# Trusted Agent User Guide to Managing Success Users

## Overview

Success.ACT (Success) is ACT's online reporting platform. This platform houses all ACT and PreACT Secure data and the access point to the Test Accessibility and Accommodations (TAA) system. Staff who need to access data or enter accommodations requests for the ACT will need access to this site.

Starting in 2023-24, each school district's DAC has been assigned as the sole Trusted Agent for their district. A Trusted Agent holds the highest administrative role for a district and assumes the responsibility of managing Success users' access for the district and all schools within their district.

## Hierarchy

Like PearsonAccess[next], district and schools are set up in hierarchies, with the district at as the top organization and each school below. Subsequently, Trusted Agents should assign user role permissions **only** under the organization the user needs access to. For example, a high school principal may only need access to data for their specific high school, whereas a superintendent will need access to all district level data.

## User Roles and Permissions

Below are the four roles that Success users can be assigned. As the Trusted Agent, you should **carefully** determine what level of access a user needs to minimize data exposure risks.

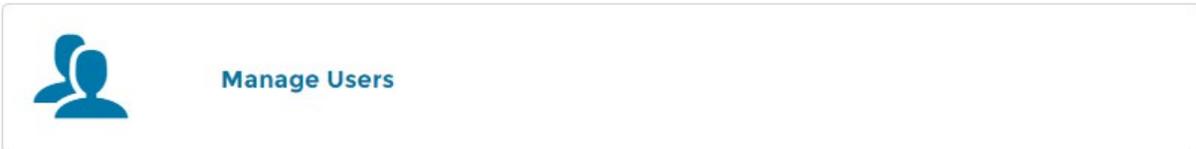| User Role | Access |
|---|---|
| Trusted Agent* | Users can view all data and reports (summary, student and disaggregate) and manage users for the organization the user has been assigned. |
| Detailed Viewer* | Users can view and export summary and detailed student data and reports for the organization the user has been assigned. |
| Summary Viewer | Users can view and export summary data and reports only for the organization in which the user has been assigned. |
| Test Accommodations Coordinator* | User has full access to the Test Accessibility and Accommodation system (TAA) to enter and manage student accommodation request for the ACT. |

*Roles have access to confidential student information*

**Note:** The Trusted Agent role is intended *only* for users who need to manage user accounts and hierarchies.
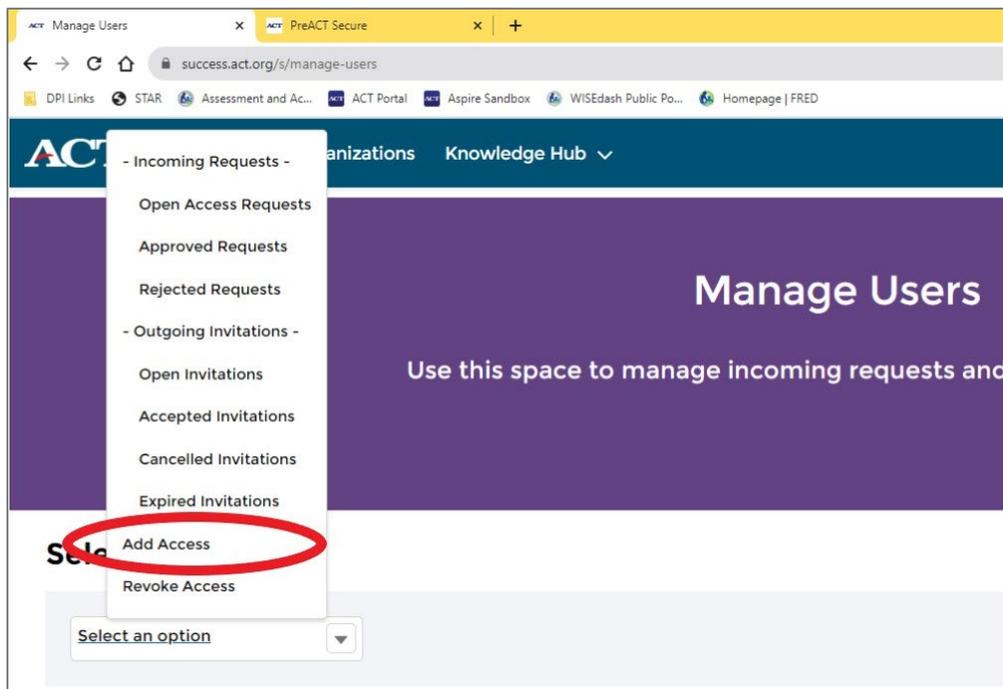
## Assigning Roles

A Trusted Agent can assign a user role in three ways: manually assigning a role to an existing user, inviting a new user or approving a role request submitted by a user.
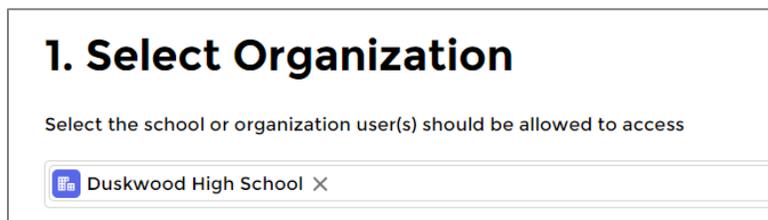
**Manually Assigning Roles:**

1) Log into Success.ACT

2) Under **Helpful Tools,** click **Manage Users**



3) On the Manage User Screen, **Select an Option>Add Access**



4) Next, use the search field under **Select Organization** to select the organization the user should be assigned to (school or district)

5) Then select the role(s) the user needs under **Type and Level of Access:**
   - Trusted Agent
   - Online Reporting
     - Detailed View
     - Summary View
   - Test Accommodations

**Online Reporting**

Select the role of the user(s) to determine data access level. To protect student privacy, only grant detailed viewing access to users who need it. View table of access levels.

**Select an option**

**Detail Viewer**

Can see
- Everything the Summary Viewer can
- Details of an individual ACT test attempt

**Can** see an examinee's name and personal information.

**Summary Viewer**

Can see
- Aggregate reports for the organization
- Aggregate reports for organizations underneath it in the hierarchy

**Cannot** see an examinee's name and personal information.

**Test Accommodations**

Test Accommodations Coordinators (TACs) are able to submit requests and reconsiderations for students who may need accommodations or EL supports to access the ACT for the organization selected above and any organizations below it in the organization's hierarchy. To protect student privacy, only grant access to users who need it.

⚠ **Be careful!** TACs have access to confidential student information.

☐ Give the users below access to manage accommodation requests on behalf of the students of Duskwood High School

**Note:** If assigning the role of Detailed View or Summary View, you must also select an **Access Level** and a **Product(s).** Select **Contract Reports & Score Reports** as well as all assessments the user should have access to (ACT, PreACT Secure).

**Online Reporting**

Select the role of the user(s) to determine data access level. To prot

**Select an option**

**Detail Viewer**

Can see
- Everything the Summary Viewer can
- Details of an individual ACT test attempt

**Can** see an examinee's name and personal information.

Select Access Level:

Contract Reports & Score Results    Score Results Only

Select Product(s):

The ACT

6) Once the role is selected, scroll down to see a list of users (**Select Existing or Invite New Users)**. If the user is listed, place a check mark next to the user's name and hit **Add User**. If the staff is not listed, you can invite the user by typing their email address in box provided and then selecting **Add User.**
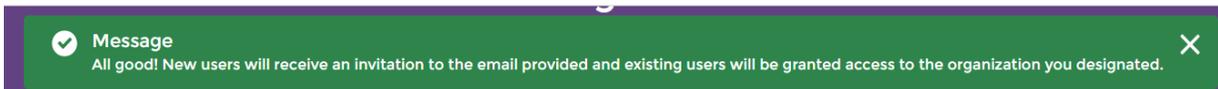
**Note:** Existing users will receive an email detailing the new role(s) assigned and new users will receive an email with instructions on how to set up a Success account. Once the new users account is set up, they will automatically have role(s) assigned.

## 3. Select Existing or Invite New Users

Please select the users you would like to add access for below. Each user will have the same access level to the organization selected above.

| Name | Title | Phone | Email | Role(s) |
|---|---|---|---|---|
| ☐ AJ Kisling | | 3193371000 | ajkisling@gmail.com | Trusted Agent |
| ☑ Bailey Stilley | | 5753614254 | baileydemo@mailinator.c... | |
| ☐ Beth DaLonzo | | 6145315677 | beth.dalonzo@mailinator.... | Trusted Agent |
| ☐ Betty DaLonzo | | 6145315677 | bethmuskie@yahoo.com | TAA Coordinator |

7) You will know the role has been assigned successfully when you receive this message:

✓ **Message**
All good! New users will receive an invitation to the email provided and existing users will be granted access to the organization you designated. ✕

**Receiving and Approving User Role Requests:**
Success users may also submit a direct request to the Trusted Agent for additional user permissions. Requests are submitted under each user's account through Manage My Access>Request More Access. Once the request has been submitted, the Trusted Agent will receive notification via email and/or review requests under **Manage Users>Open Access Request**. Trusted Agents should review all requests thoroughly ensuring the appropriate role is being assigned before approving.

## Revoking User Access

In addition to assigning user roles in Success, it is just as important for the Trusted Agent to remove access in a timely manner from users who have left the organization and/or are assigned to new roles that do not require access to data.

1.) Sign into Success

2.) Under **Helpful Tools,** click **Manage Users**

3.) On the Manage User Screen, **Select an Option>Revoke Access**

4.) Select the Organization you wish to access/revoke a user from. Note: If the **district** is selected at the organization, you will see all users in that hierarchy (district and schools).

5.) Scroll down to **Select User** and find the user, place a check mark next to their name. Then click **Revoke Access**

**Note:** Revoking access will remove **all** assigned roles to that user. If a user still needs access at a different role, you will need to add the correct user role back on to the user's account.

## Frequently Asked Questions

**Q: How do I know if I have the Trusted Agent role assigned to me?**
A: Log into Success. Under Helpful Tools, look for the Manage User icon. If the icon is listed, you are a Trusted Agent for your organization.

**Q: Our District Assessment Coordinator (DAC) left. How do we assign a new Trusted Agent to our district?**
A: The new DAC should create an account in Success.ACT if needed. Once the DAC's Success account has been created, contact ACT Customer Service (319-337-1590) and request a Trusted Agent Access Code. ACT will assist new DAC in applying access code to their account.

**Q: I see several users in my hierarchy, many are past employees. How do I confirm what users are active and what roles are assigned?**
A: When reviewing your users, take note of the roles that are assigned to each contact. If you see role is displaying in the **Role(s)** column, the user has active status. *If no role is assigned, that user has no access to data in Success.*

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| ☐ | AJ Kisling | | 3193371000 | ajkisling@gmail.com | Trusted Agent |
| ☐ | Bailey Stilley | | 5753614254 | baileydemo@mailinator.c... | |
| ☐ | Beth DaLonzo | | 6145315677 | beth.dalonzo@mailinator.... | Trusted Agent |
| ☐ | Betty DaLonzo | | 6145315677 | bethmuskie@yahoo.com | TAA Coordinator |
| ☐ | Bry Wil | | 6365842502 | bryan.k.williams.224@gma... | TAA Coordinator |

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