

Roles, Permissions & Access Guide

How flexible role-based access supports curriculum, reporting, district administration, coaching, and observations



THE STARTING POINT

The district User Administrator assigns roles. Teacher is the default role, and specialized roles can be combined so one person receives the exact mix of access needed for the work.

ASSIGNING ROLES - GUIDING PRINCIPLE

Roles should make the platform feel simpler, not heavier: each person sees the tools and data needed to do their work, while district resources, student information, and reporting definitions remain protected.

For User Administrators, district and campus leaders, curriculum and assessment teams, and approved LIFT provider partners

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Product access may vary by subscription, enabled modules, and implementation stage.

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ACCESS MODEL

1. How Roles Work

Classwork roles are capabilities, not ranks. A person's job title may suggest a starting point, but the role assignment should follow the work the person actually performs.

The TEACHER ROLE IS THE DEFAULT SETTING

Most users begin with Teacher access. If a person with a specialized role also needs to create classes, make assignments, or review student submissions, keep or add the Teacher role along with the specialized role.

Roles are additive

A user can hold more than one role. Classwork combines the access provided by the assigned roles, allowing the district to match the platform to real jobs rather than forcing every educator into a single profile.

- A Secondary Math Specialist may have Curriculum Manager + District Administrator to create, edit, and publish District Resources and to see districtwide reports. Add Curriculum Reviewer + Review Team membership only if that person must also approve submitted materials.
- An instructional coach serving one campus may have Campus Administrator + Teacher + PLC Team membership.
- A Teacher serving on an approval committee may be assigned Teacher + Curriculum Reviewer + Review Team + PLC Team member.
- An external LIFT provider coach receives support-configured Campus Administrator or District Administrator access for each district served.

The important exception

Curriculum Manager includes Curriculum Author capabilities. Coaching is not assigned as a separate role; it is available through Campus Administrator or District Administrator when the required subscription and tools are enabled. Teacher, user management, curriculum settings, and reporting scope still must be assigned separately when needed.

ADMINISTRATION IS A MENU, NOT A MASTER KEY

Specialized users may see Administration because that is where their tools live. The pages and data inside it still depend on their assigned roles, reporting scope, team membership, and enabled modules.

ACCESS MODEL

The Four Layers of Effective Access

When a user says, “I cannot see it,” check all four layers. A correct role alone may not be enough.

1	Role	What the user can do: teach, manage users, author, review, manage curriculum settings, view reports, or use enabled coaching tools.
2	Scope	Where the access applies: the user's own classes, an assigned campus, or the district.
3	Team membership	Which workflow reaches the user: Review Teams route approval submissions; PLC Teams attribute group coaching sessions to the correct teachers.
4	Enabled modules and settings	Which products and content appear: subscription entitlements, Texas OER Companion access, OER Item Banks, publication status, availability windows, and reporting selections.

A reliable troubleshooting sequence

1. Confirm the user is active and assigned to the correct organization and campus.
2. Confirm every role needed for the person's actual tasks, including Teacher when instructional tools are required.
3. Confirm Review Team or PLC Team membership and the user's campus or district scope.
4. Confirm the relevant module, folder, activity, or reporting option is enabled and published.
5. Have the user sign out and back in, then verify the expected menu and one representative task.

ROLES SHOULD ANSWER A BUSINESS QUESTION

Do not ask, “What is this person's title?” Ask, “What must this person create, manage, review, observe, or see?”

“I CANNOT SEE THE OER ITEM BANKS”

If teachers are complaining that they can't see the item banks that come with your OER Math or RLA Add-ons, it is because the Curriculum Manager must turn the banks on for teacher use. As this decision may involve compliance issues, [Classwork.com](https://classwork.com) leaves the decision up to you.

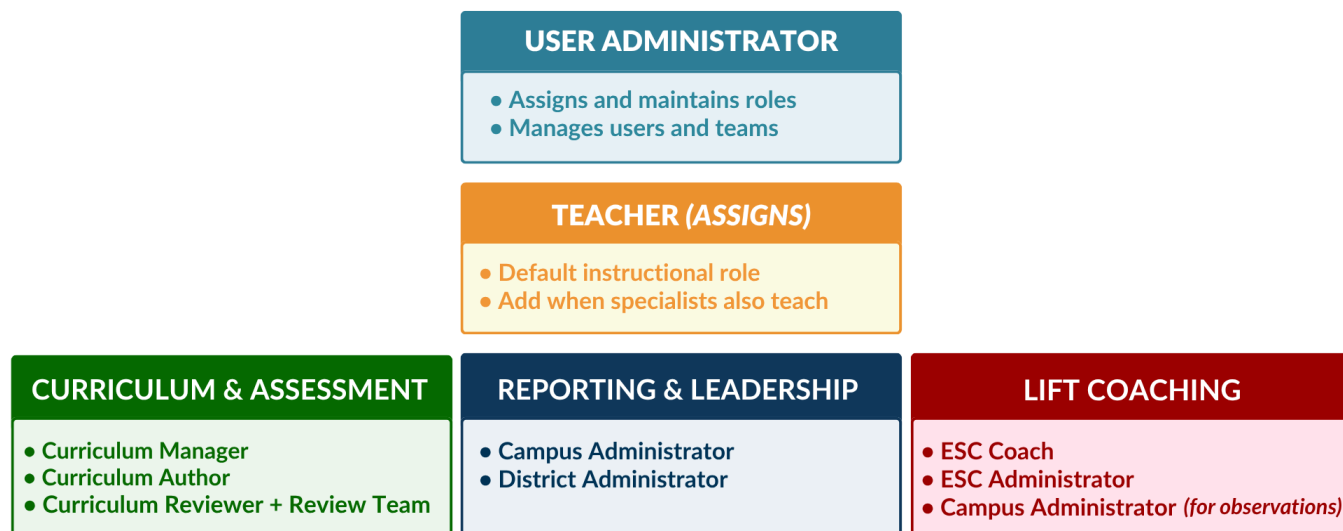
ROLE MAP

2. Role Families and Relationships

The role families overlap because real district jobs overlap. The User Administrator can combine roles without changing the user's account or creating duplicate users.

Classwork Access is Additive and Flexible

The User Administrator assigns only the roles each person needs.



One user may hold roles from several families.

Curriculum Manager is the only role that includes Curriculum Author capabilities.

ROLES CLUSTER AROUND WORK

Curriculum roles follow a production-and-review workflow. Campus and District Administrator roles follow organizational scope and also provide coaching capabilities when those tools are enabled. User Administrator is the access-stewardship role that connects them.

Terminology used in this guide

Campus Administrator (School Administrator). The public knowledge base uses School Administrator for school-level reporting. Many districts use Campus Administrator for the same organizational scope; this guide shows both terms together.

Coaching and observation access. Coaching is a subscription-enabled capability of the Campus Administrator and District Administrator roles, not a separate assignable role. PLC Team membership is added when group sessions must be attributed to the participating teachers.

District Resources. The protected, published source from which teachers assign district-provided activities. Teachers cannot edit the district source. When an activity has no availability window, or is within its open availability window, a teacher who has access to the folder can preview, print, and assign it. Classwork.com does not currently offer a separate author or manager setting that permits assignment while suppressing Preview or Print. If copying is allowed, the teacher may edit only the copied version; the district source remains unchanged.

CORE ROLE

3. Core Roles: User Administrator and Teacher

These roles form the baseline: Teacher supports instruction; User Administrator establishes and maintains access for noninstructional staff. User Administrator also assigns additional roles and team memberships for those who need more access.

User Administrator

The User Administrator is the district's access steward. This is the person who turns the role design in this guide into actual system access.

What the User Administrator can do

Classwork must establish the first User Administrator. After that, the district's User Administrators can maintain users, roles, and teams as staffing and responsibilities change.

Access and permissions

- Create, update, deactivate, and reactivate users.
- Assign one or several roles to each user.
- Import users by CSV and review validation messages before committing the import.
- Manage Review Team membership from Administration > Users by selecting Manage Curriculum Review Teams and adding each reviewer to the appropriate team or teams.
- Add district users to the appropriate PLC Teams so group coaching sessions can be attributed to the correct teachers.
- View organization information.
- Maintain campus/organization associations and alternate email addresses where needed.

Boundaries

- User Administrator does not receive Curriculum Manager settings merely because Organization Info is visible.
- User Administrator does not receive campus or district reports unless the corresponding administrator role is also assigned.
- User Administrator does not automatically receive Teacher or curriculum authoring access.

COMMON COMBINATIONS

A district implementation lead may hold User Administrator + Curriculum Manager + District Administrator. Add Teacher only if that person also needs classes and assignments.

BEST PRACTICE - HAVE A BACKUP USER ADMINISTRATOR

Assign at least two User Administrators. A backup prevents onboarding, staffing changes, and urgent access corrections from being dependent on one person.

Teacher Role

Teacher is the default instructional role for most users and is the only role in this guide whose primary workspace is classes, assignments, activities, student submissions and class reports. Most users of the [Classwork.com](https://classwork.com) platform will have the Teacher role.

What the Teacher can do

This is the foundation of the Classwork platform as this is where student work enters the data stream.

Access and permissions

- Create and manage personal activities.
- Create and manage classes and make assignments.
- Review and score student submissions.
- Assign activities directly from the District Resources folder.
- Submit an activity for approval when the district uses the optional review workflow.

Boundaries

- Teacher alone does not show the Administration menu.
- Teachers cannot edit source activities or assessments in District Resources. If copying is allowed, they may edit a personal copy. When access is open, teachers can preview, print, and assign; there is no separate setting that suppresses Preview or Print.
- Teacher does not access school- or district-wide reports.

COMMON COMBINATIONS

Add Teacher to specialists only when they also assign work to students.

DEPARTMENTAL ROLE FAMILY

4. Curriculum and Assessment Roles

These roles cluster around a controlled workflow: configure the system, create resources, review when required, publish to District Resources, and preserve comparable reporting data.

Curriculum Manager

Curriculum Manager is the highest-capability curriculum role. It includes all Curriculum Author capabilities and controls the organization-level settings that shape reporting across the district or school.

Access and permissions

- Create, organize, edit, publish, and maintain District Resources.
- Create and manage Score Bands used in reporting views.
- Create, edit, and publish the School Year Calendar and grading periods.
- Create and manage Activity Type categories and types, including which types appear in District Performance Reports by default.
- Apply Activity Types and configure teacher access controls on published resources.
- When enabled, manage OER assessment access, Readiness Check delivery, and Item Bank availability for district users.

Boundaries

- Curriculum Manager does not manage users unless User Administrator is also assigned.
- Curriculum Manager does not automatically receive district-wide reporting views unless District Administrator is also assigned.
- Because its settings affect the entire organization, this role should be limited to a small number of accountable owners.

COMMON COMBINATIONS

Curriculum Director: Curriculum Manager + District Administrator. Assessment Coordinator: Curriculum Manager + District Administrator. Add User Administrator only if the person also manages access.

DEPARTMENTAL ROLE FAMILY

Curriculum Author and Curriculum Reviewer

Author and Reviewer are complementary but independent roles. A district may combine them for a small team or separate them to create stronger approval control for high-stakes materials.

Curriculum Author

Curriculum Authors build and maintain instructional materials within Curriculum Authoring and publish approved folders to District Resources.

Access and permissions

- Create activities by importing documents, using conversion/AI tools when enabled, or composing in the Editor.
- Create root folders and nested structures by subject, grade, course, unit, module, or assessment collection.
- Add, edit, move, publish, unpublish, and update district curriculum content.
- Apply Activity Types created by the Curriculum Manager.
- Set availability windows and Never Allow Copy. Availability controls when teachers can access the activity; Never Allow Copy controls whether they may create an editable personal copy. These controls do not create a separate 'assign only' or 'not viewable while open' mode.
- Submit materials for review when the district uses an approval workflow.

Boundaries

- Authors cannot define Score Bands, calendars, or Activity Types unless they are also Curriculum Managers.
- Authors cannot add/delete questions after an activity has student assignments; Answer Key Mode protects existing student data.
- Authoring access does not provide school- or district-wide reports.

COMMON COMBINATIONS

Curriculum Specialist: Curriculum Author + Teacher. Department Lead: Curriculum Author + Curriculum Reviewer when the person both creates and reviews for a designated team.

Curriculum Reviewer

Curriculum Reviewers evaluate activities submitted for district approval, including HQIM/IMRA review when applicable.

Access and permissions

- Open the Curriculum Review area under Administration.
- Filter submissions by team and status; preview the student experience.
- Review standards, curriculum alignment, justification, rubrics, and approval history.
- Approve or decline submissions and provide required notes.

Boundaries

- The role alone is not enough: the reviewer must also belong to at least one Review Team.
- Reviewer does not create or edit District Resources unless Curriculum Author or Curriculum Manager is also assigned.
- Approval is not publication. Approving a submission records the review decision, but it does not automatically publish the activity. A Curriculum Author or Curriculum Manager must separately publish the appropriate root folder before the resource becomes available through District Resources.

COMMON COMBINATIONS

Teacher Reviewer: Teacher + Curriculum Reviewer + Review Team membership. Curriculum Lead: Curriculum Author + Curriculum Reviewer + appropriate Review Team(s).

JOB-TITLE ROLE FAMILY

5. Campus and District Leadership Roles

These roles are organized primarily by reporting scope. They do not imply curriculum authoring, user management, or teaching; if needed, those roles must be added for the user.

Campus Administrator (School Administrator)

Campus Administrators receive leadership and reporting access for their assigned school or campus.

Access and permissions

- View school-level reports and campus reporting tools available for the organization.
- Use campus-level performance information without receiving district-wide scope.
- When coaching and observation tools are enabled, log classroom observations and the paired teacher meeting.
- View Teacher Lesson Logs, attribute PLC sessions when added to the relevant PLC Team, and use the side-by-side view for co-observations.

Boundaries

- Campus access does not extend to other schools unless additional scope is assigned.
- Campus Administrator does not manage users, curriculum settings, or District Resources without additional roles.

COMMON COMBINATIONS

Principal who assigns work: Campus Administrator + Teacher. Campus instructional leader who authors resources: Campus Administrator + Curriculum Author (+ Teacher if needed).

District Administrator

District Administrators receive districtwide reporting scope and oversee selected district-level administrative workflows. When coaching and observation tools are enabled, the same role supports coaching across the district.

Access and permissions

- View district-wide reports and district-level reporting tools available for the organization.
- Compare information across campuses within the district reporting scope.
- When coaching and observation tools are enabled, log classroom observations and paired teacher meetings across the district.
- View Teacher Lesson Logs and attribute PLC sessions when added to the relevant PLC Team.

Boundaries

- District Administrator does not manage users unless User Administrator is also assigned.
- District Administrator does not control Score Bands, the calendar, Activity Types, or curriculum publishing unless Curriculum Manager/Author is also assigned.

COMMON COMBINATIONS

CAO/Curriculum Director: District Administrator + Curriculum Manager. Assessment leader: District Administrator + Curriculum Manager. District analyst: District Administrator only, plus Teacher only if instructional tools are needed.

SUBSCRIPTION-ENABLED CAPABILITY

6. Coaching and Observation Access

In Classwork, coaching is a capability of the existing Campus Administrator and District Administrator roles, not a separate role. Assign the leadership role that matches the coach's organizational scope, then add PLC Team membership when group sessions must be attributed to participating teachers.

PROGRAM AVAILABILITY - ADD-ON PURCHASE REQUIRED

Coaching and observation tools are included with a Texas OER Companion subscription for Math, RLA, or both. With an eligible Companion subscription, the Coaching section is enabled; without one, it does not appear.

Coach Working With One Campus

A coach whose work is limited to one campus should receive Campus Administrator access for that campus.

Access and permissions

- Log classroom observations and the paired teacher meeting.
- View Teacher Lesson Logs.
- Attribute PLC sessions to the correct teachers when added to the relevant PLC Team.
- Use campus-level student mastery and performance data available to Campus Administrators.
- Use the side-by-side view when two authorized leaders co-observe.

Boundaries

- Campus Administrator access is limited to the assigned campus.
- Add Teacher, curriculum, or User Administrator roles only when the coach also performs those separate tasks.

COMMON CONFIGURATION

Campus-based coach: Campus Administrator + relevant PLC Team membership. Add Teacher only when the coach also needs classes, assignments, or student submissions.

SUBSCRIPTION-ENABLED CAPABILITY

Districtwide and External Coaching Access

Coach Working Across the District

A coach who works across the district should receive District Administrator access. The role provides the same enabled coaching tools at district scope.

Access and permissions

- Log classroom observations and paired teacher meetings across the district.
- View Teacher Lesson Logs and districtwide student mastery and performance data.
- Attribute PLC sessions to the correct teachers when added to the relevant PLC Team.
- Use the side-by-side view when two authorized leaders co-observe.

Boundaries

- District Administrator does not manage users, curriculum settings, or District Resources unless the corresponding roles are also assigned.

External LIFT Provider Coaches

A district that wants its LIFT Provider coach or coaches to access its Classwork account, including observations and student mastery data, should contact support@classwork.com. Classwork.com will configure the appropriate Campus Administrator or District Administrator access for the work.

A Classwork login is scoped to one organization: a single district. A provider working across several districts receives a separate login for each district.

EXTERNAL PROVIDER ACCESS

Contact support@classwork.com to arrange access for an external LIFT Provider coach. Access is scoped to one district organization, so a provider working across several districts receives a separate login for each district.

SETUP NOTE - INSTRUCTIONAL INSIGHTS APP (IIA)

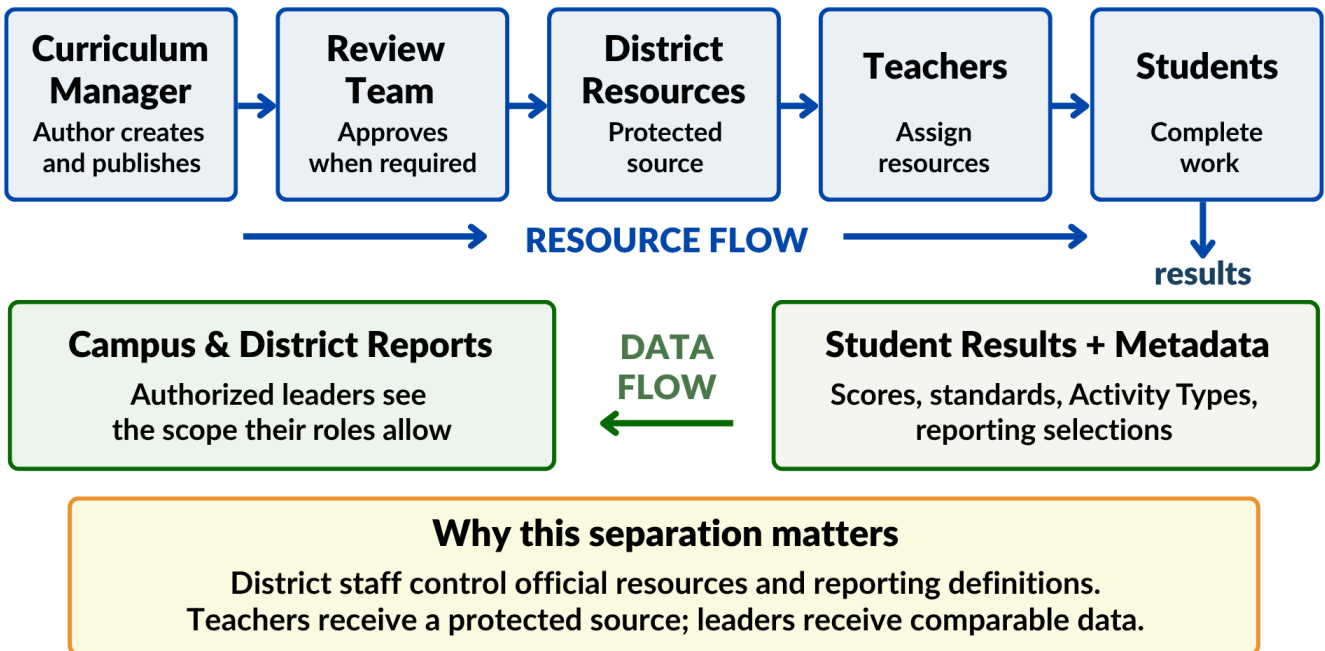
Classwork.com integrates with the TEA Instructional Insights App. Data transmitted through the configured integration is also available in IIA to provider users authorized by the district and TEA. Classwork and IIA access are governed separately; a Classwork login does not itself grant IIA access.

RESOURCE AND DATA FLOW

7. How Work Moves Through the System

The access design protects the district source while allowing teachers to assign resources easily and allowing authorized leaders to receive comparable data.

District resources flow out; student results flow back.



Controls that preserve the source and the data

- Curriculum Authors and Curriculum Managers control the district source; unpublished work remains hidden until the root folder is published.
- Teachers assign directly from District Resources; they cannot edit the source.
- Availability windows control when teachers can access the activity, and Never Allow Copy prevents creation of an editable personal copy. When assignment access is open, teachers can also preview and print; there is currently no separate setting to disable those options.
- Activity Types and reporting folder selections keep routine classroom work from overwhelming district performance views.
- Student data remains stable after assignment; Answer Key Mode limits structural changes to an activity already in use.

SYSTEM WORKFLOW

Curriculum Approval and Publication Workflow

Review is optional. Districts that do not require approval can move directly from authoring to publication; districts using HQIM/IMRA review insert a controlled decision point.

1	Create	Curriculum Author or Manager creates/imports the activity and organizes it in an unpublished folder.
2	Tag and protect	Apply the Activity Type, standards/metadata, availability window, and copy controls.
3	Submit when required	Teacher or Author selects the appropriate Review Team and submits the activity.
4	Review	Reviewer previews the activity, applies the appropriate rubric, and approves or declines with notes.
5	Publish	Author or Manager publishes the root folder; its nested folders and activities become available.
6	Assign	Teachers add the folder to their account and assign directly from District Resources.
7	Maintain	Authors add updates carefully; major revisions move through an unpublished workspace.

Important: Step 4 changes the submission's approval status; Step 5 is still required. An approved activity does not become teacher-facing until a Curriculum Author or Curriculum Manager publishes the appropriate root folder.

REVIEW TEAM SETUP RULE

Curriculum Reviewer is a capability, a role; Review Team membership is the routing rule. Both are required before submissions appear for that reviewer.

SYSTEM WORKFLOW

Reporting and Coaching Workflows

Reporting scope and coaching capability are both carried by leadership roles. Use Campus Administrator for one campus and District Administrator for districtwide access; add PLC Team membership when group sessions must be attributed to participating teachers.

Performance reporting workflow

1. Curriculum Manager defines Score Bands, the published School Year Calendar, and Activity Types.
2. Curriculum Manager/Author applies Activity Types and places reportable assessments in the district's intended reporting structure.
3. Teachers assign the common resources and students complete the work.
4. Student results, standards, and activity metadata populate available reporting views.
5. Campus Administrators see their campus; District Administrators see the district.

Coaching and observation workflow

1. Confirm that the district has a Texas OER Companion subscription for Math, RLA, or both; without one, the Coaching section does not appear.
2. Assign Campus Administrator to a coach working with one campus or District Administrator to a coach working across the district.
3. Add the coach to each relevant PLC Team so group sessions are attributed to the correct teachers.
4. For an external LIFT Provider coach, contact support@classwork.com; Classwork.com configures access separately for each district organization.
5. Data transmitted through the configured Classwork.com integration is available in IIA to provider users separately authorized by the district and TEA.

PROTECT BOTH SIDES

Curriculum roles protect official materials and reporting definitions. Campus and District Administrator roles protect access to campus, district, teacher, coaching, and student-performance data.

IMPLEMENTATION GUIDANCE

8. Best Practices and Recommended Role Bundles

Start with the smallest useful configuration, combine roles deliberately, and expand only when a new responsibility requires access.

Role assignment best practices

- Assign roles by task, not seniority or job title.
- Maintain at least two User Administrators.
- Use least privilege for external LIFT provider staff. Arrange their access through support@classwork.com and limit each login to the district and organizational scope they support.
- Limit Curriculum Manager to the people accountable for organization-wide reporting definitions and curriculum controls.
- For secure or districtwide assessments, separate Author and Reviewer when staffing allows.
- Remember that Curriculum Reviewer requires Review Team membership. Coaching requires Campus Administrator or District Administrator, an eligible Texas OER Companion subscription, and PLC Team membership when group sessions must be attributed.
- Keep/add Teacher only when the user needs classes, assignments, or student submissions.
- Review roles quarterly and whenever a user changes jobs, campuses, districts, or provider assignments.
- Deactivate departed users promptly and retain an internal record of who owns each specialized role.
- Test representative role combinations before launch and after material configuration changes.

MINIMUM DISTRICT LAUNCH

One person may serve as User Administrator + Curriculum Manager + District Administrator. Add a second User Administrator for continuity. Everyone else can remain Teacher until a specialized responsibility begins.

IMPLEMENTATION GUIDANCE

Recommended Role Bundles

These bundles are starting points, not rigid templates. Remove any role that the person does not need.

Responsibility	Recommended roles	Why / caution
District implementation owner	User Administrator + Curriculum Manager + District Administrator	Efficient minimum setup; add Teacher only if the person will assign work.
Curriculum director / CAO / assessment coordinator	Curriculum Manager + District Administrator	Controls curriculum and reporting definitions and sees district results.
Curriculum specialist	Curriculum Author + Teacher (optional)	Adds Teacher only if the specialist also maintains classes or assignments.
Teacher reviewer	Teacher + Curriculum Reviewer + Review Team	The Review Team is required to receive submissions.
Principal	Campus Administrator + Teacher (optional)	Adds Teacher only for instructional workflows; coaching and observation access appears with an eligible Texas OER Companion subscription.
District data analyst	District Administrator	Reporting access without curriculum or user-management power.
Campus-based coach	Campus Administrator + relevant PLC Team membership	Coaching tools require a Texas OER Companion subscription; add Teacher only for instructional work.
Districtwide coach	District Administrator + relevant PLC Team membership	Provides the same enabled coaching tools at district scope.
External LIFT Provider coach	Contact support@classwork.com	Classwork.com configures Campus or District Administrator access separately for each district served.

AVOID ROLE INFLATION

A senior title does not require every administrative role. Assign the narrowest combination that supports the person's responsibilities and data scope.

QUICK REFERENCE

9. Role and Access Concordance

Use these tables to translate each role or supporting access layer into scope, capabilities, and dependencies. Role assignments, team memberships, subscription entitlements, and support-configured external access all affect what a user can see and do.

Role or access layer	Primary purpose and scope	Core access	Common combinations / requirements
Teacher	Own classes, activities, assignments, and students	Create activities/classes; assign; review submissions; use District Resources	Default. Add to specialists who still need teaching workflows.
User Administrator	Organization users and teams	Add/update/deactivate users; assign roles; import users; manage Review Team and PLC Team membership	Use a backup. Add CM/DA/Teacher only for those separate duties.
Curriculum Manager	Organization-wide curriculum and reporting definitions	All Author rights; Score Bands; calendar; Activity Types; District Resources; enabled OER controls	Does not include user management or district reports unless stacked.
Curriculum Author	District curriculum workspace	Create/import/edit/organize/publish; apply types; set access/security controls	No org settings or broad reports. May submit for review.
Curriculum Reviewer	Submissions routed to assigned Review Teams	Preview; use rubrics/history; approve/decline with notes	Requires Reviewer role + Review Team membership.

QUICK REFERENCE

Role and Access Concordance Continued

Campus and District Administrator roles are distinguished by organizational scope. When coaching tools are enabled, those same roles carry coaching and observation capabilities.

Role or access layer	Primary purpose and scope	Core access	Common combinations / requirements
Campus Administrator (School Admin)	Assigned school/campus	Campus reports; enabled observations and paired meetings; Teacher Lesson Logs; PLC attribution; student mastery data	Coaching tools require a Texas OER Companion subscription. Add Teacher, Author, or UA only for separate tasks.
District Administrator	Districtwide reporting and enabled coaching	District reports; cross-campus view; enabled observations and paired meetings; Teacher Lesson Logs; PLC attribution	Does not include user management, curriculum settings, or authoring.
PLC Team membership	Relevant teachers or instructional team	Attributes group coaching sessions to the correct participating teachers	Not a role. User Administrator manages membership.
External LIFT Provider access	One district organization per login	Campus or district coaching, observation, and student mastery access, as configured	Contact Classwork Support. IIA authorization is separate.

QUICK REFERENCE

Permission-to-Role Lookup

If a person needs to...	Assign this role / access	Remember
Create classes, assign work, or review student submissions	Teacher	Teacher is the instructional baseline.
Add, edit, deactivate users or assign roles	User Administrator	Maintain at least one backup.
Create/publish district curriculum	Curriculum Author or Manager	Manager includes Author capabilities.
Create Score Bands, calendar, or Activity Types	Curriculum Manager	These settings affect organization-wide reporting.
Approve or decline submitted activities	Curriculum Reviewer + Review Team	Both the role and team membership are required.
View districtwide reports	District Administrator	Does not grant curriculum or user-management access.
Add users to Review Teams	User Administrator	Curriculum Reviewer grants review capability; team membership routes submissions.
Log campus coaching and observations	Campus Administrator	Requires a Texas OER Companion subscription.
Log districtwide coaching and observations	District Administrator	Requires a Texas OER Companion subscription.
Attribute group sessions to the correct teachers	Campus or District Administrator + PLC Team membership	User Administrator manages PLC Team membership.
Give an external LIFT Provider coach access	Contact Classwork Support	Access is configured separately for each district organization.
Use OER Item Banks in the Editor	Eligible user + enabled Item Bank access	This depends on organization flags and access settings, not role alone.
View school or campus reports	Campus Administrator	Scope must point to the correct campus.
See a published district folder	Teacher + folder added to account	Publication and teacher selection both matter.

WHEN ACCESS STILL LOOKS WRONG

Check the four layers in order: active user and role, scope, team membership, then module/content configuration.

ONGOING USER ADMINISTRATION

10. Setup Checklist for Roles

Use this checklist for initial rollout, staff changes, new programs, and periodic access reviews.

Role assignment checklist

- ☐ Confirm the user's organization, campus, and active status.
- ☐ List the exact tasks the person must perform and the data scope required.
- ☐ Keep or add Teacher if classes, assignments, activities, or student submissions are needed.
- ☐ Assign the narrowest specialized role combination that covers the tasks.
- ☐ From Administration > Users, add reviewers to Review Teams and district users to PLC Teams; confirm the user's campus or district scope.
- ☐ Confirm required modules, subscriptions, folders, and program settings are enabled, including Texas OER Companion access for coaching.
- ☐ Verify one representative task in each assigned role.
- ☐ Record the role owner and next review date.
- ☐ Review access quarterly and immediately after staffing or provider changes.

GET STARTED WITH MINIMAL SETUP

A district can begin with one person holding User Administrator + Curriculum Manager + District Administrator, a backup User Administrator, and the default Teacher role. Add Authors, Reviewers, and Campus Administrators only when those workflows begin. Coaching uses Campus or District Administrator access; it is not a separate role.

ASSIGNING ROLES - GUIDING PRINCIPLE

Roles should make the platform feel simpler, not heavier: each person sees the tools and data needed to do their work, while district resources, student information, and reporting definitions remain protected.