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QUICK REFERENCE · EVERYONE

Assessments: who does what

Four steps, spread across the year. No two people do the same one — so the first thing worth knowing is which part is yours.

DIRECTOR

Before the year starts

Set up reporting periods for the whole year, and make sure exactly one is active.

Check the skills library and the age ranges on anything you've added.

Ten minutes once. Skipping it causes problems all year.

TEACHER

All term

Rate skills as you see them. One or two at a time, in the room, in the moment.

Add a note saying what you actually saw.

This is the part that takes the year. Everything else is quick.

TEACHER

End of term

Generate the report. Read it properly. Send it for review.

Nothing exists for anyone else until you generate it.

DIRECTOR

End of term

Review it. Publish and share it, or send it back with a reason.

Only the last step reaches a family.

Set up → Rate all term → Generate → Review → Shared with family

Three things people get wrong

Ratings aren't a report. A director sees nothing until a teacher presses Generate.

A report isn't automatically shared. Draft → in review → final → shared. Only the last one reaches a family.

December is too late. Ratings recorded months after the fact are guesses, and they read like it.

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FOR DIRECTORS

Before the year starts

Ten minutes now. These are the settings that quietly break things later — and because nothing looks broken, they can run wrong for weeks.

SECTION 1

Reporting periods

Learning → Assessments → View setup

- [ ] Every period for the year is created — not just the first one
- [ ] Exactly **one** is marked Current
- [ ] The others read Not in use
- [ ] Dates don't overlap

Why it matters. The current period decides what teachers see and what a report covers. If the wrong one is active, nothing appears broken — the numbers just quietly describe the wrong window.

SECTION 2

Skills

One library, shared across your whole program

- [ ] The library reflects what you actually teach
- [ ] Any skill **you** added has an age range set
- [ ] Archived anything you won't use

Why it matters. Skills from the standard library arrive with an age range. **Skills you add yourself default to every age**, so they show up for infants and five-year-olds alike until you set one.

SECTION 3

People

- [ ] Teachers know rating happens all term, not in the last week
- [ ] Everyone knows who publishes reports at your center

When a term ends

Activate the next period. Don't leave the old one running — one period should be current at a time, and that switch is the only thing that moves everyone on.

How Bloomily decides which skills a room sees

You don't assign skills to classrooms. Each skill's **age range** decides which children see it, so a room's list follows the ages of the children in it — and a child moving rooms needs nothing updated.

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END OF TERM

Getting reports to families

Both halves of the job on one sheet. A report changes hands twice before a family sees it.

TEACHER

Write it and send it

- [ ] Open **Assessments** at bloomily.app
- [ ] Check the term at the top is the one you mean
- [ ] **Generate report** — one child, or a whole room
- [ ] Open it and read it properly
- [ ] Fix anything while it's still a draft
- [ ] **Send for review**

Once you send, it locks — for you and your director both. If it comes back, the reason is on that report's row.

DIRECTOR

Review it and release it

- [ ] Work through the reports list
- [ ] Read before publishing — comments go out as written
- [ ] **Publish and share**, or **Send back to teacher**
- [ ] Sending back needs a reason

The teacher reads your reason on the report, so be specific.

In bulk: filter to one classroom and one period, tick the reports, publish. You can't span rooms or periods in one pass.

THE FOUR STATES

STATUS	WHAT IT MEANS
Draft	The teacher's. Editable.
In review	With the director. Locked for **both** of them.
Final — not shared	Finished and locked, but still internal.
Shared with family	They can open it.

Only the last one reaches a family. Publishing sends no email — families find the report when they next open the app.

Changed your mind after sharing?

Stop sharing takes it back from the family and leaves it final. For when the report is right but the timing was wrong.

Unpublish unlocks it for editing. For when the report itself needs to change.