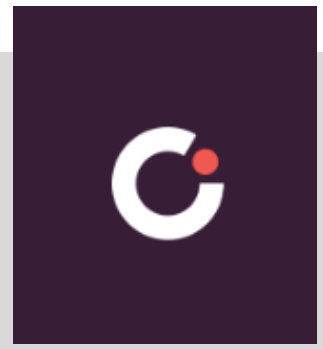




User Management Guide

Cognia Improvement Platform

Account Owners and Administrators





Overview

The Cognia® Improvement Platform is the digital hub for Cognia Membership, giving our members access to digital tools and resources designed to guide improvement, evaluate what's working, learn and grow your profession, and improve overall school performance.

Account Owners, e.g., Head of Institution (HOI), Primary Contact (PC), and Platform Administrator, are automatically invited by Cognia to create their accounts in the Improvement Platform; these accounts are managed by Cognia. Account Owners are then responsible for managing users for their institution. This includes inviting new users and assigning access to the tools. Other administrators who are invited to the institution can also manage users on behalf of the Account Owners.

This guide provides information and instructions for Account Owners and Administrators for the following:

User Roles and Permissions	1
Logging In.....	3
Viewing Users	4
Inviting New Users (Manual)	5
Inviting New Users (Import).....	6
Resending a User's Invitation.....	7
Changing a User's Role	7
Canceling a User's Invitation.....	8
Removing a User.....	8
Disabling or Enabling a User.....	9
Transferring a User	10
Approving or Rejecting a User Transfer.....	11

User Roles and Permissions

The Improvement Platform supports several user roles. Each role has its own permissions, which determine the user's access to platform tools. Users who are not Account Owner must be assigned either the role of Institution Admin or Institution User. Users may have multiple roles; however, they can be assigned only one of these roles at a time: Institution Admin, Contributor, or Viewer.

Table 1: User Roles and Permissions

Role	Permissions
Account Owner	Account Owner is the default role assigned by Cognia to the Head of Institution (HOI), Primary Contact (PC), and Platform Administrator. When the role of Account Owner is assigned, the roles Institution Admin, Coordinator, and Observer are automatically assigned by default as well. Changes to an Account Owner must be submitted to Cognia Client Care clientcare@cognia.org. User Management: Account Owners are responsible for inviting new users to the institution and assigning access to the tools.



Role	Permissions
Institution Admin	When the role of Institution Admin is assigned, the roles Coordinator and Observer are automatically assigned by default as well. User Management: Institution administrators can view and manage users for their assigned institution. Administrators of a district/system or state can also view and manage users for the institutions under their hierarchy. When the role of Admin is assigned, the roles Coordinator and Observer are automatically assigned by default as well. Strategies: Institution administrators can start, view, edit, archive, and unarchive plans for their institution, and can download outputs. Admins of a district/system can also create shared district components, view and leave feedback for school plans, edit, archive, and unarchive plans on behalf of their schools, and download outputs; they cannot start school plans. Reviews: Institution administrators can view, edit, and submit reviews for their institution, and can download outputs; they cannot start reviews. Admins of a district/system can also view, edit, and submit reviews on behalf of their schools, and download outputs; they cannot start school reviews.
Institution User	Institution users can only log in to the Improvement Platform and view the information that is posted on the homepage; they cannot access any tools unless another role which grants tool access is also assigned.
Contributor	Strategies: Institution contributors can view and edit plans for their institution and download outputs; they cannot start, archive, or unarchive plans. Contributors of a district/system can also view and leave feedback for school plans, edit plans on behalf of their schools, and download outputs; they cannot create shared district components or start, archive, or unarchive school plans. Reviews: Institution contributors can view and edit reviews for their institution and can download outputs; they cannot start or submit reviews. Contributors of a district/system can also view and edit reviews on behalf of their schools and download outputs; they cannot start or submit school reviews.
Viewer	Strategies: Institution viewers can view the plans for their institution and download outputs; they cannot start, edit, archive, or unarchive plans. Viewers of a district/system can also view school plans and feedback and download outputs; they cannot start, edit, archive, or unarchive school plans. Reviews: Institution viewers can view the reviews for their institution and can download outputs; they cannot start, edit, or submit reviews. Viewers of a district/system can also view the reviews for their schools and download outputs; they cannot start, edit, or submit school reviews.
Educator	Educator being observed at the institution; only assigned at the school level, not available to assign at the district/system level. Educators are assigned the Institution User role by default; they can only log in to the Improvement Platform and view the information that is posted on the homepage; they cannot access any tools unless another role which grants tool access is also assigned.



Role	Permissions
Observer	Observations: Institution observers can create, view, edit, and delete observations created within their institution, and can download reports; users of a district/system must be assigned as an Observer at a school if they need to create and view observations for that school. An Observer, who is also an Admin, can create, view, edit, and delete all courses and classrooms for their institution; Admins of a district/system must be assigned as an Observer at a school if they need to create and view courses and classrooms for that school.
Coordinator	Surveys: Institution coordinators can create, view, and close surveys created within their institution, and can download reports; users of a district/system must be assigned as a Coordinator at a school if they need to create and view surveys for that school. A Coordinator, who is also an Admin, can create, view, edit, and delete all courses and classrooms for their institution; Admins of a district/system must be assigned as a Coordinator at a school if they need to create and view courses and classrooms for that school.

Logging In

Follow the steps below to log in to the Cognia Improvement Platform:

1. Navigate to the Improvement Platform home.cognia.org.
2. On the Cognia Welcome page, enter your **Email** address into the text box and click the **Continue** button.
 - If your email is not recognized, you will be informed that an account doesn't exist and to contact your school administrator and request to be invited. If you have already been invited but have not created your account, a new invitation with a unique link to create your account is sent to your email; the link expires after seven days.

Welcome Page

The screenshot shows the Cognia Welcome page. It features the Cognia logo at the top, followed by the text "Welcome!". Below this is a text input field labeled "Email *" and a blue "Continue" button.

Account Doesn't Exist

The screenshot shows the Cognia "Account Doesn't Exist" page. It features the Cognia logo at the top, followed by the text "Welcome!". Below this is a text input field labeled "Email *" containing the text "jane@cognia.org" and a blue "Continue" button. At the bottom, there is a red warning message: "▲ This account doesn't exist. Please contact your school administrator for an invitation to create your account."

Account Already Invited

The screenshot shows the Cognia "Account Already Invited" page. It features the Cognia logo at the top, followed by the text "Welcome!". Below this is a text input field labeled "Email *" containing the text "jane.demo@cognia.org" and a blue "Continue" button. At the bottom, there is a red warning message: "▲ You've already been invited to set up your account but didn't complete the process. A new invitation has been sent to your email address with instructions to create your account."

3. On the Sign in page, enter your **Email address** and **Password** into the text boxes, and click the **Sign in** button; this opens your Improvement Platform homepage. If your password is not working, click **Forgot your password?** and enter your email address to receive a code to reset it.

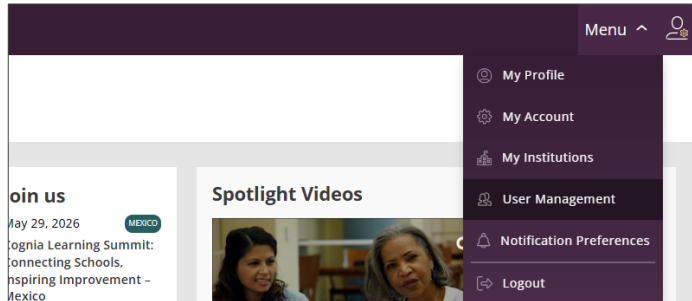
The screenshot shows the Cognia Sign in page. It features the Cognia logo at the top. Below the logo is the text "Sign in" and "Sign in to your account.". There are two text input fields: "Email address" (containing "name@host.com") and "Password" (containing "Enter password"). Below the password field is a checkbox labeled "Show password" and a link labeled "Forgot your password?". At the bottom is a blue "Sign in" button.



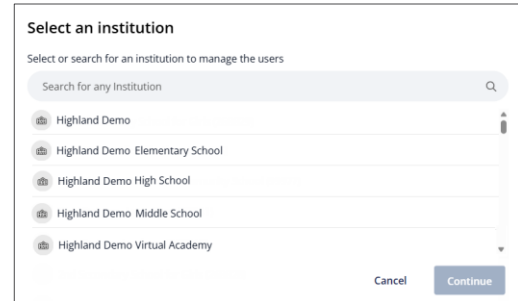
Viewing Users

User Management is accessible from the Menu drop-down at the top right of the Improvement Platform homepage. If you have access to multiple institutions or are an administrator of a district/system or state, you will be presented with the list of institutions—select an institution to proceed.

Menu Drop-down



Select an Institution



- Your institution is displayed at the top left and top right of the User Management page. If you have access to multiple institutions, you will also have a **Change Institution** link to allow you to select a different institution.
- Only Enabled and Invited users are displayed by default. To show disabled users, select the checkbox **Include disabled institutional access users**; this updates the list to also display any Disabled users.
- Users who have been invited but have not yet created their account will show with a status of **Invited** beside their name. The user's email address is shown underneath their name.
- The list can be downloaded to an Excel file by clicking the **Download** link.
- The list can be searched to find a user using the **Search by name or email** text box; the list automatically updates as you type to display the results.
- The following columns are displayed: **Name**, **Roles**, **Last Login**, and **Action**. The list can be sorted by Name or Last Login by clicking on the column header. The list can be filtered by role by clicking the Roles column header and then selecting the role from the drop-down list; multiple can be selected.
- A user's account and role properties can be displayed by clicking on their user record to select them.
- A link to a **Resource Page** is available for access to training guides and videos.

Name	Roles	Last Login	Action
Jane Demo Invited jane.demo@yopmail.com	Institution User Observer		
Jason Demo jason.demo@yopmail.com	Institution User Educator	03/02/2026 10:45 AM	
Julie Demo julie.demo@yopmail.com	Account Owner Institution Admin	01/26/2026 11:59 AM	



Inviting New Users (Manual)

Important: Invitations for an Account Owner, e.g. HOI, PC, or Platform Admin, must be submitted to Client Care clientcare@cognia.org.

New users can be invited to your institution manually. Imports can also be used to invite a group of new users to your institution. For importing new users, see the section [Inviting New Users \(Import\)](#). Follow the steps below to manually invite a new user:

1. From your institution's User Management page, select the **Invite new users** drop-down, and then click **Add manually**.

The screenshot shows the 'User Management' page for 'Highland Demo High School'. At the top, there's a search bar labeled 'Search by name or email' and a 'Download' button. Below the search bar, there's a table with 3 results. To the right of the table, there's a dropdown menu labeled 'Invite new users' with options 'Add manually' and 'Import User List'. The table has columns for Name, Roles, Last Login, and Action.

2. On the Add Users Individually page, enter the user's **First Name**, **Last Name**, and **Email** into the text boxes.
3. The Institution User role is selected by default. Select any different or additional roles the user should be assigned from the **User Roles** drop-down list; multiple can be selected. Selecting the role Institution Admin automatically replaces the Institution User role and adds the roles of Coordinator and Observer, but this can be removed if not required.
4. Optional: Click the **add another user** link to manually add another user.
5. Click the **Send Invitations** button when you are done; this invites the user to the institution, and they are added with a status of Invited.
 - **Note:** Invited users are sent an email invitation. This email contains a unique link for the user to create their account, which expires after 30 days. If the link expires, a new invitation can be sent to generate a new link, and the new link expires after seven days.

The screenshot shows the 'Add Users Individually' page for 'Highland Demo High School'. It has input fields for 'First Name', 'Last Name', and 'Email'. There's a 'User Roles' dropdown menu with 'Institution User' selected. Below the input fields, there's a '+ add another user' link. At the bottom, there are 'Cancel' and 'Send Invitations' buttons.

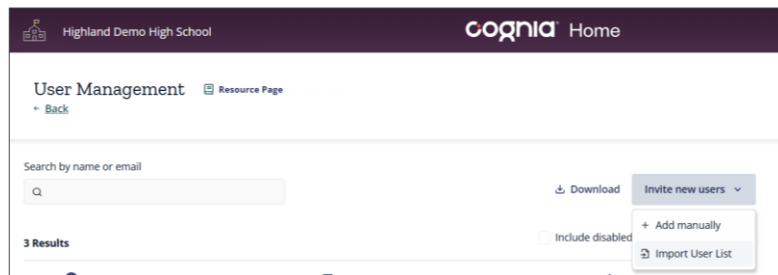


Inviting New Users (Import)

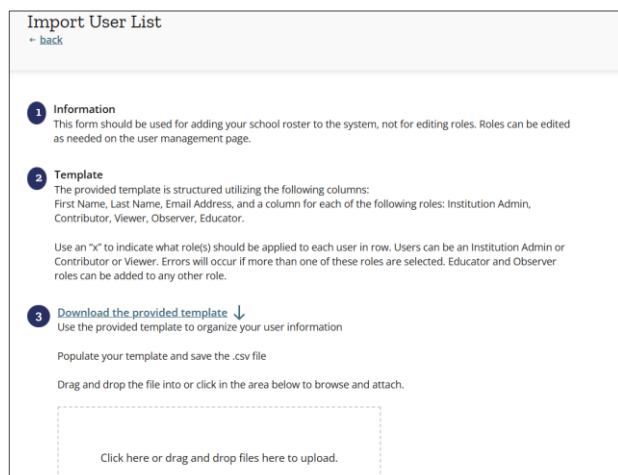
Important: Invitations for an Account Owner, e.g. HOI, PC, or Platform Admin, must be submitted to Client Care clientcare@cognia.org.

Imports can be used to invite a group of new users to your institution. New users can also be invited to your institution manually. For manually adding new users, see the section [Inviting New Users \(Manual\)](#). Follow the steps below to import a group of users:

1. From your institution's User Management page, select the **Invite new users** drop-down, and then click **Import User List**.



2. On the Import User List page, click the **Download the provided template** link; this downloads a copy of the .csv template.
3. Populate the template with the new user's information. The following columns are included: **First Name | Last Name | Email | Admin | Contributor | Viewer | Observer | Educator**. Enter an **x** in the field to indicate which role the user should be assigned; multiple can be assigned. Users who are not assigned the role of Institution Admin are assigned Institution User by default (there is no column for this role).
4. When you are done populating the template, save it as a **.csv** file.
5. On the **Import User List** page, click in the upload space to select the file or drag and drop the file; this invites the users to the institution, and they are added with a status of Invited.
 - a. **Errors:** If the file contains any errors, an error file will automatically be generated. Open the error file and make the required corrections to the user's information. Save the file as a .csv and upload it; this invites the users to the institution, and they are added with a status of Invited.
 - **Note:** Invited users are sent an email invitation. This email contains a unique link for the user to create their account, which expires after 30 days. If the link expires, a new invitation can be sent to generate a new link, and the new link expires after seven days.

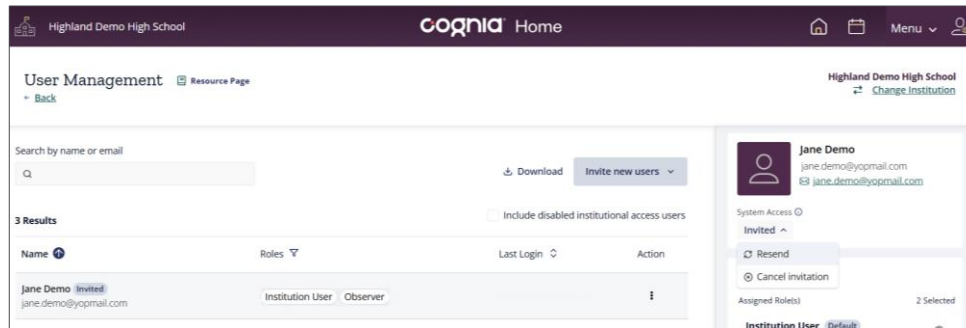




Resending a User's Invitation

New users who are invited to your institution are added with a status of Invited and are sent an email invitation. This email contains a unique link for the user to create their account, which expires after 30 days. If that link expires or the user cannot find the email, a new invitation can be sent to generate a new link; the new link expires after seven days. Follow the steps below to resend an invited user's email invitation:

1. From your institution's User Management page, find the user in the list and click on their user record to select them; this displays the user's account and role properties on the right.
2. Select the **Invited** drop-down under System Access, and then click **Resend**; this sends the user a new email invitation. This email contains a unique link for the user to create their account, which expires after seven days.

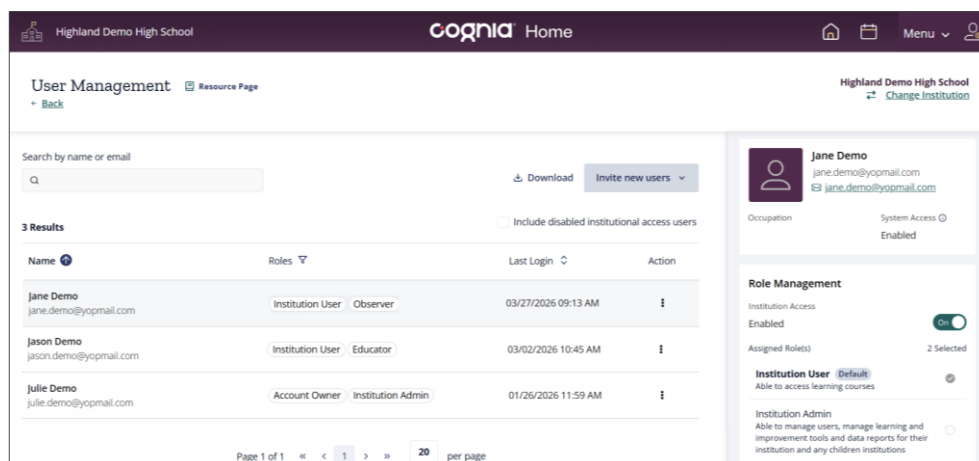


Changing a User's Role

Important: Changes to the default roles of Account Owner and Institution Admin for an HOI, PC, or Platform Admin must be submitted to Client Care clientcare@cognia.org. An Account Owner's role can only be changed for Coordinator and Observer.

If a user needs to be assigned a different or additional role, their roles can be changed. Follow the steps below to change a user's role:

1. From your institution's User Management page, find the user in the list and click on their user record to select them; this displays the user's account and role properties on the right.
2. Under Role Management, select/unselect the roles that should be assigned to the user; the changes are automatically saved, and the user is sent an automated email notifying them that their role has been updated.



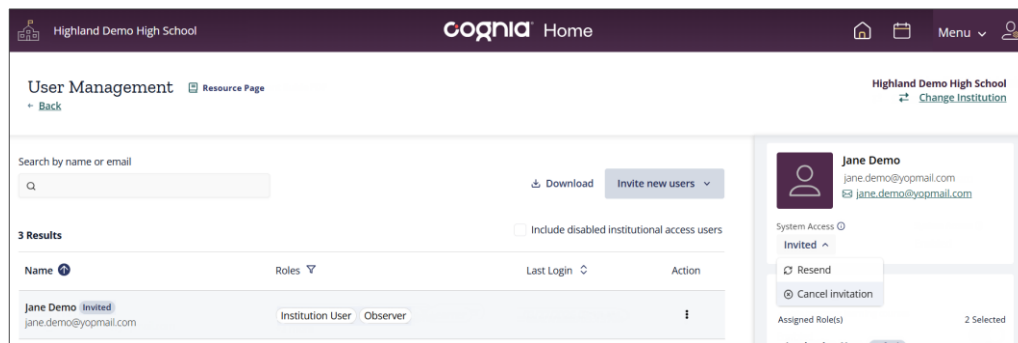


Canceling a User's Invitation

Important: Changes to an Account Owner, e.g. HOI, PC, or Platform Admin, must be submitted to Client Care clientcare@cognia.org. An Account Owner's invitation should not be canceled in the platform.

New users who are invited to your institution are added with a status of Invited and are sent an email invitation. If necessary, this invitation can be canceled before the user has created their account. Follow the steps below to cancel an invited user's invitation:

1. From your institution's User Management page, find the user in the list and click on their user record to select them; this displays the user's account and role properties on the right.
2. Select the **Invited** drop-down under System Access, and then click **Cancel invitation**; this opens a confirmation box.
3. Click the **Cancel Invite** button to proceed; this cancels the user's invitation, and they are removed from the institution.

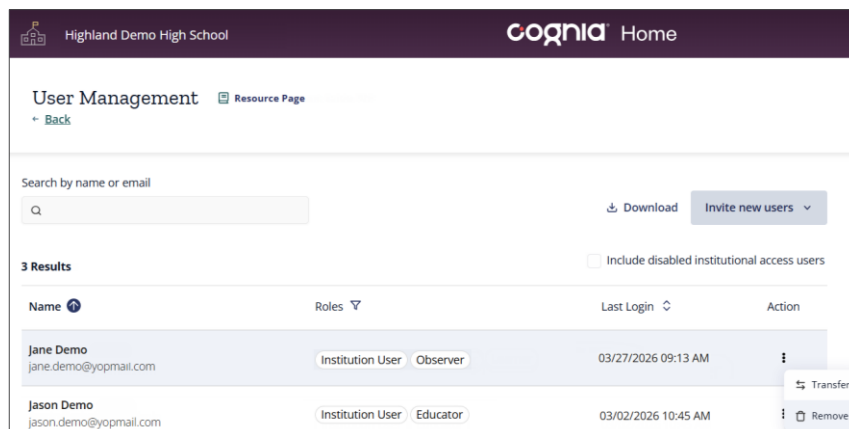


Removing a User

Important: Changes to an Account Owner, e.g. HOI, PC, or Platform Admin, must be submitted to Client Care clientcare@cognia.org. **An Account Owner should not be removed from the platform.**

An account should only be removed if a user no longer requires access to the institution and they have not entered any data into the Improvement Platform. Follow the steps below to remove a user:

1. From your institution's User Management page, find the user in the list.
2. Select the **Action** button to the far right, and then click **Remove**; this opens a confirmation box.
3. Click the **Remove** button to proceed; this removes the user from the institution.





Disabling or Enabling a User

Important: Changes to an Account Owner, e.g. HOI, PC, or Platform Admin, must be submitted to Client Care clientcare@cognia.org. **An Account Owner should not be disabled in the platform.**

An account should be disabled if a user no longer requires access to the institution, but they have entered data into the Improvement Platform. Any existing data associated with the account remains accessible to the institution. A user whose account is disabled can later be enabled if necessary. Follow the steps below to disable or enable a user:

1. From your institution's User Management page, find the user in the list. Only if you are enabling a user, select the checkbox **Include disabled institutional access users**.
2. Under Role Management, set the Enabled toggle switch to **Off** to disable the account; or set the Disabled toggle switch to **On** to enable the account; the changes are automatically saved. Enabled users are sent an email to notify them that their access to the institution has been enabled; an email is not sent when access is disabled.
3. If the user was enabled, verify that they have the correct roles assigned and make any changes; multiple roles can be selected and the changes are automatically saved.

Enabled User

The screenshot shows the Cognia Home page for Highland Demo High School. On the left, there's a table of users with columns for Last Login and Action. The user Jane Demo is listed with a last login of 03/27/2026 09:13 AM. On the right, the user profile for Jane Demo is displayed. The System Access toggle is set to 'On' (Enabled). Under Role Management, the Institution User role is selected, and the Institution Admin role is also visible.

Disabled User

The screenshot shows the Cognia Home page for Highland Demo High School. On the left, the checkbox 'Include disabled institutional access users' is checked. The user profile for Jane Demo is displayed on the right. The System Access toggle is set to 'Off' (Disabled). Under Role Management, the Institution User role is selected, and the Institution Admin role is also visible.



Transferring a User

Important: Changes to an Account Owner, e.g. HOI, PC, or Platform Admin, must be submitted to Client Care clientcare@cognia.org. **An Account Owner should not be transferred in the platform.**

Transferring a user from one institution to another allows them to continue using their existing Improvement Platform account. However, any data the user entered under their old institution remains with that institution and does not transfer with them. Follow the steps below to transfer a user to a different institution:

1. From your institution's User Management page, find the user in the list and select the **Action** button to the far right, and then click **Transfer**; this opens a Find Your Institution box.

Highland Demo High School

cognia Home

User Management [Resource Page](#)

[Back](#)

Search by name or email

Q

Download Invite new users

3 Results

☐ Include disabled institutional access users

Name	Roles	Last Login	Action
Jane Demo jane.demo@yopmail.com	Institution User Observer	03/27/2026 09:13 AM	Transfer
Jason Demo jason.demo@yopmail.com	Institution User Educator	03/02/2026 10:45 AM	Remove

2. In the **City** text box, begin entering the city in which the institution resides, and then select the city from the drop-down list; you must enter at least three characters for the list to show.
3. In the **Institution** text box, begin entering the name of the institution, and then select it from the drop-down list; you must enter at least three characters for the list to show; this opens a confirmation box.

Find Your Institution

Please help us find the institution you want to move to by selecting a city then institution.

City*

Find your city...

Institution

start typing to find your institution

4. Confirm the correct institution is displayed. If it's not, click the **No, Go Back** button to search for it again. If it is, click the **Yes, Connect** button to proceed; this transfers the user to the selected institution, and the HOI and PC of the new institution are sent an email to notify them. The HOI/PC or another Admin at the new institution must approve or reject the transfer request for it to be completed.

Is this your Institution?

Highland Demo Middle School

Alpharetta
Georgia, 30009
Alpharetta

No, Go Back Yes, Connect



Approving or Rejecting a User Transfer

Important: Changes to an Account Owner, e.g. HOI, PC, or Platform Admin, must be submitted to Client Care clientcare@cognia.org. **An Account Owner should not be transferred in the platform.**

When a user changes their institution or when a user is transferred to a different institution in the Improvement Platform, the HOI and PC of the new institution are sent an email to notify them that the user has requested to join the institution. The HOI/PC or another admin at the institution must approve or reject the transfer request for it to be completed. If the transfer is rejected, the user becomes non-associated. Follow the steps below to approve or reject a user transfer:

1. From your institution's User Management page, find the user in the list.
2. Select the **Action** button to the far right of the user, and then click **Approve** or **Reject**; this updates the user's account and sends them an email to notify them that their request for access to the institution has either been approved or rejected. If rejected, the user becomes non-associated.

Highland Demo High School

cognia Home

User Management [Resource Page](#)

[← Back](#)

Search by name or email

[Download](#) [Invite new users](#)

☐ Include disabled institutional access users

3 Results

Name	Roles	Last Login	Action
Jane Demo jane.demo@yopmail.com	Institution User Observer	03/27/2026 09:13 AM	Approve
Jason Demo jason.demo@yopmail.com	Institution User Educator	03/02/2026 10:45 AM	Reject

[Transfer](#)