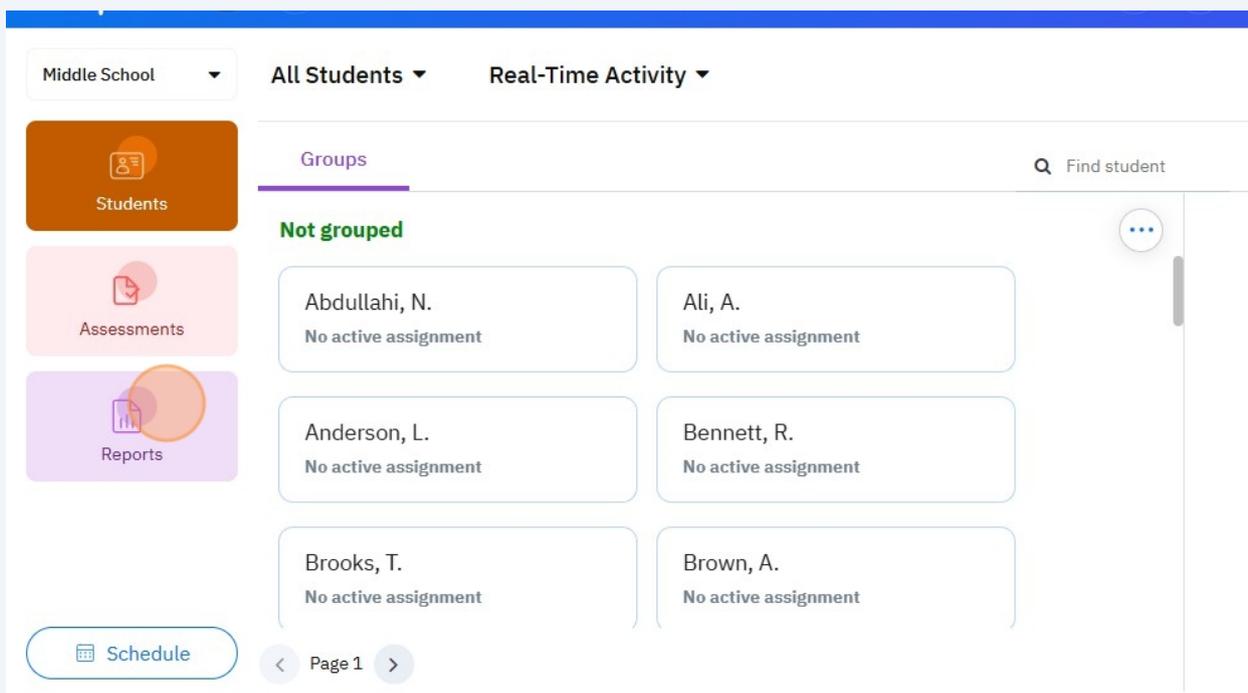# How to Create and Manage Filters in Capti

ReadBasix

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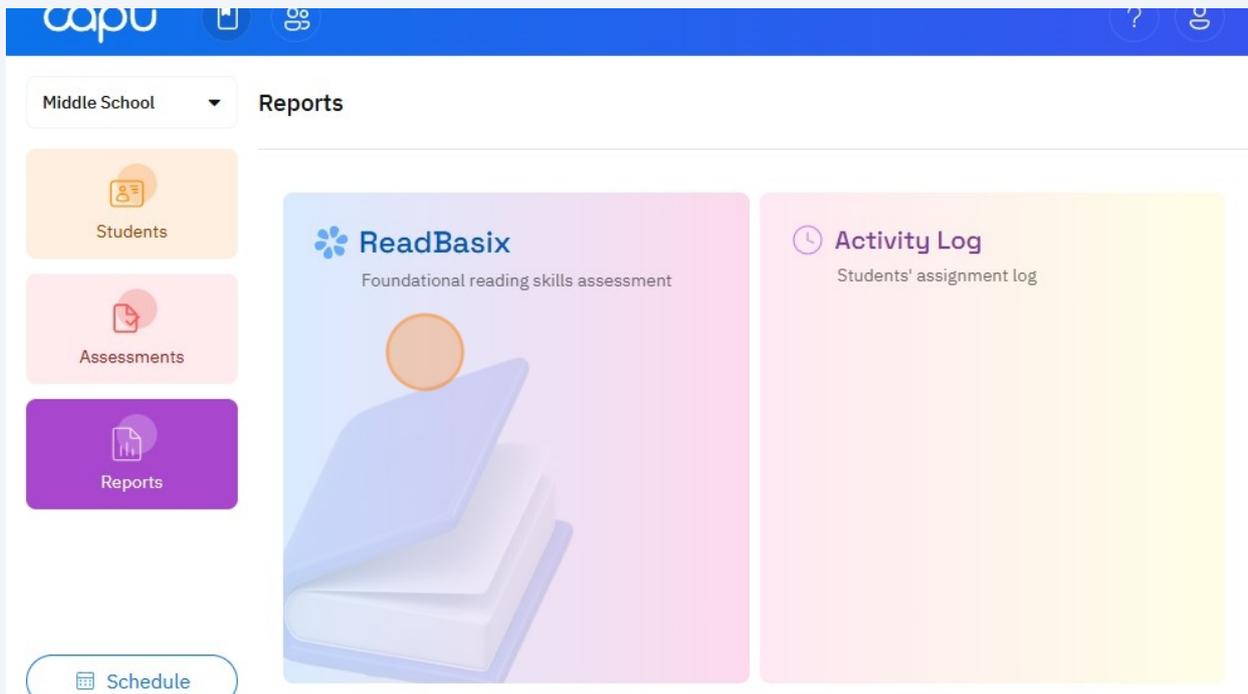
Within a filter, rules can be reordered via drag-and-drop, which affects how the filter is applied.

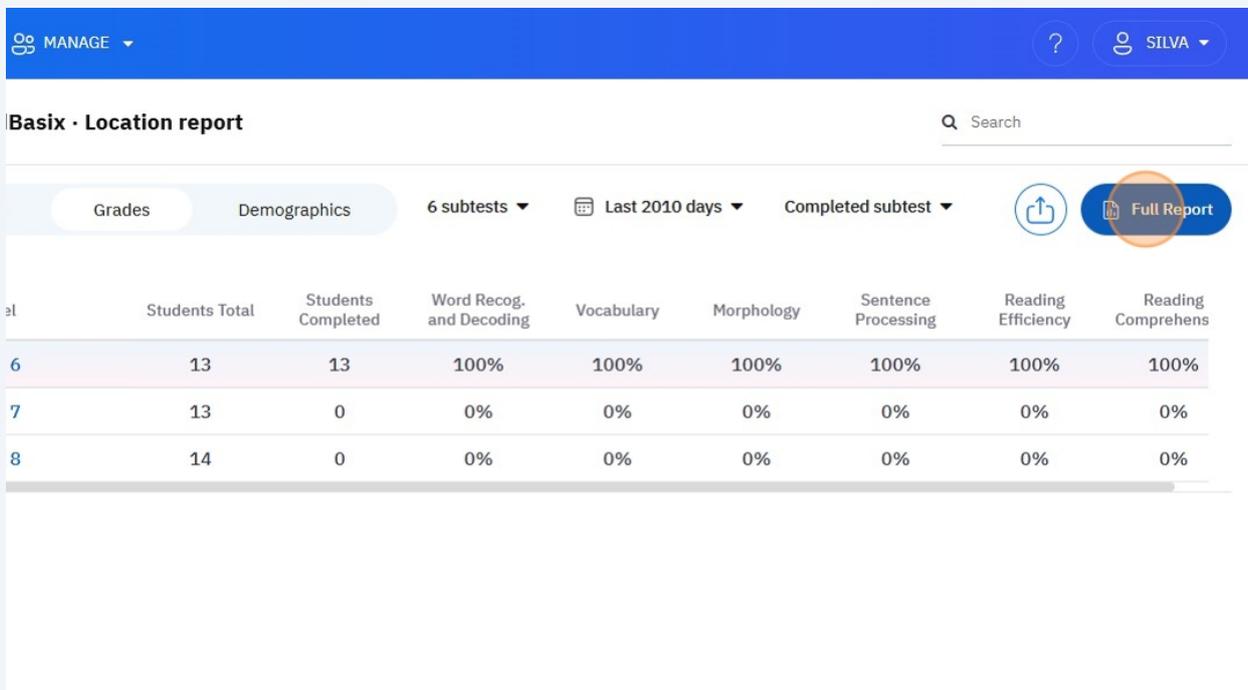**1** Begin by clicking on "Reports".

2 Click ReadBasix.

Reports

Middle School ▾

Students

Assessments

Reports

☐ Schedule

✳ **ReadBasix**
Foundational reading skills assessment

🕐 **Activity Log**
Students' assignment log

---

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

MANAGE ▾   ? SILVA ▾

Basix · Location report   Q Search

Grades | Demographics | 6 subtests ▾ | ☐ Last 2010 days ▾ | Completed subtest ▾ | Full Report

el	Students Total	Students Completed	Word Recog. and Decoding	Vocabulary	Morphology	Sentence Processing	Reading Efficiency	Reading Comprehens
6	13	13	100%	100%	100%	100%	100%	100%
7	13	0	0%	0%	0%	0%	0%	0%
8	14	0	0%	0%	0%	0%	0%	0%

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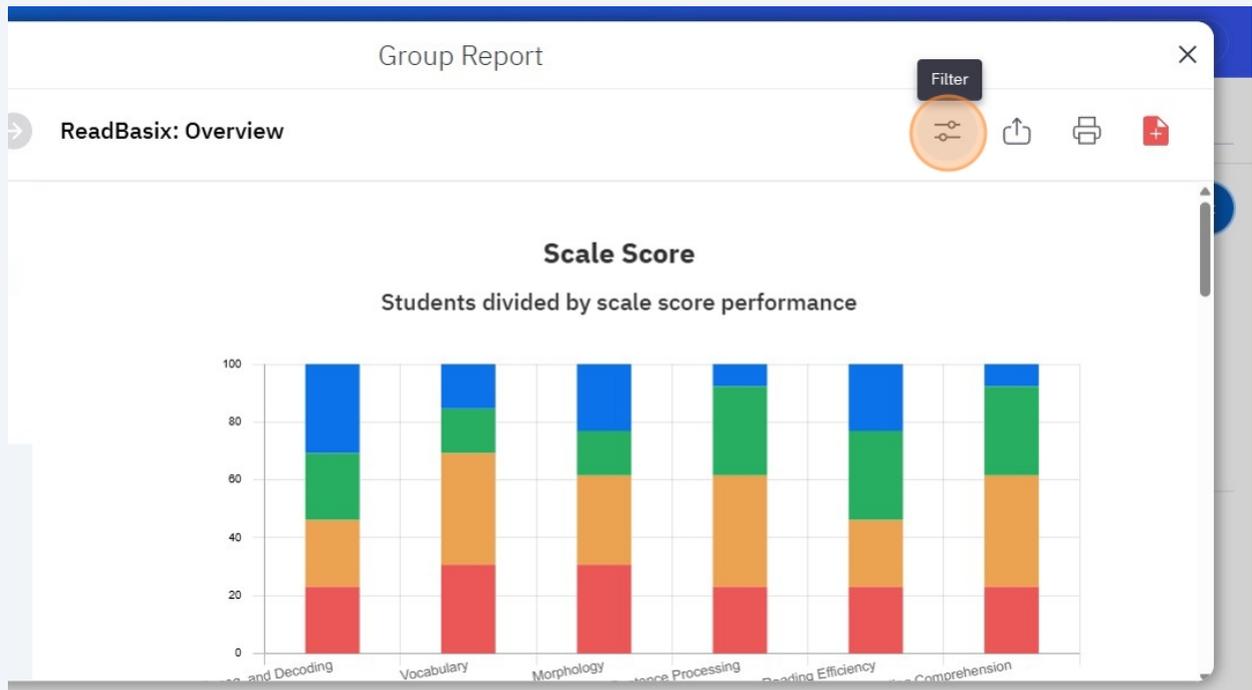
5 In the filtering rules, you can pick between a ReadBasix, Demographics, MTSS, or Grade level rule.

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

Filtering Rules

🎓 Applied to 40 students   Unnamed rule set ▾   (Actions

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   (🗑 Clear List)

| Scale Score |
| Inefficient Decoding |
| Decoding Threshold |
| Assessment Status |

No filters applied yet

Apply

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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.

Filtering Rules

🎓 Applied to 40 students   Unnamed rule set ▾   (Actions

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   (🗑 Clear List)

⠿ ✅ Include ▾   Scale Score (6 subtests) ▾ ⓘ   > ▾ [   ] ⓘ   Latest Result ▾   🗑

| Include |
| Exclude |

Apply

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.

READBASIX SUBTESTS

- ☑ Word Recog. and Decoding
- ☑ Vocabulary
- ☑ Morphology
- ☐ Sentence Processing
- ☑ Reading Efficiency
- ☐ Reading Comprehension

Save

ering Rules

🎓 Applied to 40 students   Unnamed rule set ▾   Actions

+ ReadBasix   + D...   Grade   🗑 Clear List

⠿   ⊖ Exclude ▾   > ▾   [   ] ⓘ   Latest Result ▾   🗑

Apply

---

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

Filtering Rules

🎓 Applied to 40 students   Unnamed rule set ▾   Actions

+ ReadBasix   + Demographics   + MTSS   + Grade   🗑 Clear List

⠿   ⊖ Exclude ▾   Scale Score (4 subtests) ▾ ⓘ   > ▾   [250] ⓘ   Latest Result ▾   🗑

Apply

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.

Filtering Rules

🎓 Applied to 40 students   Unnamed rule set ▼   (Actions)

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   (🗑 Clear List)

⠿ 🚫 Exclude ▼   Scale Score (4 subtests) ▼ ⓘ   > ▼   [250] ⓘ   Latest Result ▼   🗑

                                                          LAST N DAYS ⓘ

                                                          Last 7 days
                                                          Dec 10, 2025 - Dec 17, 2025

                                                          Last 30 days
                                                          Nov 17, 2025 - Dec 17, 2025

                                                          Last 90 days
                                                          Sep 18, 2025 - Dec 17, 2025

                              Apply

---

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.

Filtering Rules

🎓 Applied to 40 students   Unnamed rule set ▼   (Actions)

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   (🗑 Clear List)

                  Gender
                  Race
⠿ 🚫 Exclud   Ethnicity   e (4 subtests) ▼ ⓘ   > ▼   [250] ⓘ   Last 90 days ▼   🗑
                  ELL
                  IEP
                  Lunch Status

                  Extended Time
                  Text Font
                  Color Theme

                              Apply

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.

Filtering Rules

🎓 Applied to 40 students

GENDER

☑ Male
☐ Female
☐ X
☐ Not Specified

Save

Unnamed rule set ▼   Actions

+ ReadBasix   + Demographics   + MTSS   + (

🗑 Clear List

⠿ ⊖ Exclude ▼   Scale Score (4 subtests) ▼ ⓘ   Last 90 days ▼   🗑

⠿ ✅ Include ▼   Gender   No gender selected ▼   Present   🗑

Apply

---

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.

Filtering Rules

🎓 Applied to 40 students

Unnamed rule set ▼   Actions

+ ReadBasix   + Demographics   + MTSS   + Grade

🗑 Clear List

⠿ ⊖ Exclude ▼   Scale Score (4 subtests) ▼ ⓘ   > ▼ 250 ⓘ   Last 90 days ▼   🗑

⠿ ✅ Include ▼   Gender   Male ▼   Present   🗑

Apply

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.

Filtering Rules

🎓 Applied to 40 students ⚠️ My First Filter ▼ (Actions)

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade) (🗑 Clear List)

⋮⋮ ✅ Include ▼ Gender Male ▼ Present 🗑

⋮⋮ ⛔ Exclude ▼ Scale Score (4 subtests) ▼ ⓘ > ▼ 250 ⓘ Last 90 days ▼ 🗑

⋮⋮ ✅ Include ▼ MTSS Group ⓘ No groups selected ▼ Latest Result ▼ Delete 🗑

Apply

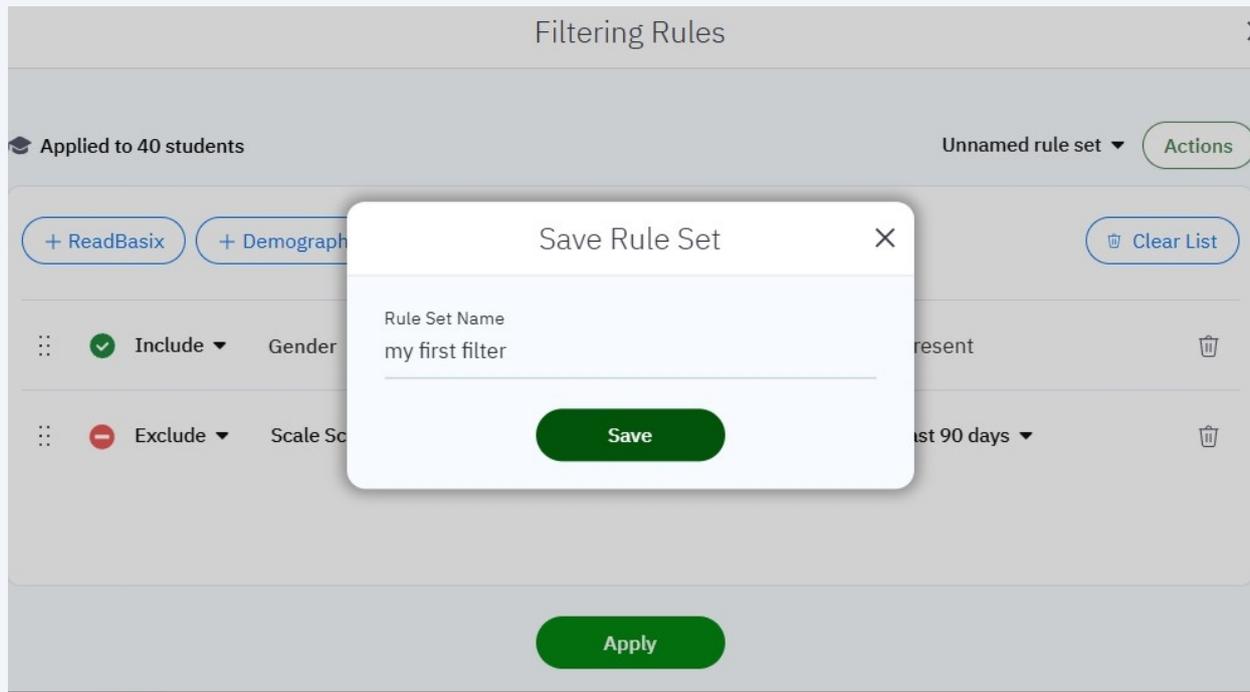**15** If you will want to use a filter again in the future, you can click the Actions button to save it.

Filtering Rules

🎓 Applied to 40 students Unnamed rule set ▼ Actions

Save as...

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade) (🗑 Clear List)

⋮⋮ ✅ Include ▼ Gender Male ▼ Present 🗑

⋮⋮ ⛔ Exclude ▼ Scale Score (4 subtests) ▼ ⓘ > ▼ 250 ⓘ Last 90 days ▼ 🗑

Apply

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

Filtering Rules

Applied to 40 students   Unnamed rule set ▼   (Actions)

(+ ReadBasix)   (+ Demograph   (🗑 Clear List)

Save Rule Set   ✕

Rule Set Name
my first filter

Save

⋮⋮ ✅ Include ▼   Gender   resent   🗑

⋮⋮ ⛔ Exclude ▼   Scale Sc   st 90 days ▼   🗑

Apply

---

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.

Filtering Rules

Applied to 40 students   my first filter ▼   (Actions)

                                                                        Save
(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   🗑   Save as...

⋮⋮ ✅ Include ▼   Gender   Male ▼   Present   Rename
                                                                        Restore
⋮⋮ ⛔ Exclude ▼   Scale Score (4 subtests) ▼ ⓘ   > ▼ 250 ⓘ   Last 90 days ▼   Delete   🗑

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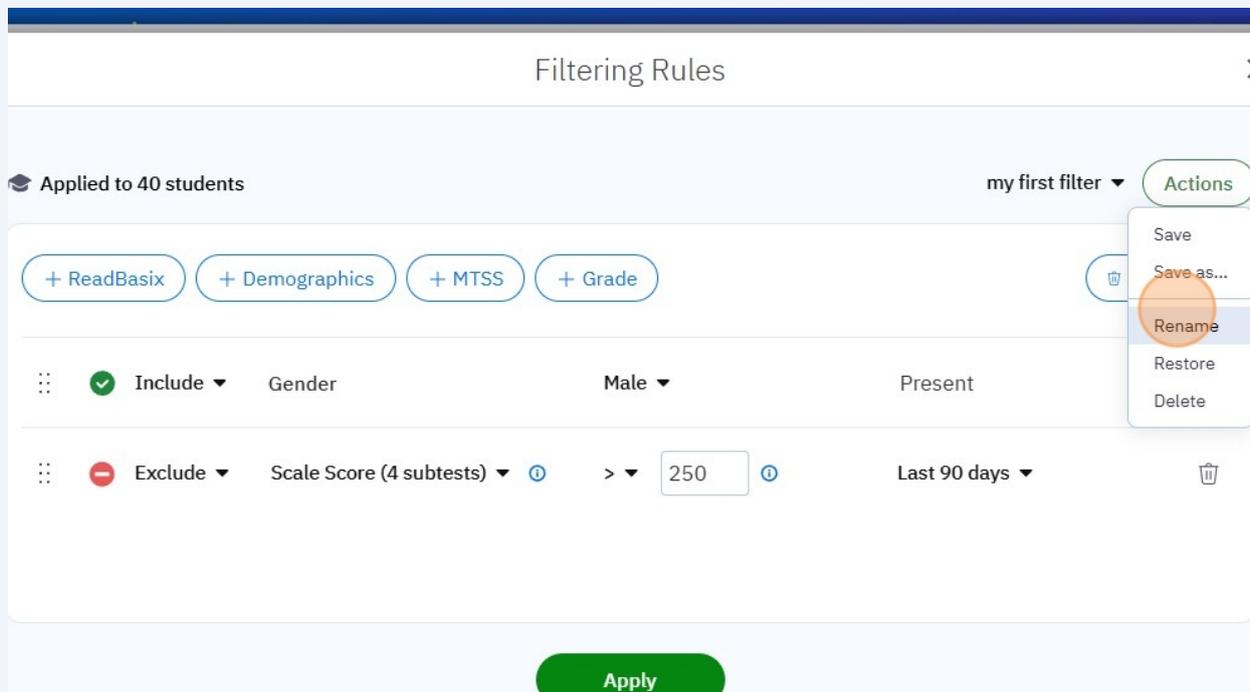
18 Click "Save" to save your changes once you've renamed.

Filtering Rules

🎓 Applied to 40 students   my first filter ▼   (Actions)

(+ ReadBasix) (+ Demograph

| ⠿ | ✅ Include ▼ | Gender | | resent | 🗑 |
| ⠿ | ⛔ Exclude ▼ | Scale Sc | | st 90 days ▼ | 🗑 |

Rename Rule Set   ✕

Rule Set Name
My First Filter
_____

                    (● Save)

Apply

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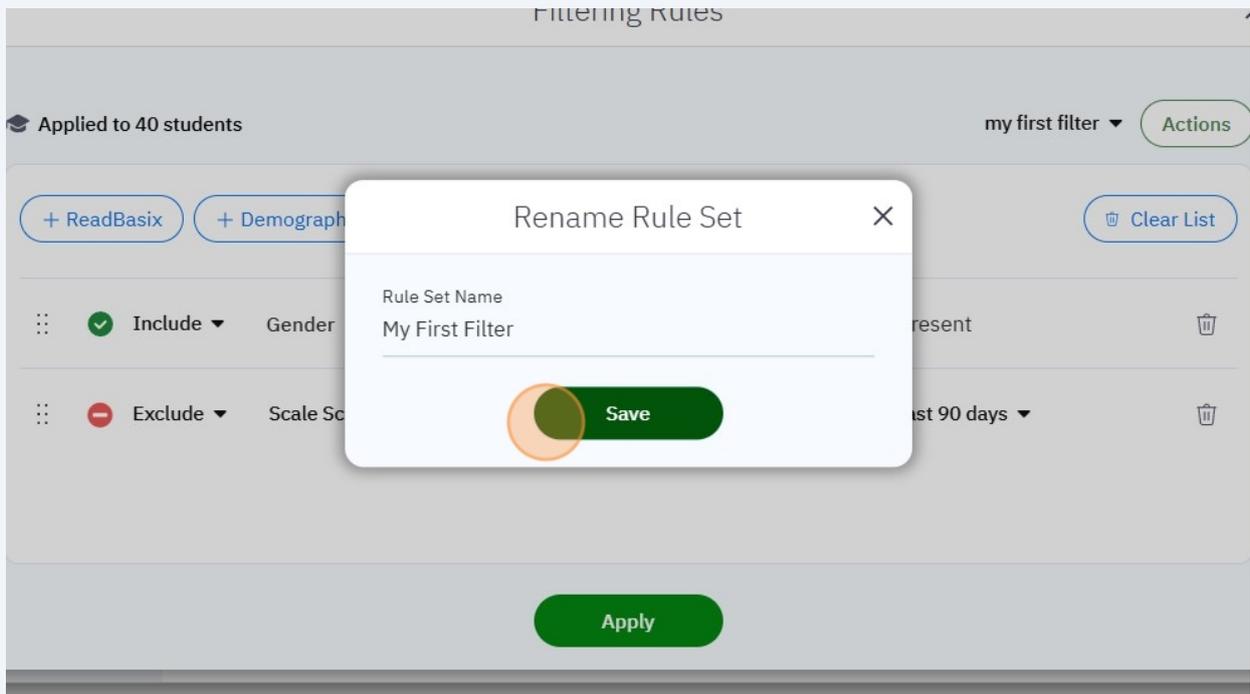
19 If you make changes to a saved filter, a yellow warning icon will appear next to the name of the filter indicating that the filter has had an unsaved change applied.

Filtering Rules   >

🎓 Applied to 40 students   ⚠ My First Filter ▼   **Actions**

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   (🗑 Clear List)

⠿	✅ Include ▼	Gender	Male ▼	Present	🗑
⠿	⛔ Exclude ▼	Scale Score (4 subtests) ▼ ⓘ	> ▼ 250 ⓘ	Last 90 days ▼	🗑
⠿	✅ Include ▼	MTSS Group ⓘ	No groups selected ▼	Latest Result ▼	🗑

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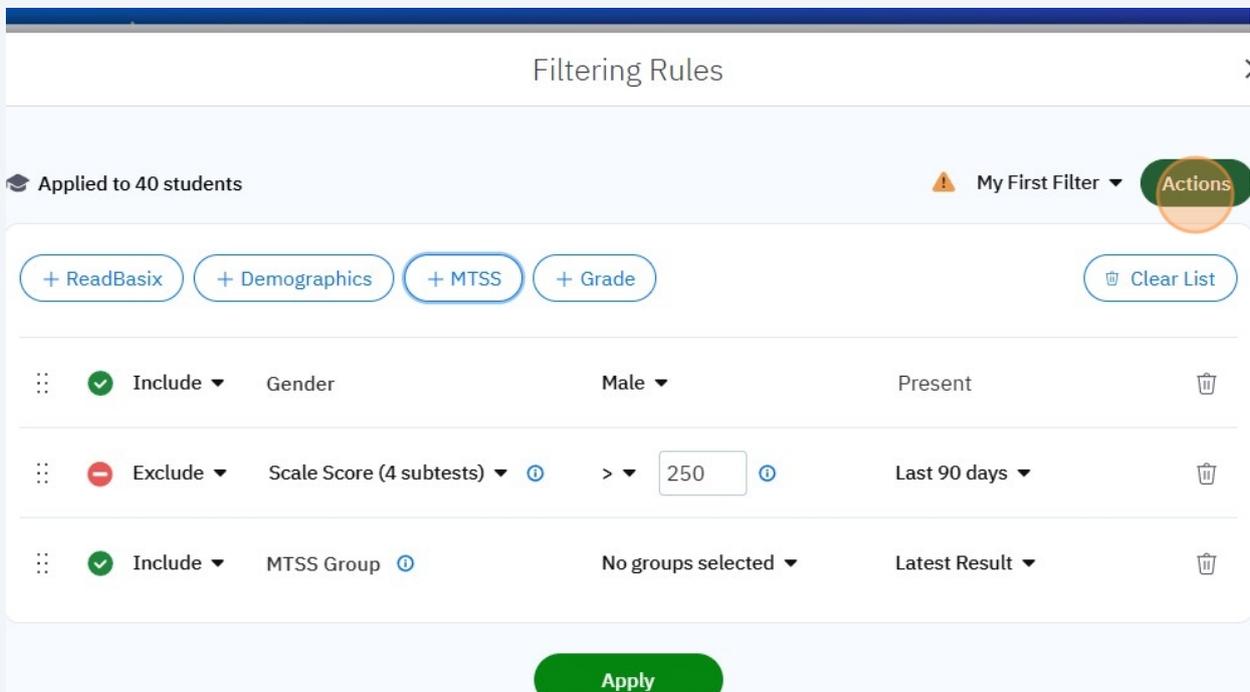
20 You can use the Actions button to save the changes to the filter, save as a new filter, or restore the filter to the last saved instance. From Actions, you can also delete a saved filter if you no longer need it.

Filtering Rules

Applied to 40 students   ⚠ My First Filter ▾   (Actions)

				Save
+ ReadBasix	+ Demographics	+ MTSS	+ Grade	Save as...
				Rename
				Restore
				Delete

⠿ ✅ Include ▾   Gender   Male ▾   Present

⠿ ⛔ Exclude ▾   Scale Score (4 subtests) ▾ ⓘ   > ▾   250   ⓘ   Last 90 days ▾   🗑

⠿ ✅ Include ▾   MTSS Group ⓘ   No groups selected ▾   Latest Result ▾   🗑

Apply

---

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.

Filtering Rules

Applied to 40 students   My First Filter ▾   (Actions)

+ ReadBasix   + Demographics   + MTSS   + Grade   🎤 🌐   Clear List

Unnamed rule set

My First Filter   ...

⠿ ✅ Include ▾   Gender   Male ▾   🗑

⠿ ⛔ Exclude ▾   Scale Score (4 subtests) ▾ ⓘ   > ▾   250   ⓘ   Last 90 days ▾   🗑

Apply

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			Q Search		
Students	Classes	Grades	Demographics	6 subtests ▼	📅 Last 2010 days ▼	Cor
Assessments	▲ Grade Level	Students Total	Students Completed	Word Recog. and Decoding	Vocabulary	Morpholog
	Grade 6	13	13	100%	100%	100%
Reports	Grade 7	13	0	0%	0%	0%
ReadBasix	Grade 8	14	0	0%	0%	0%

📅 Schedule

23 I begin by clicking the Filter button.

Group Report

← → ReadBasix: Overview   Filter ⚏ ⬆
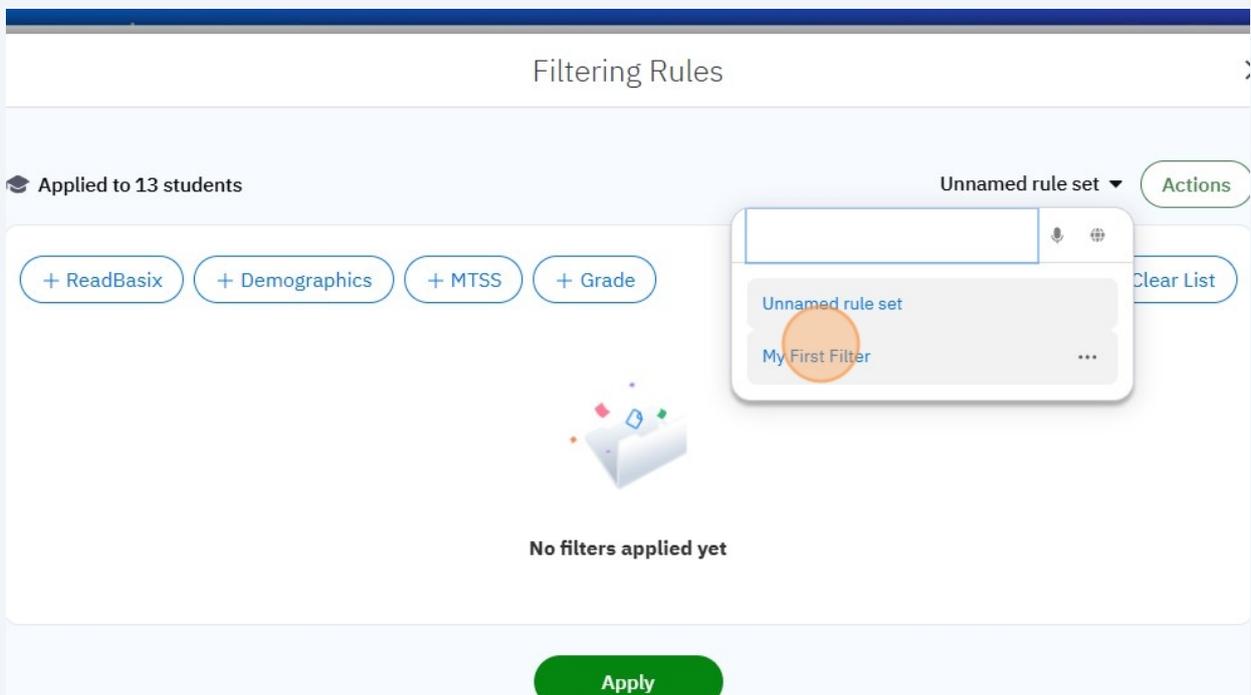
>

Scale Score

Students divided by scale score performance

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.

Filtering Rules

🎓 Applied to 13 students   Unnamed rule set ▼   Actions

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   🗑 Clear List

No filters applied yet

Apply

---
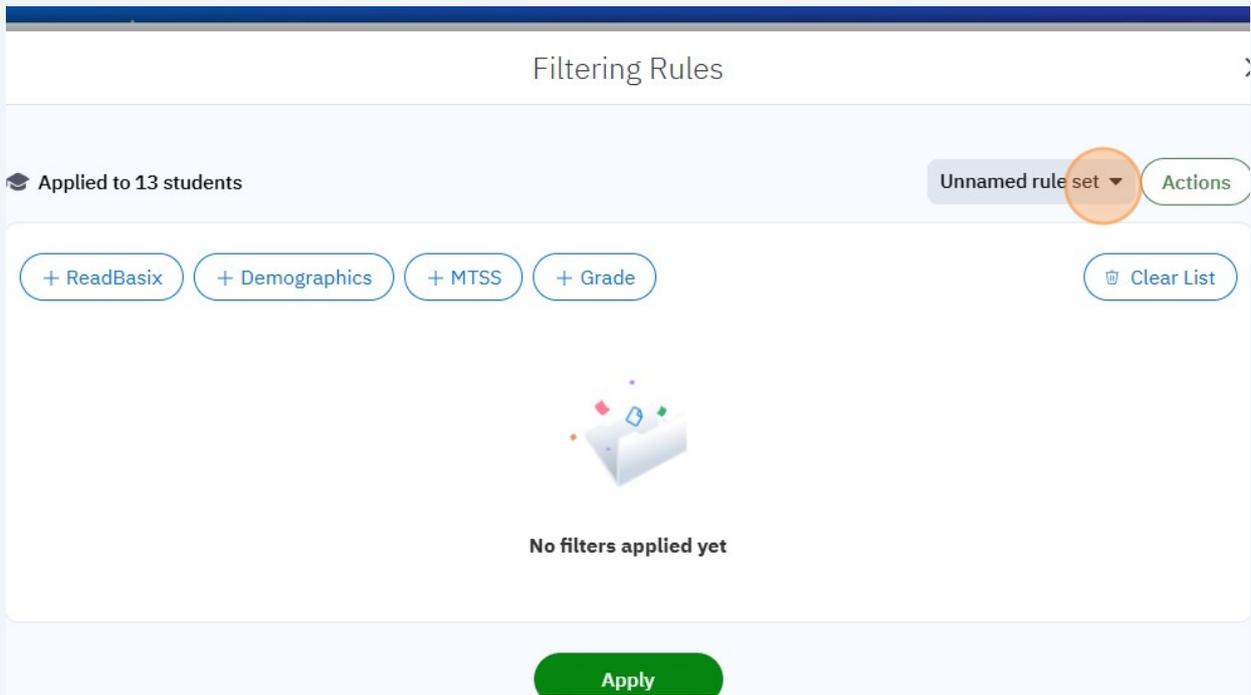
25 Here I find my saved filter.

Filtering Rules

🎓 Applied to 13 students   Unnamed rule set ▼   Actions

(+ ReadBasix) (+ Demographics) (+ MTSS) (+ Grade)   Clear List

🎤 🌐

Unnamed rule set

My First Filter   ...

No filters applied yet

Apply

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) ▼ ⓘ | > ▼ | 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