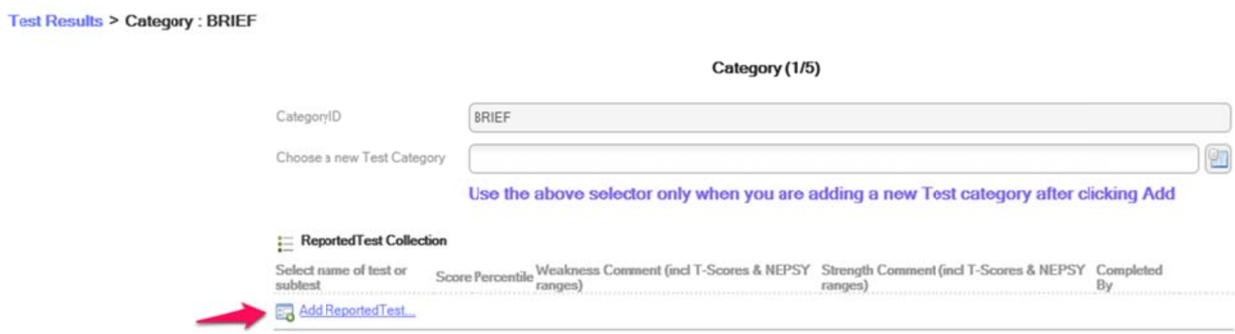


NOTE: after you have clicked the desired tests, you MUST click on the "Add selected rows to interview" button. The Save Data button near the bottom of the screen saves interview data that has been entered but you also have to click on "Add selected rows to interview" in order to continue with the next steps for entering test scores.

16. Check as many checkboxes as are applicable. The message in bold text explains which categories to select for **WISC-IV** and **D-KEFS** tests: For the **WISC-IV Integrated** tests, you should click on the **WISC-IV** checkbox and you will be able to select the Integrated tests within the **WISC-IV** table by using the tests starting with "Int" in the dropdown. Since there are over 100 **D-KEFS** subtests, they have been split into two sub-groups **D-KEFS A** which includes Trail Making, Design Fluency and Verbal Fluency; and **D-KEFS B** which includes all other **D-KEFS** tests. When you have chosen

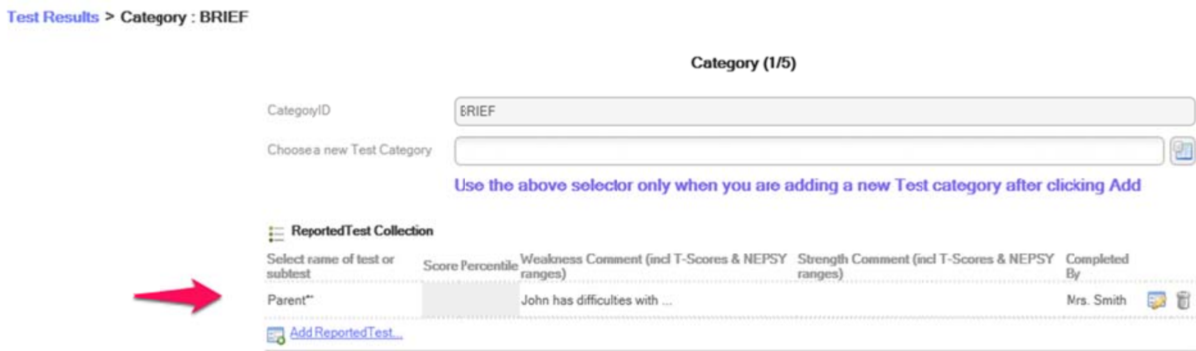
the desired categories, click on the link: Add selected rows to interview at the bottom or top of the page. This will add the selected tests and return to the main interview which now looks like this (in this example, we have only selected 3 categories for illustration purposes; typically you will select several more):

17. Notice that the row beside the Choose the Categories prompt says "**3 item(s) selected**" in this case. It will display how many checkboxes you've checked off. The next step will be to select each Category and enter one or more rows of information in a grid. First we will select the BRIEF category by clicking on the Category: BRIEF link and the following table appears:



You should ignore the box that appears near the top with the prompt "Choose a new Test Categories". You should already have selected the test categories using steps 14 and 15 described above.

18. Click on the **Add ReportedTest** link to add a new blank row to the table. The example below shows a newly added row. In the case of the BRIEF test, the Score and Percentile columns are irrelevant so they are grayed out. The Completed By column is relevant and has been completed.



19. You can enter as many rows as you want in the table (in the above example, the test could have been completed by both parents in which case, you would enter a row for each parent).
20. For Tests like **D-KEFS**, there are many more subtests to select from. For **D-KEFS** tests, the **Score** and **Percentile** columns will be relevant and the **Completed By** column is grayed. The **Strength Comment** and **Weakness Comment** columns are optional. Another feature of the **D-KEFS** tests as with most tests where the **Score** and **Percentile** columns are relevant is that if you enter the **Score** (whether it be standard, scaled or Z score), it will auto-complete the **Percentile**. So in the following screen shot the value 11 was entered in score, resulting in the value 63 automatically going into the Percentile column:

Tip: If you select a subtest and the cursor skips past the Score column either tab backwards to the Score column (using Shift-Tab) or click in the Score column to enter the score, then tab to the Percentile column to let the system calculate the Percentile from the Score that you entered.

21. After you have entered the relevant rows for a test category, click on the link near the bottom of the page called "**Confirm**". **(Do not use the option called "Confirm and Next".)**

22. You will be returned to the interview with the Test Scores tab selected. You can repeat steps 16-20 for each additional Category that was selected in Steps 14-15.

TIP: If you have entered some, but not all, test scores and you are interrupted or need to come back later, we recommend that you click on the **Save Data and Exit** button near the bottom of the page. This will save all answers and close the interview.

23. Here are some notes about entering data in the table:
    a. The first column is a dropdown list. You can select a value either by typing the first few characters of an option or by clicking on the down arrow to the right of the field. ***Tip: You can type one or two characters of an option in the list and then use the down arrow key to scroll to the option you want. When typing characters in the search, use all lower case letters. You can enter spaces in the search but not special characters such as dashes.***
    b. Here are some additional keys you can use while selecting choices from dropdown lists:
        i. ***ESC key*** – will hide the list and not select an item – cancel functionality
        ii. ***Up and down arrow keys*** - these also allow for navigation within the list – for instance you may type "pic" to hone and then move up or down one or two items to select the exact one you want.
        iii. ***Down arrow key*** - will also show the list if it is not showing.
        iv. ***Enter key -*** will do the same as the tab key – select item and hide list.
    c. For **CVLT-C** and **CVLT-II** tests you will enter **Z Score** values that range from -3 to 3. If you enter a fractional value (such as -0.5) you must enter a ***zero or other number in front of the decimal point***; otherwise you will get an error message saying that you must enter a number. You should not enter a + sign before positive values, but you still have to enter a zero or other number in front of the decimal place for positive fractional values.
    d. **N-DRT** tests do not use the standard or scaled or Z Score conversions so for **N-DRT** tests you will have to enter both the score and percentile values manually based on what the test report shows.
    e. Some **NEPSY** tests use a standard or scaled score and in those cases, the Score and Percentile columns are visible (not grayed). Other **NEPSY** tests use ranges for scores and percentiles in which case the Score and Percentile columns will be grayed out and you will have to enter the ranges in the Weakness and/or Strength columns, as the case may be.
    f. You can optionally enter (or *dictate* using your dictation software -- it may take a second or two seconds for the cursor to activate if you are dictating) a **Weakness Comment** or **Strength Comment** in the appropriate column. Remember, clients that we see are more than just their numbers! So, this option gives you flexibility to add in qualitative comments. For instance, if your client got a strong score on a writing sample test but his handwriting was terrible, you could qualify that score by augmenting it with a statement about illegibility.
    g. For some tests, such as those using T-scores or base rates, you should enter any scoring information as part of the Weakness Comment or Strength Comment rather than in the

score or percentile columns. For example, see the screen shot below (in the example below, the user has decided to manually enter the T-Scores in brackets, but that is optional and is a personal preference):

	ATTENTION SPAN	Lowest Extreme	Borderline	Low Average	AVERAGE	High Average	Superior	Very Superior
	General Attention Span							
Conners' 3rd Edition Parent **	This questionnaire, which is completed by a parent, surveys various attentonal components. It is discussed in more detail in the report (Mrs. Smith).	Inattention; minor learning problems; executive functioning (T=71/61/64)				Neither hyperactive/impulsive; compliant; peers		
Conners' 3rd Edition Parent **	This questionnaire, which is completed by a parent, surveys various attentonal components. It is discussed in more detail in the report (Mrs. Jones).	Inattention; learning; executive functioning; mild defiance; mild peers (T=65/73/73/60/62)				Neither hyperactive/impulsive		

h. For Base Rate differences that are significant (i.e., less than 15% or an even greater split), these can be recorded in the Weakness column as a comment. Base Rates are also available on the Test dropdown menu (e.g., VCI > PRI).

WISC-IV VCI > PRI	Base Rate: The difference between the Verbal Comprehension Index and Perceptual Reasoning Index is measured. Wide discrepancies (i.e., those that occur in less than 10% of the population) make it particularly hard for participants to coordinate their abilities.	Base rate = 0.1%		

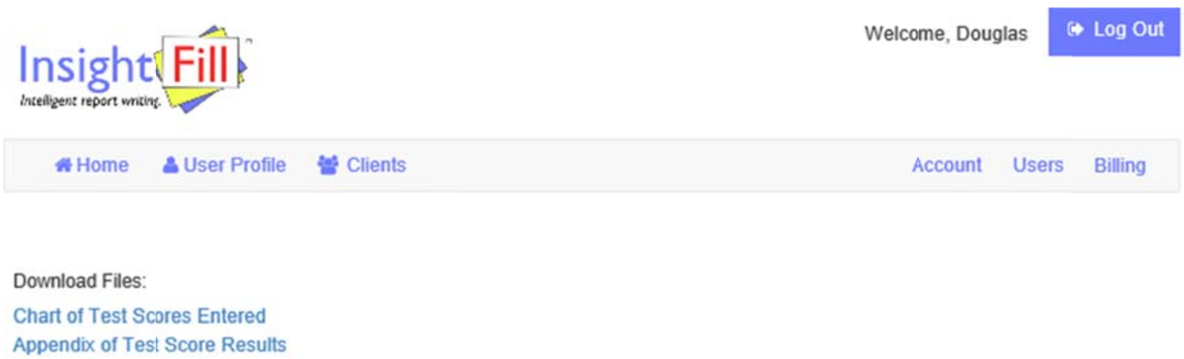
i. The software also takes into account observational scores such as commission errors on the **WRAML-2**. However, these, too, should be entered as comments in the Strengths or Weaknesses columns.
j. The **Completed By** column is grayed out except in cases where you are entering tests that have been completed by a parent, teacher or informant. You should enter the name of the person who completed the test.
k. You can select and enter test rows in any order that you wish. They will be sorted into an appropriate order in the Appendix document.
l. You can select the same test more than once (e.g., if the same test was administered to more than one parent or teacher of it was administered to the client more than once)
m. You can enter as many rows in the table as you like.
n. Even for a single test such as **CPT-II**, you still need to select an option from the Test Name dropdown (i.e., don't leave it blank).
o. The system will also plot scores and comments into relevant columns in the output document.
p. If you want more space to enter test information you can click on the detail icon to the right of any row ( ). A screen like this will appear showing the row information in a dialog view:

Test Name	Comprehension of Instructions
NEPSY Score	34-40
Percentile	78
Weakness Comment	
Strength Comment	

In this view, fields that are not relevant to the type of test you are completing are not displayed. If you use this option you will need to click on the link for the test category to return to the table view.

q. You can delete a row by clicking on the trashcan icon to right of the row ( ).

24. When you have entered all test score results, at the bottom of the interview (you may need to scroll down), click on the Save Data And Exit icon that appears near the bottom right of the interview page.
25. You should now see the **Home Page**. The interview information has been saved and the client should still be selected. To assemble the output documents, click on the **Assemble Document** button**:** Assemble Document
26. When the system is finished assembling, two links will appear:



   a. **Chart of Test Scores Entered**: this document summarizes the data that was entered. This can be used to verify that you have entered the correct information but you may not need to download or save this document.
   b. **Appendix of Test Score Results**: this document sorts and plots the information into a format that can be attached to the assessment report.

27. You can click on the links to open either or both of the documents that were assembled. A message may appear near the bottom of your browser giving you the option to open or download the file (this may depend on what browser you are using. Internet Explorer and Chrome may display a button to open the downloaded document. Users of Safari may not see a button, but the document will appear in your Downloads folder so you may need to look for it there. If you select to open the file it will be displayed in the word processor that is specified for opening docx files on your computer (Microsoft Word is recommended for highest fidelity particularly for Appendix of Test Results).

    Note: when you review the assembled document in Word, some items will be sorted in multiple categories (e.g., Working Memory and Attention). You can always choose the best fit and delete the row you don't need, or keep both rows or move a row to another area. The whole document is fully editable at this point using Microsoft Word.

    In the output document, any composite scores (e.g., Verbal Comprehension Index) are displayed in bold and any tests which the composite score is based on, if relevant, are grouped below the composite score. WISC-IV Integrated tests are displayed in blue text and are grouped below the related WISC-IV test if both are included in the report.

Here are a couple of common edits that you might perform:

To delete a row from the table:

Position your cursor in the margin to the left of a row and right-click. Select the **Delete Rows** option from the Right-Click menu.

To merge some cells in a row in a table

Sometimes you will want to add a comment in an area (e.g. Weakness or Strength columns) but the columns are currently split into 3 on either the left side or right side of the table. To add a comment where there are currently 3 columns, position your cursor in the first cell that you want to merge. Hold down the SHIFT key and click anywhere in the last cell that you want to merge. Right-click in the selected cells and select the option **Merge Cells**. The separate cells will be merged into a single cell and any contents of the previous cells will also be merged to become the content of the new cell.

28. You should save the edited version of any Microsoft Word document on your computer in any folder that you choose (you can regenerate the original unedited version from the InsightFill website but it will not contain any edits that you have made to assembled document in Word). **TIP:** ***You should develop a convention about how and where you save and name your documents so that you can easily find the version that you have edited after downloading it from the InsightFill website. We recommend creating a main folder on your computer or on a shared folder (e.g. Reports). Then, create a subfolder for each client (e.g. Smith, John). After you assemble and open each document for a given client, use the Save As feature in Word to select the appropriate folder and give the file a meaningful name. You can store the Appendix of Test Score Results, Observations and Report documents in the same client folder so that you can easily locate and reopen a file at any time. If you organize the files as described above, you can go to the top level Reports folder and use the Search feature on your computer to search for files in any of the subfolders.***