

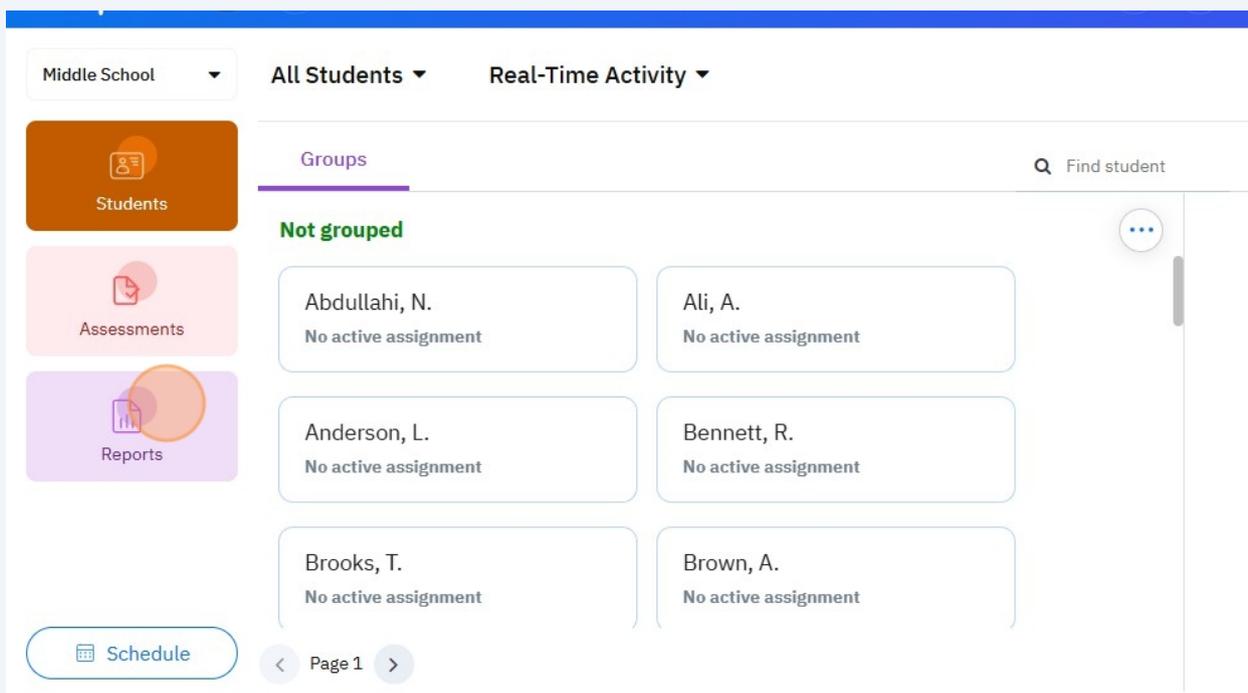
How to Create and Manage Filters in Capti

We've added a flexible filtering system that makes it easy to segment students.

You can easily create, save, rename, delete, or modify filters. Each filter is made up of rules which can be configured to include or exclude students who meet its criteria, apply criteria based on ReadBasix outcomes, demographics and more, and specify a time frame over which the rule's criteria are applied.

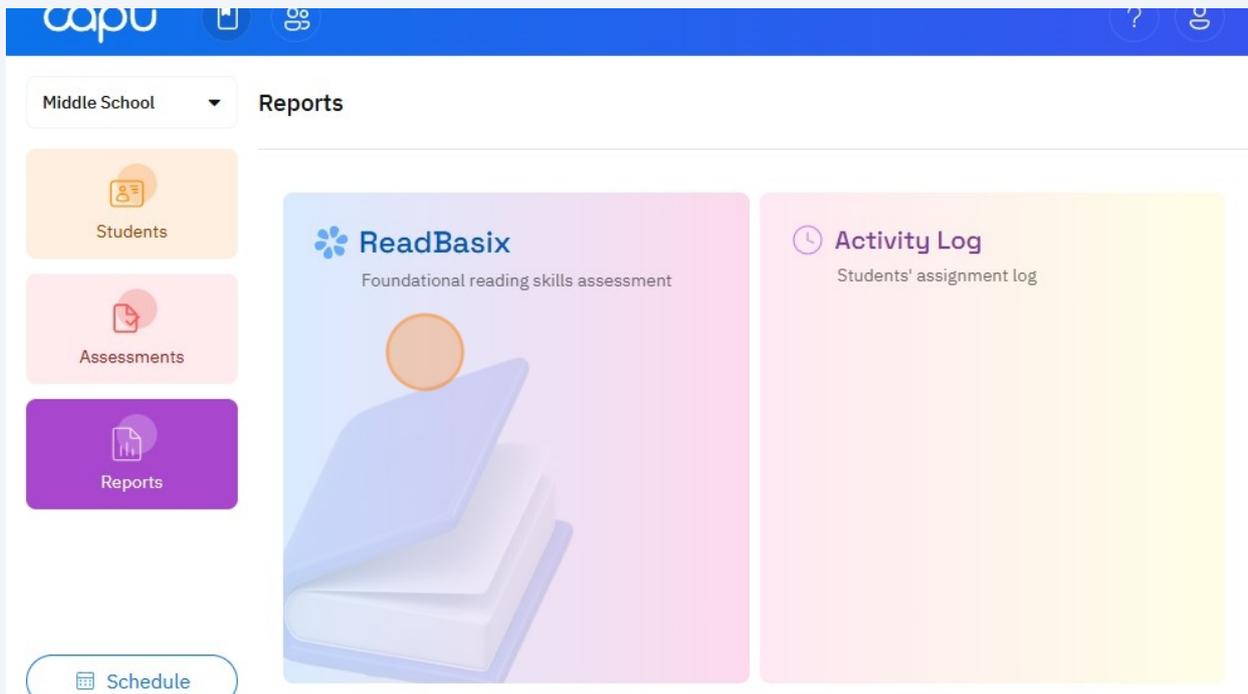
Within a filter, rules can be reordered via drag-and-drop, which affects how the filter is applied.

1 Begin by clicking on "Reports".

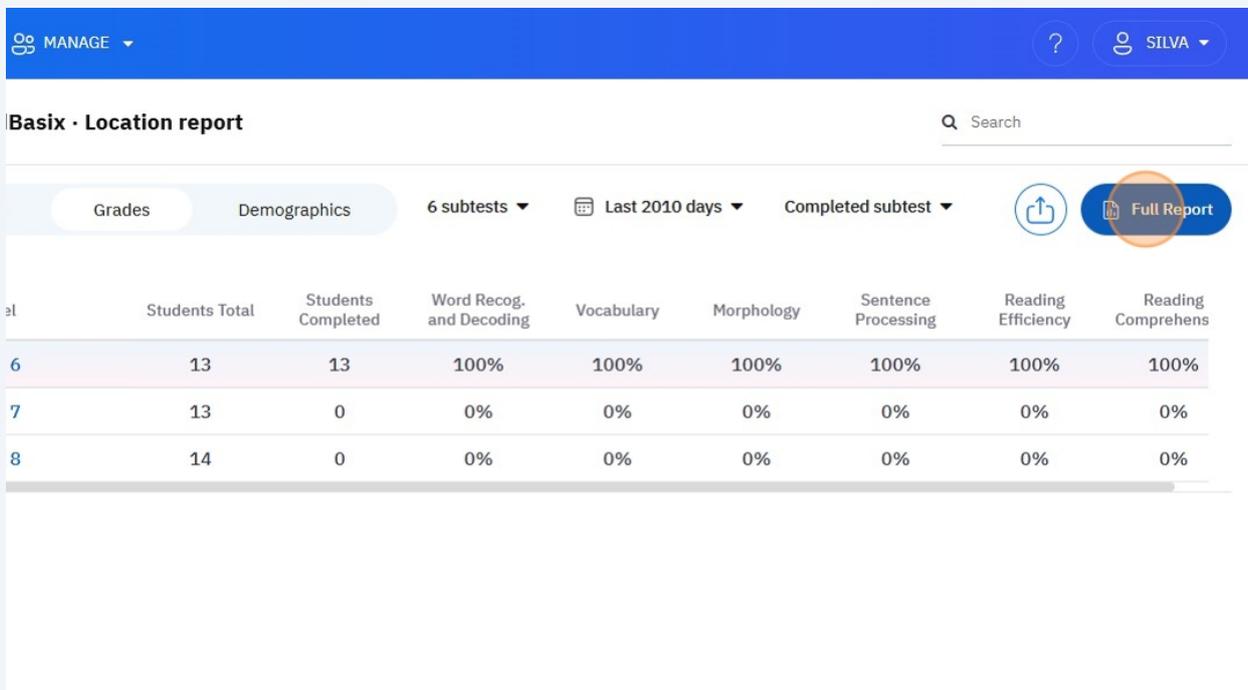


The screenshot displays the ReadBasix interface. At the top, there are filters for 'Middle School', 'All Students', and 'Real-Time Activity'. The left sidebar contains three main sections: 'Students' (orange), 'Assessments' (pink), and 'Reports' (purple, which is highlighted). Below the sidebar, there is a 'Schedule' button. The main content area is titled 'Groups' and shows a search bar with the text 'Find student'. Underneath, the section is labeled 'Not grouped' and contains a grid of student cards. Each card displays a student's name and the status 'No active assignment'. The students listed are Abdullahi, N.; Ali, A.; Anderson, L.; Bennett, R.; Brooks, T.; and Brown, A. At the bottom of the main content area, there is a pagination control showing '< Page 1 >'.

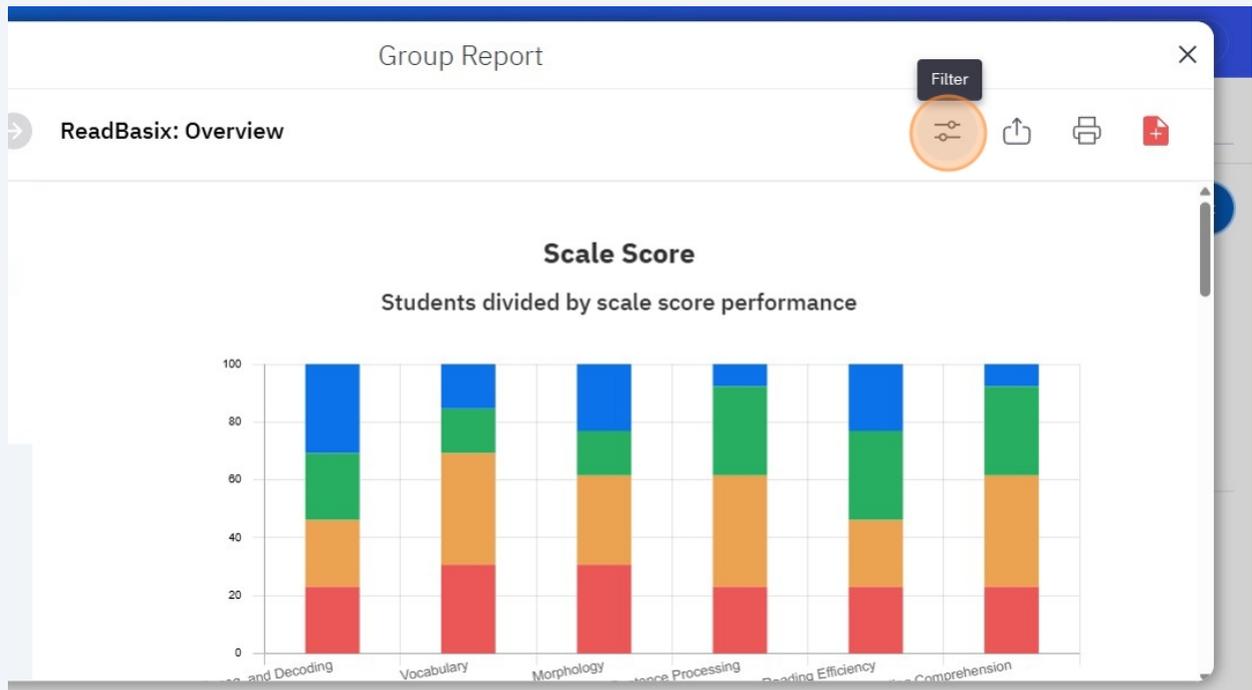
2 Click ReadBasix.



3 You can pick a group, grade or click Full Report to begin.



4 Click the Filter button.



5 In the filtering rules, you can pick between a ReadBasix, Demographics, MTSS, or Grade level rule.

Filtering Rules

Applied to 40 students

Unnamed rule set Actions

+ ReadBasix + Demographics + MTSS + Grade

Clear List

No filters applied yet

Apply

6 Within each category, there are several properties to pick from to create the rule.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set'. Below this, there are four buttons: '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade'. A dropdown menu is open under '+ ReadBasix', showing options: 'Scale Score', 'Inefficient Decoding', 'Decoding Threshold', and 'Assessment Status'. The 'Scale Score' option is highlighted with an orange circle. To the right of these buttons is a 'Clear List' button. In the center, there is an icon of a folder with papers and the text 'No filters applied yet'. At the bottom, there is a green 'Apply' button.

7 Once you've added a rule, you can also choose whether students that meet that criteria should be Included or Excluded from the results.

The screenshot shows the 'Filtering Rules' interface with a rule added. The rule is 'Scale Score (6 subtests) > [] Latest Result'. The 'Include' dropdown menu is open, showing options: 'Include' and 'Exclude'. The 'Include' option is highlighted with an orange circle. The interface also shows 'Applied to 40 students', 'Unnamed rule set', and 'Actions' buttons. Below the rule, there is a green 'Apply' button.

8

Different rules may have sub-options to pick from. For example, the Scale Score rule shown below can be modified to only apply to certain subtests.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set'. Below this, there are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade'. A dropdown menu is open, titled 'READBASIX SUBTESTS', with the following options: Word Recog. and Decoding, Vocabulary, Morphology, Sentence Processing, Reading Efficiency, and Reading Comprehension. A green 'Save' button is highlighted with an orange circle. At the bottom, there is a green 'Apply' button.

9

Within comparison rules, you can also pick the operator and the value against which to compare.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set'. Below this, there are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade'. A dropdown menu is open, showing 'Scale Score (4 subtests)'. To the right of this dropdown is a comparison operator '>' and a text input field containing the value '250'. Further right is a dropdown menu labeled 'Latest Result'. At the bottom, there is a green 'Apply' button.

10

You can also specify a timeline for which the rule should be applied. In the rule below, we want to exclude students from the results who scored higher than 250 on the 4 subtests selected within the last 90 days.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set'. Below this are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade', along with a 'Clear List' button. The main rule configuration shows a red minus sign, 'Exclude', 'Scale Score (4 subtests)', a greater-than sign, and a text box containing '250'. To the right, a 'Latest Result' dropdown menu is open, showing options: 'LAST N DAYS', 'Last 7 days (Dec 10, 2025 - Dec 17, 2025)', 'Last 30 days (Nov 17, 2025 - Dec 17, 2025)', and 'Last 90 days (Sep 18, 2025 - Dec 17, 2025)'. The 'Last 90 days' option is highlighted. A green 'Apply' button is at the bottom.

11

To add more rules to the filter, simply click on one of the rule categories to combine a new rule with the existing rule.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set'. Below this are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade', along with a 'Clear List' button. The main rule configuration shows a red minus sign, 'Exclude', 'Scale Score (4 subtests)', a greater-than sign, and a text box containing '250'. To the right, the 'Latest Result' dropdown menu is set to 'Last 90 days'. The '+ Demographics' button is highlighted, and its dropdown menu is open, listing: 'Gender', 'Race', 'Ethnicity', 'ELL', 'IEP', 'Lunch Status', 'Extended Time', 'Text Font', and 'Color Theme'. A green 'Apply' button is at the bottom.

12

In this example, we are specifying that we only want to include students whose gender is Male in addition to the existing Exclude Scale Score rule.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set'. Below this, there are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ C'. A 'Clear List' button is on the right. The main area contains two rules:

- Rule 1: Exclude Scale Score (4 subtests) with a value of 250 and a time filter of 'Last 90 days'.
- Rule 2: Include Gender with a value of 'No gender selected' and a time filter of 'Present'.

A dropdown menu for 'GENDER' is open, showing options: Male (checked), Female, X, and Not Specified. A 'Save' button is highlighted in green at the bottom of the dropdown. An 'Apply' button is at the bottom of the interface.

13

You can click and drag on the dots next to each rule to change the order of operations that the filters will be applied in. Filters at the top are applied before filters at the bottom.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set'. Below this, there are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade'. A 'Clear List' button is on the right. The main area contains two rules:

- Rule 1: Exclude Scale Score (4 subtests) with a value of 250 and a time filter of 'Last 90 days'.
- Rule 2: Include Gender with a value of 'Male' and a time filter of 'Present'.

The 'Gender' rule is highlighted with an orange circle, and its three-dot menu icon is also highlighted, indicating it is being interacted with. An 'Apply' button is at the bottom of the interface.

14

You can click the Trash Can icon next to a rule to delete it. The Clear List icon also deletes all rules at once.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'My First Filter' with a dropdown arrow. There are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', '+ Grade', and 'Clear List'. Below these are three filter rules:

Filter Type	Field	Value	Time Period	Action
Include	Gender	Male	Present	Trash Can
Exclude	Scale Score (4 subtests)	> 250	Last 90 days	Trash Can
Include	MTSS Group	No groups selected	Latest Result	Trash Can

A 'Delete' tooltip is visible over the trash can icon for the third rule. At the bottom is a green 'Apply' button.

15

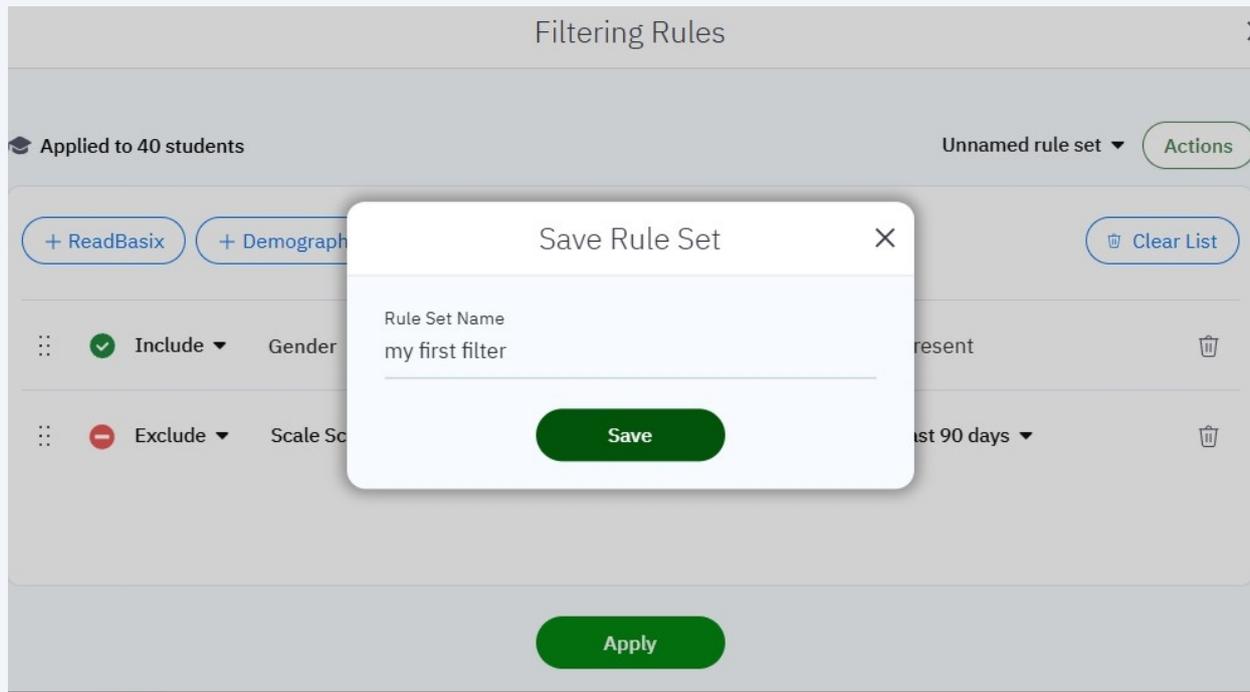
If you will want to use a filter again in the future, you can click the Actions button to save it.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'Unnamed rule set' with a dropdown arrow. There are buttons for '+ ReadBasix', '+ Demographics', '+ MTSS', '+ Grade', and 'Clear List'. Below these are two filter rules:

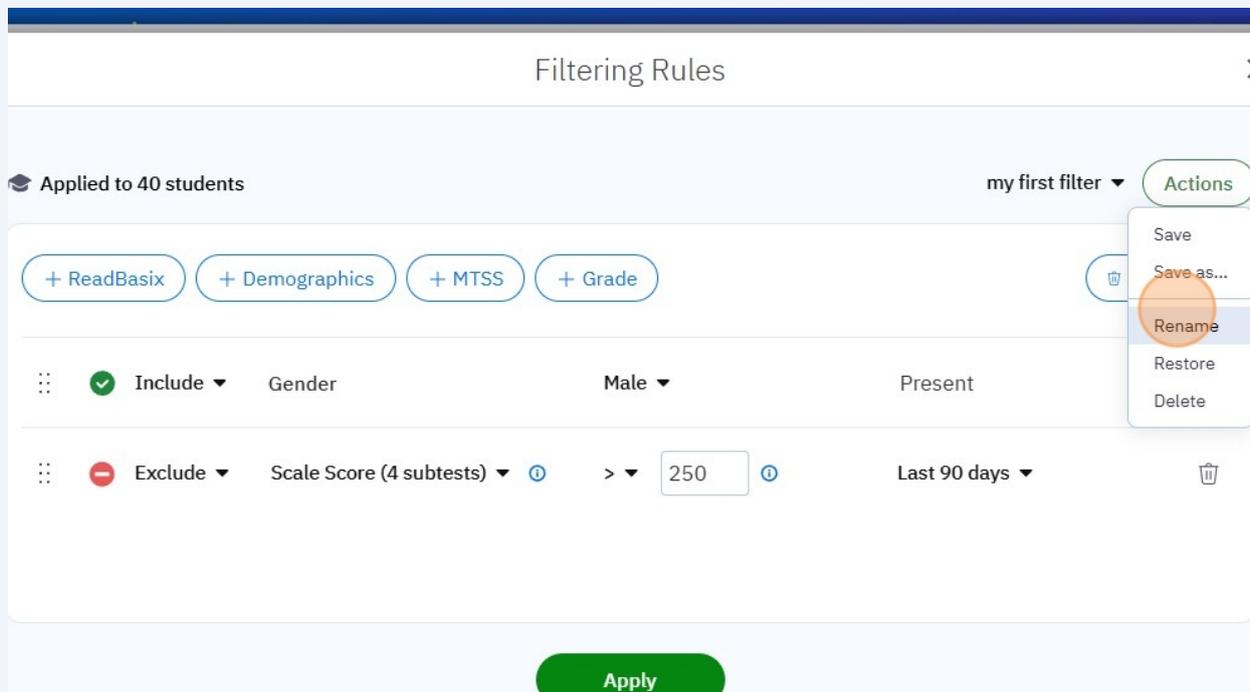
Filter Type	Field	Value	Time Period	Action
Include	Gender	Male	Present	Trash Can
Exclude	Scale Score (4 subtests)	> 250	Last 90 days	Trash Can

The 'Actions' button is highlighted with an orange circle, and a 'Save as...' tooltip is visible over it. At the bottom is a green 'Apply' button.

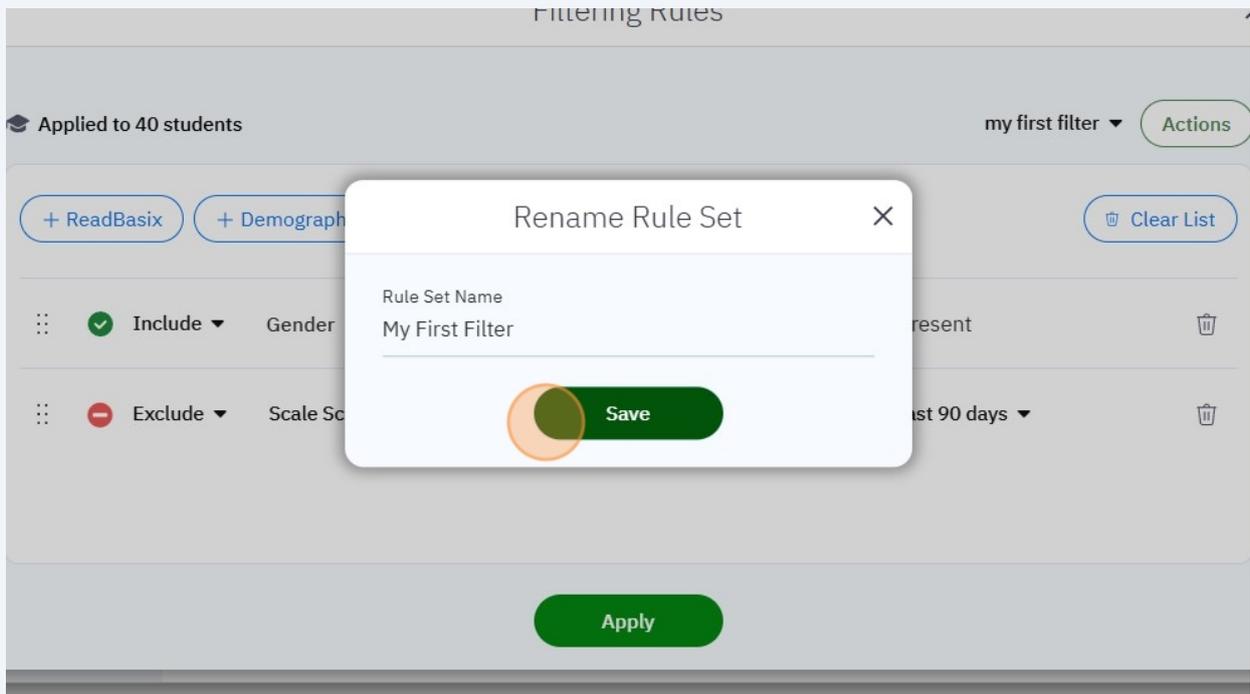
16 A screen will pop up that will allow you to rename the rule set and save it.



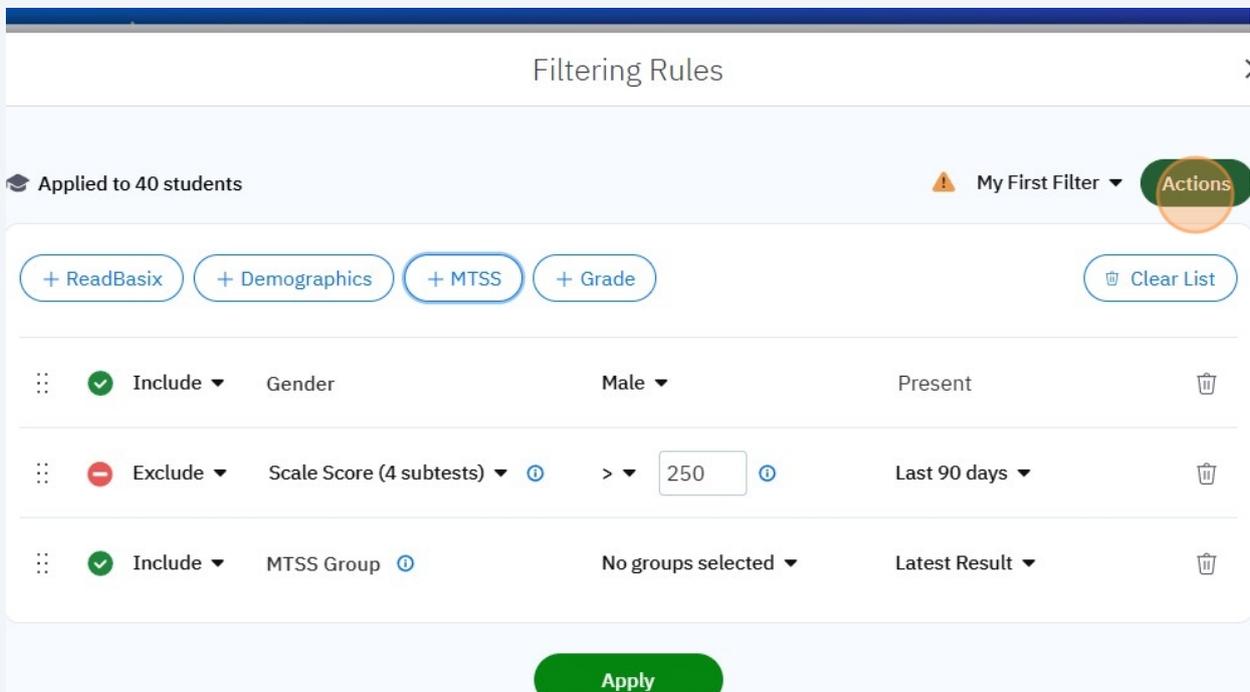
17 Once you've saved the filter ruleset, the Actions button will have more actions available to you. You can Rename the ruleset using the Rename option.



18 Click "Save" to save your changes once you've renamed.



19 If you make changes to a saved filter, a yellow warning icon will appear next to the name of the filter indicating that the filter has had an unsaved change applied.



20

You can use the Actions button to save the changes to the filter, save as a new filter, or restore the filter to the last saved instance. From Actions, you can also delete a saved filter if you no longer need it.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'My First Filter'. Below this are four filter categories: '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade'. The main area contains three filter rules:

- Rule 1: 'Include' (checked), 'Gender', 'Male', 'Present'.
- Rule 2: 'Exclude' (unchecked), 'Scale Score (4 subtests)', '>', '250', 'Last 90 days'.
- Rule 3: 'Include' (checked), 'MTSS Group', 'No groups selected', 'Latest Result'.

An 'Apply' button is at the bottom. An 'Actions' button is in the top right, with a dropdown menu open showing options: 'Save', 'Save as...', 'Rename', 'Restore', and 'Delete'. The 'Restore' option is highlighted with an orange circle.

21

You can click on the name of the current filter to see a list of all your filters as well as the default "Unnamed rule set" which you can use to begin a new filter from scratch.

The screenshot shows the 'Filtering Rules' interface. At the top, it says 'Applied to 40 students' and 'My First Filter'. Below this are four filter categories: '+ ReadBasix', '+ Demographics', '+ MTSS', and '+ Grade'. The main area contains two filter rules:

- Rule 1: 'Include' (checked), 'Gender', 'Male'.
- Rule 2: 'Exclude' (unchecked), 'Scale Score (4 subtests)', '>', '250', 'Last 90 days'.

An 'Apply' button is at the bottom. A dropdown menu is open over the 'My First Filter' name, showing a search bar, 'Unnamed rule set', and 'My First Filter' with a three-dot menu icon. A 'Clear List' button is also visible on the right side of the dropdown.

22

Let's take a look at an example. I will start by looking at just my Grade 6 students as they have just completed testing. *By clicking the grade 6 group, I will be looking only at that group of students. The filter can then be applied to this group just like it can be applied to the full listing of students.*

Middle School ReadBasix · Location report Search

Students Assessments Reports ReadBasix Schedule

Classes Grades Demographics 6 subtests Last 2010 days

Grade Level	Students Total	Students Completed	Word Recog. and Decoding	Vocabulary	Morphology
Grade 6	13	13	100%	100%	100%
Grade 7	13	0	0%	0%	0%
Grade 8	14	0	0%	0%	0%

23

I begin by clicking the Filter button.

Group Report Filter

ReadBasix: Overview

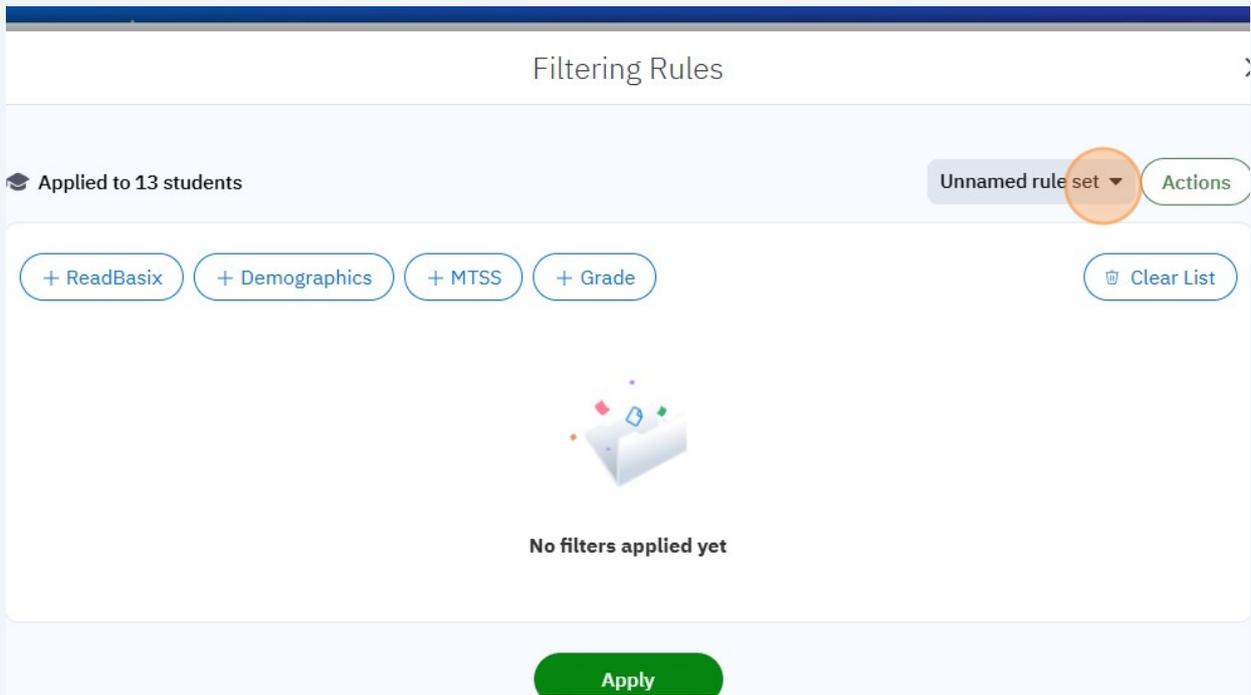
Scale Score

Students divided by scale score performance

Bar	Red	Orange	Green	Blue
1	22	24	24	29
2	30	38	15	17
3	30	30	15	25
4	22	38	30	10
5	22	24	30	24
6	22	38	30	10

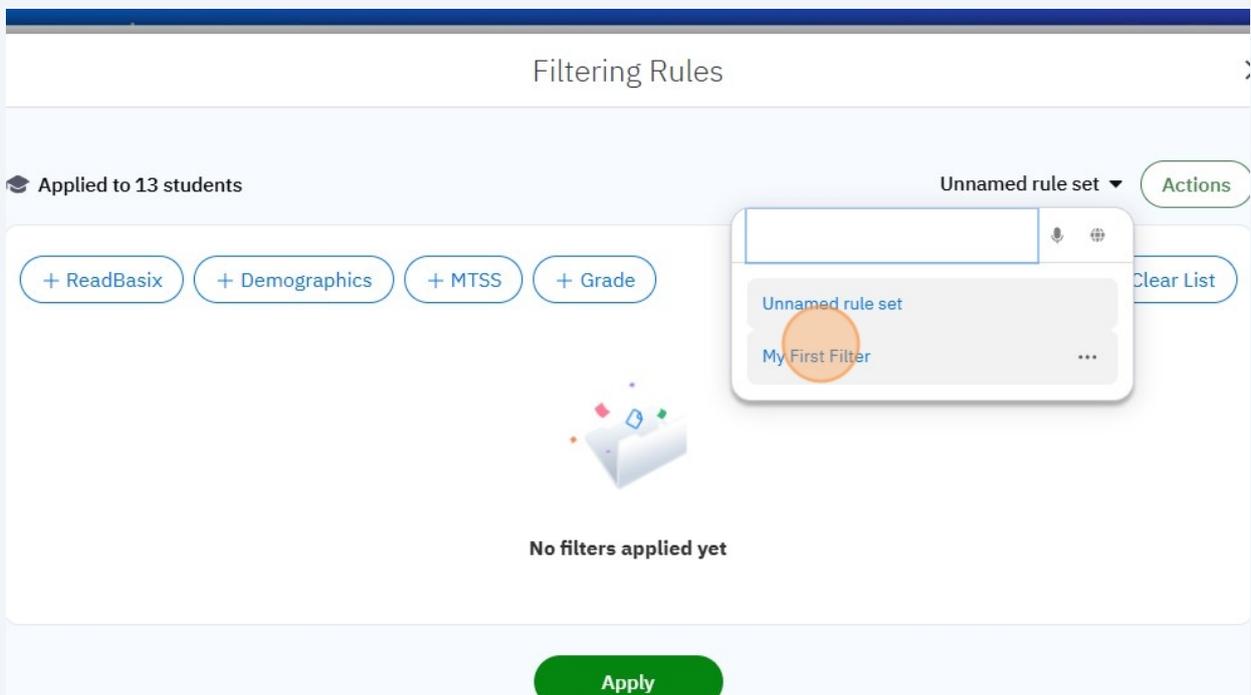
24

You can see that the Filter will be applied to my 13 Grade 6 students. I will click on Unnamed rule set to pick my saved filter.



25

Here I find my saved filter.



26

Once I see that the filter ruleset has been added to the screen, I will click apply to look at the results.

Filtering Rules

Applied to 13 students My First Filter Actions

+ ReadBasix + Demographics + MTSS + Grade Clear List

⋮	✔ Include ▼	Gender	Male ▼	Present	🗑️
⋮	✖ Exclude ▼	Scale Score (4 subtests) ▼ ⓘ	> ▼	<input type="text" value="250"/> ⓘ	Last 90 days ▼ 🗑️

Apply

27

When looking at the results, I can now see that only 7 students are included out of the 13 initial Grade 6 students, since only 7 students match the filters I put in place.

Group Report

ReadBasix: Overview 🔗 📄

Criterion	Word Recog. and Decoding	Vocabulary	Morphology	Sentence Processing	Reading Efficiency
● Completed subtest	7 (100%)	7 (100%)	7 (100%)	7 (100%)	7 (100%)
● Not assigned/incomplete subtest	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Students Total	7	7	7	7	7