Appendix K

Guide to Field Management System (FMS)

2000 NAEP

Instructions for Using the Field Management System

The Toshiba 225 Laptop Computer

E-Mail Quick Guide

Instructions for Using the NAEP 2000 Field Management System

TABLE OF CONTENTS

		PAGE
1.	OVERVIEW	3
2	STARTING THE PROGRAM	3
3	BASIC FEATURES OF THE SYSTEM	4
3.1	THE VIEW OR MAIN SCREEN	4
3.1.1	FILE	5
3.1.2	VIEW	5
3.1.3	TRANSMISSION	6
3.1.4	REPORTS	6
3.1.5	PROJECT	6
3.1.6	HELP	7
3.2	SELECTING THE REGION OR TEST DATA	7
3.3	USING THE VIEWS	7
3.4	GRADE AND PUBLIC/PRIVATE SELECTION	8
3.5	GENERAL EDITING INFORMATION	9
3.6	BACKING UP YOUR DATA	10
3.7	EXITING THE FMS	11
4	VIEW, DISTRICTS	12
4.1	PURPOSE	12
4.2	SELECTING A DISTRICT	12
4.3	DISTRICT INFORMATION	13
4.4	CLOSE EDIT SCREEN	13
5	VIEW, SCHOOLS	14
5.1	PURPOSE	14
5.2	CALLING UP THE SCHOOL EDIT SCREEN	15
5.3	REFINING SCHOOL SELECTION - GRADE AND SCHOOL TYPE	16
5.4	SEARCH BY ID NUMBER	16
5.5	SCHOOL EDIT FORM	17
5.6	THE GRADE INFORMATION PAGE	17
5.6.1	STUDENT SAMPLING	20
5.6.2	TRANSCRIPT STUDY	22
5.6.3	NAEP/TIMSS LINK STUDY	22
5.6.4	SHIPMENT INFORMATION FIELDS	22
5.8	SESSION EDIT SCREEN	23
5.8.1	SESSION ID	23
5.8.2	RECORDING SESSION INFORMATION	24
6.	TRANSMISSION	25
6.1	TRANSMITTING AND RETRIEVING DATA	25
6.2	RETRIEVE DATA ONLY	27
7	REPORTS	28
7.1	VIEWING REPORTS	29
7.2	MOVING AMONG REPORT PAGES	30
7.3	FILTERS AND SORTS	31
7.4	REPORT 1: SUMMARY TALLIES	31
7.5	REPORT 2: SCHOOL STATUS LISTING	32
7.6	REPORT 3: ASSESSMENT SCHEDULE	32

8 PROJECT 34
8.1 SCHEDULE 34
8.2 SHIPPING 35
8.3 EA ROSTER 36

EXHIBITS

Page

1 School Level Status Codes 19
2 Example of Report #3 33

INSTRUCTIONS FOR USING THE NAEP 2000 FIELD MANAGEMENT SYSTEM

1. Overview

You will report the results of the work in your schools by entering data into the Field Management System (FMS) and transmitting weekly to the home office either by phone link or by mailing a diskette. You will be provided with a laptop personal computer that you will use to sample students and update the FMS data on numbers of students sampled, excluded, absent, and assessed.

The Field Management System was used by the recruiting/scheduling supervisors to record the result of their activities and, thus, contains some features and options that you will not necessarily be using during the assessment field period. The FMS, which will assist you in managing the assessment activities for the 2000 NAEP assessments, operates on Windows 95 platform. The system has been designed to help you:

- Update school status codes and assessment dates, if necessary;
- Draw the sample of students in each school;
- Report on the number of students sampled, excluded, absent, and assessed in each school;
- Run reports to review information in the system; and
- Transmit information to the NAEP office on a weekly basis.

2 Starting the Program

We recommend that you use the AC adapter whenever possible to save the computer's battery. If you want to use the external mouse, **be sure that the mouse is plugged in before turning on the computer**.

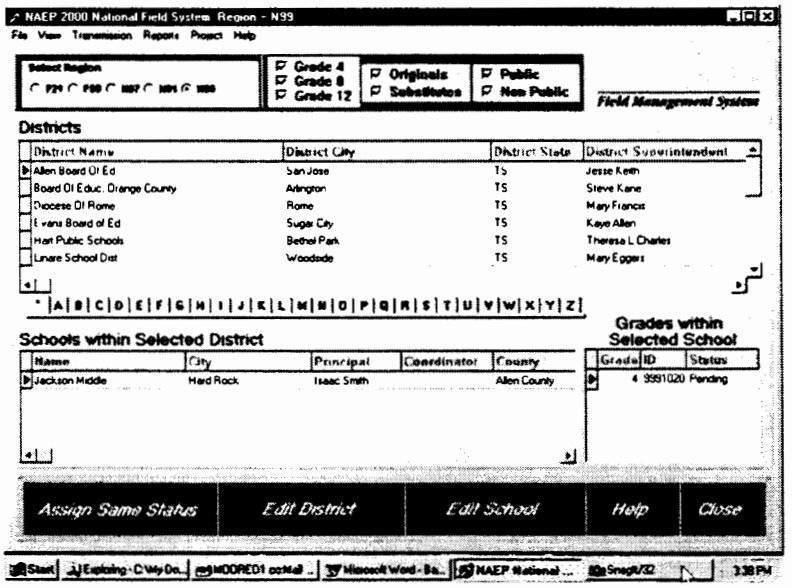
After the computer goes through its internal check, it will load Windows95 and take you to the Desktop.

Double click on the 2000 NAEP FMS icon to start the Field Management System.

3 Basic Features of the System

3.1 The View or Main Screen

When you access the FMS, you will see the View as presented below showing the list of districts from which you may make a selection. If you change the View, for example, to be that of the list of schools and then exit the system, the View you will see when you access the system the next time will be that of the list of schools. Since most of your work in the system will involve working with the district or school data, the "main screen" concept has been replaced in this version of the system with the View.



The View contains:

- A menu bar from which you will make selections;
- The dataset that has been selected - your region or practice test data; and
- The View that you used in your last session with the system (Districts, Schools, or NAEP IDs).

By clicking on the various menu bar selections, you will be able to access the components of the FMS. These are outlined and briefly explained below. Instructions for using the routines are given in the sections specified.

File	View	Transmission	Reports	Project	Help
Backup Exit	Districts Schools NAEP ID	(Goes directly to transmit & retrieve dialog box.)	(Goes directly to report menu screen)	Schedule Shipping EA Rosters	Version Help

3.1.1 File

Backup: Select this option to make a backup copy of your school/district dataset to a diskette. (Section 3.6)

Exit: You should always choose this to close the FMS before shutting down the computer. (Section 3.7)

3.1.2 View

Districts will present you with the list of districts from which you can choose. The district edit screen contains the district name, address, and contact information. Fields are available for information on the district test director or other district contact information. (Section 4)

The recruiting supervisor could assign a status of Cooperating, Interim Refusal, District Refusal, or Pending automatically to all selected schools within the district in this View.

Schools will present you with the list of sampled schools from which you can select one school and then move to its school edit form which consists of three pages (Section 5):

- **School Information.** General information about the school including name, address, principal, and test director.
- **Grade Information.** The sampled grades, each on a separate tab, and fields indicating the school's participation status, grade enrollment, and parent letters requested. This page contains the student sample selection routine as well.
- **Session Information.** The session screen will list the sessions scheduled for the school. On it you can record the assessment date and, if obtained, the time the

session(s) will be conducted. This is where you will record the results of the assessment activities for each participating school.

NAEP ID gives you the opportunity to select a school by entering its NAEP ID number. (Section 5.4)

3.1.3 Transmission

This option takes you directly to the Transmit and Retrieve dialog box. This is the option you will use to send data to NAEP electronically via modem. If necessary, updates will be downloaded at the same time. When necessary, within this routine is the option of downloading data with no corresponding upload. (Section 6)

3.1.4 Reports

The reports were developed to help the recruiting supervisor monitor the progress of assessment preparations. Report 3 will display the assessment schedule as well as numbers of students assessed for a region. (Section 7)

3.1.5 Project

Schedule. You will use this to record information on your travel plans during the assessment field period. (Section 8.1)

Shipping. It is not likely that you will use this feature of the system given the length of the field period and shipping schedule.

EA Roster. As individuals were being considered as candidates for EA positions, information was recorded here. (Section 8.3)

3.1.6 Help

Version: This will give the FMS version number.

Help: Click to see reminders of how to use the system (based on information from these instructions).

3.2 Selecting the Region or Test Data

Your system is loaded with two sets of data: 1) the sampled schools in your regions and their districts, and 2) a set of fictitious schools and districts that are called the test data.

Select the region you want to work on by clicking on the region number (or the small button in front of it). If you want to practice with the test data, select region N99, which contains the test data.

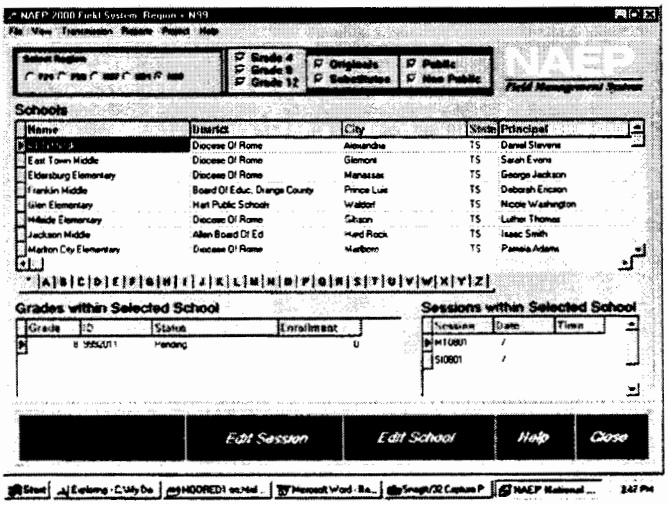
You should always select the test data when you are practicing with the system, especially as you become familiar with the editing techniques to be sure that no changes are made to your regions' data.

To remind you that you are working with the test data, instead of a valid region number, number N99 will be displayed at the top of the screen.

3.3 Using the Views

The Views are selection screens that give you access to: (1) the school districts, and (2) the sampled schools. Except for the NAEP ID search field and the filters (grades, originals/substitutes, and public/non-public), none of the fields displayed can be edited in the Views. The school View is shown below:

A school can be located on this list by selecting one of the alpha tabs under the list of schools or by scrolling down the list.



Click on the scroll bar beside the list of names to scroll down one screen listing.

Access the school's edit screen by either double clicking on the school name or, with the name of the school highlighted, click on *Edit School* (or *Edit Session*).

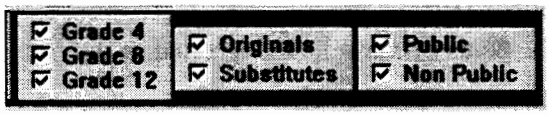
Click on an alpha tab under the list of schools to see a list of schools beginning with that letter. Click on the first tab (with the asterisk) to return to the list of all schools.

Reminder: The fields on this View are read only. If, for example, you click on a school's disposition on this screen, even though it becomes highlighted you cannot change it here. You must go to the school's edit screen to make any changes or corrections to a school's information.

3.4 Grade and Public/Private Selection

All active schools are shown on the list of schools as indicated by the checks beside the grades and school types (originals/substitutes and public/nonpublic) as shown below. If you want, you can restrict the list to only schools of one grade level and/or only private or public schools.

Restrict the list to one grade by clicking on the grades NOT wanted (since the default is for all grades to be selected for viewing). For example, to see only the 4th-grade schools, click on 8th Grade and 12th Grade (either the box or words) to delete the check marks.



Similarly, to see only the private schools, click on Public.

Note: Schools sampled for more than one grade will continue to be displayed even if you restrict the list to one grade level.

3.5 General Editing Information

When the mouse pointer is over a field and it changes to an I-beam, this indicates that you can enter or edit information if you click on this field. Note that when you place the mouse pointer over the name of a school (or any of the other school-related fields) in the Schools View, the pointer DOES NOT change to an I-beam. You cannot edit any of these fields in this View.

When a school or district edit screen first appears, the first field will be highlighted by default. **You can move from field to field by pressing the tab key**. Go directly to a field by moving the mouse pointer to the field and clicking once.

When you enter data, the system is in insert mode. All characters that you type will be inserted with the characters in the field moved to the right of what is being inserted. The only exception to this is within a telephone number field. If you edit a telephone number, the system will be in the overstrike mode.

If the entire contents of a field are highlighted and you begin to type, you will delete everything that is highlighted as you enter new data. You can recall the original contents of the field by pressing the Esc key before you move the cursor to another field.

To **cancel all changes** made on a screen before you leave it, click on *Cancel* at the bottom of the screen.

To **change one number** in an address, use the following steps:

- Place the I-beam to the left of the number to be changed;
- Click the left mouse button to place the flashing cursor to the left of the number;
- Press the Delete key to delete the number (to the right of the flashing cursor); and
- Type the correct number.

Similarly, you can **correct the spelling** of a person's name or of an address by placing the cursor to the left of the characters needing to be replaced and press the delete key to delete the characters. Then, type in the correct letters.

To **change a number in a phone number**, place the cursor over the number to be changed and click. The number will be highlighted. Move the cursor to the left or right, as needed using the right or left arrow keys. Type the correct number, which will replace the old number with the new one.

To **replace a whole word** and enter a correct word (a principal's last name, for example), place the pointer on the word (it will turn into an I-beam) and double click. This will highlight the entire word. As you begin to type, the word will be deleted and replaced with what you type. As noted above, if you make a mistake and want to recall the word deleted, press the Esc key before you move the cursor out of the field.

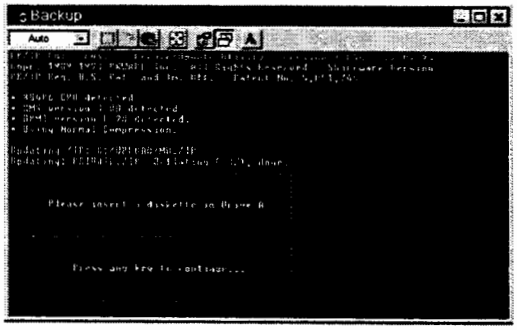
To **replace two or more words**, use the following steps:

- Click to the left (or right) of the words and hold the mouse button down as you drag across and highlight the words to be replaced; and
- With the words highlighted, begin typing the new text.

In the above procedures (replacing one or more words), if you want to delete the words, after highlighting the words, press the Delete key.

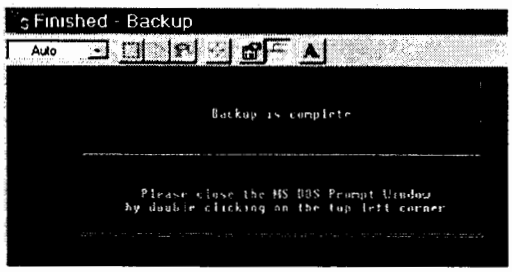
3.6 Backing Up Your Data

You can create a back-up diskette as a safeguard against losing information due to a system crash, or other incident. Select File, Backup at the main menu. The system will remind you that you will need a diskette to perform the backup.



The Backup window opens as the system compresses your data files and prepares them to be stored on a diskette.

When the files are ready, a message is displayed asking you to insert a diskette in drive A and press any key to continue.

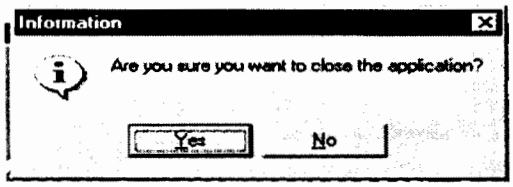


After your files are copied, another message notifies you that the backup is complete. Close the window by double clicking on the MS-DOS icon in the upper left corner of the window (next to the word Finished).

You may back-up your data as often as you like. At a minimum, it is recommended that you back up once a week. It is also a good idea to alternate between two diskettes as you back up.

Remember to label and date any diskette containing back-up information to prevent mix-ups.

3.7 Exiting the FMS

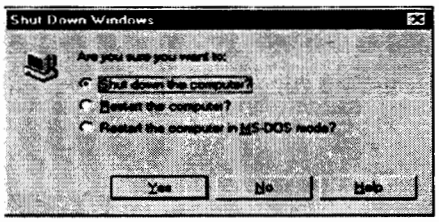


You should always exit the Field Management System by selecting File, Exit. As a fail-safe, a small dialog box opens and asks you if you are sure that you want to close the application.

Since Yes is the default, you can press the enter key to select this.

If you are ready to turn the computer off, it is a good idea to double check the Task Bar to see if there are any other applications open that you need to shut down.

To shut down the computer, click on Start on the Task Bar and move up to and click on Shut Down.



The Shut Down Windows dialog box appears as fail-safe. Since shutting down the computer is the default, you can press the enter key to say Yes.

The computer will turn itself off.

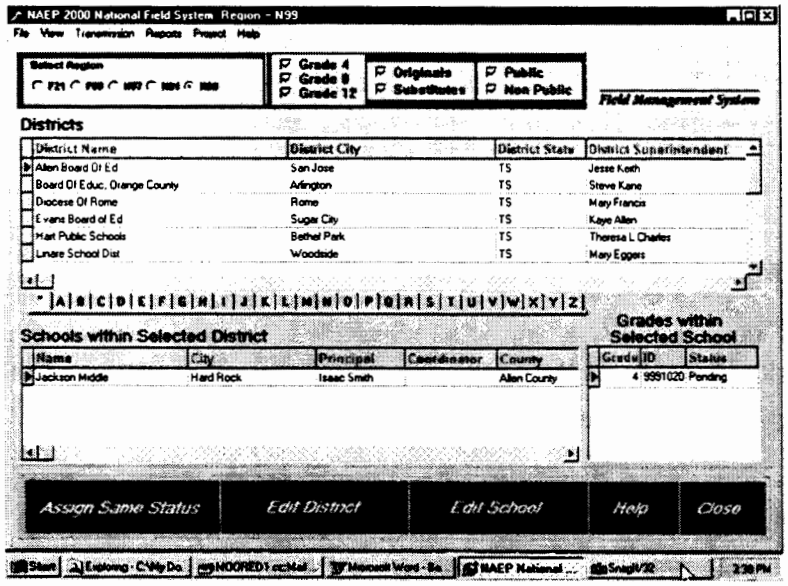
4 View, Districts

4.1 Purpose

This option allows you to quickly locate and select a district to view information such as: district-level name, address, and phone number; superintendent and district contact information; and district test director name, address, and phone. The schedulers used this option to update this information as well as to assign the same participation status to all sampled school grades in a district, when appropriate.

4.2 Selecting a District

The District View displays the following information. As you click on the name of a school district, the sampled schools in that district are displayed in the bottom half of the View.



By clicking on one of the alpha tabs at the bottom of the list of districts, you will get a list of districts beginning with that letter. The first tab has an asterisk (*) on it indicating that all districts will show in the list when it is selected. (This is the default setting.)

Click on the slide to move down the list. If there are more schools than can be displayed, you can scroll down the list of schools using the sliding button on the right.

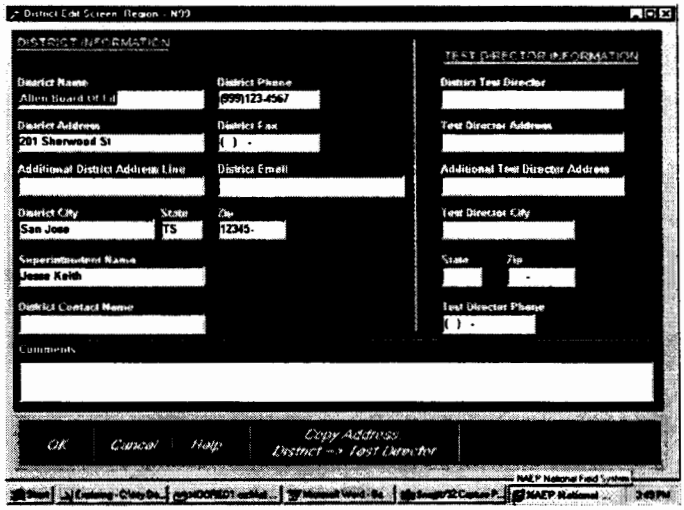
There are two ways you can access the District Edit Screen from the District View:

- Double click on the name of the district; or
- With the district name highlighted, click once on *Edit District* at the bottom of the screen.

If no district name is highlighted and you click on *Edit District*, the first district on the list will be selected. (Note the pointer to the left of the first district name on the list.)

4.3 District Information

The district screen contains general information on the district including the superintendent's name. During scheduling, the names of the district contact person and/or the test director may have been entered as well. Comments can be entered in the Comments window.



4.4 Close Edit Screen

Click on *OK* in the lower left of the screen. This will save your entries and take you back to the previous View. In a system such as this, you should always use one of the buttons provided as a way

of closing a window and saving any changes you may have made. In the system, each edit screen has a button labeled *OK* which you should use to close it and return to the previous screen. If you click on the X button at the top right, your changes may not be saved.

5 View, Schools

5.1 Purpose

Use this option to quickly locate a school from a list of all sampled schools in a region and select a School Edit Screen to view information or to make updates. Once a school is selected, the School Edit Form appears. This form is divided into three pages as indicated by the tabs at the top of the form. You can move from one page to the other by clicking on a tab.

The School Information page of the School Edit Form contains basic school information including the school's name, address, telephone number, and the principal's name. You can use the comments field to record any comments about the school that you find useful.

The Grade Information page is comprised of three tabs, one for each potentially selected grade for the assessment (4, 8, and 12). On these pages the scheduler recorded:

- The participation status information for each grade;
- The actual enrollment for each grade; and
- Noted whether the school requested parent letters and, if so, what type and how many.

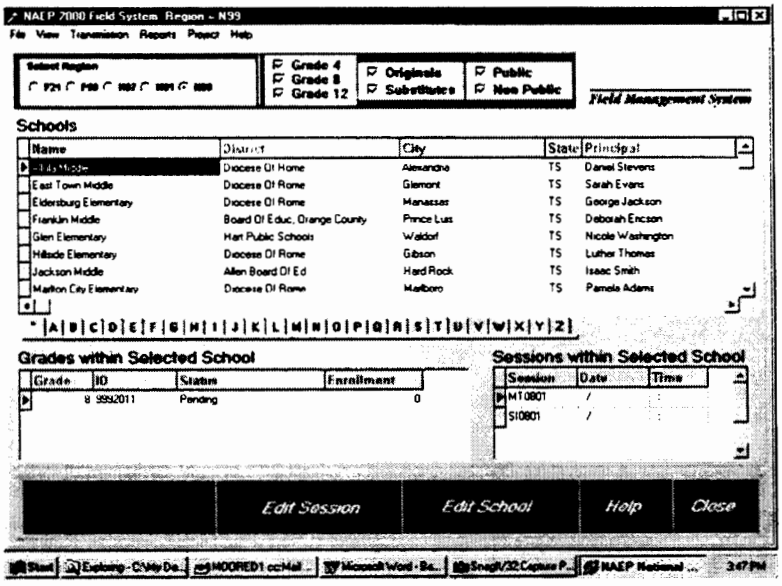
The Session Information page, is also comprised of three tabs, one for each potentially selected grade for the assessment (4, 8, and 12). The assessment dates should be recorded for each session. On these pages you can enter the results of the assessments by session including information about make-up sessions that were conducted.

5.2 Calling Up the School Edit Screen

There are several ways that you can access the information on a school. You can select a school:

- In a particular district from within the District View by double clicking on the school's name and go directly to the school's screen; or
- From a list of all active schools (View, Schools); or
- By its ID number using the NAEP ID View.

The School View is shown below:



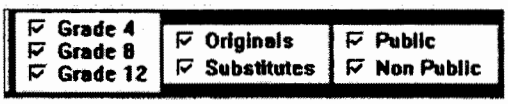
This selection window has several features that are similar to the District View described in Section 4.3. You can locate a school by:

- Clicking on the scroll bar on the right side of the list (or press the page down key) to drop down one window at a time;
- Clicking on the name of one of the schools and then, press the down arrow key to move down the list one line at a time; or
- Clicking on an alpha tab to get a list of all schools beginning with that letter.

If no school name is highlighted and you click on *Edit School*, the first school on the list will be selected. (Note the pointer to the left of the first school name on the list.)

5.3 Refining School Selection - Grade and School Type

If you prefer to see a list of only 4th grade schools, click on the box next to 8th Grade and 12th Grade to remove the check mark from their boxes. To see a list of 4th and 8th grade schools, there should be a check mark in the boxes beside both of these grade levels.



Likewise, you can restrict the list to private schools only by clicking on Public to remove the check from this box.

Note: Schools sampled for both 4th and 8th grade will be listed for both grades even if the list is restricted to one of these grade level.

5.4 Search by ID Number

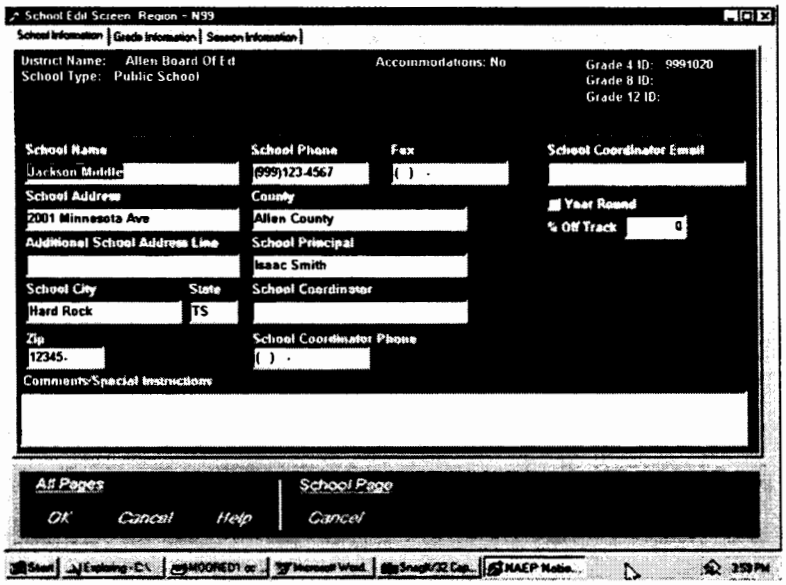
You can search for a school by its NAEP ID number by selecting View, NAEP ID. Enter the identification number of the school that you are searching for and, as you begin to type the number, you will notice that the list of schools will be reduced to only those that match the characters that you type in. Thus, you could use this feature to look for all schools that meet a certain ID characteristic. For example, if there is more than one PSU in the region, entering one of the PSU numbers in this box will result in your only seeing a list of schools in that PSU.

To reset the list in this View so that you can see all schools, delete the numbers in the Search window.

5.5 School Edit Form

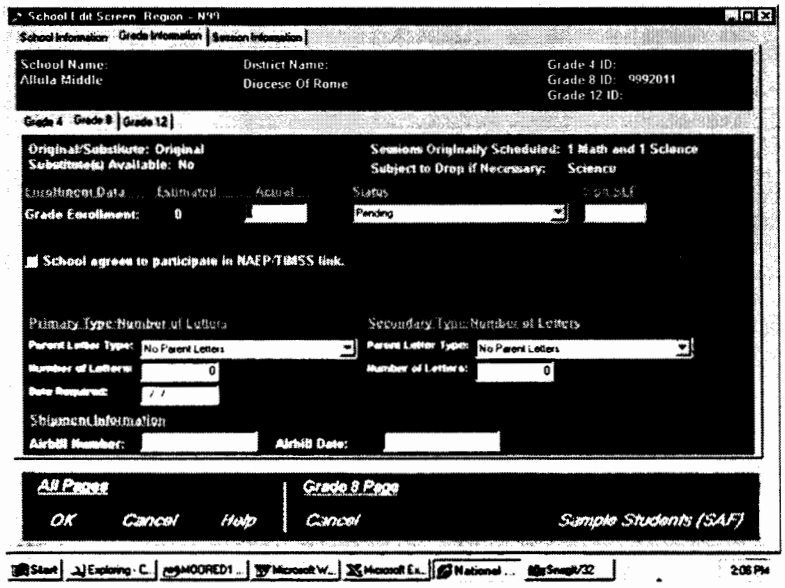
The school information screen contains general information about the school. The school's district name and its NAEP ID(s) are displayed at the top of the screen. The school type, in the upper left corner, reminds you that his particular school is a public (vs. private) school. Also included across the top is information on accommodations allowed in the school and concerning the school's involvement in State NAEP, PISA, or CES.

If this school is not in State NAEP, but is in a district with other schools sampled for State NAEP, this is also noted for your information.



5.6 The Grade Information page

There are three tabs at the top of this page, corresponding to each of the potentially selected grades in the study (4, 8, and 12). If the school is selected for only one grade (as are most schools), the pages under the other tabs will be blank.



Identifying information on the Grade Information page includes:

- The school name;
- The district name;
- Sampled grade(s);
- The NAEP ID number(s);
- Whether this is a substitute or original school; and
- The estimated grade enrollment.

On this page, the scheduler recorded information about:

- The participation status of the selected grade in the school;
- The actual number of students in the selected grade;
- The willingness of 12th grade schools to participate in the Transcript Study; and
- The parent letters requested by the school.

The status codes are explained in Exhibit 1.

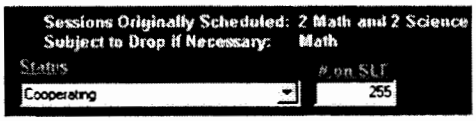
Exhibit 1. School-Level Status Codes

SCHOOL-LEVEL STATUS CODES

CODE	EXPLANATION
Pending	The school has not been contacted (though you may have spoken with the district).
Cooperating	The school will definitely participate in the assessment.
Interim Refusal	The school has indicated that they do not wish to participate, but there is a possibility that they will agree.
School Refusal	The school has said that they will definitely **not** participate in the assessment. **Record grade enrollment information**
School by District Refusal.	The school district has refused for this one school to participate. Other sampled schools in the district will cooperate. **Record grade enrollment information**
Closed	This school has officially closed.
Has Grade, No Students	This school has the sampled grade, but no eligible students this year.
No Sampled Grade	This school does not contain the sampled grade.
Not a Regular School	This school does not offer a traditional academic or comprehensive educational program to the general student population. Examples of such ineligible schools would be Special Education Schools, Vocational schools, and Alternative Schools.
Ineligible, Other	You should talk with your supervisor before using this code.

5.6.1 Student Sampling

After you have verified that the list of students (SLF, computer-generated list, or other list) in the selected grade is COMPLETE AND UP TO DATE, and you have numbered the list, enter the total number of students listed by the school in the FMS in the field labeled # on SLF.

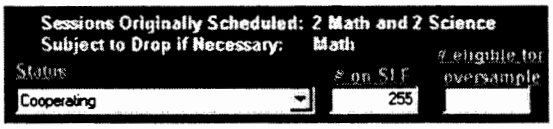


Then, click on the *Sample Students (SAF)* button in the lower left of the screen. This will generate the Session Assignment Form with the selected line numbers for this school. (An example of an SLF can be found in Exhibit 4-3 of your supervisor manual.)

You should print the SAF by clicking on the *Print* button at the bottom of the screen. (Be sure that your printer is plugged in and turned on.) If you need to, you can return to the SAF by clicking on the *Sample Students (SAF)* button and print it later.

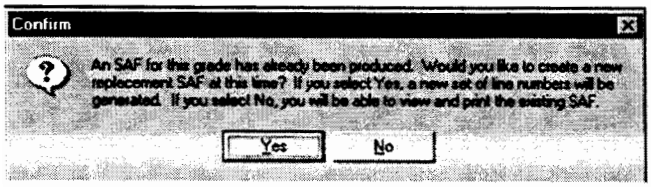
You must read and carefully follow the steps on the SAF including the oversampling.

After you have printed the SAF and you return to the Grade Information page, you will notice that a new field has appeared next to the # on SLF field. It is labeled # eligible for oversample.



After you have completed step 4, the oversample, you will enter the total number of students eligible for the oversample (the largest line number you recorded when renumbering the students eligible for the oversample) in the field labeled # eligible for oversample. It is important that you enter this number in the FMS since this will be the only record that we will have of the total number of eligible students for the oversample.

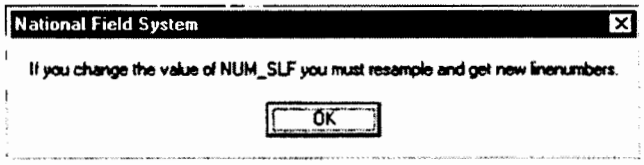
As noted on the SAF, it is NOT necessary to click on the *Sample Students (SAF)* button again after you have recorded the number eligible for the oversample.



Once you have produced an SAF for a school, if you click on the *Sample Students (SAF)* button again, you will be reminded by the system that the sample has already been selected.

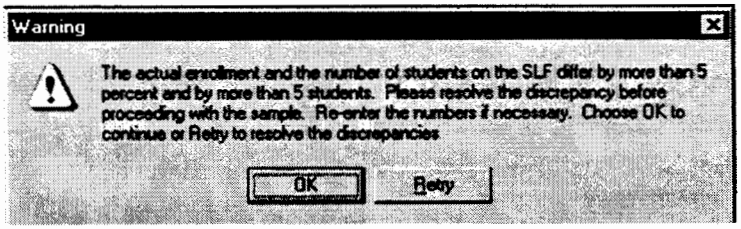
If you did not print the SAF when you generated it the first time, you can do so at this time. By selecting No at this point, this will prevent you from generating a new set of line numbers. The original SAF will be displayed and you can print it.

After you have generated an SLF for a school and you learn that the list of students was not accurate (students were listed that were not eligible or some eligible students were not listed), it is possible to enter a new number in the # in SLF field. First, you must double click on the field label (# on SLF). When you do so, a reminder box appears.



You can then enter the new, correct number of eligible students and click on the *Sample Students (SAF)* button again.

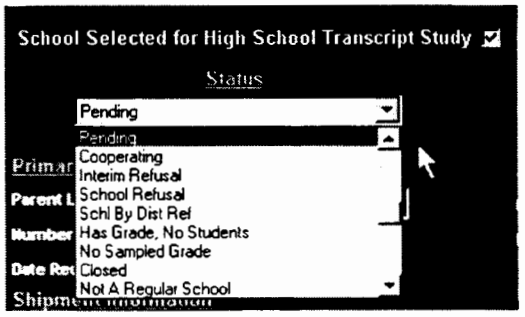
As noted previously, when you click on the *Sample Students (SAF)* button to select the sampled line numbers, the system will compare the number that you have entered in the *Sample Students (SAF)* against the Actual Grade Enrollment that was entered in this field. If the difference is considered "significant", the following warning box will appear.



If you have not obtained an explanation prior to seeing this warning, you should do so now. Then, if the discrepancy is resolved you can proceed.

Remember that the complete instructions for preparing the teacher questionnaires are contained in documents that are stored in the folder on your DeskTop labeled NAEP Documents. Double click on the folder to open it and see the list of documents (22 letters, forms, and instructions). If you double click on the name of a document, the system will launch the Word Viewer on your computer so that you can see the document and print it. To print the document, select File, Print while in the Viewer. (Be sure that your printer is connected and turned on.)

5.6.2 Transcript Study



As schedulers contacted the public schools selected for the 12th grade assessment, they discussed the transcript study and recorded the school's willingness to participate.

All private schools were included at this point since the subsample had not been determined.

If you receive an update to the information concerning whether a school will participate in the Transcript Study, you will record this on the Grade Information page. Click on the down arrow button next to the Status field and select the appropriate status code for the school.

5.6.3 NAEP/TIMSS Link Study

Those schools selected for the 8th grade assessment will have an additional field on the Grade Information page. After the assessment has been conducted in 8th grade schools, you will inquire about whether the school would be interested in participating in the NAEP/TIMSS Link study. If they agree, you will click on the statement as shown below.

5.6.4 Shipment information fields

After the assessments are complete in a school and you have boxed the materials and gotten them ready to ship to NCS in Iowa City, don't forget to note the UPS ARS tracking number. You will record this number in the Airbill Number field and the date that you ship the boxes in the date field. It is important that you record this information here so that it can quickly be located if a shipment does not arrive in a timely fashion.