Teacher of Record
Training Manual
2022-2023 School Year

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Highlights of Policy Changes for 2022/23

Admissions
- **TK enrollment:** The deadline for TK entry has been extended. Students turning 5 years old between September 2- February 2nd may begin TK with Excel at the beginning of the school year. This has changed from December 2nd being the cutoff.
- **Household Data Collection form**: This year, parents will NOT be able to start placing orders for the fall until their Household Data Form (HDC) is signed in their Parent Portal. Once the form has been signed and approved by admissions, they will bridge to OPS. There are no exceptions.

Education/Compliance
- Starting in August, ToRs are required to pre-load AWRs prior to the beginning of each LP. The goal is to increase accountability, model and assist pre-planning for parents and aid our progress monitoring.
  It's recommended that ToRs complete all AWRs for the semester or the year in advance to provide long-term planning for parents.
  These printed AWRs may take the place of teacher-created pacing guides.
  Either teacher-created pacing guides or the pre-loaded, printed AWRs **must be provided to the parents before their teaching occurs (prior to the start of an LP).** This may be at the beginning of the semester, before each LP or whenever pacing guide updates are necessary.

Tier Check-In Procedure
- A Tier System will be put in place to account for weekly check-ins. This will take the place of the monthly reflection log and will align with weekly pacing guides. This procedure will consist of three tiers ToRs will follow based on the oversight needed for each student.

- **LP meetings:** Beginning in 2022-23:
  - Personalized Elementary ToRs are allowed to alternate LP meetings in-person or virtually on a rotating schedule with a minimum of 5 in-person meetings throughout the school year.
  - Personalized Secondary ToRs:
    - Must complete one in-person LP meeting in the first semester (new families in the first three LP meetings)

- Must host a secondary community event (one per ToR in the county they serve). This is meant to be geared toward older students and more than a park day. Details and planning information will be provided. ToRs may use up to two service-credit hours for the event.
    - Virtual Elementary will have ToR/parent meetings at minimum once a semester.

Secondary
- For every honors course there will be a quarterly project due and this will be the required sample. [Please see details and deadlines here](#).
- All core curriculum will use CP curriculum content for AWRs and pacing.
- IMPORTANT World Language update: Customized and non-online classes are only available in Spanish.
- All other online courses (BYU, FLV, LB, German school) will require a transcript to be ordered and sent to the Registrar's office upon completion.
- The Honors option has been extended to the Honors English 8 ETL class ONLY. Future options for honors credit in junior high are being considered but not available for 22/23.

Department Highlights

Education/Compliance
- ToRs will fill out a [Course of Study Elementary Doc](#) or the [Course of Study Secondary Doc](#) detailing each of their student's Course of Study. The Course of Study Google Doc will be reviewed by the ToR's Regional Leader.
- Pacing Guides MUST be created by the ToR for all core courses students are taking. These also must be updated each LP if the student works ahead/falls behind.
    - Pacing guides may be the printed AWRS (pre-loaded before the LP, semester or year) or a teacher-created pacing guide.
- ToRs must order materials for students after one week of school being in session or one week after the MA is signed once the school year begins. If the parent does not submit any orders by that time, the ToR will inform the parent that they will order from the recommended curricula for TK-6 and Secondary. After 24 hours, the order will be placed.
- ToRs are required to ensure students are on track every 5 school days, not just at the LP meeting. This will look different for each family, depending on if the student is consistently on pace. For students that are falling behind, you will need to require proof of progress every 5 school days, coming to the Secondary Principal or Elementary Principal for a possible PIN if the student completes less than 70% of the assigned work for the week. Proof of Progress can include checking online courses, and/or providing work samples from the week via email or in-person.

High School

- Each quarter the following monthly samples are due - English essay, science lab, any honors project. If the English and/or science course is an honors course, then only the honors project is needed for the monthly sample. See the HS section for exact due dates.
- Students will submit at least one essay writing assignment per quarter via Google Classroom. There are ToR training documents including a PP, video, and step-by-step instructions in the High School Shared Drive>Plagiarism/Google Classroom Info-22/23 _HSD. Every Secondary ToR will need to create a Google Classroom.
- All high school science courses require labs. These may be informal and are meant to complement what the student is already learning. A lab report or paper will be required quarterly or twice a semester.
- For high school A-G courses, you must use the CP curriculum content as the default if the specific curriculum for the CCP or textbook is not in SIS. All core courses should be following the CP curriculum content in SIS. If you print this, you may use as your pacing guide. All core courses on the MA should include the CP course titles.
- ToRs will submit a monthly progress report for any student scoring 70% or below in any course.
- The Concurrent Enrollment Request Survey doc will now be only for community college course requests. For AP, accelerated, and/or honors courses please use the Advanced Course Request Survey.
- iReady scores for HS students will be taken into consideration when reviewing concurrent enrollment requests.
- Single subject credentialed teachers will be asked to sign up for high school specific service credit opportunities including at least one secondary community event.

Assessment
- ToRs will proctor the i-Ready assessments virtually. For specific details, see Assessments-ASMT > i-Ready Information
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  - i-Ready proctoring will be done by ToRs for 22/23
  - Testing window #1 - 9/1 - 9/23 - ALL K- 11th GRADE STUDENTS
  - Testing window #2 - 11/28 - 12/16 - WIN AND SHORELINE STUDENTS ONLY & THOSE WHO CHOOSE TO TAKE A MID-YEAR ASSESSMENT
  - Testing window #3 - 3/6 - 3/24- ALL K - 11th GRADE STUDENTS
  - Each testing window will begin with 5 days for math, 5 days for reading, and 5 days for make-ups.
  - ToRs will create their own schedules for testing (i.e. block two hours per day for students to attend a Zoom session - students will login on their own)It is highly suggested that ToRs test students the first two weeks of each window and team with other ToRs to proctor.
  - As of July 18, 2021, Google Chrome Versions 80 and below will no longer be able to access the i-Ready Platform. Students will have access to borrowing an EACS computer if needed.

- ToRs will proctor CAASPP assessments
  - CAASPP proctoring days will be based on student enrollment and the need of 1:1 test takers. The SPED team will proctor students with 1:1 accommodations

provided the students have current IEPs. The number of necessary ToR proctoring days assigned are not set at this time if the state moves forward with in person testing. If EACS continues with virtual testing, ToRs will resume testing students on their own. <mark>It is highly suggested that ToRs work with other ToRs to create a schedule and share the proctoring responsibilities.</mark>

Intervention--WIN/SST/ELD

- **WHO to contact for what:**

  - Elementary TK-6

    - WIN Program: Tamara
    - Concerns, Support & SSTs: Tamara
    - English Learners TK-12: Tamara
    - 504s Plans: April
    - NEW SPED Referrals: April
    - McKinney-Vento (Homeless, Foster, Mobile Youth): Tamara
    - Other/Unsure: Tamara

  - Secondary 7-12

    - WIN Program: April
    - Concerns, Support & SSTs: April
    - English Learners TK-12: Tamara
    - 504s Plans: April
    - NEW SPED Referrals: April
    - McKinney-Vento (Homeless, Foster, Mobile Youth): Tamara
    - Other/Unsure: April

WIN Program
- **WIN Live:** Small group instruction will now support math, as well as reading.
- **WIN Online Requirement:** *Complete 3 lessons (pass minimum of 2)* each week
  - We are no longer tracking minutes
  - We have turned off the Close Reading domain (longer lessons) so all lessons will be around 20-30 minutes long
- **No longer using ToR WIN Data Sheets**. ToRs will fill out a Google Form to report assessment data 2-3 times per year
- **Weekly compliance checks** will be supported by a paraprofessional. ToRs will continue to communicate with families and provide support when needed.

ELD Program
- **ELD Live:** Small group instruction is no longer recommended, **it is required for all students designated as English Learners.** The INT department notified families of their scheduled days/times in the spring of the 21/22 school year.

- **Weekly compliance checks** will be supported by a paraprofessional. ToRs will continue to communicate with families and provide support when needed.

<u>SST</u>
- **Led by INT Contact:**
  - April - Grades 7-12
  - Tamara - Grades TK-6

SPED
- COC Policy Revision
  - In collaboration with the HS team - included language regarding timing of COC discussions; clarified and increased the Employment, Education, and Life Skills credit requirement.
- Sondra Ryan <sryan@excelacademy.education> is the SPED intake manager. When onboarding a new student with an IEP, contact Sondra once the MA is signed. Send her the student's name and parent contact information and she will follow-up with required next steps.
- You should receive the IEP at a Glance from the CM at the beginning of the year. If you don't please reach out to them.
- i-Ready Assessments:
  - At the IEPs, you will be invited to be a part of the conversation regarding i-Ready accommodations.
  - ToRs are responsible for administering the i-Ready assessments to ALL students on their rosters, including students needing 1:1 accommodations. The SPED team will administer the CAASPP to students who have designated 1:1 accommodations.
- 8th Grade Students
  - Beginning in March, if you have any 8th grade students with IEPs (not Speech Only) please do not schedule high school planning meetings. You, and the perspective counselor, will be invited to the Transition IEP.

ToR Protocol for Crisis Response

Suicide, Self-Harm,
Emotional Distress, or Mental Health Concerns

When a student is identified by a staff member as potentially suicidal, inducing self-harm, experiencing emotional distress, or having mental health concerns, they will follow the protocol

provided for each scenario. Additional information can be found in our [Suicide Prevention Policy](#)

Crisis Team:

Operating Hours: Monday-Friday 8:00-4:30
**If you become aware of alarming concerns outside of school hours:
- **ToR** should advise parents to call 911, or take them to the ER.
- **If the student's life is in immediate danger & the parent does not seek immediate support**, ToR should call 911
- If parent refuses to access treatment for a student who has been identified to be at risk for suicide or emotional distress, the Crisis Team will meet with the parent to identify barriers to treatment and work to rectify the situation. If follow-up care is still not provided, an Excel Academy staff member may report the incident to Child Protective Services.

  - ❖ LA County DCFS: (800) 540-4000
  - ❖ OC County CPS: (714) 940-1000 or (800) 207-4464
  - ❖ Riverside DCSS: (800)442-4918
  - ❖ San Bernardino CPS: (800) 827-8724
  - ❖ San Diego CPS: (858) 560-2191 or (800) 344-6000
  - ❖ Ventura County CFS: (805) 654-3200 or 1-800-754-7600.
  - ❖ National Child Abuse Hotline: (800) 442-4453

CORE Crisis Team:
Melissa O'Dell, *School Counselor*: (949) 774-6293 modell@excelacademy.education
Lisa Durham, *School Counselor:* (949) 774-5799 ldurham@excelacademy.education
April Saade, *Assistant Director of Intervention*: (949) 774-6231
asaade@excelacademy.education

Supporting Members:
* These staff members will be contacted by the Core Crisis Team as deemed necessary*
Rebecca Metoyer, *School Psychologist:* (714) 367-6749, rmetoyer@excelacademy.education
Noell Scott, *School Psychologist:* (949) 382-1198, nscott@excelacademy.education
Heidi Gasca, *Director*: (949) 412-3122, hgasca@excelacademy.education

ToR Protocol After Crisis

If the ToR learns of an attempted suicide, harm to self/others, or admittance to a treatment program, follow the protocol below:

1. **Send Core Crisis Team an email (list of emails on page 1)**
   a. State "URGENT CRISIS TEAM: (first initial). (last name)" in the subject line, notifying them of all known details of the situation.
2. **Call Core Crisis Team Members until you speak with someone:** School Counselors, Intervention Coordinator
3. The Crisis Team will work together to support the student, family, & ToR.
4. Once the situation is stable, an SST Meeting may be held, if appropriate

Active Suicide or Harm to Self/Others with Excel Staff Present

In the case Excel Staff is present when a student attemps suicide, follow the protocol below:

1. **Immediately call 911**
2. **Supervise the student to ensure their safety until help arrives**
3. **If possible, assign another Excel Staff Member to call Core Crisis Team Members until you speak with someone:** School Counselors, Intervention Coordinator
   a. If parent/guardian was not present, Crisis Team will contact the parent and assist them.
4. **Send Core Crisis Team an email (list of emails on page 1)**
   a. State "URGENT CRISIS TEAM: (first initial). (last name)" in the subject line, notifying them of all known details of the situation.
5. Crisis Team will work together to support the student, family, & ToR.
6. Once the situation is stable, an SST Meeting will be held.

Signs of Suicide, Self-Harm, & Emotional Distress

Self-Harm Behavior that is self-directed and deliberately results in injury or the potential for injury to oneself. Can be categorized as either nonsuicidal or suicidal. Although self-harm often lacks suicidal intent, youth who engage in self-harm are more likely to attempt suicide. For example:
- Cutting
- Burning

- Head banging

Risk Factors for Suicide
- Direct statements about suicide
- Indirect statements about killing, or harming themselves
- Expressing the desire to be dead
- Suicide ideation: talking about specific plans and/or details of suicide
- Suicide contagion: student knows someone who commited suicide recently
- Family history of suicide
- Prior suicide attempt
- Self-medication with drugs or alcohol
- Promiscuous behavior
- High-risk behaviors

Warning Signs
- Suicidal ideation
- Substance abuse
- Purposelessness
- Anxiety and agitation
- Feeling trapped
- Feeling hopeless
- Withdrawal, Isolation
- Anger
- Recklessness
- Mood Fluctuations
- Significant change in behavior and/or physical appearance
- **Any other unusual or upsetting behavior**

ToR Referral Protocol for Mental Health Conditions:

Mental Health Condition
A state of mental and emotional being that can impact choices and actions that affect wellness. Mental health problems include mental and substance abuse disorders
- Anxiety
- Depression
- Bipolar disorder
- Obsessive compulsive disorder
- Oppositional defiant disorder, etc

ToR Protocol
1. **Send Core Crisis Team an email**

     a. State "<u>IMPORTANT: (first initial). (last name)</u>" in the subject line, notifying them of the condition.
2. School Counselor will reach out to the family to ensure the student is receiving proper support
3. If they need more support, an SST Meeting will be held with the ToR & Crisis Team

Crisis Services and Resources for Students:

Here is a link to mental health resources by county:
Mental Health Referrals by County

<u>National Suicide Prevention Lifeline:</u>   The lifeline is a 24-hour, toll-free suicide prevention service available to anyone in suicidal crisis or their friends and loved ones. Call 1-800-273-8255. Callers are routed to the closest possible crisis center in their area.
www.suicidepreventionlifeline.org

<u>Suicide online Chat format (similar to texting):</u> Lifeline Chat is a service of the National Suicide Prevention Lifeline, connecting individuals with counselors for emotional support and other services via web chat. All chat centers in the Lifeline network are accredited by CONTACT USA. Lifeline Chat is available 24/7 across the U.S

https://suicidepreventionlifeline.org/chat/

<u>The Trevor Lifeline:</u> The only nationwide, around-the-clock crisis intervention and suicide prevention lifeline for lesbian, gay, bisexual, transgender, and questioning young people, 13-24, available at 1-866-488-7386.

TrevorChat: A free, confidential, secure instant messaging service that provides live help to lesbian, gay, bisexual, transgender, and questioning young people, 13-24 years old, access through your computer.
www.thetrevorproject.org

<u>Crisis Text Line</u> is a free, 24/7, confidential text message service for people in crisis. <u>Text</u> **HOME** to **741741** in the United States

https://www.crisistextline.org/

Comprehensive Safety Plan
Click the link above to review Excel Academy's safety plan for all possible scenarios.

Calendar

Excel Academy Charter Schools
2022-2023 Academic Calendar

July

Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
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31						

August

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September

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November

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December

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January

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May

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28	29	30	31			

June

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11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

LPs	Dates	Days
1	9/1 - 9/23	16
2	9/26 - 10/21	20
3	10/24 - 11/18	19
4	11/28 - 12/16	15
5	12/19 - 1/27	18
6	1/30 - 2/24	18
7	2/27 -3/24	20
8	3/27-4/28	15
9	5/1 - 5/26	20
10	5/29 - 6/9	14
Total		**175**

Legend
- school holidays
- end of semester
- P1/P2 attendance
- Pali 10/21 - 10/23
- All staff meetings
- Graduation TBD
- Spelling/Geo Bee TBD
- *Tech day potential*
- testing dates TBD

Instructional Funds, Materials, and Content & Community Providers

Instructional Funds Information and Guidelines

Each California state student generates funds by his/her average daily attendance (ADA). The funds are budgeted for use as outlined in the school's Local Accountability Plan (LCAP). Guidelines are as follows:

- Excel Academy may not provide any funds or other things of value to the pupil, or his or her parent or guardian, that a school district could not legally provide to a similarly situated pupil of the school district, or to his or her parents or guardian.
- Excel Academy may only receive funding for the provision of independent study to pupils who are residents of the counties the school serves.
- The Instructional Funds (IF) are appropriated for education purposes to deliver the student's educational plan. The funding may only be spent on appropriate educational materials for the enrolled student. They may not be used to provide educational materials/admissions for siblings or parents or anyone else not enrolled in Excel Academy, or for materials not applicable to the enrolled student's educational plan.
- IFs may be used on educational materials or services that are approved by the Teacher of Record (ToR).
- These funds can NOT be used for items designated in the Policy for Criteria of Materials or activities/product/instructors disallowed in the Conflict of Interest Policy. They also cannot be spent on any item or activity that requires payment for transportation. Excel Academy does not pay for transportation, as we receive no transportation funding. For our students, core learning occurs remotely and anything the parent/guardian/student chooses to do outside of their home needs to be within the realm of what transportation they can and want to arrange/provide.
- The amount of funding is based on the ADA calendar the state uses to appropriate school funds. The IF amount is prorated and differs depending on the student's enrollment date.
- Students who are enrolled on the first day of the school year will have the maximum amount of appropriated funds when planning their educational program. Students who enroll later in the year will have less than the maximum amount of appropriated funds with which to plan.
- For the 22/23 school year, the maximum IF appropriation for each student is $2200 for TK-K on the Personalized Path, $2,700 for grades 1 -8th on the Personalized Path, and $3,200 for grades 9–12 on the Personalized Path. Students in grades 1-6 on the Virtual path will receive $1500, ~ for students who are enrolled for the entire 175 school days. The IF's are placed into the IF account in two or three disbursements during the school year. No school funding is provided directly to parents or students for any purpose.
- All families must have the **Content & Community Provider Agreement** on file with their TOR before being allowed to request purchase orders
- Excel Academy reserves the right to determine what services and materials will best promote the student's academic achievement. IF spending ought to be considered as being ultimately at the school's discretion.
- April 7th is the deadline for orders to be submitted by parents and approved in OPS no later than April 28th. It is vitally important to place orders earlier than the deadline.

After the deadline, no purchase orders can be submitted. IFs do not roll over from year to year. If the IFs are not used by the deadline they will no longer be accessible.
- IFs should be spent evenly throughout the year. All orders containing excessive quantities of anything will be reviewed by the Business Services Purchasing Coordinator, Business Services Manager, or administration. It is imperative that the parent and ToR ensure that students receive services and materials throughout the year.
- Student must reasonably be able to use all items by the last day of school. If the Business Services Department (or SSD??) does not believe all items can be used in time, items will be reviewed and non-essential items may be canceled from the order.

Management of Instructional Funds

The parent/guardian and the ToR will work in cooperation to evaluate the most effective use of funds to produce the best possible outcomes in terms of student learning. It is the ToR's responsibility to help each family manage their IF account within the guidelines set forth. Please be mindful that while these funds are allotted to each student, the funds remain part of the Excel Academy's budget and the items purchased with these funds remain Excel Academy's property. It is the ToR's responsibility to make sure that each family does not spend in excess of their allotted IFs. Parents can obtain information on their IF balance at any time by contacting their ToR or logging into their access point in OPS. Parents are encouraged to assist in determining the allocation of these funds, however, the ultimate responsibility for ethical and professional distribution of these funds is the ToR's. This responsibility is not shared and the ToR is responsible to ensure that all core curriculum has been put in place prior to requesting purchase orders for extracurricular activities. The administration will mediate any disagreements between parents/guardians and ToRs regarding IF purchases.

Criteria for Materials That Can Be Purchased with Instructional Funds

Excel Academy receives funding from the state to support student learning and progress toward the state's standards. Therefore, IFs need to be spent on educational items that meet the criteria below. ToRs will consult with the Business Services Purchasing coordinator for additional clarification on acceptable IF purchases. The list below should not be considered as all-inclusive and Excel Academy reserves the right to the interpretation of the below criteria and to exercise final judgment on how IFs will be used.

Here are some examples of things that can be purchased with IFs:
- CORE educational classes
- CORE materials and curriculum
- CORE tutoring
- Elective educational classes
- Elective educational materials/supplies
- School supplies
- School sponsored field trips
- Music lessons
- Physical education classes

General Criteria:

- Educational curriculum ordered is appropriate for the student's courses and learning plan.
- Materials must be used to meet state and school standards for the student for whom the materials are being purchased.
- All materials must be non-sectarian and non-denominational.
- As a general rule, **basic, economical items/models must be selected**. If the student requires a higher-priced, less than basic item/model, a statement from the ToR justifying the purchase may be required.
- School & office supplies adequate for learning basic course skills (paper, pencils, etc).
- Materials for a documented educational project: fabric, wool, yarn enough for one project (exception: no food purchases allowed.) **ToRs are responsible for monitoring the quantities of items purchased.**
- Educational software to instruct and enhance learning in a subject area.
- Materials must not expose the ToR or student to danger or serious injury.
- Tracking forms & educational plans are required for certain items.
- School sponsored field trips.
- No more than 2 black printer ink cartridges and 1 color ink cartridge per semester - Printer must be an Excel purchased printer.
- 1 Toner Cartridge per semester.
- Only 2 reams of paper are allowed per semester per student.
- Organizational items if only intended to be used by the student explicitly for the organization of school supplies.
- Instruments are to be rented out by an approved vendor. If a rental instrument is not in stock, proof needs to be submitted to Business Services that it is not in stock first, in order to purchase an approved instrument. Instruments need to be Purchased no later than January 30th.

Disallowed Items: (Please see complete list here)

If a ToR inadvertently orders materials from this list, the ToR will collect the materials and return them to school administration.

Disallowed Items by Category:	Household Furniture	Technology	Personal Items	Kitchen	P.E. Equipment	Art	Outdoors	Music	Dangerous Items
	Furniture	Computer Parts	Toys or items with no educational value	Popcorn Popper	Skis	Epoxy/Resin	Grass Watering Kits	Tuner	Knives
	Storage	Accessories & Software(1)	Personal Hygiene	Trays	Bicycles	Cricuts & Accessories	Garden Ponds	Instrument Stools	Poisons
	Storage containers	Phones	Costumes	Plates	Tricycles	Vinyl	Swimming Pools	Drums	Darts
	Picture Frames	Dictation Equipment	Uniforms	Silverware	Scooters	Heat Transfer Paper	Watering Cans	Electric Guitars	Sharp Items
	Footrest	TV's	Clothes	Food Coloring	Yoga Mats	Wax	Sharp Gardening Kits/Tool Set	Amplifier	Bow & arrows
	Chairs	3D Printers & Filament Refills	Makeup	Basic Kitchen Items	Weights	Wax Stamp Kits	Already grown plants	Cello	Weapons
	Lapdesks	Ink (2)	Jewelry	Kitchen Scale	Gloves	Hot Glue Guns	insect lore (1 per semester)	Harp	Welding Equipment
	Iron	Coding Robots over $80+	Backpacks	Disposable Gloves	Mitts	Pottery wheels	Bubbles/Bubble Machines	Piano	Explosives
	Bookshelves	VR Goggles	Power Tools	Chef Hats/Hair Nets	Bats	Large Easels		Keyboard over $75	Weedkiller
	Washer/Dryer		Wrapping Paper	Aprons	Rackets	Dried Flowers			Insect Repellant
			Gift Bags		Helmets				Fertilizer
			Soap Making Kits		Golf Clubs				
			Candles		Paddleboards				
			Fingertip Moisturizers		Gymnastics Equipment				
			Hairspray Bottles		Hockey Equipment				
			Balloons		Pogo Sticks				
			Rolling Whiteboards (3)						
			Household Cleaning Supplies						
			Hand Sanitizers						
			Fidget Toys						
			Rubix Cubes						

- (1) Accessories (ie. Tablet covers) & Software cannot be purchased for non-Excel-owned technology
- (2) Printer ink can only be purchased for an Excel purchased printer (No personal printer ink allowed)
- (3) Whiteboards must be within 48 x 36 inches
- Sectarian materials (see below for detailed instructions)

Sectarian Materials
School materials cannot have sectarian/religious content. The ToR will ensure sectarian/religious materials are not ordered with IFs

Technology Options
At Excel Academy, we value the use of technology as a powerful educational tool. Therefore, we offer our students a variety of technology options for purchase with IFs. Please be aware that, like all school materials, computers ordered with IFs are property of the school and must be returned when a student's enrollment in the school ends.

- Environmental waste fees and warranties for school owned computers must be purchased with IFs.
- All families must have the **Excel Academy iPad & Laptop Lease Agreement** on file with their ToR, **PRIOR** to purchase, to ensure internet safety for students and that internet and computer policies and procedures are followed.
- All accessories and software purchased must be only used for devices issued by Excel Academy. Excel Academy does not assume any liability for accessories and software installed on or used with non-Excel Academy issued devices.
- *Please note that computers don't come with any additional software (e.g. Microsoft Word).
- A list of available technology options can be found here. All computer orders must be placed according to the options listed on the technology options.
- One computer or tablet per student.

Community Provider
An approved community provider is a provider that supplies services paid for with IFs. Approved services include but are not limited to: class fees, material costs (if approved as a materials provider), enrichment activities, community involvement activities, core subject assistance, and other educational services from our current approved vendor list. All approved community providers must provide proof of background check clearance from the Department of Justice, proof of commercial liability insurance, and complete our pre-approval process.

The list below should not be considered as all-inclusive and Excel Academy reserves the right to interpretation of the below criteria and to exercise final judgment on how IFs will be used.

Please note that all service orders must be placed 10 days prior to the start of class to allow time for processing.
Excel Academy does not pay for registration fees or membership fees.

Community Provider Policy
- If instructional funding is to be used for approved services, all school policies and procedures must be followed.
- Prior to a student placing an order for a community provider, who is supplying non-core for TK - 8th grade students elective activities with instructional funds, core curriculum

must be in place and the ToR must confirm that the student is making adequate progress with respect to grade appropriate standards.

- The services must be approved by the ToR, the purchase order (PO) must be submitted and received by the community provider prior to the event/activity.
- Excel Academy will not, under any circumstances, reimburse parents or ToRs for a student's participation in any services.
- No sectarian or denominational instruction may be given in any course/activity paid for by the school.
- The community provider must be approved before the school will pay for any services.
- School funding may only be used for students currently enrolled in the school, during the school year.
- The school does not pay for season passes, memberships, registration fees, and recital fees.
- Excel Academy cannot pay for uniforms, belts, costumes, makeup, and/or ticket costs.
- All non-core/elective VCIs over $500/mo must have a ToR note on the PO stating the student is doing well academically and has core curriculum in place.
- Any orders placed after the first of the month for that month MUST be prorated to only pay for services provided 10 days after the order was placed and must include the service start date on the description line. Per the Content & Community Provider Agreement, Excel Academy will not pay for any services rendered prior to POs being created, including the 10 day approval time frame. For example, an order placed on 9/10/2022 must be prorated for services given on or after 9/20/2022

Field Trips

Field Trips are group activities that are organized and overseen by the Field Trip and Special Programs Coordinator and school representatives. Field trips are a great, fun way for students and parents to join other students while pursuing their individual learning plans.

Field Trips are school activities for which a parent can decide if their students and family would like to attend. Students' participation in a trip is paid through their IFs, and parents and siblings will pay out of pocket.

Subscriptions

Excel Academy allows students to order educational subscriptions from CCPs like Kiwi Crate and History Unboxed. The following guidelines apply to subscriptions purchased in the 22/23 school year.

- 12 month subscriptions must be ordered between September and December 15.
- 6 month subscriptions can be ordered between December 15 and February 28.
- After February 28 all subscription orders must be for 3 months or fewer.

Gardening

Some providers offer gardening materials to students. The following restrictions apply to gardening items purchased in the 22/23 school year.

- All items must be basic in nature.
- Only enough materials for one educational project are allowed per semester.
- Educational projects must be documented through learning samples and monitored by the ToR.
- Items like seeds, bulbs,and soil are allowed but must be basic in nature.

- Gardening tools may be ordered but cannot be sharp or dangerous to the student, and must be basic in nature.
- Additional items such as composters, sprouting trays, label sticks, and small pots may be ordered, but must be basic in nature.
- No items that students will wear, such as gloves or aprons, may be ordered.
- All equipment must be deemed fit for child educational gardening use.
- No furniture is allowed.
- No already grown plants are allowed -- seeds only.
- No potentially dangerous items such as weedkiller, insect repellant, or fertilizer.

LEGO Education
LEGO provides educational kits that are subject to the following guidelines in the 2022/2023-school year:
- All orders must be placed for kits on the LEGO Education website.
- All orders must have clear educational value (no minifigure kits allowed).
- Any LEGO Education order must be documented through learning samples monitored by the ToR, and documented on the AWR.
- Kits must be grade-level appropriate.
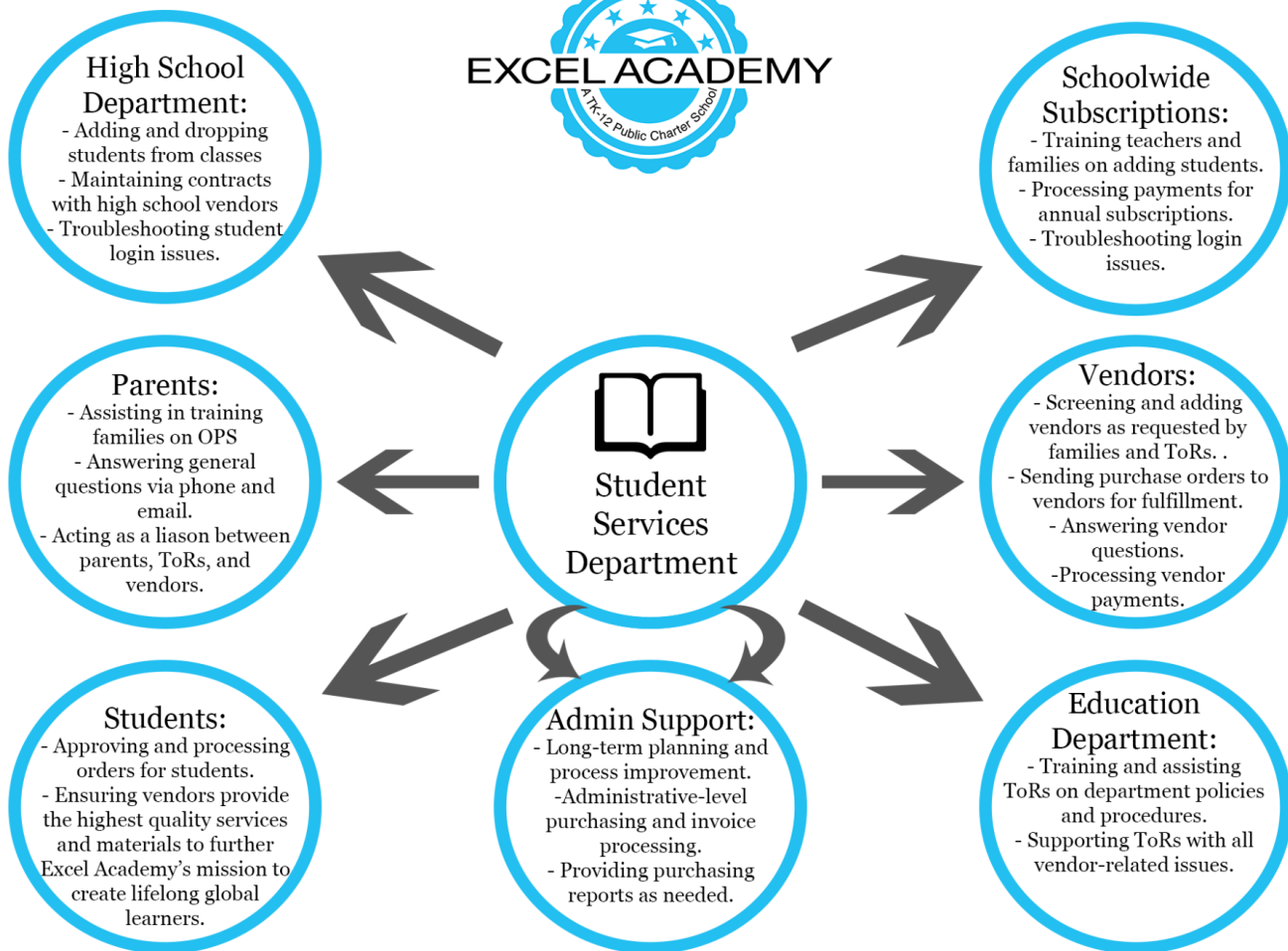
Cancellation Policy
We cannot cancel an EMR order after they are processed and sent to the Content Provider. Once materials are requested, the Student Services Department will order them and they cannot be canceled. If an order has not been processed and is still in "Pre-Pending Status," the parent can cancel or edit the purchase order in OPS. For VCI orders, Community Providers **must** be notified, by the parent or guardian, of cancellation prior to orders being canceled in OPS.

Disallowed Educational Activities
The following activities are examples of disallowed activities that cannot be paid for with IFs since they impose high liability and/or political risk to the school. CCP's who provide the below services will not be approved.
- Religious, sectarian, or denominational services or materials
- Scuba Diving
- Sky Diving
- Water / Jet Skiing
- Skiing / Snowboarding
- Aircraft-related activities
- Behind the wheel driver's education
- Any motorized vehicle operation
- Extreme sports that expose the student to unnecessary risk: outdoor rock climbing, white water rafting, paragliding, etc.

ORDERING INSTRUCTIONS

EXCEL ACADEMY
A TK-12 Public Charter School

Student Services Department

High School Department:
- Adding and dropping students from classes
- Maintaining contracts with high school vendors
- Troubleshooting student login issues.

Schoolwide Subscriptions:
- Training teachers and families on adding students.
- Processing payments for annual subscriptions.
- Troubleshooting login issues.

Parents:
- Assisting in training families on OPS
- Answering general questions via phone and email.
- Acting as a liason between parents, ToRs, and vendors.

Vendors:
- Screening and adding vendors as requested by families and ToRs. .
- Sending purchase orders to vendors for fulfillment.
- Answering vendor questions.
- Processing vendor payments.

Students:
- Approving and processing orders for students.
- Ensuring vendors provide the highest quality services and materials to further Excel Academy's mission to create lifelong global learners.

Admin Support:
- Long-term planning and process improvement.
- Administrative-level purchasing and invoice processing.
- Providing purchasing reports as needed.

Education Department:
- Training and assisting ToRs on department policies and procedures.
- Supporting ToRs with all vendor-related issues.

Content & Community Provider (CCP) List Located on Website

Families can log in to their online profile to search for appropriate CCPs in their area.

If a parent is *only looking for local classes/instructors (community providers)*, we have a fantastic new app for that on our website: [Map Search](#)

Please make sure your families are aware of these search tools! They can both be found under the CCP tab on our website.

Glossary of Terms

- EMR: Educational Materials
- VCI: Educational Services
- OPS: Online Purchasing System. The system we use for ordering educational materials and services.
- Red notes: Individual guidelines for placing orders.
- Internal notes: Notes placed on orders after they have been created. Method for admin and teachers of record (ToRs) to communicate about a specific order.
- Consumable items: Items that (A) are under $30 and/or (B) cannot be reused by another student. Examples of consumable items include: workbooks, pens, paper, pencils, printer ink, etc.
- Non-consumable items: Items that (A) are over $30 and/or (B) can be reused by another student.
- Purchase order status terms:
  - **Pre-Pending:** Order has been placed by the parent and is *pending review by the ToR*.
  - **Pending:** ToR has carefully reviewed the order to ensure that the items or services being ordered correspond to Excel Academy guidelines and selected "Pending," OR the ToR has placed the order on behalf of the parent *(orders placed by ToR are assumed to have been carefully reviewed)*.
  - **Approved:** Order has been reviewed and approved by the Student Services Department.
  - **Processed:** Order has been sent to the CCP for fulfillment.
  - **Received Partial (EMR ONLY):** ToR has indicated that some, but not all, of the items on the order have been received.
  - **Received Fully (EMR ONLY):** ToR has indicated that all items on the order have been received.
  - **Invoice Matched:** Student Services Department has received the invoice from the content or community provider and matched the order in OPS to match what the charge shows on the invoice.

Content & Community Provider (CCP) Agreement

A signed copy of the [Content & Community Provider Agreement](#) must be on file before the ToR can begin placing purchase orders for services. This is critically important! The ToR must go

over the CCP Agreement carefully with each parent before signing. ==If the parent doesn't understand their role in requesting service purchase orders correctly, it will cause problems for the ToR, the Business Services Department, the community provider, and the parent.== (Parent must contact a community provider to see if they are able to accommodate the student *before* placing an order. The community provider will then hold a place for the student.)

The ToR may be asked to produce a copy of the signed Content & Community Provider Agreement at any time.

ToR RESPONSIBILITY

While families are able to place orders, and the Business Services Department screens each for compliance, *it is ultimately the ToR's responsibility* to ensure that all items correspond to the Ordering Guidelines and that families adhere to the CCP Agreement. Keeping in compliance with these guidelines is critical to ensure both our students' academic success and the longevity of our school. Read the guidelines carefully, and follow all instructions listed in the red notes.

NON-CORE CURRICULUM ORDERING
Student academic achievement is of paramount importance to Excel Academy, and it is the ToR's responsibility to ensure that core curriculum is in place before allowing families to place orders for electives and other non-core materials or activities. It is the duty of the ToR to exercise their best judgment in approving all orders.

EMR ORDERS

Placing EMR Orders
To place an EMR (Educational Materials) order you must first review the order for content and appropriateness of educational material requests. Look up each item on the provider's website and confirm the item number, description, cost and availability. You must verify that items do not contain religious content as well as the cost of the item.
**Please note:
- 12 month subscriptions must be ordered between September and December 15.
- 6 month subscriptions can be ordered between December 15 and February 28.
- After February 28 all subscription orders must be for 3 months or fewer.

Training video: ToR EMR Training

1. Log in to OPS. The dashboard will show any applicable alerts and orders that need to be marked received. ***OPS uses the word vendor which we refer to as Content Provider or Community Provider***
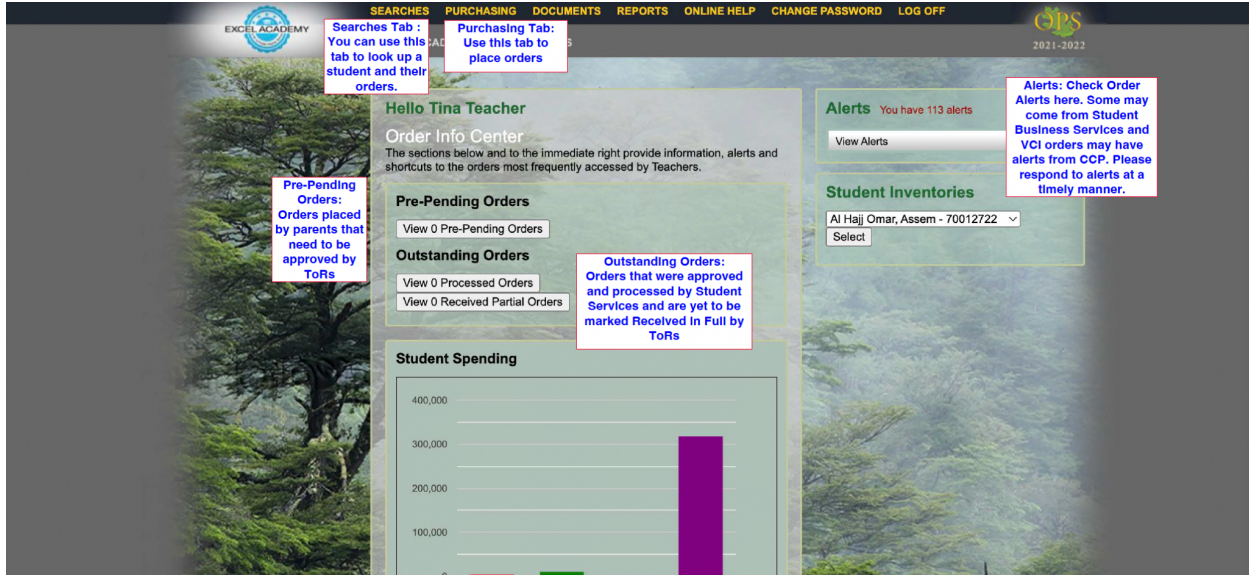
2. Click on the **"Purchasing"** tab on the top and a list of available content and community providers will be shown. Select the student from the "Select Student" drop-down list. You will see the available funds for the student there. You must be sure there are enough funds in the account to cover the order plus about 30% for shipping,handling and tax. These costs are estimates and will be adjusted when we receive the invoice.

3. Select an EMR (content) provider from the first drop-down menu and indicate the number of items needed on the purchase order. Number of items in this case are item lines not quantity. You can change the quantity on the next screen. **If you forget item(s), you may add additional lines after completing instructions #1-6.** Then press "Request".

4. First, read any **red notes** on the top of the page. Not every provider has red notes. Make sure you follow the red notes for each provider that has red notes. See below:

View site information - **Rainbow Resource Center [P]** (VENDOR NOTE: PLEASE Double check for religious materials! Especially LATIN & SCIENCE & HISTORY CURRICULUM! No-No List - Parachutes over 6ft. No Latin Primer, NO Visual Manna --i.e.Teaching History Through Art or Teaching English Through Art. No Latin Road to English Grammar, No Memoria Press, Apologia, Bob Jones University-Latin for Children-Classical Academic Press- Monarch, Ignitia, Switched-On Schoolhouse, Latins Not So Tough, LIFEPAC, The Weaver Curriculum, La Clase Divertida, Alpha Omega Science,Science in the Ancient World, Science in the Beginning, Memoria Press, Lift up your Eyes on High-Understanding the Stars, Climbing To Good English, Life of Fred books. Childs History of the World by V.M. Hillyer. Pathway Readers. Five-in-a-Row NOT VOL. 4 or the Christian character and Bible supplement. Grammar of Spelling ANY Learning Language Arts Through Literature or GREENLEAF PRESS MATERIALS NOT PERMITTED ie- Famous Men of the Renaissance and Reformation, etc. IEW Ancient History Based Writing Lessons and IEW Fables, Myths, and Fairy Tales Writing Lessons not permitted- No Homeschool In The Woods timeline books or curriculum, Notgrass America The Beautiful, Sign Language for Everyone, Singapore Math MUST be ordered through our Singapore Math vendor. Rainbow cant sell S.M. to Charter Schools - as per S.M.s request. Please check all Horizons items - some are not secular. Write shop ALLOWED items:WriteShop Primary Book A WriteShop Primary Book B WriteShop Primary Book C WriteShop Junior Book D WriteShop Junior Book E Blue Book of Grammar and Punctuation. YOU MUST ENTER THE 5 DIGIT RR NUMBER NOT THE ISBN NUMBER Reasons for Science)

This is how the red notes for Rainbow Resource appear when attempting to place an order. Please ensure all orders follow these guidelines. Following proper ordering procedures is essential to your families receiving their items in a timely manner.

5. Next, click "**Select Category**" to access the drop down menu. Choose the most appropriate category for each item. Fill in "**Item Number**" with the item number for the product. If there is no item number available enter 0000. For **"Con."** (consumable) you must click **"Y"** or **"N"**. **All items under $30 may be marked consumable. Items that cost more than $30 that can be used by another student must be marked nonconsumable.** For **"Qty"** (quantity) enter the correct number. For **"Cost"** enter the cost for the individual item. You must verify the cost on the vendor website. OPS will calculate the total cost, but note that this is a subtotal and shipping/tax has not been factored in during this step. When complete, click on **"Add to Request"**.

6. Pressing "Add to Request" **will not create the purchase order**. It will save that individual order. You can see the amount previously requested at the bottom of the request form once you return to that page.

7. If you have another order that must be placed for that student you may follow steps 3-6. Additional items/lines can also be added to an order that is still in the Request 'cart' by

repeating steps #3-6. Avoid combining VCI and EMR orders into the same 'checkout' as the EMR orders will appear on the VCI OA.

8. Once you have completed this process, click "Proceed to Checkout."

8. On the checkout screen, you will see a summary of the individual orders you have placed. Review your orders to make any last-minute corrections (you **must** press "Update Order" for the changes to be saved), then press "Confirm Request."

9. You will then be presented with the confirmation screen, where you can click on the purchase order numbers to see the PO details.

Request Confirmed

Teacher: (#8888)
Student: (#test) - Test Testson
Tax: $0.16
Shipping: $30
Order Total: $32.16 'includes estimated tax and shipping if applicable.

You requested the following items:

EMR Requests - Rainbow Resource Center [P] PO Number: 263210704

Category	Item	Description	Con.	Qty	Cost	Total
Math	0000	TEST ITEM	Y	1	$ 1.00	$ 1.00
						Total: $16.08

EMR Requests - Amazon PO Number: 263210705

Category	Item	Description	Con.	Qty	Cost	Total
Language Arts	0000	TEST ITEM	Y	1	$ 1.00	$ 1.00
						Total: $16.08

Order Agreement Form | Email OA | Order More Materials | Add internal note | Add PO note

Duplicate Order The 'Duplicate Order' button will only duplicate one order at a time. It will only duplicate the last order on 'Requests' containing multiple orders.

PO details:

ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin

Student	Test Testson - Gr. emr		Order Notes:		Add internal note	View/Add PO note					
Available EU's	67.84									
Vendor	Rainbow Resource Center [P]									
PO Number	263210704 - Date Requested: 07-02-2019									
Order Type	EMR									
Order Status	Pending ▼ Update Order Return To List									

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pending ▼	0000	TEST ITEM	Math ▼	✔	1	1.00	1.00
							Tax:	0.08
							Shipping:	15.00
		Tax and shipping may change when invoice matched.					TOTAL:	16.08

Update Order Return To List

Invoice Info:

Duplicate Order

10. On this screen you may edit any changeable fields while the order is in the "Pending" stage. If you have a question for Admin, you may send a note to the Business Services Department by clicking to add an internal note. An example would be if you want items shipped directly to you, the ToR first - you would add a note to ship to you ~ Otherwise the order will ship directly to the family.

Marking EMR Orders Received

All materials are shipped directly to the students' residence. It is critical that the ToR mark the order received within 48 hours of receipt. For all materials received, the ToR verifies the contents of the box against the packing list. To mark an order received, locate the purchase

order in OPS (see "Searching for Orders" section on how to perform a PO search). Change the status of each item received to "Received." When finished select "Update Order."

For damaged or missing items, leave status as "Processed" and place an internal note for our Business Services department and select alert.

Use "Received Partial" only if part of the quantity of an item ordered has been received. Ex: 3 boxes of crayons were ordered and only 1 box is received. Place a note and alert admin if an incorrect amount of items is received.

Approving EMR Orders Placed by Parent

Orders placed by parents must be thoroughly reviewed by ToRs to ensure that they meet Excel Academy ordering standards. Ordering Guidelines are available to ToRs and to parents as well.

EXAMPLE: In the below order placed by the parent, there are several issues that need addressing.

Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

Student	Test Testson - Gr. emr		Order Notes:		Add internal note	View/Add PO note	

Available EU's	955.95
Vendor	Rainbow Resource Center [P]
PO Number	263210760 - Date Requested: 07-03-2019
Order Type	EMR
Order Status	Pre-pending ▼ [Update Order] [Return To List]

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pre-pending ▼	34092	Art Book	Art ▼	☑	1	10.00	10.00
2	Pre-pending ▼	40938	Toy	Multi-Subject ▼	☐	1	50.00	50.00
3	Pre-pending ▼	54921	Math Book	Science ▼	☐	1	15.00	15.00
4	Pre-pending ▼	32981	J	Office/School Supp ▼	☐	1	0.00	0.00
							Tax:	5.81
							Shipping:	15.00
			Tax and shipping may change when invoice matched.				TOTAL:	95.81

[Update Order] [Return To List]

Invoice Info:

- Toys are not appropriate uses of student funds. To cancel this item, click on the drop-down box **on the specific line** and select "Canceled", then press "Update Order."

Item descriptions will not be as blatant as the above example. You must be judicious in scrutinizing each item on an EMR order.

- These item descriptions are incomplete. All orders must have the full name of the product in order to be approved and processed. Full Description of items must be in the Description section.
- Line item 4 has an incomplete item description and price. Look up the item number on the Rainbow Resource website (or whichever vendor the order is for) and find the correct item. Update the item description and unit cost to the correct item and press "Update Order" at the bottom.
- It is also the ToR's responsibility to ensure that items are correctly marked as consumable or non-consumable.

Once you have approved the items on the order, reviewed that the item numbers, descriptions and prices are correct, change the line item status using the drop-down to "Pending" and press "Update Order."

How to place a VCI order

Training video: ToR VCI Training

1. Check the provider's website OR CALL to confirm class description, cost and payment option (either monthly or lump sum—see item 6).

2. Follow the first two steps of the Placing EMR Orders.

3. Choose the correct provider name from the "VCI Requests" drop-down.

Select Student:			Date:
Testson, Test, test - 955.95 EUs ▼			Jul 3, 2019

Available Funds:			
Student Totals Available: $955.95 Pending: $144.05 Net Balance: $955.95	<< Totals do not include tax and shipping for the current request.		
Tax and shipping may apply (unless vendor has been designated as "pickup" or 0% tax rate).			

Requests:			
Type of Request	**Vendor**	**Number of Items**	**Make Request Form**
EMR Requests	Select Vendor ▼	8	Request
VCI Requests	TEST VENDOR, - TESTVEND ▼	1	Request
VCI Catalog Requests	Select Vendor ▼	-	Request
COLLEGE COURSE Requests	Select Vendor ▼	2	Request
COMPUTER/ISP/SOFTWARE Requests	Select Vendor ▼	4	Request
ACTIVITY Requests	Select Subject ▼	1	Request
		Request Total (excluding tax and shipping). $0.00	

Proceed to Checkout

4. Then, check for any **red notes** that will determine how the provider requests the order to be placed. This particular provider doesn't have any so there are none listed. Next, choose the most appropriate **"Category"** on the drop down menu, write a brief description of services, including the class's start date under the field **"Description,"** use the drop down menu to select the correct months, enter the cost per month or lump sum payment if lump sum was requested and click **"Add to Request."**

VCI Requests - TEST VENDOR (VENDOR NOTE: TEST VENDOR SET UP TO TEST THE VENDOR LOGIN)				
Category	**Description**	**Month**	**Cost**	**Total**
Math ▼	Mathematics classes Tuesday and Thursday, start date 9/3	September ▼ to December ▼	$ 100	$ 400.00
Request Total (from request page). $ 400.00		Add to Request		

- If placing an order for one month only, select the same month from both drop-downs.

- If placing an order for more than one month, select the first month of service to the last month of service. *The system will create as many POs as there are months that are selected.*
- If placing an order MID month, please be sure that you have notated the start date on the PO (the start date needs to be after the date the PO was submitted) and **ALERT** admin.

5. The months are divided into separate purchase orders. Community Providers have the option of being paid monthly or in a lump sum at the end of the class If the community provider requested to be paid monthly, costs will be entered for each month. Check for accuracy and click **"Add to Request."**
**If the student enrolls late and has a partial month of service please work with the CCP to figure out the pro-rated cost for a partial month of service.

6. If the provider has requested to be paid in a lump sum at the end of the class, Please create a PO for ***last month of the class only.*** ToR will enter in the description line "Title of Class - Sept - Jan - Lump sum requested".   Please hit Alert so the Student Services Department knows to send this notice to the community provider right away Check for accuracy and click **"Add to Request."**

7. After verifying all the information, click "Proceed to Checkout." Click on "Confirm Request" if all information looks correct.

Confirm Request	Delete Request					
VCI Requests - TEST VENDOR						
Remove	**Category**		**Description**	**Month**	**Cost**	**Total**
☐	Math ▼		Mathematics classes Tuesday and Thursday	September ▼	100.00	100.00
☐	Math ▼		Mathematics classes Tuesday and Thursday	October ▼	100.00	100.00
☐	Math ▼		Mathematics classes Tuesday and Thursday	November ▼	100.00	100.00
☐	Math ▼		Mathematics classes Tuesday and Thursday	December ▼	100.00	100.00
Update Order					**Updated Total:** 400.00	
Confirm Request	Delete Request					

8. **IMPORTANT:** On the next screen you **absolutely *MUST* click on EMAIL OA.** If you forget to email the OA, you can send it using these instructions.

Without this the provider will not be notified that a PO has been created and your student may not be able to receive the services requested.

Request Confirmed

Teacher: (#8888)
Student: (#test) - Test Testson
Tax: $0
Shipping: $
Order Total: $400   includes estimated tax and shipping if applicable.

You requested the following items:

VCI Requests -TEST VENDOR PO Number: 263210767 (VENDOR NOTE: TEST VENDOR SET UP TO TEST THE VENDOR LOGIN)

Category	Description	Month	Cost	Total
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Sept	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Oct	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Nov	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Dec	$ 100.00	$ 100.00
				Total: $ 400.00

Order Agreement Form | Email OA | Order More Materials | Add internal note | Add PO note

Duplicate Order   The 'Duplicate Order' button will only duplicate one order at a time. It will only duplicate the last order on 'Requests' containing multiple orders.

On the next screen, click "Send Document":

EMAIL THIS DOCUMENT

Reply To Email Address:
test@ops-online.com

Please enter a valid address to send this document to:
test@OPSLR.COM

CC this PO? (separate multiple email addresses with commas)

Email Subject:
Important document regarding student Test Testson of Community Collaborative Charter Schools

```
This is NOT a purchase order and should not be used as such.  Once the order is approved,
the purchase order will appear on your Online Vendor Billing Page.  Please review the Terms
and Conditions on the form.  Please review as soon as possible and keep for your records.

It can be viewed at
https://www.ops-online.com/cgi-bin/year20/teacher/edmat_agreement.pl?
request_id=8888test3210764
```

Send Document

9. Check to ensure the order was placed correctly by following the instructions in the Searching for Orders section to find and verify the POs.

<p style="text-align:center; color:red">Purchasing Online Courses</p>

When placing a PO for an online course, please pay careful attention to the content providers notes as additional steps may be required. If the online course is an EMR, mark the order "Received" once the student receives access to the online course. **ALL ORDERS PLACED FOR ONLINE CONTENT PROVIDERS MUST INCLUDE THE PARENT FIRST AND LAST NAME ALONG WITH THEIR EMAIL ADDRESS IN THE PO DESCRIPTION LINE.**
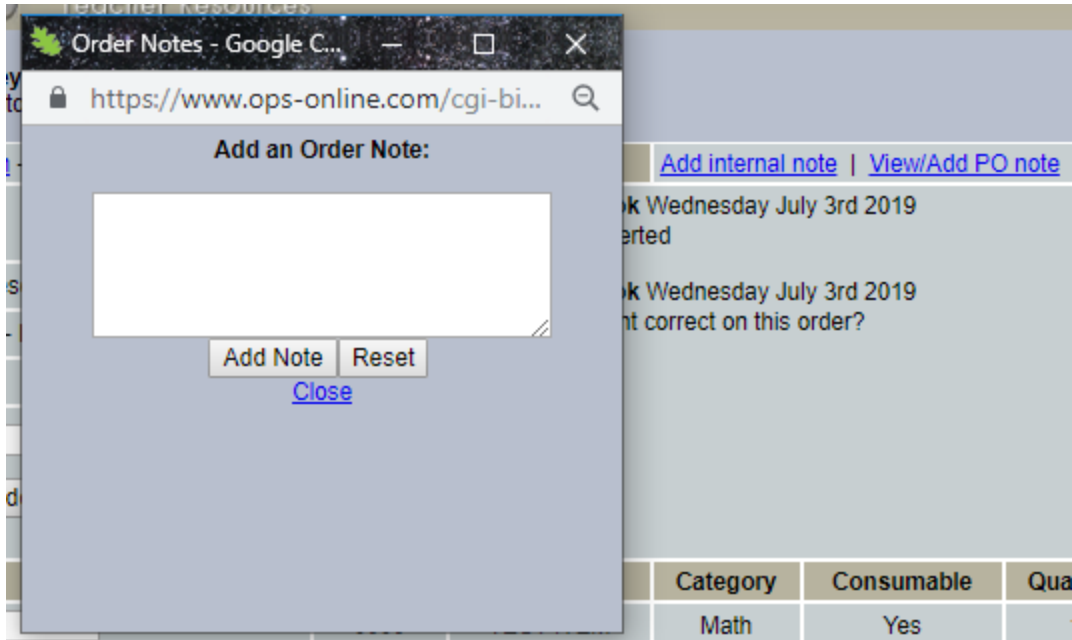
<p style="text-align:center">Internal Notes</p>

1. You can make an internal note when you first create the purchase order or you may search for the purchase order and add an internal note later. To find the order, please follow the instructions in the Searching for Orders section.

2. Then find the purchase order that needs the internal note and click on the Purchase Order number. You will be taken to the order summary page.

ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

Student	Test Testson - Gr. emr			Order Notes:	Add internal note	View/Add PO note				
Available EU's	555.95			**Charles McCook** Wednesday July 3rd 2019 Teacher was alerted						
Vendor	Rainbow Resource Center [P]			**Charles McCook** Wednesday July 3rd 2019						
PO Number	263210704 - Date Requested: 07-02-2019			Hi, is the amount correct on this order?						
Order Type	EMR									
Order Status	Processed ▼ Update Order Return To List									

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Processed ▼	0000	TEST ITEM	Math	Yes	1	1.00	1.00
							Tax:	0.08
							Shipping:	15.00
	Tax and shipping may change when invoice matched.						TOTAL:	16.08

Update Order   Return To List

Invoice Info:

3. Click on **"Add Internal Note."**

4. A small dialog field will then pop up in the left hand corner of the screen. Enter the internal note and click the field **"Add Note."**

Order Notes - Google C...

https://www.ops-online.com/cgi-bi...

Add an Order Note:

Add Note   Reset

Close

Add internal note | View/Add PO note

k Wednesday July 3rd 2019
erted

k Wednesday July 3rd 2019
nt correct on this order?

Category	Consumable	Qua
Math	Yes	

5. In order for admin to see your note, you must click on "Alert Admin to Note."

Order Notes - Google C...

https://www.ops-online.com/cgi-bi...

Add an Order Note:

Add Note   Reset

Close

Add internal note | View/Add PO note

k Wednesday July 3rd 2019
erted

k Wednesday July 3rd 2019
nt correct on this order?

Category	Consumable	Qua
Math	Yes	
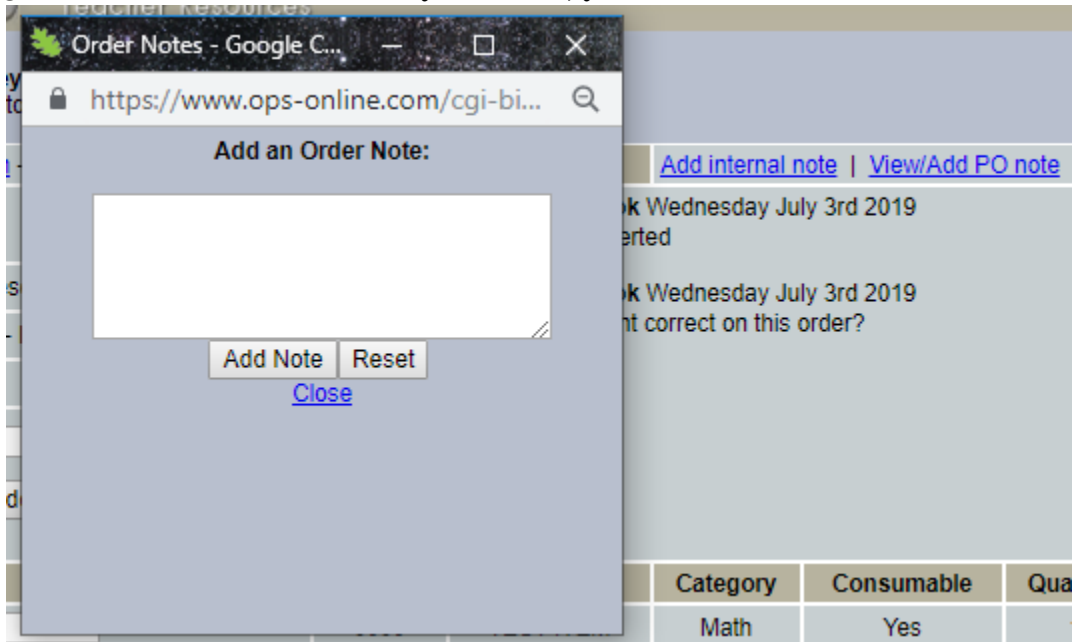
6. To confirm your note was added and admin was alerted, check the Order Summary.

ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

Student	Test Testson - Gr. emr		Order Notes:	Add internal note	View/Add PO note
Available EU's	555.95		**Guy StokleyTeacher** Wednesday July 3rd 2019 Admin was alerted		
Vendor	Rainbow Resource Center [P]		**Guy StokleyTeacher** Wednesday July 3rd 2019 No. I will update.		
PO Number	263210704 - Date Requested: 07-02-2019				
Order Type	EMR		**Charles McCook** Wednesday July 3rd 2019 Teacher was alerted		
Order Status	Processed ▼ Update Order Return To List		**Charles McCook** Wednesday July 3rd 2019 Hi, is the amount correct on this order?		

Line#	Status	Item	Description	Category	Consumable	Quantity
1	Processed ▼	0000	TEST ITEM	Math	Yes	1

The Order Notes will display your note, and indicate that the alert was sent. If the alert was not sent, you can send it again by clicking "Alert Admin."

Searching for Orders

1. Once the order is placed, you can find it by clicking on the "Searches" tab on the top. Under the "Orders" section, select the student whose orders you would like to see.

Orders

Combination Search ...		Choose Status ▼ Search
Status: Type: Vendor:		Choose Type ▼ Select Vendor
Select Student:		Select Student ▼ Select Select Student Testson, Test - test
P.O. Number:		Search
View Teacher Inventory:		View Teacher Inventory
View Student Inventory:		View All Student Roster Inventory

2. On the subsequent page, you can see all orders placed for that student.

Orders Search
Your search has returned 7 results.

Request #	Purchase Order #	Order Status	Req Type	Req Date	Student	Vendor	Orig Cost	Tax	Use Tax	Shipping	Actual Cost	Order Stat Date
8888test3200186	263200186	Canceled	EMR	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200187	Canceled	VCI (Sept)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200188	Canceled	VCI (Oct)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200189	Canceled	VCI (Nov)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200264	263200264	Canceled	VCI (Sept)	05-03-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-03-2019
8888test3210704	263210704	processed	EMR	07-02-2019	Test Testson	Rainbow Resource Center [P]	1.00	0.08	0.00	15.00	16.08	07-03-2019
8888test3210704	263210705	Pending	EMR	07-02-2019	Test Testson	Amazon	1.00	0.08	0.00	15.00	16.08	07-02-2019

3. In OPS, there are many ways to find the orders you are looking for. Instead of the above process, you can also use the Order Combination Search under the "Searches" tab.

On the combination search, you may designate multiple criteria to assist you in locating orders. If you would like to see all orders of a particular status, type, or provider, you may select that criteria from the drop-down list. You may also combine this criteria: for example, select "Pending" and "VCI" from the Choose Status and Choose Type drop-downs to see all pending VCI orders. **TIP:** Scrolling through a long list of providers can be a daunting process. When you click on the drop-down menu, you may begin typing the name of the provider you are searching for. The list will then jump to that provider.

Training video: **ToR Order Search Training**

Content & Community Provider-Specific Order Instructions

Certain providers have specific ordering instructions. These providers include, but are not limited to:

- Amazon
- ASTEME Learning Center
- Staples

- Start ASL
- Teachers Pay Teachers
- Time4Writing
- Urban Workshop

These instructions are located in the Student Services Department Ordering Instructions folder. Along with Provider-specific ordering instructions, this folder will also contain processes that will assist you in completing your duties as a ToR.

Transferring Funds Between Siblings

Excel Academy Charter School allows families to transfer funds between siblings to place combined orders to save on shipping costs. **It is the ToR's responsibility to ensure that each student has core curriculum in place and is sufficiently supported in their education.**

To place a budget transfer request, navigate to the "Searches" tab, and scroll to the "Students" section. There, you will see the "Student Budget Transfer Request."

Student Budget Transfer Request:	From Student ▼
	To Student ▼
	Amount: $ [_____] Request Budget Transfer
Funding Drop Request:	For Student ▼
	Amount: $ [_____] Request Funding Drop

Select the student FROM whom you would like to transfer the funds, and the student you would like to receive the funds. Then, enter the amount and select "Request Budget Transfer."

On the next screen, you MUST add an explanation for the request. Enter why the request is being made, then click confirm.

Community Collaborative Charter Schools
on behalf of Excel Academy
Transfer Funds from One Student to Another

Transfer $10
From Test Testson - test ($555.95)
To PAYMENT BATCH - 11 ($0.00)

Manual adjustment notes to be added to both students:
[_____]

Confirm

The BusinessServices Department will review the request and decide whether to approve or deny. ALL REQUESTS WITHOUT EXPLANATIONS WILL BE DENIED.
Fund transfers between siblings must be for:
❖ Core Subjects Only
❖ Tutoring is OK

- ❖ $350 per allotment
- ❖ Combined orders to save on shipping costs

Other Notes

Instructional Funds

The instructional funds are as follows:

<u>Personalized Path:</u>
TK - K $2200
1st - 8th $2,700
High School $3,200

<u>Virtual Elementary Path:</u>
1st - 6th $1500

<u>The instructional funds are disbursed in multiple allotments</u>:

Virtual Path $750 in August, $375 in December, and $375 in February
TK-K $1100 in August, $550 in December, and $550 in February.
1- 8 $1,350 in August, $675 in December, and $675 in February
High School $1,600 in August , $1600 in December.

Disallowed Items

Please refer to the "Ordering Guidelines" Google Doc for a detailed list of allowed/disallowed items. It is available on the website.

Returning Materials

All non-consumable materials are property of Excel Academy Charter School and must be returned when the student withdraws from Excel Academy. <u>This needs to be explained to the parent at the initial meeting. Please collect materials at the time of withdrawal.</u>

To view the list of outstanding student materials, go to the "Searches" tab and scroll to the "Orders" section. Click on "View All Student Roster Inventory."

Staying Within Budget

The ToR is responsible for making sure the student stays within budget. This is a very important part of the ToR's job. Do not rely on the parent to stay within budget. In order to make sure you are staying within budget, you must estimate an extra 30% for EMR orders to account for shipping and tax. Once our student services department has paid the final bill, an accurate total will be updated in OPS. This is especially important to pay attention to in the spring when the ordering window is closing and parents are sending off many material orders to use up the remainder of funds.

No Out of Pocket Payments

Parents will not be reimbursed for curriculum. It is critical to make parents aware of the ordering procedures so that they don't believe they can hand you a receipt and expect reimbursement. Under no circumstances will parents be reimbursed.

Basic Materials Only

All EMR orders must be basic school supplies. In other words, we can only purchase the type of supplies that could be found in a brick and mortar public school. We also cannot pay for high priced/overpriced lessons, classes or materials. Please refer to the "Ordering Guidelines" Google Doc for a detailed list of allowed/disallowed items.

Cancellation Policy

We cannot cancel an EMR order after they are processed and sent to the content provider. Once materials are requested, the Student Services Department will order them and they cannot be canceled. If an order has not been processed and is still in "Pre-Pending Status," the ToR can cancel or edit the purchase order in OPS. For VCI orders, community providers must be notified of cancellation prior to orders being canceled in OPS. It is the responsibility of the ToR to ensure that the community provider has been notified and any outstanding payments have been reviewed and adjusted accordingly in OPS.

To cancel a purchase order in the pending stage, you must pull up the purchase order by completing a search. Then click on the drop down menu **"Pre-Pending"** and choose **"Canceled."** Then click **"Update Order."** If you don't click **"Update Order"** the order will not cancel.

Student	Test Testson - Gr. emr	Order Notes:
Available EU's	555.95	
Vendor	Rainbow Resource Center [P]	
PO Number	263210760 - Date Requested: 07-03-2019	
Order Type	EMR	
Order Status	Pre-pending ▼ Pre-pending Pending Canceled Return To List	

Line#	Status	Item	
1	Pre-pending ▼	34092	Art Book
2	Pre-pending ▼	40938	Toy
3	Pre-pending ▼	54921	Math Book
4	Pre-pending ▼	32981	J

When orders are canceled the funds are automatically returned to the student account.

Backordered items

When items are backordered, two things *can* happen. Sometimes our Student Services Department is notified by the content provider and will send you an alert in OPS. Other times, we find out when we get the order and the item is not with the other items in the box. Usually there will be a note on the packing slip that the item was backordered. If this happens, search for the purchase order in OPS and add an internal note. Backordered items are especially unfortunate when we find out after the end of the ordering window in spring. If it is past the ordering window, the parent cannot request an alternate item. Please encourage families to complete their orders well in advance of the deadline.

Ordering Deadline

April 7th is the deadline for orders to be submitted by parents. ToRs have until April 28th to review and approve all orders in OPS. **It is vitally important to receive order requests from your families earlier than the deadline.** Make sure to send a few reminders to your families, because after the deadline, no purchase orders can be submitted. Instructional funds do not roll over from year to year. If the instructional funds are not used by the deadline, families will not be able to access them.

It is a good idea to **periodically check your students' funds**. Funds should be used evenly throughout the year and not all at once at the end of the year. The Ordering Guidelines state that excessive quantities of anything will be rejected, and this likewise applies to extremely large orders at the end of the year.

For EMR orders late in the year: Student must reasonably be able to use all items by the last day of school. If the Student Services Department believes not all items can be used in time, you will be asked to cancel some from the order.

Computers

Each year we will put out a list of computer providers and the items that may be purchased from them. We will not allow any computer purchases from providers or items that are not on that list. The list may continue to change throughout the year and we will keep you updated as to what the current selections are. To place a computer order, you will follow all of the above instructions for content providers. (Computers may come either to the office in Irvine, or to your house, depending on the provider. You will be notified if a computer arrives in the office for your family.)

Other Questions

For other questions, please read the materials in the Student Services Department Ordering Instructions folder in the Shared Drive and the ToR FAQ.

How to Access Student Roster in SIS

LOGINS for SIS scopes
https://excelcs.plsis.com/mod.php/login.php For students in "ExcelCS " Scope
https://exceleast.plsis.com/mod.php/index.php For students in "ExcelEast" Scope

Once the ToR has logged into SIS, go to "Teachers," then "PLS/Student Roster."
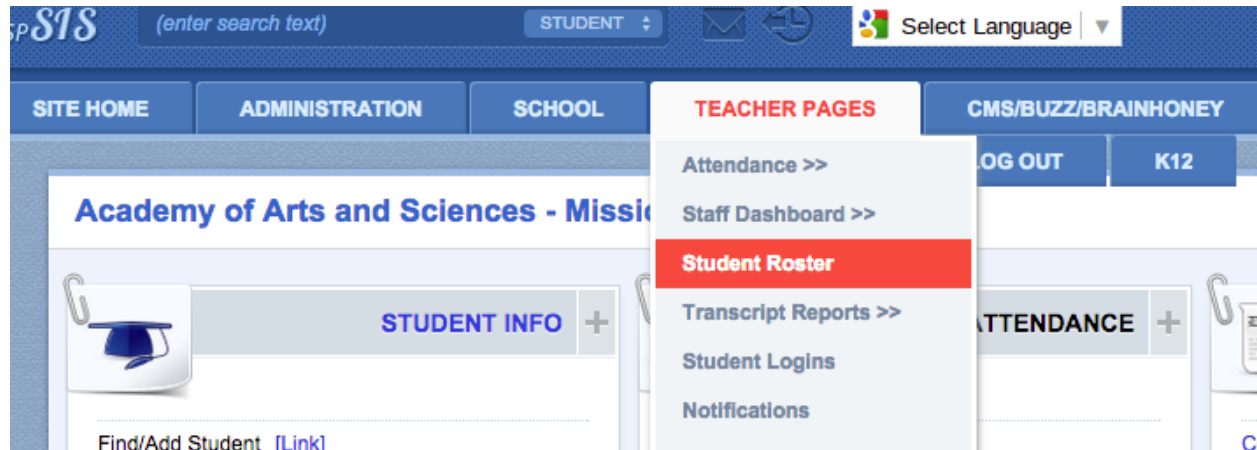
The student roster will appear. Check to see that the correct dates and semester are showing at the top. If the date needs adjusting, make sure to click "Update" (under the first large blue and white box) after the date and/or semester has been changed. To print a roster, click "Print/Export" under the first large blue and white box.

ToR Roster in SIS:

Enrollment status and Additional Information

Each time the enrollment team assigns a student to a ToR after school begins,the student will be highlighted in RED in the PLS/Student Roster portion of the teacher's roster. This notifies the ToR that the student has been added, but still needs to **verify the exit date** of when they *withdrew from their previous school.* They can verify this date by having the parent send their ToR an email stating the date they withdrew from [list name of previous] school. The student will NOT be able to start school until the day they turn in their withdrawal email verification to our admissions clerk.

Once admissions has received exit date verification, or if it is before the first day of the school year, the student will be given a pre-enroll date and they will show up in the ToR SIS roster in BLUE. This indicates that the MA is ready to be prepared and sent to the family for signature.

(Note: Every student will show up in BLUE before the school year starts. We do not need withdrawal verification before the first day of school 09/01/22)

When the MA has been signed and approved, the student will show up in GREEN on the SIS roster. The student in green is now active in school and will acquire attendance.

Note that the ToR can see the student's full name, birthdate, and contact information in each stage.

The ToR will now be able to see all the necessary information to make initial contact with all of their families.

RED– Do Not Enroll-Parent *needs to send enrollment **verification of the exit date** of when they withdrew from their previous school.* Parent may send ToR an email stating the date they withdrew from (name of) school. Upon receipt ToR sends the email to admissions and registrar. Please see below for Prospective Student Contact instructions.

BLUE– Enroll! MA is ready to be sent to the parent for signature. It's in the student's best interest for the parent to sign and return the MA the day they first receive it so as not to lose any funding. However, ensure that you follow the procedures laid out for contacting families and that they understand the responsibilities of the parent before you send the MA.

GREEN– You did it! You have successfully enrolled your student with Excel Academy.

How to Add Student Courses in SIS
(High School and JH students taking high school level courses only)

Before the beginning of the school year, ToRs must add High School courses in SIS. *TK - 8th grade students will have their courses loaded for them. If a TK-8th grade student is missing their preloaded courses add their names and the needed information* onto the TK-12 Missing Students Classes/Curriculum *doc. All Tk-8 students should have five classes for their grade level: math, language arts, science, social studies and PE. If you need to add a HS course for an advanced 8th grader, please use the instructions below.*

High school courses for both semesters need to be added at the beginning of the year to create the Master Agreement. Please watch this video for Adding Classes to SIS and How to Create a Master Agreement.

Instructions:

1. Once in the roster in SIS, click on the blue arrow ▶ next to the student's name. The box will expand and no courses should show. Click on the green ⊕ **Add Class** button. You will be directed to the next screen.
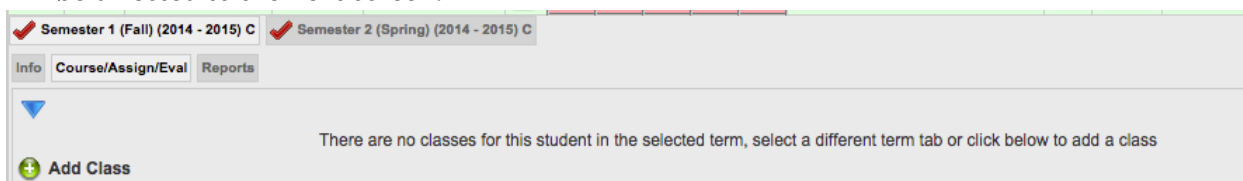
2. This box below will open up. Please watch the ToR training video on How to Add Courses in SIS, which will give a thorough explanation of what information to choose in this box. Click here for written instructions.
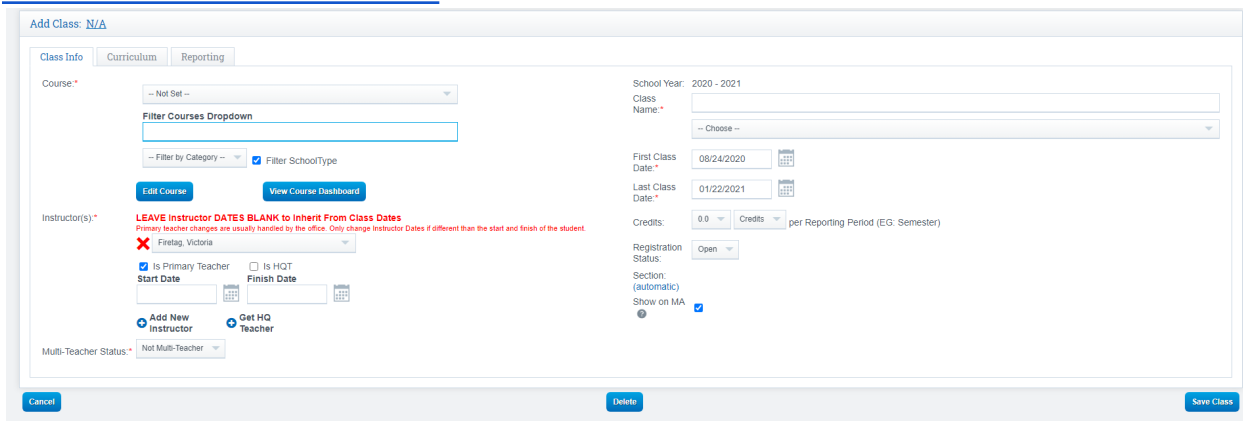
3. **If you cannot locate a course in SIS:** Try searching with multiple keywords and filters. If your course is missing from SIS, please add it to this doc.
   a. For a-g courses, the course names will be prefaced by CP, BYU, EDG, EDY (except for ASL), FLV, LB, and TGS.
   b. For junior high school students taking high school courses, you will need to unclick the "Filter School Type" to find the high school courses.

How to Add Curriculum Content to a Course in SIS

You must add curriculum content to all classes. Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes or the state standards. You can add curriculum content when you first add a course or at any point in the year. Some TK-8 curriculum content will be pre-populated.

Please watch these helpful videos and read the directions below:
Introduction to Curriculum Content
Adding Curriculum Content to Courses in SIS

1. To add/edit curriculum content from the dashboard, choose the green ⚛ icon next to the student's course.
2. Choose the "Curriculum" tab to open the search.

Edit Class: English 12 A

| Class Info | Curriculum | Merge | Reporting | CC Class To Students |

Class Curricula

	Local ID	Name	Owner	Category	Preview	Weight
☑	1859	EXCEL CO - ENGLISH 12 [XL26] [1920]	Coon, Erika	Language Arts	View	33.33% 1
☑	3818	CP English 12 A/B	Haas, Amanda	Language Arts	View	33.33% 1
☑	2179	British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	View	33.33% 1

Add Curriculum   Clear

Grade	Range	Category	Text Search
12	excelcs	Language Arts	Oak meadow

	Imported ID	Name	Owner	Category	
☐	2179	British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	View
☐	2587	British Literature - Oak Meadow	Coon, Erika	Language Arts	View
☐	2351	Oak Meadow English 9 [1920]	Coon, Erika	Language Arts	View
☐	2808	Oak Meadow Literature and Composition II C. 2009	Hernandez, Amy	Language Arts	View

Cancel   Delete   Save Class

3. Use the filters to find the correct curriculum and click the box next to the desired curriculum content to add it. You may add a single or multiple curricula to any TK-12 course to individualize the student's record.
   a. Always add the standards to TK-8 courses, in addition to any specific textbook-based curriculum content, so you can use them when students work on teacher-created assignments or curriculum that is not in SIS.
   b. For high school a-g courses, **you must use the CP curriculum content as the default if the specific curriculum for the CCP or textbook is not in SIS.**
4. For additional detailed information about choosing appropriate curriculum, see the section *How to Complete AWRs*.

How to check Grid Logs for Engagement

How to check grid logs for a single student:

1. In SIS, go to "Teacher Pages" and go to your student roster.
2. Choose the drop down arrow next to the student name.
3. Choose the 'reports' tab.

4. Choose the learning logs icon for the correct LP. This will open to the learning logs page. Make sure the Log type reads 'grid log check' and choose 'review log' button.
5. This should open the student's grid log. You are able to make edits and updates from this page.

How to check grid logs for your entire roster:

1. In SIS, go to "Teacher Pages" and go to your student roster (instruction video here)
2. Once there, go to the box located above your roster and click on the "LL" icon next to the correct learning period   (image #1 below). If you are using the 'new student roster' you will click the drop down for 'mass print reports' (image #2 below).

3. A box will open. In this box choose "grid log check" and 'print logs'

4. This will load all grid logs for your entire roster. Check if they are current and make contact with those parents that are not. Follow the re-engagement procedure if they are not current. If you need to make changes to the grid log to reflect student engagement as dictated by the parent, use the instructions above for How to check grid logs for a single student.

How to Take Attendance in SIS ☑

Each ToR will officially claim attendance by the Wednesday following the last day of each learning period.

Prior to claiming attendance, a ToR should have samples from the student.

First, make sure that all Attendance Grid Logs are sent out on the last day of the learning period. Make sure that the days in which a learning activity took place are checked. They cannot be sent *before* the last day of the learning period. Parents will sign electronically. You will be automatically notified via email that the parent has signed the grid log. Follow the link to the grid log to sign or find the log in your 'Sign Document Compliance' section of SIS. . You will sign **AFTER** the parent does.

Second, once **all** of your attendance grid logs are returned, take attendance for your whole roster. Your signature should fall on a work day, not a weekend or holiday. (A parent signature on a weekend or holiday is fine.)

To do so, log into SIS, go to "Teacher Pages" and go to your student roster. Once there, go to the box located above your roster and click on the "Att" ☑ icon next to the correct learning period. (see below)

Your entire month of attendance will open up for your roster. There is a box at the top left of the screen with a drop-down menu that will allow you to claim all attendance at once rather than having to do it manually one student at-a-time.

Your entire month of attendance will open up for your roster. There is a box at the top left of the screen with a drop-down menu that will allow you to claim all attendance at once rather than having to do it manually one student at-a-time.
Change all students to IP – I/S Present and click the "Save" button on the screen.
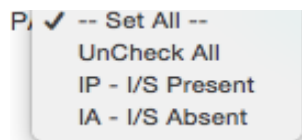
You will be unable to change attendance once you click "save," so please proceed carefully.

You will then print and archive your attendanceThese are helpful slides and a helpful video on this procedure .

Report Cards in SIS

At the end of each semester, ToRs will create electronic report cards in SIS for each student. *Grades TK-12 are required to have a report card.* This information can also be found in the shared drive under Assessments> Report Cards.

1. Login into the SIS
2. Go to your student roster
3. Use the drop down to find the Fall semester dates and click *Update* (Spring - find the semester two Spring dates and click *Update.*)
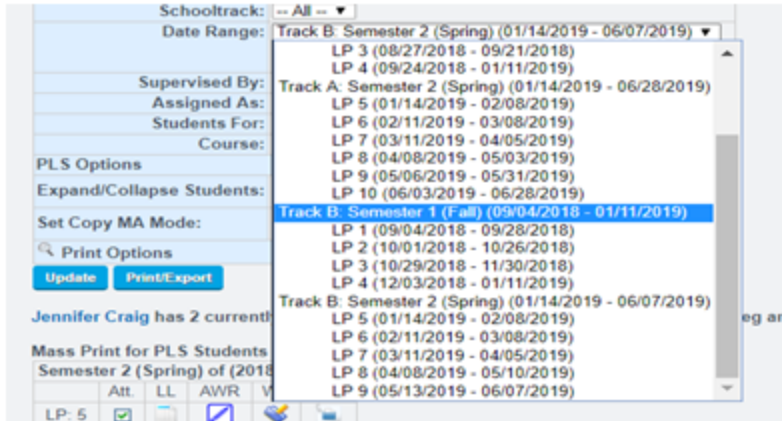
4. Next, click on *Reports* under the student's name, and from the list provided click *Report Card*.
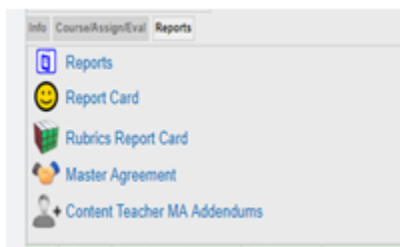
5. You will be directed to this screen (scroll down to see where you enter grades).

6. The above screenshot represents a TK-8 report card. ***You will NOT type in anything under the column titled *Computed Grade*. You will type in the grades under the column titled *Override Computed*.

7. TK-5 - Using the 4-1 scale, under the column *Override Computed* you will indicate the appropriate number (4, 3, 2, or 1) next to the designated subject.

8. Here is an example of the completed column with the appropriate grades.

9. Grades 6-8 - Using the A-F scale, under the same column as above (*Override Computed*) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 6-8 will earn letter grades (not numbers).

10. Grades 9-12 - Using the A-F scale, under the same column as above (*Override Computed*) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 9-12 will also earn credits (5 per semester) which will be indicated in the *Credits* column. ***You will only type in the shaded yellow columns. Once you type the credits in the shaded yellow column, the credits will also appear in the white column titled Credits Attempted/Credits. Example:

11. Comments - Please refer to the report card folder. Every student in grades TK - 12 should have at minimum one comment on the report card that has been chosen from the dropdown. Some students may have more than one depending on their progress in each subject. In the column titled Comments, you do not have to type any comments in line with the designated subject for your students in grades TK-12, **unless the student is performing below grade level as specified on the directions and FAQ documents in the shared Report Card Resource Folder. There is a specific example for 6-8 grade students. Please refer to the shared folder.**

12. If you had a student drop prior to the withdrawal deadline, simply hide the course; do not do an addendum. If your student withdrew after the deadline, remember to include the "W" or the "F" based on the withdrawal date.

13. ToRs will input "IP" for the grade of all concurrently enrolled courses and zero out the credit earned. Upon the receipt of the official transcript, the registrar will input the grade and credit earned and then email ToRs when complete. At this point ToRs can update the report card to reflect the college class grade if requested by the parent. However, once the registrar department inputs the grade and credit for college courses, then the parent can automatically see that reflected in their parent portal on the transcript view, thus updating the RC is not a necessity.

14. At the bottom of the report card, you will see another box titled *Comments.* For TK-5 students, please cut and paste the appropriate 4-1 grading scale.

15. ***IMPORTANT - DO NOT INDICATE SPED OR EL ANYWHERE ON THE REPORT CARD.

16. If you have questions about comments, please email Jenny Craig.

17. Please make sure to click *Save All* if you are not ready to finalize the report card, so you can come back to it at a later time.

18. **Click the box next to *Finalize* under the *Comments* box when you have completed the report card. The screen will become shaded.**

19. Then, click *Save All.*

20. Click *Archive* to sign and date (always the last day of the semesters.) Once archived, you will be directed to a new screen and you will see a blue arrow to click to *view,* which will create a PDF to save and print to send to your student/parent via email.

21. Make a copy of each report card to bring to the office to be filed in student cumulative folders.

***Here is a sample copy of a completed report card (without the student's name, grade, SSID).

Subject	Credits Attempted	Semester 1 (Fall)		
		Mark	Credits	Comments
Dance 2 A	5	A	5	
EDG: Chemistry w/Lab A	5	A-	5	
EDG: Mathematics III A	5	B	5	
ODY: English 11 A	5	A	5	
ODY: US History A	5	B	5	

Year: 2018 - 2019   Grade: 11

Semester 1 (Fall) GPA: 3.60

This student has (completed/not completed) _____ all course work for grade _____ and (has/has not) been promoted to grade _____.

Teacher Signature: _____   Date _____

***FALL - Do not complete the sentence regarding promotion
***SPRING - Complete the sentence indicating promotion to the next grade level. For example -
This student has completed all course work for grade _____ and has been promoted to grade
_____.
Please indicate the promotion status on the RCs for HS students as...
Student in 12th grade who graduated...
has promoted to completion of required credits towards a high school diploma

Student who will be completing a fifth year in HS...
has been promoted to a fifth year

Student who will earn a certificate of completion...
has been promoted to certificate of completion

TK-5 Scale for Comments Box

4: Exemplary – Above Grade Level
3: Proficient – At Grade Level
2: Approaching Proficiency
1: Non-proficient

Helpful Hints -

****SIS did an update and now the *archive* button needs to be clicked in order for the report cards to be officially archived.

****If you choose to print at another time, you can go into your *archive* through SIS to print the report cards. Please print a copy to keep in your students' files and bring a copy of each report card alphabetized and paper clipped together to the February ALL staff meeting (FALL) and to the office no later than two weeks after the last day of school (SPRING).

****Progress reports are printed and not completed through SIS. Progress Reports are found in the shared Report Card Folder. MAKE A COPY FIRST AND KEEP THE BLANK ORIGINAL IN THE FOLDER FOR OTHERS TO USE. Please print a copy to keep in your students' files and bring a copy of each progress report alphabetized and paper clipped together to the February ALL staff meeting (FALL) and to the office on or before two weeks after the last day of school (SPRING).

ToR Roster Requests:

ToR will send **(admissions@excelacademy.education)** requests for the following:

1. Names of anticipated students you would like on your roster-*this is a request, not a guarantee*. (Follow Request Format previously sent out-ToR not to tell families they have room on roster)
2. Incoming siblings-Name and Grade level
3. Desired roster count (Admin approval required)

Prospective Student Contact:

ToR will contact parents via email and phone to welcome the family to Excel Academy and to ask them for withdrawal date verification from their previous school. (Students in RED need withdrawal verification)

1. Phone and send follow up email to pending student(s) on your SIS roster.

The following are example emails for families assigned to your roster. Please use the appropriate emails based on the color students show up on the roster. Students in RED still need a withdrawal confirmation.

<u>Student(s) Show RED in SIS</u>

Hello _____ Family!
My name is _____, and I will be your Teacher of Record for this year. **Could you please give me a quick reply to this email so I know that you received it?** I will call <insert approximate time or date> to introduce myself. This will be a brief phone call to set up our one-hour intake meeting.

We are missing an important piece of information. Please provide an email verification from you or your previous school stating the last date your child(ren) were enrolled with that school. You can send this to me directly via email and I will make sure the admissions department receives the information. We cannot complete enrollment until we have this information.

I am excited to work with you and your child(ren). My job is to help you with all aspects of independent study. As your child's teacher of record, I will monitor their progress and collect their work samples throughout the year. To support you, I will help plan your curriculum, answer your education questions and manage your instructional funding.

During that first meeting, we will complete your enrollment by signing a Master Agreement and additional paperwork. We will also discuss curriculum choices, our program's structure and guidelines and begin planning for the year. In the meantime, please feel free to browse through some of these resources:

*Excel Academy Website: I encourage you to read the school handbook and watch the video about your pathway.
*Excel Academy CCP list: this is a list of our current providers that accept education funds from our school

Documents Attached:

- o School calendar
- o Preparing for the School year: This is basic information to know before completing your enrollment.
- o Course of study: Please use this to record your final curriculum choices.
- o Parent Meeting LP checklist- This is basic information to help you understand our expectations for our learning period (LP) meeting, which are monthly.

My phone number is <insert phone number>. I will send you additional information about curriculum after I call. I look forward to speaking with you soon!

Student(s) Show BLUE in SIS

Hello _____ Family!
My name is _____, and I will be your Teacher of Record for this year. **Could you please give me a quick reply to this email so I know that you received it?** I will call <insert approximate time or date> to introduce myself. This will be a brief phone call to set up our one-hour intake meeting.

I am excited to work with you and your child(ren). My job is to help you with all aspects of independent study. As your child's teacher of record, I will monitor their progress and collect their work samples throughout the year. To support you, I will help plan your curriculum, answer your education questions and manage your instructional funding.

During that first meeting, we will complete your enrollment by signing a Master Agreement and additional paperwork. We will also discuss curriculum choices, our program's structure and

guidelines and begin planning for the year. In the meantime, please feel free to browse through some of these resources:

*Excel Academy Website: I encourage you to read the school handbook and watch the video about your pathway.
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<mark>Documents Attached</mark>:

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- o Course of study: Please use this to record your final curriculum choices.
- o Parent Meeting LP checklist- This is basic information to help you understand our expectations for our learning period (LP) meeting, which are monthly.

My phone number is <insert phone number>. I will send you additional information about curriculum after I call. I look forward to speaking with you soon!

1. ToR will attempt to make contact for 5 school days through phone calls and emails.
2. If there is no response from the parent after 5 school days-the ToR <u>will send the following email</u> with the appropriate student/family information.

<u>No Parent Response After 5 Days</u>

Hello Mr. and Mrs. _____

My name is _____ and I am a Teacher of Record with Excel Academy and have been assigned as your ToR.

I have attempted to contact you via phone and email several times during the last few days, but have been unsuccessful in reaching you. I am eager to partner with you on your educational journey. However, if I do not hear from you within the next 2 calendar days, I will assume you are no longer interested in our school and you will be placed on a waitlist with the admissions department.

Thank you,

(Excel Academy Signature)

1. Notify Noel Park (admissions@excelacademy.education) and cc Nick Romo to let them know the newly assigned family has made no contact with you or is not interested in enrollment with Excel at this time.

2. Admissions will attempt to contact the family and/or place the student(s) back on student intake with a designation of previously placed (PP).

Custody Notes in SIS

At times there will be parents that share custody or have special custody arrangements that we need to know about. There are also times when parents have restricted custody arrangements (certain persons are not to be near the students.) <u>For all of these situations, court papers must be on file in the office</u>. We cannot restrict a parent from their child unless we have this information.

If a student's parents are divorced, ask them about any custody arrangements they might have. If the student will be split between the father and mother's house, we will need to have **both the father and mother sign the Master Agreement in SIS before archiving.** If you need to add a signature after, you can always do an addendum.

Go to the dashboard of the student.
This icon is where you will find all of the necessary information about custody arrangements:

*Please contact **Cori in the Registrar's office** (registrar@excelacademy.education) if you have any questions or need to make Excel aware of custody arrangements that are not in the system.

Documentation within Contact Manager and Student Notes

Recording important interactions with your families is crucial to maintaining a professional record of each student's time at Excel Academy. While not every interaction will need to be recorded in the Student Information System (SIS), the following instances warrant documentation in the contact manager by the appropriate person(s).

Contact Manager
Documenting contact with your families and important student information is easy in the SIS. The first area this is possible is through Contact Manager, which will be used for the following:
  ❖ Documenting a Phone Call, LP Meeting, etc.

❖ Any other type of "contact" with the family that was successful OR unsuccessful (meaning you talked with them or attempted to talk with them and left a message).

**Examples:*
  ❖ You met with a parent outside of the usual LP meetings and helped them to navigate the curriculum; providing a pacing guide and suggestions for streamlining the work.
  ❖ A first meeting with a parent who is new to Excel Academy Charter School.
  ❖ Injury or Incident at a School Event/Field Trip (contact should be made with BOTH the parent and admin and you would document that you talked with both.)
  ❖ A conversation with a parent discussing a PIN or any conversations about opting-out of state testing

To Access Contact Manager:

  ❖ **Go To "Teachers" Tab and scroll down to "Content Manager" and Select "Contact Manager" again in the menu.**
    ➢ You can also get to Contact Manager from the Home Screen and when on the student dashboard. Just look for the words "contact manager" and it will take you to the same place.

  ❖ **Then, you will get to a screen that looks like this:**
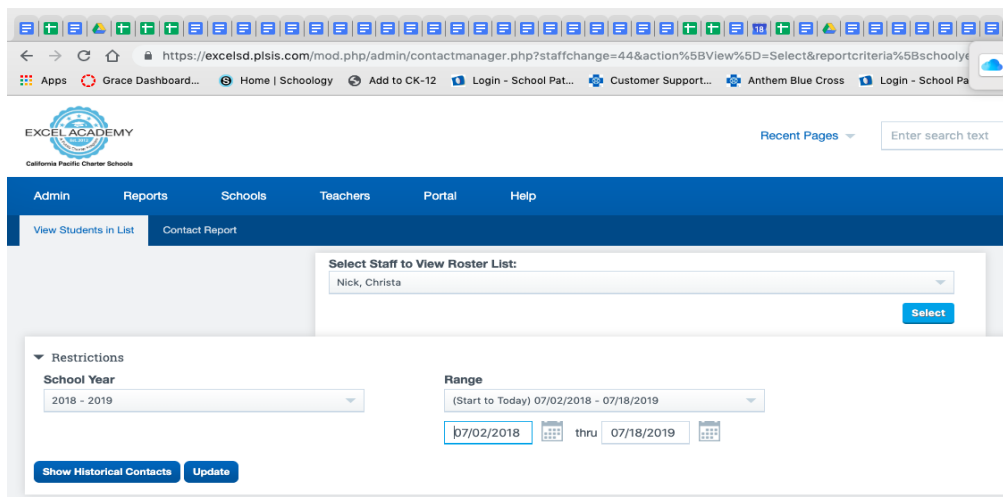
    ➢ Make sure the dates are set to the correct year and that your name is in the teacher spot at the top and then click "Update" in the lower, right-hand corner
  ❖ **You will see student names pop up at the bottom (scroll down), then select the student for whom you are creating a contact log for and click "contact now."**

❖ **On the Contact Information Page, you will fill out the portion with the date, time of contact in minutes, toggle the type of contact (in-person, phone, etc.), whether it was successful, etc. and put a description of what the contact was and if follow up is needed.**

❖ **Click "Save Contact"**

Student Notes Section:

The second area you will log information will be in the "Student Notes" section of the SIS. _This section will be used for things that need to be recorded, but are not necessarily interactions with the student or parent._ Some of the following reasons would qualify:

- Instances of Plagiarism (upload the plagiarized copy to the notes section; change to pdf if you have difficulty uploading)
- Behavioral Issues
- Dates SSTs took place with the SST Doc uploaded
- _CHYA opt out letters from parents_
- _Important Information that Any Admin Should See When Logging in SIS (Parent Dislikes being on Video, Student Accelerated a grade on _____ (date), etc._

If you go to the student dashboard (you can get to Student Notes by clicking on the student name anywhere in the SIS, including your roster page); then, scroll down to the _Student Notes_ section of the dashboard.

How to Complete AWRs

AWR= "Assignment and Work Record"

AWRS: "Assignment and Work Records"
AWRS are a digital list of work assigned to a student. It is, essentially, a gradebook with no grades. Teachers of Record create AWRs for each student to show assignments that work towards progress in their grade level standards and curriculum.

Beginning in 2022-23, AWRS (Assignments and Work Record) must be completed before the beginning of each LP. This pre-loading of objectives and assignments will create a default pacing guide,and help hold the home educator accountable for progress. After meeting with families, the AWRs should be reviewed and/or adjusted to reflect the actual work completed and reflected in the body of work

AWRs Fundamentals:
- Choose objectives/standards that were attempted and the assignments used to do this for each class
    - Each module must have objectives and assignments
- Reflect the number of days in the LP
- Prioritize the use of textbook curriculum content, not the standards
- Add multiple curricula under one class if there are multiple textbooks

Please use the curriculum/textbook your student is using, if at all possible:

1. Curriculum content must be added to a course before AWRs can be loaded. Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes or the state standards.
2. When choosing a curriculum content for your AWRs, make sure you are selecting the curriculum from the proper range (excelcs or exceleast).

   or
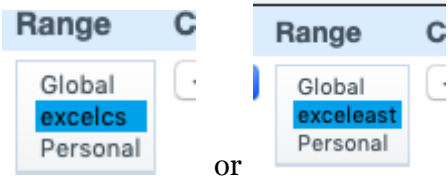
3. Make sure you are looking at the correct edition. Usually, you can still use a different edition, but check off the assignments in a different order, as the books are usually very similar.
4. If you are using a curriculum already in the system, make sure it has both *Objectives and Assignments listed*. Sometimes, even then, there is not enough information listed by the author of the AWRs, so please check with the vice-principals or ToR Training Coordinator if you are unsure. (The blue arrows are objectives and the pieces of paper are assignments.)
5. If the book only lists assignments, please add standards or custom objectives. (Enough to show 20 days of learning)
6. You can add curriculum content to SIS by following this procedure.

For more information about loading Curriculum Content, please watch these helpful videos:
Introduction to Curriculum Content
Adding Curriculum Content to Courses in SIS

If your textbook is not in the system, please choose standards for the TK-8th student, and high school students should be choosing the corresponding CP curriculum content:

1. Choose the current grade level standards for Math or Language Arts.
2. Science and Social Studies may be outside of the grade level for TK-8, but you must use the multi-grade level standards found in **"excelcs" and "exceleast."** (Make sure that 6-8th grade students hit all of the science for those grade levels before high school, if they decide to go out of the order listed in the standards.) **You can use the search function with the keyword 'Excel' to find these.**
3. Standards that are in SIS mainly read as objectives. Each module must have both objectives and assignments. If you must use curriculum content that do not have assignments listed, you must add assignments as custom comments. (For example: Student will complete worksheets. Student will read textbooks. Student will complete assessments on the above objectives/standards.)

4. **If you are unable to find grade-level standards or textbooks that match the learning your student completed, you must write enough objectives and assignments to reflect 20 days of learning in that subject. This is not the ideal way to document the learning and will require more time.**

Step -by-step instructions are below. You can also watch this video on how to complete AWRs: [Adding AWRs from Assigned Curriculum](#)

AWRs Step-by-Step
Before the new LP:
1. From your roster page, choose toggle the arrow next to a student's name to see all of their classes.
2. Choose the curriculum that you want to populate and the LP# next to that curriculum. This will open your "add/edit assignments" window.
3. Type in the 'assigned on' date. It will be the first day of the learning period.
4. Click on the module that you want to open.
5. Choose any additional objectives that will be attempted and methods/assignments that will be used to complete these objectives/assignments.
6. There must be assignments if you choose an objective.
7. Scroll down to the bottom and click 'assign'
8. This will open the records page. In the top left corner, choose *save*. If you're done, close the tab.
9. If you need to add more, you can choose the + sign.
10. Sometimes you have to choose the module.
    a. It will open to add/edit window
    b. Choose assign from curriculum
    c. Choose the additional assignments/objectives that need to be added.
    d. Add the assigned on date
    e. Choose assign
11. Repeat this process for each relevant curricula in each class.
12. You might not use each curriculum every time
    a. You might need to use a combination of textbooks and standards
    b. You might have a student working from multiple books
After the LP meeting
1. Review the AWRs for accuracy against the body of work. You may need to add or delete some objectives/standards and/or assignments to create an accurate record.
2. During your review, find the objective and assignment that matches your sample. It is helpful to think of the sample as a picture and the objective & assignment as its caption. **The auditor and your peer reviewer will look for this to match.**
3. This video will help you add/edit objectives and standards
Helpful videos:
[Adding forgotten dates or adding objectives and assignments](#)
[Adding to an AWR](#)

How to complete a custom comment in SIS:

1. Watch the following videos on how to write custom comments or add a comment(s) to standards.
   a. [Adding Assignments (Custom Comments) to Standards](#)
2. Custom comments should have:
   a. Objective/WHAT was learned: "Student will identify parts of a butterfly," "Student will observe butterflies in their natural habitat," "Student will learn about the jobs of an Ichthyologist," "Student will identify the plants eaten by Monarch Butterflies." "Student will observe butterfly collections from around the world." etc.
   b. Assignments/HOW it was learned: "Student will read a book." "Student will watch a video." "Student will study charts identifying butterfly parts." "Student will complete a worksheet." "Student will attend a field trip to the butterfly museum." "Student will complete an art project."

Loading Samples Into SIS

In addition to completing AWRs, teachers must also load samples into SIS. See the section "Sample Requirements " for more information about sample requirements, acceptable vs unacceptable samples and labeling.

1. Go to *Teachers > Compliance > Archive Compliance*
2. Make sure the following information is chosen:
   a. Report title: Work samples
   b. Include students "with or without Archived reports"
   c. Staff: your name
   d. Range: the correct LP
3. Choose "Generate Report" button
4. Watch this video on [how to load samples](#):
5. You may load TK-8 samples in each section or load them as a single document into "Language Arts". They must be in the following order: ELA, math science, social studies and PE
6. High school samples must be loaded into their individual classes.
7. Samples must be /jpeg or .pdf files.
8. Uploading options:

   a. Option #1: Upload from a computer or Google drive using the
   b. Option #2: Direct upload from your phone via text message: This works for single

      pages only.

Sample Archive Compliance:
Below is a sample screenshot from Archive Compliance after samples have been uploaded.
Please note that high school classes, including those for junior high school students, are
loading into the individual classes. This helps HQT's to check for their specific subject.
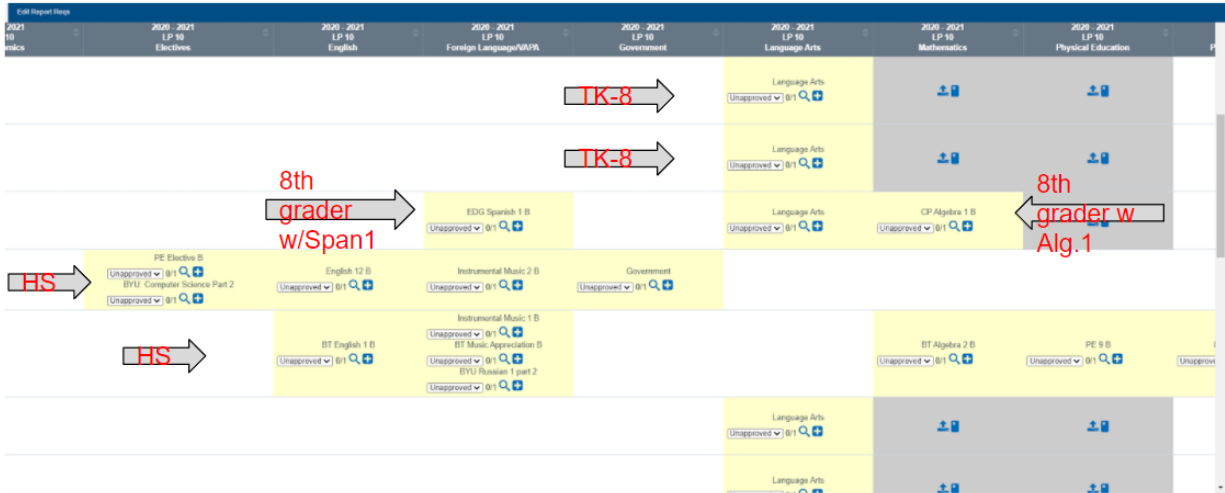
Archiving AWRS:

After you have completed all of your AWR's for every student on your roster, you will archive the AWR's all at the same time. **This must be done AFTER you take attendance for your roster.**

1. Click on the ✏ AWR button for the appropriate LP on your roster home page. (see photo below).

2. Click on 'Sign and Archive electronically'. Make sure the "teacher signature" box is clicked. Parents and students do NOT sign the AWR.

3. SIS will create a document version of your student's AWRs in alpha order. Scroll through all of your students and make sure that the AWR's are showing up for all subjects.

4. Sign each AWR with your signature and your typed name. Use the <u>same date that you signed your attendance</u> as the signature date.
   a. Hint: You can use the 'Attendance Forms' section on your dashboard to see your signature date: Click 'view' to remind yourself of the date it was signed and archived.

5. At the top of the AWR you want to see the number of days the student was present. For example:
   a. "*The number of attendance days possible for this student's learning period is 19. In my professional judgment, the student has completed work that has a value of 19.*"
   b. You do not want to see the value '0' here. If you see '0' here that means you have not claimed attendance yet. <u>AWRs are to be completed and archived after attendance has been claimed.</u>

6. If you see the correct number of days, choose 'Send Invitations/Submit Agreement' in the bottom right corner after the last AWR.

Completion of Compliance
Grading for Students
w/ Little to No Assignments

Q: Should the AWR show all objectives and assignments for each Learning Period?
A: Yes. All objectives and assignments noted on the pacing guide should be noted on the AWR. Remember that AWRs are written in the future tense by showing what the student is planning to complete. The purpose is to establish the intended learning and workload for each student per LP. Ex: Student will complete lesson 6.

Q: What if a student only completes a few of the total assignments?
A: Place a custom note (see below).

Q: Can the uploaded sample reflect a student's best work even if they are failing a course? (ex. Uploaded sample earned an "A" but the student earned an "F" in the course.)
A: Yes, but ideally the sample should reflect the grade they have in the course. The lack of work completion as noted in the custom comments or low grades on their other assignments will also support the lower grade in the course. If the lower grade occurred because the student failed to turn in assignments, the comment on the AWR should show less work was completed, indicating the purpose of lowering the grade.
Ex: "Student completed 2 out of 10 assignments." ~which would be an "F"

Q: Should I note a lack of work completion on the report card?
A: The report card should include a line about why the grade was lowered. Ex: Student only completed 20% of work, resulting in a lower grade and/or failing of the course.

How to Complete AWRs for Little to No Assignments Completed for the LP

1. Choose assignments for your AWRs that represent the 20 days of learning the student SHOULD have completed for the LP.
2. Then, you will write a comment (see below for instructions) for each subject area affected that reads: "Student failed to complete assigned work in this subject." OR "Student completed ____% of the assigned work for this subject."

How to Include a Comment on AWRs:

1. While in the AWR for the class with no samples, click on the little speech bubble at the bottom of the assigned AWRs next to their name.

2. A box will open and you will type the comment in the box **for each subject that you received little to no work.** If you receive work in one subject, you will keep that AWR as normal.
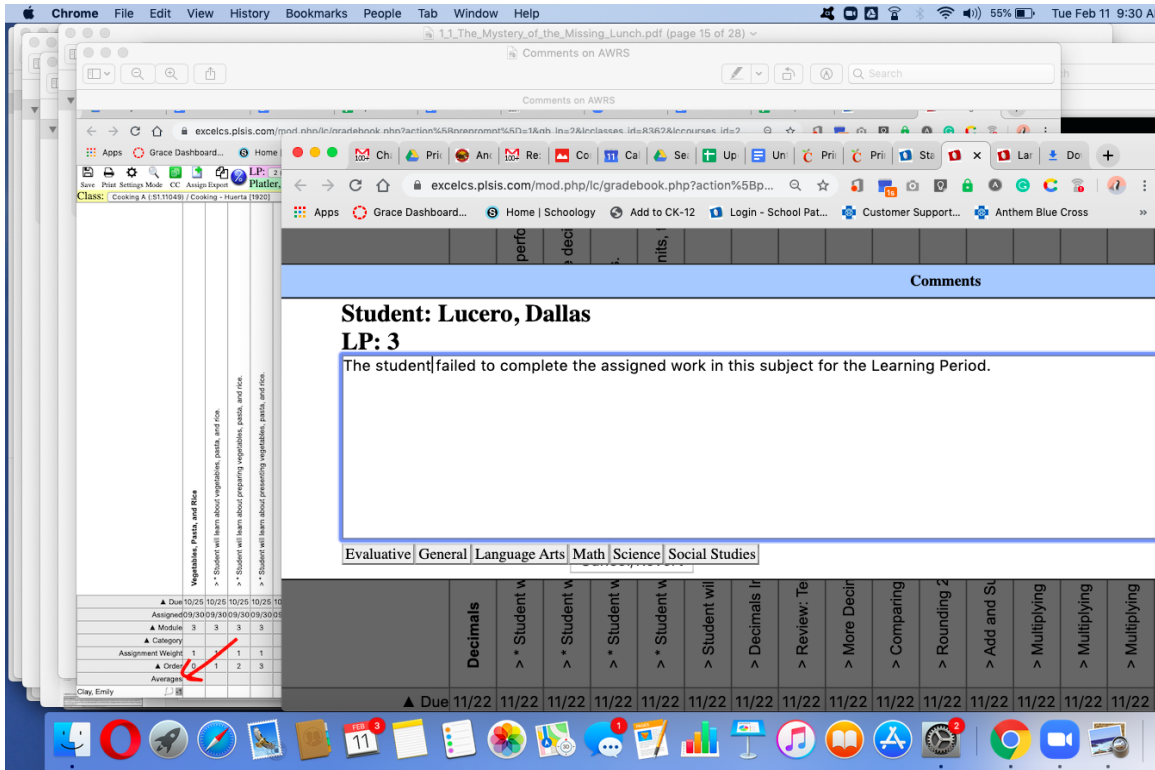
First Steps with Assigned Families

Assigned Students: You will be assigned students both before school starts and throughout the school year. Before school starts, your roster will be in the Student Information System (SIS), for which you all should have logins. If you do not have a login, please reach out to Keri Schneeweiss @ kschneeweiss@excelacademy.education. For students assigned **after** the school year begins, the admissions office will send you an email letting you know a student has been placed. Once you receive this email, please look carefully in the SIS for any pertinent information about the student. (See the SIS section for instructions on how to access student information.) Once the student is highlighted in **blue**, you may contact the parent. See the section on _Enrollment status and Additional Information_ for an explanation of the different colors in SIS.

Transfer Students: At times it is necessary to transfer a student from one ToR to a new ToR. The process is similar to that of an assigned student, except, once the school year begins, you will complete an addendum to the original Master Agreement (MA) , rather than a completely new Master Agreement. For instructions on this process, please see the addendum video located in the "Training Materials and Manuals" folder of the Education folder.

Your Role as ToR: The ToR/family relationship is very important to most families. They are looking for someone who can be there to guide them, provide encouragement and work alongside them to ensure a successful academic year for their child(ren).

Please note: ToRs should _never_ contact a student via email, phone, text, social media or any other messaging system _without the parent/guardian also being included in the correspondence_. Even then, prior permissions from the parent/guardian should be granted before including students in a conversation with you and the parent. **At no time should conversations between a ToR and student occur without the parent/guardian.**

- ***Initial Email:*** Send a welcome email to all new students before reaching out via telephone or Zoom. Even if it is the same day, it's less intimidating for the parent and more likely that they will answer the first time. In the introduction email, attach applicable documents of help. (ie. [TK-8 Curriculum Handbook](#), school calendar, etc.)
  - If the parent replies, this is a great opportunity to set-up a Zoom meeting to discuss the curriculum. Let them know that the Zoom will be long (approximately 45 minutes).

- ***Initial Phone Call:*** This call is a **brief** time to confirm student details and ensure the family knows how our school functions. You can use [this checklist](#) to guide your phone call.

  - ➔ ***Ask the parent questions about their family and how they came to Excel Academy***. Ask them what their goal is for independent study (escape bullying in school, desire character building, improve academics, etc.). This will give you a feel for what is important to the family and how you can best approach them as a teacher.

  - ➔ ***Introduce yourself and your role as their Teacher of Record.*** Feel free to let them know a little about your family or hobbies, as well as your passions within education.

  - ➔ ***Confirm Name, Grade Level, Birthdate, Telephone Number, Address and Email*** of each student in the family. Each year we have students with incorrect information or the wrong grade level in the SIS! Also use this time to ask for alternative contact information (like additional phone # or email.) *Let the family know that we communicate primarily _via email_ and that they should check it daily for important information from you. Let them know you will always email them back within 24 hours (1 business day) and they must respond to emails within 48 hours (2 business days.)

  - ➔ ***Ask the parent about any custody arrangements***. Say: "We want to make sure to respect any family arrangements that you may have, so if there are any custody arrangements or special concerns you wish for us to honor, please let me know. If your child(ren) splits their time between homes, that is completely fine, just let me know so I can include both parents' signatures on the Master Agreement and Acknowledgement of Responsibilities." *Refer to instructions in

the SIS section of the manual for reporting legal custody arrangements to Cori in the Registrar's office: registrar@excelacademy.education.

➔ *Describe the role of the parent as the primary teacher for the student for Personalized Families.*
  ◆ The day to day teaching and correction of learning assignments is completed by the parent/guardian. You will support them as the credentialed teacher, but you do not tutor the student in any way,
  ◆ Parents/guardians must oversee student learning on a day to day basis, be responsible for all work completion and ensure all necessary student work learning is brought to the Learning Period (LP) meeting.
  ◆ Instructional funds (IFs) can be used to purchase curriculum or classes, with the ToR having ultimate say over where funds are allocated if a child needs resources allocated differently to support their comprehensive Course of Study. Core curriculum must be in place before supplemental classes and curriculum are purchased. Religious material is not acceptable.
  ◆ There will be daily teacher-student instruction offered and the parent must log their attendance daily.
  ◆ Parents will provide samples monthly at a meeting with the ToR.

➔ *Set up an in-person meeting or Zoom to discuss curriculum, courses and sign paperwork. This will need to be within the next few days.* Please note: All Content and Community Provider classes must be ordered 10 business days before the student's first day of classes.
  ➔ Let them know to bring any curriculum they already have on hand so that you can approve it and take a picture of the Table of Contents for each book for reference throughout the year.
  ➔ *Have them think about their curriculum choice*s before they meet with you. Share the TK-8 Curriculum Handbook with the parent ahead of time, or the high school information for older students.
  ➔ Let them know that the meeting will last about one hour.

➔ *End the phone call by asking if they have any questions.*

● ***Send a follow up email***. Thank the parent for their time and send all of the resources, including free subscriptions, resources, etc. that were discussed on the phone.

Personalized Pathway: Initial Meeting

The initial in-person meeting is a time to go over the responsibilities of the parent and/or any changes in policies for the current school year for returning parents. You will introduce parents to the ordering system (OPS), ParentSquare, and the many resources available to them (TK-8 Curriculum Handbook, free school-wide subscriptions, etc.) If the parent/guardian understands and agrees with the policies set forth in the Master Agreement (MA) and AoR, they will sign them at this time.

This meeting may be in-person or virtual. With a shortened ordering time in August, Zoom and Google Meets are a great resource for reviewing important documents with families while still 'seeing' each other for the first time.   New families may want to meet in person before committing to our school. Please work with each family to address their needs and comfort level.

Returning Students in August: Because policies and procedures change throughout the years, it is important that parents have the most up-to-date information. Please <u>meet with families</u> ***in-person or, due to COVID, via webinar*** as necessary. **<u>This is a yearly requirement with all families.</u>** This allows parents to get essential updates for the school year. You might also consider having a webinar for all of the parents on your roster to discuss any new policies and procedures and answer questions.

Supplemental documents for this sections:

[Initial Parent Meeting Checklist](#)

[Parent Checklist: Getting Ready for School](#)

[HS New Student Checklist](#)

Hand Out the Following Documents/Email in advance if the meeting is virtual

1. **Excel School Calendar**- [2022-23 School Calendar](#)(Print in Color) available on the website or in EACS Handbook as well

2. [**CCP Acknowledgement**](#)**:** Shared Drive> Student Services

3. [**Acknowledgement of Responsibilities**](#) **(AoR)**: see section below

4. **Course of Study template for information gathering:** Shared Drive> Education folder > [ToR Resources](#)

   a. You will add this information to the [Course of Study Elementary Doc](#) or the [Course of Study Secondary Doc](#) spreadsheet for review by your Regional Leader.

5. **Course Content:** *(may be shown on your screen if virtual)* Print course content for approved HS courses and TK-8 curriculum from SIS by clicking "view" and scrolling to the bottom to "print"

Topics to Cover During the Meeting:

1. Acknowledgment of Responsibilities and Master Agreement
   ❖ Place the [Acknowledgement of Responsibilities](#) in front of you ([click here](#) for Virtual Path AOR) and go through it line by line with the parent. (located in SIS, along with the MA.)
      ❏ This is absolutely crucial, as many parents get to a point in the semester where they are issued Progress Improvement Notifications (PINs) because they did not understand the policies set forth in our [Acknowledgment of Responsibilities](#).
      ❏ Review with families any new and relevant changes to our program.
   ❖ Explain policy changes for this school year that will directly affect parents, especially veteran parents.
   ❖ Have the parent sign the <u>Master Agreement/Acknowledgement of Responsibilities</u> for each child if it was not signed in the spring)
      ● **For HS students,** you may need more time to discuss and add courses. A generic MA can be signed. Please refer to the [HS New Student Checklist](#) for

onboarding information for HS students and ways to create a generic grade level HS MA

- Confirm the student information in SIS for accuracy (name, <u>grade level</u>, birthdate, telephone number, address and email).
    - For inaccuracies,please email **admissions@excelacademy.education with the** corrections that need to be made. <u>Email subject line: *SIS Corrections*</u>
    - <u>If the student grade level is wrong, you can have them sign an addendum later to correct this inaccuracy on the MA.</u>

2. CCP Agreement (CCPA)
❖ [Go through this document thoroughly with your families](#), so they understand how funds work. Some of the most important items are:
  ➢ Non-consumable items are the property of the school and must be returned.
  ➢ Content and Community Providers (CCPs) may not have room in their classes. Parents/guardians must contact the CCP first to see if there is room for the student and ask that their place be held. ***Excel Academy does not pay registration fees.***
  ➢ CCP class orders must be received by the ToR *10 working days* before the first day of school. Teachers can enter the orders 7 days prior to the start of a course.
  ➢ Materials will be shipped to parents as a default. Confirm this option and shipping address with them. Most will be happy about this; some will want their materials to come to you.

3. Curricula (Course of Study)
❖ Discuss curriculum options with the parent. If the parent does not know where to begin, you may suggest the TK-12 Curriculum Menu. If the family does not find a curriculum through the menu, they may use the TK-8 Handbook/9-12 Catalog. **Students must have curriculum content and a pacing guide in place for each core course before the start of school.
    - Fill out the [Course of Study Elementary Doc](#) or the [Course of Study Secondary Doc](#) with the parent, explaining areas that need another curriculum to fill in the gaps. Make sure to write down everything the student is using for curricula and check for gaps in learning (spelling, reading literature, writing). Families might need a few days to make final decisions.
    - Parents/guardians must choose complete curricula, for all courses, **within 5 days of signing the Master Agreement if school has already begun.** ToRs must order curricula for the student if a full week has gone by and the parent still has not chosen a Course of Study.
    - For those that have curricula in hand that they would like to use, take a picture of the <u>Table of Contents</u> for each course. You will need this to ensure it hits all standards and for pacing purposes/AWRs.
4. Pacing Guide
❖ *The ToR must complete a Pacing Guide for all core subjects* a student is taking. Explain to the parent their responsibility for following the pacing guide on a weekly basis.
  ➢ Pacing guide *[templates](#)* can be found in the Shared Drive under Education and Curriculum.
  ➢ ToRs may also send copies of the pre-loaded AWRs to families as pacing guides.

➢ Families must receive their pacing guides before the first day of the learning period.
➢ Help parents to understand what a *'body of work'* is.

5. **Recording Student LearningExplain the options for parents to record student learning in preparation for the LP meeting each month.**
    ➢ Parents should bring a copy of the Pacing Guide to each LP meeting, in order to reference the material the student completed. The ToR may need to adjust the Pacing Guide each LP for the parent/guardian and provide them with an updated copy.
    ➢ Tier System should be embedded here.

6. **Ordering:** Parents must have an academic plan and all necessary curricula ordered before the ToR can order supplemental courses (PE, art, field trips, etc.)

7. **Graduation Goals: (8th grade and up):** ToR must communicate that our goal is to have students graduate and meet graduation requirements. If students are wanting to attend a UC/CSU school, they must meet with our high school guidance staff *as soon as possible* to plan out a-g courses. However, ultimately, the PARENT is responsible for contacting colleges of interest to clarify specific admission requirements. Use the generic HS MAs as a guideline for common courses by grade level.

8. **Start Date:** Inform the parent that a student's start date is the beginning of academic learning. It will be either the first day of school, or the date in which the family signs the Master Agreement (after school begins). Families must log academic progress for each subject/course from that point on (even if they start supplemental CCP classes at a later date.)
    ○ Please note: If a family wishes to start on a date later than their signature date on the MA, please contact **Noel Park in Admissions** and she will adjust the date in school pathways. The MA does ***not*** need to be redone.

9. **LP meeting location/time**: This must be a public location, no home visits are allowed for liability reasons. M*ake sure your LP meeting schedule is established and set before the first day of school.*

    ○ **Alternating virtual and in-person meetings:** ToRs are allowed to alternate LP meetings in-person or virtually on a rotating schedule.
        i. Half of a roster *may* be seen virtually, while the other half **must** be seen in person.
        ii. The following month, ToRs must alternate those families to have in-person meetings with families that were vitual the LP prior.
        iii. *Recommendation*: Maintain the same schedule for both virtual and in-person meetings to avoid confusion.

Progress Monitoring

The primary responsibility of the Teacher of Record is progress monitoring. This comes in many forms:
- Weekly check-ins
- Weekly monitoring of grid logs to document engagement
- Regular and timely communication with families
- Monitoring online classes
- Learning period meetings (monthly or as needed)
  - Goal-setting
  - Monitoring completion of work outlined by the pacing guide
  - Measuring student academic growth
- Assigning additional work if needed
- Monitoring IEP goals and
- Using SSTs to address academic issues

Engagement and Re-Engagement Programs and Policies (AB130/Ed Code 51747)

Recent changes to Ed Code 51747 through AB130, added July, 2021, require independent study programs to outline, offer, engage and re-engage students in synchronous instruction and live interaction. These guidelines and Excel's program adaptations to meet these guidelines are listed below. This new legislation has made programming fluid and may change as needed.

Tiered Engagement

Excel has adopted a tiered re-engagement strategy, which is outlined in the Acknowledgement of Responsibilities signed as part of the Master Agreement. Students must engage in educational activities on a daily basis.

ToR steps for monitoring engagement:
1. Parents are required to mark daily engagement on the student's grid log.
2. ToRs are required to check the grid log every third day.
3. If the grid log is not marked, the ToR must contact the parent or guardian about the lack of participation within one school day of the absence or lack of participation.
4. If proof of work cannot be provided, the ToR will begin the PIN process.

Synchronous Instruction and Live Interaction

Personalized Pathway ToRs are required to participate in Excel's programming for synchronous instruction and live interaction.

<u>Elementary:</u>

Monday through Friday: ***Eagle Engagement*** **-** Virtual**,** daily engagement via Zoom for 30 minutes daily

- Curriculum programming will be literature-based.
- Students will be broken into grade bands.

<u>Secondary:</u>

Mondays (7th-12th): ***Teen Talk*-** Social and Emotional Learning (SEL) opportunities

Tuesday through Friday(7th & 8th): ***Eagle Engagement* -** Virtual**,** daily engagement via Zoom for 30 minutes daily

- Curriculum programming will be literature-based.

Weekly Check-Ins

Teachers are required to check-in with their students on a weekly basis. Weekly check-ins are done on Thursdays. This allows the ToR time to get parent responses and take appropriate steps if students and families are struggling, behind or need to be issued a BIP or PIN.

<u>The weekly check-ins will consist of three tiers for TK-12:</u>

Tier I:

This is for: reliable families whose students are making consistent progress

- Each Thursday parents will submit their pacing guide, where the parent has signed, marked or indicated the last assignment the student left off on for each subject. This method can be determined by the ToR. They can submit their updated pacing guides any time on Thursday.
- The following morning (Friday) the ToR will review the progress of each student and check that it aligns with what was previously discussed/agreed upon.
- This process also applies to students who are in ETL or online classes. This requires the parent to be in touch with their student's progress (or lack thereof) from week to week.

Tier II:

This is for: families that have failed to comply with Tier I, families that you have had trouble collecting samples for at LP meetings, students who you have concerns about or who have struggled with pacing in the past

- This tier can also be utilized for all students on your roster so that it is less stressful for parents to scan/submit an entire body of work right before LP week.
- Each Thursday parents will submit their signed pacing guides and submit the last assignment the student completed in each core subject.

- The ToR can utilize Google folders or Google classroom to make this collection automatic and easy.

Tier III:

This is for: a family that has failed to comply with tier II

- Tier III families will be required to attend mini ***weekly*** LP meetings that can last from 15-20 minutes. The parent and student will be required to attend these meetings so that the expectations are clear for all involved parties.
- During each mini LP meeting this family will have to attend a virtual meeting with their ToR and share work that has been completed for the week.
- At the meeting the ToR will set clear expectations on where the student should be at in their pacing guide when they meet again.
- Failure to comply with weekly check-ins may lead to a PIN being issued.

Learning Period Meetings

Learning Period (LP) meetings are required every 20 school days by the State of California and are scheduled by the ToR based on the end date of Learning Period (LP). Generally, meetings occur the week an LP ends, but may be held earlier if needed. All meetings should take place <u>before</u> the last day of the learning period. That way, if there is an emergency, there is a chance to reschedule and take attendance before the deadline. **(Please note: You are required to have all samples in-hand before taking attendance.)**

<u>REQUIREMENT</u>: New teachers are required to observe one learning record meeting of their regional leader *before they meet with their families for LP1*. These observations will be scheduled the week prior to LP1 meeting week. The ToR Trainer will then schedule a time to observe the new teachers during their first two learning period meetings.

Supplemental documents for this section:

LP Meeting Checklist

Parent LP Meeting Checklist

Work Sample Checklist

Forms for LP Meetings folder

LP Meeting Scheduling

*Please note: **At no time should families see the names of the other families you are meeting with on a shared schedule**. It is easy to create confidential Calendar Sign Ups in Google Calendar for your LP meetings. See the following video tutorial for instructions!*

1. **LP Week:** Reserve the last week of the LP for your meetings. *If an LP ends on Friday the 5th, meetings should be held the 1-4th or the previous week* Refer to the *Excel 22/23 School Calendar* for school year LP dates. Reserve the Friday of LP week for make-up meetings and taking attendance.

2. **Elementary Pathway- alternating virtual and in-person meetings:** Beginning in 2022-23, ToRs are allowed to alternate LP meetings in-person or virtually on a rotating schedule.
   a. Half of a roster *may* be seen virtually, while the other half **must** be seen in person.
   b. The following month, ToRs must alternate those families to have in-person meetings with families that were vitual the LP prior.
   c. *Recommendation*: Maintain the same schedule for both virtual and in-person meetings to avoid confusion.

3. **Secondary Pathway- mostly virtual**
   a. Must complete one in-person LP meeting in the first semester (new families in the first three LP meetings)

4. **Locations:** Pick locations central to your families, doing your best to never make a family drive over 15-20 minutes except in special circumstances that the parent has agreed to ahead of time. Pick a location with ample seating and internet access if you want to work in between meetings. Keep families of small children in mind; the children might squirm and make noise.

5. **Duration:** Meetings should be scheduled at least one hour apart for single students in order to make time for a 45 minute meeting. If there are multiple students in a family, schedule an additional 30-45 mins for each student, depending on grade level. High School students may take even more time. It is always better to allow more time than to run out of time.

6. **Mandatory:** Stress the importance that LP meetings ***cannot be rescheduled*** unless there is an *unavoidable* emergency. A doctor's appointment is not a valid excuse, as they should work appointments around monthly meetings. Be kind, yet firm, setting the tone the first time you meet with the family. If a family arrives late, cancels or misses meetings, refer them to the policies in the EACS Handbook. If a family misses their meeting or fails to turn in work, a PIN may be necessary. Give the parent until the attendance deadline for each LP and, if they still have not met with you and/or provided samples, reach out to Nick Romo (TK-8) or Lorrie Wood (high school) for a possible PIN.

The Scheduling Email:
(*All emails to families should be **bcc'd*** so families cannot see one another's email addresses.)

- [Create a Google Calendar appointment invite](#), with time slots for parents to sign up their children for an LP meeting. Give a cushion of 10-15 minutes between families to allow for transition time.
- Ensure that you have included the meeting location in the sign-ups. For COVID, we will be virtual and you can utilize Google Meet/Hangouts or Zoom invite links in your calendar appointments.

Make sure your email is friendly, and includes:
- An explanation of what an LP meeting is
- The link to the calendar sign ups
- A reminder that LP Meetings are **mandatory and <u>cannot</u> be rescheduled,** unless there is an unforeseen emergency
- Both the student(s) AND parent(s) are required to be at all LP meetings, no exceptions.
- Students must arrive <u>on time</u> for scheduled time-slots, or risk having it rescheduled.
- Meetings will last approximately 45 minutes per student, depending on grade level.
  - Families with a high school student should expect to give an entire 45-60 minutes for the high school student plus the amount of time needed for any remaining TK-8 siblings.

The Monthly Learning Period Meeting

<u>Purpose of the LP meeting</u>
The purpose is to oversee and assess student attendance and student progress towards subject mastery by reviewing the body of work. This can be a very rewarding part of the ToR position. It is a time to encourage students in their learning and offer parent support. Students and parents may start out very insecure, especially if they are new to independent study, so lots of encouragement may be needed. This is a time to reassure them that they CAN do this! Training parents in what is expected may take several LP's. However, when parents are trained well and follow expectations, <u>you will have meaningful and productive meetings.</u>

<u>What does a meeting look like?</u>
The order of a meeting is flexible, but should include these components:
1. Announcements/scheduling/pressing matters
2. Review of samples for each child
3. Collect samples from every category (ELA, math, sci, ss and PE)
4. Parent mentoring

<u>Objectives during a meeting</u>
1. Review work to assess learning for participation, attendance and mastery
2. Record the work that was completed so you know what to put in the Assignment and Work Record (AWRs)
3. Collect samples to upload into SIS for compliance to match AWRS
4. Assist parents in planning, pacing and troubleshooting

Objective #1: **Work Review to Assess Learning**

As a ToR, one way to assess student learning occurs during Learning Period meetings. Participating in student centered discussions, _based on the student's complete body of work_ is a great way to connect with students and find out if they understand the material. Beforehand, ensure you communicate with your families the need to bring a _body of work_ from each subject, not just a sample.

- Each student should take 30-45 minutes to review:
  - Take charge of the questions; don't let parent guide the conversation.
  - When possible, allow the meeting to be student-led to promote student advocacy.
  - Allow students to use their notes and samples to answer questions. It's not a test-- it's a conversation.
  - Try to review students separately or require they answer separately.
  - Use samples as a starting point for discussing and assessing mastery.

As students review their work with you, ask meaningful open-ended questions that include a variety of Bloom's Taxonomy and critical thinking. Remain friendly and down-to-earth to build strong relationships. Don't unnecessarily quiz students or put them on the spot, but work towards assessing their knowledge in a variety of ways. You can work on math problems, listen to them spell or read and have them explain concepts based on their work from the month. The types of questions below can be helpful. (Please see _Questions to Check for Understanding Doc_).

- *I see you learned about butterflies! Were you able to see real butterflies? Did you read a book about butterflies? Did you color any pictures or do a project?*
- *What steps did you take to create this final draft/project?*
- *What was the most interesting fact you learned about _____?*
- *What are you reading at home? Tell me about your favorite character...*
- *What do you think will happen next in the story?*

***It may take a couple of meetings to break the ice with some new students, but hang in there!*

Assessing Learning in a Virtual Meeting:
During virtual meetings, ToRs should maintain high standards for assessing work. Students must still provide a body of work and should have their workbooks and papers with them. ToRs may need to use creative methods and leverage technology to assess student learning in a virtual setting. See the Virtual LP Meetings and Training Resources folder.

Objective #2: Recording Learning for the LP:

Parents need to communicate the monthly learning that takes place for their student(s). They may use reflection logs, learning logs or pacing guides to do this.

While a pacing guide should be in place before the LP begins, at times students complete slightly more or less than what was planned. The easiest way to communicate the learning from the LP (about 20 school days) is to print out a pdf of the curriculum from SIS and have the family check off the completed assignments. To retrieve the pdf from SIS, follow these instructions:
1. Go to your roster PLS/Student Roster.
2. Scroll down to the student and expand the blue arrow on the left.
3. Click on the green dot next to the subject you would like to open.
4. For the curriculum entered for that subject, click on the "view" button to the right of the curriculum title. (This will open up a pdf that you can then save and print.)
5. Repeat this for each subject for each student. Talk and add notes to grasp a full picture of learning that took place for the LP.

For curriculum that is NOT in SIS, parents can communicate learning with a reflection log, learning log or by referring to the table of contents:
1. A "**Reflections Page**": Parents will write down what the student learned and how they learned it for each subject on the reflection page (found in the Education Shared Drive under ToR Resources).
   ○ **Example:** What: Studied verb tenses, compound words, pre-writing activities (outlining and drafting) How: *Language Arts for 5th Grade Students*, Lessons 40-60
2. The **Learning Log** is found in the Parent portal and can be used to record completed work
3. **Table of Contents:** Teachers can refer to the Table of Contents for that curriculum and take notes as you talk to the student. (Take a picture or Obtain a copy at the beginning of the year.)

*Please make sure you write down enough learning for each subject (20 days worth), for each student. You will complete learning reports based on this information.

Objective #3: Collecting Samples to Upload into SIS for Compliance
During the Personalized Path learning period meeting, your goal is to take a variety of samples from the body of work. You can take paper copies or digital copies. Always take more than you'll need.
   ○ Take lots of pictures with CamScan
   ○ Have parents send them to you in advance if it's a virtual meeting

TK - 8th: Review the entire body of work and and collect several graded work samples for each core subject listed on the MA:
   ● Language Arts
   ● Math
   ● Social Science/History
   ● Science
   ● PE: Students may complete a PE Log or assignment, such as:

- **TK-2** A picture with a simple written description by a student or dictated and written by the parent/ToR.
- **Grades 3-5**: A picture with 3-5 sentences of their PE activities related to the picture.
- **Grades 6-8**: A paragraph or two about their PE activities

High School: Review the entire body of work and collect multiple graded work samples for each course title listed on the Master Agreement. High school students must be enrolled in a minimum of five courses per their approved four-year plan. (See High School Sample Requirements in the Helpful Hints for High School doc.)

Objective #4: Assist parents in planning, pacing and troubleshooting
- Leave time to answer parent questions about curriculum, lessons and goals
- Briefly review the next month's goals/pacing
- Don't be afraid to ask for more samples, better quality, or assignments that cover missing standards/objectives
- Ask them how you can help during the next LP
- Remind them that you'll be checking in weekly and that you need a response within 24 hours.
- Remind them about daily attendance

Sample Requirements

As Teachers of Record, the student's _complete body of work_ allows us to assess student learning and provide feedback to the parent/guardian. In addition to examining the body of work for the LP, teachers will also be required to **pull a sample from each content area** to upload into the student records system. These samples must contain the following:

1. Samples must be graded/marked:
a) Grades (6-12) Please include a letter grade, percentage, or fraction (all are okay) that indicates how well a student did on the assignment. If the student misses several questions on the assignment, but the page that is uploaded is free from error, it is advised to please write "page 1 of____," at the top so that it is understood the missed questions occurred on the pages not included. (Stickers, stars, checks, etc.. are not acceptable substitutes for a letter grade.) *

b) Writing Samples: The sample should have comments and corrections throughout the piece, along with a letter grade from the parent/teacher, showing they have read through it and provided feedback to the student. High school writing samples earning an A should include a corresponding rubric.

c) Grades (TK-5): Stickers, stars, checks or comments are acceptable forms of grading. A letter grade is NOT required. However, for math, students should show their work and wrong answers should be clearly marked. Ideally you will include the amount incorrect at the top of the paper, but again not necessary. (ie. -4 or 6/10)

*When labeling a sample digitally, please make sure the font and color is distinctly different from the font of the sample. This avoids confusion for the auditor.

2. Samples must show _as much student work as possible:_

a) <u>Acceptable Samples:</u>
   i) A picture of a science lab, accompanied by a lab write-up, detailing what the student learned.
   ii) Math homework in which all the student computations are shown (not just answers).

b) <u>Unacceptable Samples:</u>
   i) A picture of the student completing a lab with NO write-up
   ii) Multiple choice or T/F exams or worksheets
   iii) Maps or coloring pages <u>not</u> accompanied by a brief description;
   iv) Math homework which shows only the answers.

c) For very young students (TK and K), the parent may write what the child dictates. Have them use quotation marks to indicate it was a dictation. _Once the student is able, they should be encouraged to write independently._

3. **Samples must be <u>nonsectarian (no religious content)</u>** - please double check the content, as well as the publisher at the bottom of the page.

4. **Samples should represent the student's work for that Learning Period.** The ToR, along with the student and parent should select something that truly reflects the student's abilities.

a) _Equally important is showing a progression of work._ For example, a 1st grade student may start with copy work samples and by the end of the year be writing original paragraphs.

b) Do not accept <u>the same type of sample each Learning Period</u>. For example, language arts includes writing, reading comprehension, spelling, etc. Do not upload a spelling test for each Learning Period sample.

c) A student's BEST work does not necessarily mean it will be an "A" on every paper. Get to know your students and what they are capable of and educate parents that an "A" is above grade level work.

5. **Samples should represent the <u>student's original work</u>** and may not be plagiarized in any way. (Please refer to the Plagiarism section of the Student/Parent Handbook for more information.)

Withdrawal Process
(During the School Year-First Day of School Until Last Day)

Summer Months: No withdrawal form is needed for students that decide not to enroll during the **summer** months Excel is not in school.
Simply notify:
1. **Registrar (Cori McCook)**: Previously enrolled students
2. **Admissions:** New Students with No Previous Enrollment

Withdrawals During School Year:

Meet with the parent one last time, if possible, to collect:

1. <u>Withdrawal Form</u>: Have the parent sign the withdrawal form that is located in the shared drive. Or, click the link <u>here</u>.
2. Collect <u>non-consumable books and computers</u> purchased with Excel student funds.
    a. If parents refuse to return items or they are not responding to your requests, please send a list of the items not returned to Cori in the Registrar's Office. She will follow up with the family to obtain the items.
    b. Cancel any outstanding orders in OPS.
3. <u>Attendance Roll (Grid) Log</u>:
    a. Send the parent the attendance grid log to sign **with only the dates that the student was actively enrolled checked off**. The last day checked off should be the <u>date of the withdrawal</u>.
    b. You can also print the grid log if the parent is meeting with you and wishes to sign it in person. The signature date on the Grid Log <u>will be the date of the withdrawal or after</u> (typically within one week if you are meeting in person).
4. <u>Collect Work Samples for the days enrolled during the LP</u>:
    a. Reach out to Nick Romo (TK-6) or Lorrie Wood (7-12) and Cori McCook (Registrar) if you are unable to take full attendance.

Parent-Teacher Conferences (Virtual Path)

Virtual ToRs will hold parent-teacher conferences twice per year. These conferences will serve to facilitate a more in-depth discussion with the parent about the student's academic progress and the learning going on in the classroom. It is important to note that regular communication should occur with the parent outside of these two conferences. Parents should receive some type of weekly communication from their student's Virtual ToR. Should concerns about a student or situation involving a student arise, a telephone call or video call should be made to the parent/guardian.

Discipline

Progress Improvement Notifications (PINs)

Excel Academy aims to partner with families to create a positive atmosphere in which mutual trust is built between the ToR and parent. In order to achieve this, it is crucial that teachers explain policies and expectations *thoroughly* with parents <u>at the beginning of each school year</u>. Most families will only need this one explanation to smoothly navigate through the rest of the year without a problem. However, some families will fall short of fulfilling Excel Academy Charter School policies and expectations. For those families, we have set up our Progress Improvement Notification (PIN) system, which works to inform parents of their failure to follow policy. Hopefully, this will correct the behavior and show that we have done our due diligence of identifying needed improvement and informing the parent.

How Do I Know When to PIN?

Students can earn a PIN anytime they or the parent fail to comply with responsibilities outlined in the EACS Handbook, Acknowledgement of Responsibilities, and/or Master Agreement. During the first LP, it is important for ToRs to issue immediate PINs for families who do not make contact, miss a meeting, or fail to check-in. A ToR may follow a three-day time period. Beginning LP 2 when a ToR notices a student or family falling behind, they should immediately email the family and identify the issue along with a one-week time period to make adjustments. If the family fails to comply by the deadline, then a PIN should be issued. If you feel that a parent or student has failed to comply with Excel Academy expectations and policies, please contact Nick Romo (Elementary Principal) for TK-8th or Lorrie Wood (Secondary Principal) for High School students <u>before</u> *issuing or threatening a PIN.*

Some of the most common times PINs are issued:
1. Lack of work completion or failure to show work completion.
2. Failure to attend a learning period meeting or other mandatory school meeting.
3. Lack of communication for more than 5 school days, despite attempts at contact by phone and email.
4. Late cancellation of a meeting or cancellation of more than two required school meetings for non emergency reasons.
5. Failure to complete required WIN and/or ELD assignments.

Weekly Check-Ins and PINs

ToRs will conduct weekly check-ins and will monitor student progress following the check-in tier procedural process. Excel families will start on tier one and will be monitored on a weekly basis. If the student fails to meet the requirement for tier one, the ToR will follow up with the student to ensure adequate progress is made. If the student fails to meet the tier one agreement for a second time, then the student will receive a PIN and will be moved to tier two. The student will then continue with tier two check-ins with their ToR. If the student fails to meet the requirements of tier two, the ToR will give the student another week to get back on track. If the student still falls short of the requirement in tier two, then a second PIN is issued and the student moves to tier three. However, if the student is on tier two and shows improvement over the course of three weeks, then the student may be moved back to tier one.

Attendance

In our non-classroom based model, attendance is calculated two ways via work progress and daily engagement. Daily engagement is recorded daily in School Pathways. <u>Please Note:</u> If you are unable to take full attendance for any reason, *please contact Nick Romo (Elementary Principal) or Lorrie Wood (Secondary Principal) and Cori McCook (Registrar)*. They will work together to ensure that attendance is properly recorded for each ToR for the LP.

Completion of PINs

It is the ToR's responsibility to fill out all PINs. PIN templates are located in the **Shared Drive**, in the **Dept. of Education Folder,** then **PIN Template Folder**. This year we are utilizing one PIN template that can be used for all types of PINs. Please read the directions carefully. Always make a copy of the template and save it to your drive before continuing with filling out the information. All general education PINs will be sent to Nick Romo (Elementary Assistant Principal) or Lorrie Wood (Secondary Assistant Principal) for review before being sent to the office staff. Any time a second PIN is issued, an AIM meeting will be required. In some cases an SST <u>may</u> be held in lieu of the AIM meeting to ensure the student is being supported adequately. The respective department will make this determination and will inform families for which meeting they should attend. PINs remain in the student file for the academic school year and start over each new school year. If a student receives three PINs in one school year, a third party review may be held by the AD of Education in conjunction with the parent, ToR, and an unbiased third party to see if independent study is in the best interest of the student. The determination is final and immediate. For students receiving special education, an IEP team meeting is required to be held following the issuance of a third PIN. Leah Vides (SPED Program Specialist) should be made aware of all PINs being issued to students with IEPs. Students with IEPs may not be referred to third party review until after the IEP meeting is held to discuss the impact of the student's disability.

Behavior Improvement Plans

Excel Academy will issue a Behavioral Improvement Plan for a student if they violate Excel Academy's behavioral standards. The consequence of violating these behavioral standards as outlined in the BIP, may lead to suspension or involuntary withdrawal from Excel Academy.

For students who commit violations such as dishonesty, cheating, disruption, and inappropriate language, a BIP will be issued with consequences individually designed to help restore the individual student back into good standing with the school. These include but are not limited to a family meeting with the Teacher of Record and Administration, reflecting on the violation, writing a letter of apology, rewriting an assignment in question, removal from extra-curricular opportunities, removal from the National Honor Society, and/or an in-school suspension.

For students who commit plagiarism, the first offense will result in a zero on the assignment until the behavior is corrected. For the second offense, the student will be removed from the class and will receive an F in the course. If a student earns an F in a course that is required for graduation, then they will be required to repeat this course for credit. Any subsequent offenses will be dealt with on a case-by-case manner.

Violations that may result in suspension or immediate involuntary withdrawal are included in the school's charter petition.

Excel Academy has reviewed Education Code Section 48900 et seq., which describes the non charter schools' list of offenses and procedures to establish its procedures for suspensions and expulsions. The language that follows closely mirrors the language of Education Code Section 48900 et seq. The Charter School is committed to annual review of policies and procedures surrounding suspensions and expulsions and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.

When the Policy is violated, it may be necessary to suspend or expel a student from regular instruction. This policy shall serve as EACS's policy and procedures for student suspension and expulsion and it may be amended from time to time without the need to amend the charter so long as the amendments comport with legal requirements. EACS staff shall enforce disciplinary rules and procedures fairly and consistently among all students.

High School

HS Terms

Course Title: The course title is the general name recognized for what your student is taking, these are the required courses over the 4 years of high school.
Ex: CP English 9 A/B, CP Algebra 1 A/B, CP Biology w/lab A/B, CP Visual Arts, CP Spanish 1
- Course titles are what the state refers to when we must report which courses our students are enrolled in each year.

Class Name: The class name is specific to the class they are taking.
Ex: EDG English 9.
- Class names are what are shown on the report card and transcript giving a more specific picture to the students' educational journey.

Curriculum Content: The scope and sequence of a course. These contain the objectives and corresponding assignments for each unit and should align with the state standards.

HQT: Highly Qualified Teacher - Every teacher who holds a valid, single-subject credential is a highly qualified teacher. We use this same term to identify our lead high school teachers. The HQT team works diligently to provide expertise and up-to-date knowledge in high school subject content with a focus on aligning courses to current California standards. HQTs serve the ToRs in evaluating courses and curricula, providing feedback on samples, providing teacher training, and offering practical support as needed.
English – Forest Muther
Math – Wendy Pendergraft
Science – Kim Platler
Social Studies – Alin Vanciu
Spanish – Jill Walsh
VAPA – Alanna Desmond

Pacing Guide: A division of the curriculum content into monthly requirements to ensure that students complete the scope of the work in one school year. The curriculum content in SIS may serve as the pacing guide. ToRs need to download the CC from SIS, indicate work to complete per LP, make a copy, and share with the student and family.

Acceptable Samples: Student work that is acceptable to collect as monthly samples. These include:

- A unit test -strongly prefer that it comes from the publisher or course. All assessments must demonstrate high school-level rigor. Final determination on acceptance will be determined by the HQT.
- A final draft multi-paragraph essay or paper on a related topic. Paper must follow MLA formatting rules. Papers/essays are required twice a semester.

- A rough draft of an in-progress paper - a final draft is always prefered and cannot use final draft for future sample. ToRs need to ensure a final draft is completed.
- A lab write-up (science courses only) - must include title, intro/purpose, materials list, method, data, results, analysis, conclusion, and graphs or figures, if applicable. Refer to a Lab Report Template. Labs are required twice a semester.
- A project/presentation showing significant learning and application.
- A book report with critical analysis - may not be a simple summary.
- A written copy of a student-written speech or an oral presentation.
- Answers to a section of chapter questions or a chapter review.
- A timeline or map that clearly reflects HS level work/detail.
- A reflective paper (VAPA).
- Another high school-level sample as agreed upon by ToR/parent/student in advance.

Pacing Guide Dates

Fall Semester – September 1

By 9/30/22	25% complete (4.5 weeks)
By 10/31/22	50% complete (4 weeks)
11/21-11/25	Thanksgiving break
By 12/06/22	75% complete (4 weeks)
12/23-1/6	Winter break, study for finals, and order spring classes
1/17-1/20	100% complete & online finals have been scheduled
1/23-1/27	FINALS last week of fall semester (1/17 - MLK Day)

Spring Semester – January 30

By 2/28/23	25% complete (4.5 weeks)
By 3/29/23	50% complete (4 weeks)
4/10-4/14	Spring break
By 5/03/23	75% complete (5 weeks)
5/30-6/2	100% complete & online finals have been scheduled
6/05-6/09	FINALS last week of school

Important Sample Due Dates:
Each quarter the following is due for the monthly sample - English essay, science lab, honors project. If the English and/or science course is an honors course, then only the honors project is needed for the monthly sample.
Quarter 1 work due - LP 3 - 11/18/22
Quarter 2 work due - LP 5 - 1/27/22
Quarter 3 work due - LP 7 - 3/24/23

Quarter 4 work due - LP - 10 6/2/23

Adding/Changing/Dropping Courses
Students adding, changing (including curriculum), or dropping a course can only do so within 10 school days of the start of the semester or within 10 school days of enrollment without penalty.
Dates: **Fall - 9/1/22 - 9/15/22 / Spring - 1/30/23 - 2/10/23.**
See below for further clarification:
- Courses dropped on or before the 10th school day will not show on the transcript.
- Courses dropped after the 10th school day in the first and/or second semester will receive a "W"on the report card/transcript.
- Courses dropped after 10/21/22 for fall semester or 3/24/23 for spring semester will receive a/an "F" on the report card/transcript.

Individual CCPs have their own refund policies. Please work with your ToR if you have any questions on this.

Understanding A-G

- [A Parent's Guide to A-G Requirements](#)
- [UC admissions requirements by subject](#)

A-G Protocol:
1) Every core high school is now considered A-G approved. Therefore, students must choose and complete course curricula from the High School Course Curriculum Catalog.
2) For students completing courses from an in-person provider, ToRs must verify that the corresponding course syllabus aligns with the Excel Academy approved CP coursework. This is because Excel Academy is the institution issuing the credits and not the provider.
3) For Master Agreements, the course names will be prefaced by CP, EDG, EDY (except ASL), FLV, LB, or TGS.

Community College Courses:

Students may request concurrent enrollment courses by following these steps:
1. ToRs need to ask if their students are planning on or hoping to take a concurrent enrollment course. This should happen at least twice a year, once prior to the start of school, and once prior to the start of the second semester.

2. ToR will discuss eligibility requirements which include the following: Students must have a minimum 3.0 GPA for academic courses or a 2.7 GPA for elective/vocational courses. Students must show college readiness in their respective core courses (ie. each community college sets their own prerequisites for determining high school eligibility).
3. School Counselors will only approve college-level courses which are defined as courses that will earn college credit and are either UC/CSU transferable or applicable to earning an Associate's degree or higher. Courses not receiving credit will not be approved.
4. ToR completes [Concurrent Enrollment Course Survey](#).
5. The High School Department either grants or denies approval for a student to take the requested community college course.
6. High School (9th-12th) students must be enrolled in at least 4 Excel classes (20 credits) per semester at Excel Academy to be considered eligible for concurrent enrollment at a community college. Students may take a maximum of 2 community college classes per semester while concurrently enrolled in Excel Academy. This may include one semester-length course and one interim session or two semester-length courses per semester.
7. Junior high school (7th-8th) students interested in taking community college courses are limited to math (PreCalculus or higher math) & world language. Please see the [Community College Handbook](#) for grade-level policy per community college.
8. Students must complete and sign the concurrent enrollment form obtained from the community college admissions office and submit it to the Excel Registrar's office (registrar@excelacademy.education). Please note: The turn-around time for concurrent enrollment approval is 3-7 days, depending on wet signature requirements.
9. It is the responsibility of each student to take this signed form back to their respective community college to submit and finalize registration.
10. It is also the responsibility of the student to know the community college's fees, registration, and deadline dates (information can be found on the college's website).
11. If a student's first choice is unavailable and/or if they are unable to register for courses, the student is responsible for informing their ToR and High School Counselor. In this circumstance, students **must** work with their ToR in either finding another course to add to their Master Agreement or removing the course from their schedule. **Students need to be aware that if they are unable to register for a late-start college course, then they will be required to enroll in a late-start accelerated high school course with Excel Academy**. If an additional community college course is chosen, student must complete and submit an additional concurrent enrollment form to reinitiate the process.
12. Students must be aware and adhere to all college rules and regulations.
13. In order to confirm the course will transfer to the university of the student's choice, please consult with a Community College Counselor.
14. Per the Community College regulations, only 5% of Excel Academy students can attend a community college during the summer. Priority approval will be given to those needing courses to graduate.

15. Grades from any concurrent enrollment course will not be reflected on the Excel Academy transcript until the official college transcript has been received and verified. Upon completion of the college course, students are required to send an **official transcript** to the Excel Academy Registrar's office. Upon receipt, the high school transcript will be updated to reflect grades/credits earned. Please send all transcript requests to:

Excel Academy Charter School
ATTN: Registrar Department
1 Technology Drive, Ste. I-811
Irvine, CA 92618

Honors Courses Process & Requirements:
Honors courses are designed to be more in-depth, challenging, and rigorous. Students may take honors courses with prior written approval. The student may submit the course for approval, by following these steps:
1. ToR will discuss honors options with students and family
2. Student requests to register for an honors course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. Honors courses require quarterly projects (see above dates)
6. ToR will assist students in meeting additional honors requirements
7. Students must meet the full criteria, or the course will not receive the honors designation
8. Honors credit will not be issued retroactively

AP Courses
Students may take AP courses through one of our online content and community providers with prior approval:
1. ToR will discuss AP options with students and family
2. Student requests to register for an honors course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. ToR informs the student and family that the AP exam must be scheduled and completed through their local public high school. This should be done in early fall
6. Students take an AP exam through their local public high school in the spring

Additional Advanced Course Options
For students wishing to complete a year-long course in one semester (i.e. English 9 A/B) or two courses in the same subject simultaneously (i.e. English 9 A/B and English 10 A/B), they must choose an online curriculum from the High School Course Catalog or enroll in a concurrent enrollment course.

1. ToR will discuss advanced course options with student and family
2. Student requests to register for an accelerated course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework

5. ToR will aid the student in choosing curriculum that would work for this designation or follow process for concurrent enrollment

For students who are credit deficient, they may request to complete two courses in the same subject simultaneously (i.e. English 9 A/B and English 10 A/B) if summer school is not an option. They must choose a curriculum from the [High School Course Curriculum Catalog](#) with the exception of in-person provider courses.

Junior High students:

Junior High students wanting high school math (Algebra 1 or higher) and/or world language courses may be considered for these higher-level courses, by completing the following steps:

1) Student requests to take high school math and/or world language course/s with their ToR
2) Complete the [Advanced Course Request Survey](#)
3) HS department verifies eligibility for a student to enroll in advanced coursework
4) The course(s) will be indicated on the Master Agreement for credits, not weeks
5) Any student using any Algebra I curriculum MUST be enrolled in an Algebra I course for HS credit, and this MUST be noted on the MA
6) Algebra 1 or higher math or world language are the only honors courses that a junior high student may take. Students must follow Excel Academy honors requirements for this designation. The GPA will not be weighted

● **Per the [CA Dept. of Education](#), junior high students who take Algebra 1 or higher math and/or world language courses are still required to complete courses in both the high school math and world language respective categories while in grades 9th-12th. Thus, high school-level courses taken in junior high do not count towards the 220 credits required for graduation.**

Sample Compliance:

1) Include the student's first name as it appears on MA - This can also be a nickname, if it makes sense. For example, Michael may appear on the MA, and Mike is fine for the sample. If the student's name is Jennifer and they write Carol, that will not work.
2) Include the full course title as it appears on the MA - Example Algebra 1 not math - if a teacher forgets the A or the B for a course, and the intended class is clearly evident, sample will be accepted.
3) Include the LP #.
4) Scan the document to make sure it is free of religious content. Content may include reference to religion only from an academic perspective.
5) Assignment must meet grade-level standards – readings must be high school level and work must reflect high school caliber.
   Pro Tip: If you are unsure if the literature is high school level, try the following search tools (lexile.com, download apps such as Levelit or Literacy Leveler)

6) Grade the assignment – This should be done by the parent/teacher but must be completed by the ToR if the parent does not grade the assignment (ToR can override if they disagree - they have final say). Do not cross out the parent grade. Simply write the "teacher grade" alongside.

7) If the sample is an essay, written book report, science lab, or major project and earned an A, it needs a rubric to show the grading – see rubrics in specific folders in Shared Drive>HSD.

8) There must be some indication for why a student earned the specific grade. For example, if a student earns a B-, it needs to be clear why they received a lower grade. This can be accomplished through teacher comments.

9) Page numbers are not necessary. However, if the work on the sample appears to be an insufficient amount of work for a high school course, then note page $\frac{1}{5}$, for example.

10) Label all pages for work samples with more than one page (Name, LP, subject).

11) Assignment must show work (ie. math problems worked out, full sentence explanations for history and English).

12) Refer to the ToR Training Manual *Compliance* section for more details and the Compliance FAQs doc for answers to difficult and common questions.

The HQT team & their Role in Helping ToRs:

1) **Checking curricula** – HQTs will research to verify if new curriculum is acceptable to use. HQTs take into consideration the length of the curricula, the depth of the material, and how many hours for completion. The general rule is that each high school class should require about five hours a week. If a curriculum falls short of meeting the standards, the HQT team can help you find additional materials for a complete course.

2) **Checking state standards** – All curricula needs to adhere to the current CA state standards. The HQT for each specific subject will verify that the course closely aligns with the state standards.

3) **Checking monthly samples** -Every month the HQTs look at each uploaded high school sample to review for compliance and credibility. Each sample is either accepted or rejected. When you open SIS and notice a rejected sample notification, this is a notification that changes need to be made to the sample. Enter the sample section and click on the rejected sample. A note from the team will indicate what needs to be corrected. Please make the correction/s and reupload the new sample.
There is no need to email the HQT that your sample has been corrected.

ToR Responsibilities –
Each ToR is responsible for the following:
1) Helping new students HS New Student Checklist
2) Ensuring every student uses an approved curriculum from HS catalog
3) Filling out the Course of Study Elementary Doc or the Course of Study Secondary Doc
4) Adding course name to MA - TK - 12th missing student classes/curriculum 21/22
5) Bring the following to your first meeting: Curriculum Content for each course, copy of the Plagiarism Academic Honesty Pact for student to sign, Parent Letter and Google Fact Sheet.
6) Creating a Google Classroom
7) Creating a pacing guide for each course

8) Weekly checking online course work; highlighting which items have been completed; identifying which items student plans to complete for the next month
9) Monitor monthly progress for both online and textbook courses.

10) Viewing a body of work and collecting multiple samples (may need as backup)

11) Ensuring that students submit two essays each semester to Google Classroom to run through the plagiarism checker. Additionally, two science labs are required each semester as monthly samples.

12) Discussing grades ~ current progress & anticipated progress – keeping a written log or gradebook

13) Providing support to struggling students

14) Identify any students working at a 70% or below on a monthly progress doc.
15) Keeping written log of concerns in portal and creating a student support log (this will make any SST meeting much more successful and productive)

16) Students are required to take one CHYA course in junior high school and once when in high school. Parents can OPT OUT via email/letter. Place in SIS notes and archive.

17) Reviewing each sample for the following – proper heading, legible, enough work to merit a passing grade, no religious content, incorrect answers or work are marked accordingly, and an accurate grade with rubric when needed

18) Proctoring A-G online final exams in the fall and spring.

It is the ToR's responsibility to be checking in with HS students on a weekly basis. Specifically for online courses, it is important to view the 'score to date' which is the most accurate grade the student has in the course. Example: If a student is showing 87% as their current grade, but only completed 36% of a course, that just means their average grade on assignments is a B. However, if you add in the zeros for the incomplete work, the student would actually be receiving an F in the course. To sum up: The 'score to date' shows the actual grade with the zeros included.

Links for easy access to high school course information:

HS Course Curriculum Catalog
A-G Courses
How to Handle Plagiarism
Google Classroom Instructions
High School Virtual Course Schedule
Excel Academy Charter School Handbook

Online CCP Price List & Ordering-22/23
Q & A HS Doc

For more information on high school related items, please review the various folders in the HSD section of the Shared Drive before reaching out to the admin team for questions.

Shared Drive High School Folder

- [High School Helpful Hints Doc 22/23](#)
- Detailed list of documents found in the ToR Manual and in the Shared Drive - High School - HSD.

4 Year HS Plans
- Find your high school student by name
- 4-Year Plan Changes: Directions for ToRs

Advanced Courses
- AP options
- Honors requirements
- Alternate assignment options

Concurrent Enrollment
- Survey

CP Resources
- A-G/CP Courses Doc
- Curriculum Content
- Key Assignment & Syllabi
- Math sequence
- Science lab information
- Spanish workbooks
- Additional A-G information and docs

CTE/CAREER
- CTE flier and articles

Curriculum Approval Info
- Process for Submitting Curriculum Content

ETL Virtual Course Information
- All the ETL course syllabi
- ETL course schedule
- Virtual course behavior policy
- ETL teacher training docs

Final Exams

- Proctor schedule

Grading Guidelines/Rubrics
- Rubrics
- HS grading guidelines

HS Core Course Info
- English - customized course requirements/checklists; reading lists; study guides
- Science lab templates
- Math pacing guide
- Visual Arts class supply list
- VAPA customized requirements

HS Resources
- Assessments
- Helpful Hints
- Miscellaneous teacher docs

HS Samples/Compliance
- Low, mid, high sample examples
- LP sample compliance reminders

National Honor Society
- Survey
- Regulations
- Tracking service hours

New Students
- New student checklist
- What 20 days of learning looks like
- Curriculum ideas

Online Resources
- Online CCP Info
- Online CCP Price List & Info

Plagiarism/Google Classroom Info
- Academic honesty pact

Social Emotional Learning
- SEL weekly activities
- Feelings chart
- Well Nest Virtual Classroom

Struggling Students
- Support suggestions
- Student progress form

Surveys/Forms/Questionnaires
- ToR Survey for Advanced Courses

Webinars/PowerPoints/Flyers
- Past and present flyers and presentations

ASSESSMENTS

Assessment Section Overview

- Assessment Contents found in the ToR Manual and in the Shared Drive - Assessments - ASMT.
- Assessment Details (State and internal testing, proctoring, etc.)
- Assessment Guide for Parents - Share with parents at LP 1 - The parents receive this document when they sign the MA, etc. However, since they are reading and signing so many documents at once, it is crucial for the ToR to review this document with every parent explaining how it applies to each student at various grade levels.
- Protocol for Opting Out - MUST READ before discussing assessments with parents

Shared Drive Assessment Folder

Alternative Assessment Directions Folder
- Directions to administer alternative assessments in lieu of i-Ready

Assessment Folder
- Details pertaining to all state and internal assessments
- Assessment Guide for Parents - Share with parents at LP 1
- Opt Out Protocol - MUST READ before discussing assessments with parents
- Test Prep Information
- CAASPP Test Security Form - Collect ONE per family - If testing in person
- Testing Technology Loan Agreement

Goal Setting Folder

- Fall Goal Setting Student Form
- Spring Goal Setting Student Form
- Promoting Self-Efficacy and Goal Setting Across All Grade Levels PowerPoint

i-Ready Information Folder
- Directions for ToRs to get started with i-Ready
- Parent Tutorial
- i-Ready Certificates
- i-Ready Shared Doc. - used to add students, make edits, and indicate opt outs, etc.
- ToR Documentation of i-Ready Completion- Must complete monthly
- Letter to Parents Explaining i-Ready
- Directions to Administer the Alternative Assessments
- FAQ - i-Ready Accessibility

K/1 Benchmark Assessment Folder - in lieu of i-Ready
Fall and spring assessment directions, assessments, answer keys, and word count per minute chart

Math Placement Tests Folder
- Algebra and Geometry Placement Tests - administered by the ToR

PFT Folder
- Directions for administration of the PFT by the ToR
- Data Collection Sheet
- PFT Fillable Form - shows exercises and can be provided to parents

Report Card Folder
- Grading Scales
- ToR Directions
- FAQ
- Progress Reports
- Sample Completed Progress Report
- Fall and Spring Letters to Parents
- How to Create a Report Card

ToR Student Tracking Spreadsheet Folder
- ToR Student Tracking Spreadsheet - HIGHLY ENCOURAGED TO UTILIZE - MAKE A COPY FIRST!

TK-5 Students - REQUIRED for students in grades TK-5

Report Cards

Report cards are required for students in grades TK - 12. <u>Please have the necessary discussions with parents prior to grading so parents are aware of the grades prior to receiving the report card(s).</u> The grades administered on the report card are final, as determined by the ToR and the administration. Please refer to the *Grading Scales* document (included in the handbook and shared assessment folder) and the directions for administering grades.

Grading Scales

TK-5 Students

The 4 – 1 grading scale that Excel Academy implements will give parents a clear understanding of student performance and progress.

4 Exemplary – Student consistently demonstrates an in-depth understanding of the standards, concepts, and skills taught during this reporting period. Student is working above grade level and produces outstanding work with little help or reteaching.

3 Proficient: Student consistently demonstrates an understanding of the standards, concepts, and skills taught during this reporting period. Student is meeting grade-level expectations, and able to complete assignments with appropriate amount of instruction and assistance.

2 Approaching Proficiency: Student is approaching an understanding of the standards, concepts, and skills taught during this reporting period. Student is working towards grade-level expectations. Student requires many tools and reteaching to understand concepts being taught, works at a slower pace, or works slightly below grade level at a faster pace.

1 Non-proficient: Student does not yet demonstrate an understanding of the standards, concepts, and skills taught during this reporting period. Student is working far below grade-level expectations. Student may have difficulty understanding new concepts.

*Please understand that a student who earns a "3" is at grade level and is where he/she needs to be working at this time. A student who earns a "4" is working

above grade level and consistently provides excellent work in all areas of the course.

Grades 6 – 12
Students in grades 6 through 12 will earn grades using the standard A-F scale (see below). Grades will be specific to the grading scale.

*Outstanding performance in mastery of the subject. Achievement of superior quality.
98 - 100 = A+
93 - 97 = A
90 - 92 = A-

*Consistent performance in achievement beyond the usual requirement. Achievement of high quality.
88 - 89 = B+
83 - 87 = B
80 - 82 = B-

*Performance meets grade-level standards and expectations. Achievement suggests sufficient understanding of the subject/course.
78 - 79 = C+
73 - 77 = C
70 - 72 = C-

*Minimally acceptable performance of course-level material. Achievement suggests below-average understanding.
68 - 69 = D+
63 - 67 = D
60 - 62 = D-

*Achievement is at a level insufficient to demonstrate an understanding of the basic elements of the course and will not count towards graduation requirements.
59 and below = F

***Students taking online A-G courses or Community College courses will be graded by the instructor teaching the course

OPTING OUT OF STATE TESTING

As TORs and representatives of a state funded charter school, we want to discourage parents from opting out students from testing, and emphasize the positive aspects of test taking. Please refer to the information provided below to help you address this subject <u>if necessary</u>.

Q: Are there specific forms approved for opting out?

The answer is **NO**. There are many created forms found online, but there is not an official form for opting out of state testing.

Q: As employees of Excel Academy, why is it important to encourage state testing?

The state has issued a mandatory 95% participation rate for state testing. It is our role as teachers to encourage and educate our families to participate in testing. Opting out of state testing cannot be an option. Effective during the 21/22 school year, if CAASPP participation rates fall below 95%, our charter school will suffer significant penalties when it comes to reporting the school's performance measurement. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter Schools who are designated as low performing are subject to non-renewal. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families. We want to work together to continue to provide a one of a kind top notch educational experience for our students.

Q: What can we share with parents to encourage participation in state testing?

We must let parents know that instructional funds and our charter are dependent upon participation in state testing. State testing is the primary way data is gathered to show stability and growth in a school. **Without data and accountability, districts do not want to hold a charter; therefore, Excel Academy could be at risk.**

Please reiterate the following message to parents/guardians.
Effective during the 21/22 school year, if CAASPP participation rates fall below 95%, our charter school will suffer significant penalties when it comes to reporting the school's performance measurement. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter Schools who are designated as low performing are subject to non-renewal. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families. We want to work together to continue to provide a one of a kind top notch educational experience for our students.

Excel Academy is successful in making testing a fun and positive experience for the students and the parents. We want to encourage and support parents and assure them that there is nothing to be afraid of. We must be very mindful of our delivery and attitude and how much that will influence the decisions our parents make. <u>If a parent is negative about state testing, ask the parents what their concerns are and work to address them through understanding, compassion, and education.</u>

- Share with parents that testing is an important life skill.
- Results from testing can be helpful in guiding curriculum choices and instruction.
- Parents have the right to choose if they want to share the test scores with their student(s).
- The experience of test taking is important.
- In person testing - TBD - More than likely we will remain virtual.
  - The testing sites are safe, and our students are monitored and supervised by our credentialed teachers and staff in and out of the testing rooms, outside of the restrooms, and in the snack area.
  - Parents are welcome to stay at most of the testing locations outside of the testing rooms, and can carpool to the designated locations.
- The state requires 95% participation in state testing or Excel's charter could be at stake.
- The state provides the funding for Excel Academy's charter which is passed down to Excel families through instructional funding. Without a charter, our families would not have the instructional funding to enhance their students' education through purchased curriculum, materials, and vendor courses.

Q: Is there a consequence for students who do not participate in state testing?

Although it is the parent or legal guardian's right to opt out of state testing, as a public charter school, Excel Academy is required and legally has the right to request data for all students to show academic growth and progress.

<mark>If testing is in person, participation in an alternative assessment *at the testing location* for the required two days will need to be enforced.</mark> If testing is virtual, ELA and math testing will be separated over two set sessions.

IMPORTANT
When do we mention the alternative assessment to state testing to parents who want to opt out their student(s) from state testing?

The alternative assessment can only be suggested if a parent strongly refuses participation in the state assessments AND is starting the opt out process described below.

1. **DO NOT mention the alternative assessment prior to having parents understand the importance of state testing.**
2. **We DO NOT want our Excel Academy families to choose the alternative assessments in lieu of state testing.**
3. **Excel Academy DOES NOT receive participation credit from the state of California for these internal assessments.**
4. **CAASPP results are reflected on the state's dashboard, not internal assessments.**

Parents who decline the alternative assessments are to be notified that their student(s) will earn a PIN for <u>EACH</u> assessment that is not completed.

What is an alternative assessment?

- An alternative assessment will be issued in both math and language arts.
- The paper pencil assessments will cover grade level standards and will be multiple choice and some fill in completion.
- The assessments will be completed and graded, and parents will be notified of the scores. Parents will not receive copies of the assessments, as these tests are the property of Excel Academy.

Where do students take the alternative assessments?

If in person testing takes place, parents of students taking the alternative assessments will register as they would if their students were taking the state assessments. They would choose a testing location and two dates to attend (one for math and one for language arts). **STUDENTS WILL NOT BE ALLOWED TO TAKE THESE ASSESSMENTS AT AN LP MEETING OR ANOTHER LOCATION. These students will be treated equally to those who are taking the state assessments.**

If virtual testing resumes, ToRs will set two Zoom sessions to test their students in ELA and math.

Does the TOR need to notify the Director of Assessment and Accountability if a student is opting out of the state assessments, but has agreed to take the alternative assessments?

Yes, the Director of Assessment and Accountability will need to be informed by the ToR that the student is taking the alternative assessments either at the specific location (in person) or via Zoom (virtual) and the specific dates to ensure that the Director of Assessment and Accountability provides the assessments on time.

Can a student earn a PIN for NOT participating in state testing?

We cannot issue a PIN for a student who does not participate in state testing because parents have the legal right to opt out. **HOWEVER**, because Excel Academy has the legal right to assess students "in house" and collect data showing progress and growth, and is required to do so by the Governing Board and districts holding our charters, we can issue a PIN for <u>each day</u> the student does not show up to one of the designated testing locations to take the alternative assessments. **Students can earn two PINS for not participating in both language arts and math alternative assessments at the testing locations or virtually.**

Example - A PIN will be administered if a student does not take the math alternative assessment. A PIN will be administered if a student does not take the language arts alternative assessment.

Will PINs be given to students who are "no shows" at testing and make-ups?

Yes, this policy will also hold true for students who are "no shows" at testing and make-ups.

What are the proper steps to handle parents who insist on opting out of state testing?

Parents will need to follow the opt out process AFTER the ToR has tried to encourage participation AND has explained the alternative assessment.

All parents of students who opt out of state testing will need to complete the following steps to submit an opt out notification to Excel Academy's Director of Assessment and Accountability. (Including parents of students who choose to have their students participate in the alternative assessment.) These opt out letters will be filed in case of an audit.

If the family is persistent about opting out, inform the parent that a letter **MUST** be submitted via email to the Director of Assessment and Accountability.
Letter MUST include:
- Student(s) names
- Grade level(s)
- Parent Name
- Waiving - **ALL** CAASPP testing (SBAC Math, SBAC ELA & CAST Science for grades 5, 8, or grade level determined by the state of California) **OR PART** of testing and **MUST SPECIFY** which test(s)
- Include whether or not the student will be taking the alternative assessments in lieu of state testing at a designated testing location (if in person) or via Zoom (if virtual).

Please reach out to the Director of Assessment and Accountability if you have any questions. **As the TOR, it is your responsibility to share all aspects of testing with your families,**

including the PIN policy, prior to the Director of Assessment and Accountability contacting the families.

State and Local Assessments (CAASPP, ELPAC, PFT, and i-Ready)

Standardized Testing

The California Assessment of Student Performance and Progress (CAASPP) is the state-mandated academic testing program. All charter schools are required to administer the CAASPP as well as other state-mandated assessments such as the ELPAC and PFT (Ed. Code, § 47605(c)(1). CAASPP is a system intended to provide information that can be used to monitor student progress on an annual basis and ensure that all students leave high school ready for college and career. Following the spring of each year, individual student test score reports are provided to parents. Student score reports will include an overall score and a description of the student's achievement level for English Language Arts (ELA) and mathematics.

In California, parents may opt out of state mandated academic testing by submitting a written request to the school each year, but this only applies to the state mandated assessments. *We do not recommend opting out.* There is no law permitting a parent to opt out of the school's internal assessments, and therefore, students are required to participate in all internal assessments. Every ToR MUST read the document titled Excel Academy - Protocol for Opting Out of Assessments 22-23- ASMT located in the shared drive under assessments.

Charter schools exist in a performance-based accountability system where they are held accountable for student academic performance. In fact, a charter school cannot continue to exist without collecting data on students' performance on a variety of assessments and indicators. When a charter authorizer is evaluating whether to revoke a school's charter, or to grant a school's charter renewal petition, "increases in pupil academic achievement" is the most important factor in the decision. (Ed. Code, §§ 47607(c)(2) , 47607(a)(3)(A).) Therefore, it is important during the revocation and renewal processes for a school to gather as much positive academic achievement data as possible to show progress in student performance. Evaluating graduation, attendance, suspension, and English Learner (EL) reclassification rates are also ways to show student progress. However, student participation and performance on state mandated assessments is by far the most common and used method, and results are indicated on the California School Dashboard and System of Support. The Dashboard is a powerful online tool to help districts and schools identify strengths and weaknesses and pinpoint student groups

that may be struggling (https://www.cde.ca.gov/ta/ac/cm/). Your student's participation in state mandated assessments is highly encouraged and recommended. **Please remember that results and attendance from all state tests are directly tied to school funding per recent LCFF legislation and are an integral part in maintaining partnerships with our chartering school districts.**

If you have any questions, please contact Excel Academy's Director of Assessment and Accountability, Jenny Craig at jcraig@excelacademy.education.

English Language Proficiency Assessments for California (ELPAC)

The English Language Proficiency Assessments for California (ELPAC) is aligned with the 2012 California English Language Development Standards. The ELPAC consists of two separate assessments: one for the initial identification of students as English Learners (ELs) and a second for the annual summative assessment to measure a student's progress in learning English and to identify the student's level of ELP (cde.ca.gov).

- Grades K-12
- English Learners only
- Test Administration
    1. Initial Identification - When student enrolls with Excel Academy - Dates and Locations TBD (Assessment will be administered by trained proctors.)
    2. Annual Summative Assessment - Beginning in February
- Results are provided by the California Department of Education and sent to the school. Once received, parents will receive a letter explaining student score reports.

English Learners (ELs)
ELs are targeted for ELPAC testing when the Home Language Survey indicates that their primary home language is a language other than English and are tested during the school year.
- Excel Academy students are in an English Language Mainstream academic program with an English Language Development (ELD) Support Curriculum. The mainstream curriculum is taught and/or supported by CLAD certified teachers and includes vocabulary and visual thematic-based support. ELs are accommodated within this curriculum by providing multiple opportunities to demonstrate mastery on all assessments, including writing assignments.
- Progress in their assigned ELD curriculum is monitored weekly by the ToR. Excel Academy requires students to participate in both synchronous and asynchronous instruction for a total of 150 minutes each week.. *Questions pertaining to ELD curriculum can be directed to Tamara Murphy, Intervention Coordinator.*

- Both the parent, as the primary educator, and the ToR are responsible for ensuring adequate progress through the ELD curriculum.

Criteria for Reclassification to Fluent English Proficient (RFEP)
In order to be reclassified to Fluent English Proficient (FEP) and exit the EL program, students must meet the following criteria:
- Minimum ELPAC overall score of 4
- Teacher Evaluation
- Parent Approval
- CAASPP - Smarter Balanced and/or Local Assessments (i.e. i-Ready) can also be used in determining student readiness for redesignation

CAASPP - California Assessment of Student Performance and Progress

California Science Test (CAST) – Computer Based Assessment
- The California Science Test (CAST) is an online test based on the California Next Generation Science Standards (NGSS).
- Participation in the CAST is required for all students in grades five and eight and for the pre-selected high school grades.
- All local educational agencies (LEAs) with eligible students in grades five and eight will administer the CAST. LEAs with eligible students in high school (i.e., students in grades ten, eleven, or twelve) will be pre-selected to participate in the spring assessment. The CAST uses the current California Assessment of Student Performance and Progress test delivery system and will only be administered online (www.caaspp.org).

Smarter Balanced Assessment Consortium (SBAC) – Computer-Based Test
With new state standards, students are working harder, thinking more critically, and applying their learning to the real world. To measure these new standards, educators from states using Smarter tests have worked together to develop new, high-quality tests in English and math for grades 3–8 and 11. Using computer adaptive technology, the tests are customized to every student (smarterbalanced.org).
- Grades 3 - 8 and 11
- ELA and Math – Computer Adaptive Tests (CAT)
- ELA and Math – Performance Tasks (PT)
- CAASPP - SBAC spring testing - Dates and Locations TBD
- Registration for the SBAC ELA/MATH/CAST will take place online. Information will be emailed to parents in February.
- At testing sites, whether in person or virtual, cell phones are highly discouraged, and *no* electronic devices are allowed during testing, including smart watches.

- Parents are notified when students have completed testing by a proctor at the site.
- If testing is in person, parents are welcome to stay in the waiting area at most sites, but are not allowed in the testing rooms.
- Technology usage by students is prohibited in the designated testing areas.
- Photo ID may be *required* at pick-up.
- Siblings picking up students MUST be old enough to have a photo ID and must be identified at the time of check-in.
- Students may bring water and lunch to testing in a clear bag. Backpacks are not allowed.
- Students will be encouraged to take breaks during testing (i.e. restroom and snack breaks).
- Parents MUST review this information with their students.

Student Testing Participation Requirement

All students currently enrolled in Excel Academy are required to participate in the aforementioned tests (where applicable). Failure to participate or satisfy the above requirement with alternative paper-pencil assessments will result in Progress Improvement Notifications (PINs) being issued to the student. Please refer to Excel Academy's Progress Improvement Notification Policy and Opt Out Protocol document in the ToR manual. ToRs will need to reach out to the Director of Assessment and Accountability to issue a PIN. Once approved, the ToR will follow the guidelines of administering a PIN.

Smarter Balanced Assessment Consortium (SBAC) and California Standards Tests (CAST) for Science

Please refer parents to the *CAASPP Practice Tools for Students* document located in this manual, as well as the parent and student handbook and Excel's website. All ToRs should provide this document to their families prior to testing.

Please note that some of the practice tests do not provide answers or a score; however, it does provide your students with the experience of navigating through a sample test session, which is important to practice.

There are four major types of questions that students may see: multiple choice, multiple response, short answer, and performance assessments. Encourage your families to explore and discuss the practice tests with their students.

Additional Resources:

- Test Practice for Common Core (by the grade level) Barron's Core Focus Workbook - Language Arts and Math combined
- Critical Thinking Test Taking Practice for Math (by grade level)
- Spectrum Test Prep - (Updated and revised for grade levels)

Physical Fitness Test (PFT) **– California**

The Healthy Fitness Zone standards are available on the California Department of Education Physical Fitness Test FITNESSGRAM: Healthy Fitness Zone Charts Web page. **http://www.cde.ca.gov/**

OPTING OUT OF REQUIRED ASSESSMENTS

Can parents opt out of the Physical Fitness Test (PFT) according to the California Department of Education?
The answer is no. There will not be an alternative assessment given in lieu of the PFT; therefore, the student will earn a PIN for not participating.

The general opt-out provision of California Education Code Section 60615 does not apply to the PFT. There are a limited number of allowable reasons for not participating in parts or all of the PFT (e.g., medical excuse, student with disabilities); therefore, most students cannot be excused from the PFT.

Can parents opt out of the ELPAC?
The answer is no. EL students will continue to be classified as English Learners until they pass the ELPAC as Reclassified Fluent English Proficient (RFEP).

Can parents opt out of i-Ready benchmark diagnostic assessments? The answer is yes, HOWEVER, ToRs need to discourage opting out of the i-Ready benchmark assessments because the data provided is valuable for the progress and growth we want our students to achieve. i-Ready provides data that will assist with course planning, curriculum and materials, SST evaluations, IEP evaluations, and data that can be shared with the Governing Board and districts holding Excel Academy's charters. If a student opts out of i-Ready and does not complete the assigned alternative assessments in ELA and math, a PIN will be administered.

Are there alternative assessments that ToRs need to offer if parents opt out their student(s) from taking the i-Ready benchmark assessments?

YES! If parents choose to opt out of the i-Ready benchmark assessments, alternative paper pencil assessments in reading and math MUST be offered to avoid earning a PIN.

One PIN will be administered if a student does not take both required assessments (either i-Ready or alternative paper pencil assessments) during the set testing windows.

Who administers the paper pencil alternative assessments?
The ToR will administer the paper pencil alternative assessments.

What is the process to obtain the paper pencil assessments?
The ToR will need to notify the Director of Assessment and Accountability and request the paper pencil assessments through a shared Google document.
- name(s) of student(s)
- grade level(s) of student(s)
- reason for not taking the i-Ready benchmark assessments

The Director of Assessment and Accountability will email the assessments to the ToR and the ToR will make arrangements to proctor the tests in person or virtually at an LP meeting or another time and location.

Who will grade the alternative assessments?
Directions for administering and grading the alternative assessments are located in the shared assessment folder.

The ToR will be given the answer keys to the assessments provided by the Director of Assessment andAccountability . A grading template will be shared with the ToR to complete and provide to the parents.

ToRs of EL students will need to provide the results on the shared spreadsheet, as well as to Jenny Craig. Tamara Murphy and April Saade will need to be informed of any student who falls below grade level and is in need of support and interventions.

IMPORTANT
The alternative assessments do not provide the same level of feedback and results as i-Ready. Although the alternative assessments will provide necessary grade level information, i-Ready benchmark assessment results provide a greater, in-depth understanding of the students progress and gaps seen across grade levels due to the fact that i-Ready tests are adaptive diagnostics, and result in individualized lessons to assist students further.

Furthermore, ToRs should highly encourage their students to complete the individualized i-Ready lessons.

Assessment Guide for Parents

ToRs are responsible for providing a copy of the *Assessment Guide for Parents* (included in handbook) to each family at the first LP meeting. This form shows the tests that are required at each grade level. ***Parents/guardians will Docusign this document along with other essential forms; however, it is important to review the assessments in person.***

- The ToR will indicate the students' names next to their grade levels and highlight the required assessments.
- One copy per family.
- Parents must sign the form indicating they have been notified of the required assessments.
- This document is a great tool for parents to refer to and begin a conversation about assessments. The parent will take the signed copy home.

Testing Resources

For additional information regarding assessments, please refer to Excel Academy's website under *Our Academy* and *Assessments*. For **CAASPP AND ELPAC practice tests**, please refer to *Parent Tools* and *Assessment Resources*. Excel Academy provides the following resources to students:

- Online practice tests links
- EACS created grade level paper pencil assessments in ELA and math
- Virtual test prep sessions

CAASPP Testing Security Form - If testing in person
ToRs must have each family complete one *CAASPP Testing Security Form* once families have registered for state testing. This form will be kept at the testing location in case of an emergency.

- The Director of Assessment and Accountability will notify all ToRs when the forms are due.

Proctoring of State Assessments
Virtual Testing:
ToRs are highly encouraged to work with other ToRs to create virtual testing sessions that are flexible and offer students choice in terms of available times. Multiple sessions over the course of the testing window should be offered to best meet the needs of all students. ToRs are 100% responsible for ensuring the completion of their students assessments.

In Person Testing:
Each year, Excel Academy participates in state testing at various locations throughout Southern California. The Director of Assessment and Accountability works to organize testing locations and a proctoring schedule that best meets the needs of all students. For this reason, it is essential that we have ToRs working together to assist our students. Depending on the number

of students registered for the testing sites, Excel Academy teachers will be assigned proctoring days based on student needs. While we try to place teachers at the closest locations to their homes, there will be times when teachers will need to drive quite a distance to proctor at various locations. We try to inform everyone of these location assignments well in advance, in order to allow for scheduling and childcare arrangements.

While we completely understand that sickness is out of the control of the teacher, and a teacher may be sick on an assigned proctoring day, it is the responsibility of the teacher to find someone to take his/her place. In addition, the teacher will need to take a sick day in Paycom and also proctor on another date to make-up for the missed proctoring day. If the teacher is unable to swap proctoring dates with another colleague, please note that the make-up proctoring day may or may not be at the same location, and could possibly be during make-up testing. The Director of Assessment and Accountability will do their best to place the teacher where they feel is necessary and in the best interest of the students. Make-up testing days will be scheduled once the coordinators solidify the number of students needing to test and the locations for testing. State testing is indeed a positive experience and would certainly not be as successful without the support of our Excel Academy Team.

- **Physical Fitness Test** – **California**

The PFT provides information that can be used by (1) students to assess and plan personal fitness programs, (2) teachers to design the curriculum for physical education programs, and (3) parents and guardians to understand their children's fitness levels. The program also provides results that are used to monitor changes in the physical fitness of California students. By law (Education Code (EC) Section 60800 public schools are required to administer the PFT annually to all students in grades 5, 7 and 9 (cde.ca.gov).

- Grades 5, 7 and 9
- Dates vary in February through May
- The PFT is administered by the ToRs. ToRs will provide Excel Academy's Director of Assessment and Accountability with the results for each student tested. A data collection form will be provided prior to testing.
- Accommodations for Special Education students will be outlined in their IEPs or 504 Plans.
- If a parent states a student needs additional support, the ToR will need to notify the Director of Assessment and Accountability to verify accommodations.

Testing Includes:

1. Aerobic Capacity – One Mile Run
2. Abdominal Strength and Endurance – Curl Up
3. Upper Body Strength and Endurance – Push Up
4. Trunk Extensor Strength and Flexibility – Trunk Lift
5. Flexibility – Shoulder Stretch

6. Recording of Height and Weight

PFT Collection Data Sheet

ToRs are responsible for administering the PFT assessment to the students on their individual rosters in grades 5, 7, and 9. Specific details will be provided to all ToRs by the Director of Assessment and Accountability in advance in order to begin preparation for testing.

Please plan a day and location (i.e. convenient park) to assess your students' ability to run a mile, to do curl-ups, trunk lifts, push-ups, and the shoulder stretch. **ToRs may not assist the students on any of the exercises. This includes holding feet down during curl-ups. All exercises MUST be completed solely by the students. In addition, parents are not allowed to test the students or assist with testing while students are taking the PFT assessment.** Please refer to the *PFT Fillable Form* (included in the handbook and shared drive under Assessment) for you to see the directions for each individual exercise. Please remember to bring a ruler to measure the trunk lift, make a strip of paper for students to use as a marker for their hands for the curl-ups, and a stopwatch to record the minutes and seconds for the mile. **You do not need to document anything on the *PFT Fillable Form*. Please email it to your families, so they can see each exercise and can practice at home in advance. Your documentation will be on the *PFT Collection Data Sheet*.** ToRs will document the information for each student on this sheet and email the document to the Assistant Director of Assessment andSpecial Programs.

The Director of Assessment and Accountability will keep the ToRs informed regarding the testing window and due date for the *PFT Collection Data Sheet*.

Recommendation - Try to buddy up with a few other ToRs to test your students together. The experience is even more enjoyable when you are working with others to create a low-key, positive environment for your students. For instance, in the past, groups of ToRs held the PFT at a nearby park on a designated weekday and everyone worked together to assess students. It's a great idea to go early and map out the one mile run.

When you are emailing your families about your specific testing date and location, please make sure to ask the families to be on time and have each student prepared with running shoes, a water bottle, a towel or an exercise mat (only if the student already has one), and comfortable, breathable athletic attire.

i-Ready Benchmark Assessments – Computer Based Tests - (K-11)

i-Ready benchmark assessments are adaptive diagnostic tests that will indicate mastery and identify learning gaps in students K-11. This particular assessment will be given in the fall to provide ToRs and parents pertinent knowledge to assist with academic support and guidance, mid year to those who are in the WIN program and want to retake the assessments, and in the spring to determine growth and goals prior to state testing.

- Test Administration –
  We will no longer be looking at the *beginning of the year view* for the first benchmark assessment that begins on teh first day of school.

Instead, <mark>we will only look at the *standard view*.</mark> When we report our data, the data reflected is always in *standard view*. <mark>***Although there are paper pencil assessments in lieu of i-Ready for students in grades K-11, PLEASE encourage ALL of your students to take the i-Ready assessments and utilize the personalized lessons (available for grades K-8). The i-Ready data that is collected is essential for telling our story to our stakeholders, on the LCAP, etc.</mark>

Benchmark Diagnostic #1 - FALL

- All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).

- ToRs will proctor students virtually!

- IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/504 Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.

- The results shared with the parents/students will be in *standard view* only!

- **Please see the Intervention section for WIN and Shoreline student identification.

- ALL students need to be encouraged to complete the personalized i-Ready lessons that are provided upon completion of the ELA and math assessments.

Benchmark Diagnostic # 2 - WINTER

- ONLY students who are in WIN (falling into tiers 2 and 3 on benchmark #1) and identified as Shoreline will be required to take the second benchmark assessment.

- This will give WIN and Shoreline students an opportunity to test out if they have made sufficient progress. See the Intervention section for details.

- <mark style="background-color:#00ff00">ToRs will ONLY proctor students on their rosters who are WIN or Shoreline students, unless a tier 1 student chooses to retest.</mark>

- The results shared with the parents/students will be in *standard view* only!

Benchmark Diagnostic #3 - SPRING
- All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).
- ToRs will proctor students virtually!

- IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/Intervention Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.

- The results shared with the parents/students will be in *standard view* only!

- **Please see the Intervention section for WIN and Shoreline student identification.

Important -
- Newly enrolled students will be required to take the i-Ready assessments immediately upon enrollment.
- ToRs will provide the student's score report/data to parents once students have completed both reading and math assessments.
- ToRs will encourage their students to consistently complete the individualized lessons.

***Alternative paper pencil assessments are available for students in K-11 who opt out of taking the i-Ready assessments. PLEASE ENCOURAGE i-READY TESTING!

Final Examinations of Online Courses

All students taking online courses with final exams that require proctors, will be given the exams in person. They will be administered by appropriate Excel Academy Staff in the fall and spring where applicable. Please reach out directly to the High School team for specific details.

Intervention

WIN Program, SSTs, ELD, 504 Plans, IEP Requests
Homeless/Foster/Mobile Youth, Retention/Acceleration

Due Diligence

As a Teacher of Record, it is your responsibility to ensure that students are supported and progressing adequately. It is critical that you consistently monitor your students' academic, social, and emotional needs. It is critical that you reach out for additional support when necessary.

Who to Contact for What

Assistant Director of Intervention: April Saade, assade@excelacademy.education
Intervention Coordinator: Tamara Murphy, tmurphy@excelacademy.education

- **Elementary TK-6**

  - WIN Program TK-6: Tamara
  - Concerns, Support & SSTs TK-6: Tamara
  - English Learners TK-12: Tamara
  - Translation & Interpretation TK-12: Tamara
  - 504s Plans TK-12: April
  - NEW SPED Referrals TK-12: April
  - McKinney-Vento (Homeless, Foster, Mobile Youth) TK-12: Tamara
  - Retention & Acceleration TK-12: April
  - Other/Unsure TK-6: Tamara

- **Secondary 7-12**

  - WIN Program 7-12: April
  - Concerns, Support & SSTs 7-12: April
  - English Learners TK-12: Tamara
  - Translation & Interpretation TK-12: Tamara
  - 504s Plans TK-12: April
  - NEW SPED Referrals TK-12: April
  - McKinney-Vento (Homeless, Foster, Mobile Youth) TK-12: Tamara
  - Retention & Acceleration TK-12: April
  - Other/Unsure 7-12: April

Types of Student Support
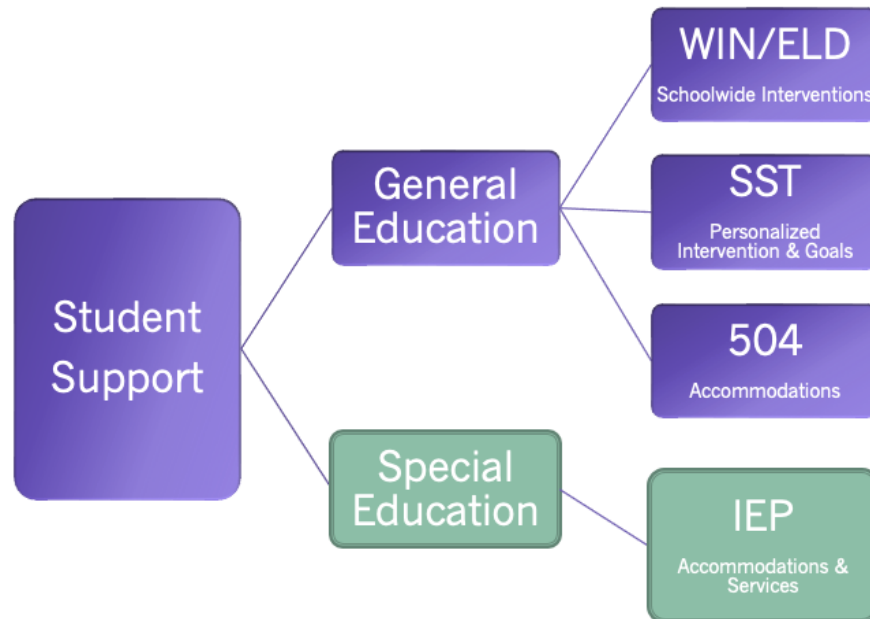
Support Cycle

The Support Cycle may be used to address challenges in any area. Most often it is utilized with students, yet it may be helpful to implement with families and staff members, as well. Please see Using Data to Make Decisions for Student Learning for detailed information.
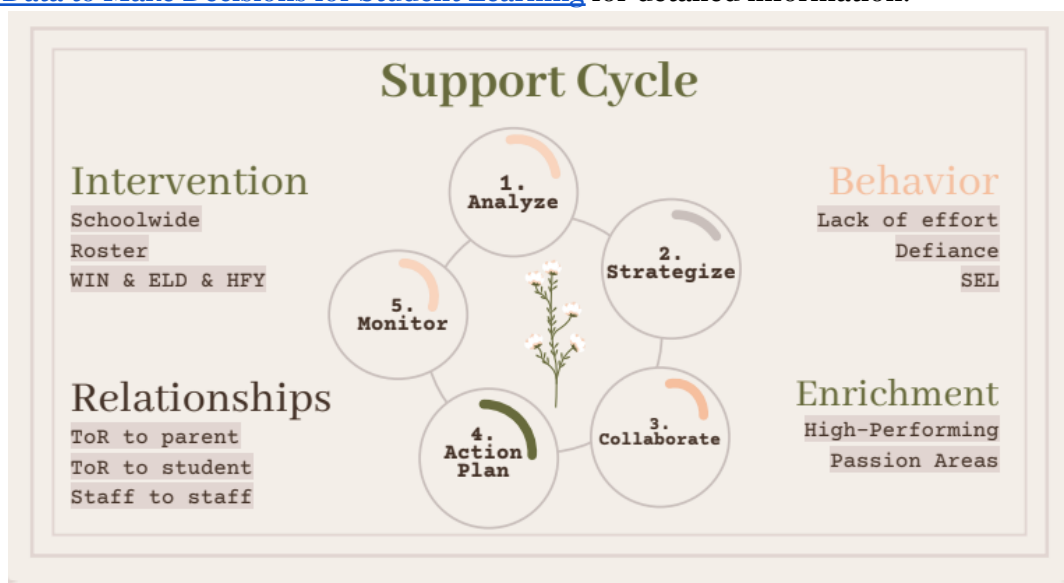
WIN Intervention Program
(**W**hat **I** **N**eed)

TK-6 Intervention Coordinator: Tamara Murphy, tmurphy@excelacademy.education
7-12 Assistant Director of Intervention: April Saade, assade@excelacademy.education

Who:

WIN students are identified by i-Ready diagnostic scores. Students can test into and out of the WIN program with each test (Fall, Mid-Year, Spring). Students required to participate in the WIN program are indicated below:

- Overall score (*standard view*) is **RED** *AND* **BELOW 8th grade**
- Overall score (*standard view*) is **YELLOW** *AND* **BELOW 50th percentile** **(National Norm)** *AND* **BELOW 8th grade**

What:

- The *WIN Program* is targeted, academic intervention and progress monitoring. Monthly plans are outlined in the **WIN Math Plan** and **WIN Reading Plan**.
- The WIN program may also include **WIN Live** small group instruction. Students are selected by the Intervention Department.

Why:

- As educators, it is our due diligence & our moral imperative to ensure that each student can access grade-level standards.
- The state of California requires every public school to have a *Multi-Tiered System of Supports (MTSS)* in place to help at-promise students reach state standards and make adequate academic progress. (https://www.cde.ca.gov/ci/cr/ri/)

Important:

All parts of the WIN program are REQUIRED per the *Acknowledgment of Responsibilities* signed in the Master Agreement. Therefore, Parent, Student and ToR participation is required. It is the ToR's responsibility to ensure it is done. If students or parents do not participate in the WIN Program they may receive a PIN (Progress Improvement Notification).

Student Success Team (SST)
Process, Forms, & ToR Responsibilities

TK-6 Intervention Coordinator: Tamara Murphy, tmurphy@excelacademy.education
7-12 Assistant Director of Intervention: April Saade, assade@excelacademy.education

An SST (Student Success Team) is a problem solving group that meets to develop strategies and

interventions to assist students with academic, attendance, behavioral, &/or social-emotional challenges. Please refer to the [Pre-SST Resources](#) & [SST Info & Directions](#) for more information.

English Learners

Curriculum, Policies, & ToR Responsibilities

TK-12 Designation & ELPAC Assessment - Jenny Craig, jcraig@excelacademy.education
TK-12 Curriculum, Instruction, Compliance & Support - Tamara Murphy,
tmurphy@excelacademy.education

Designation

Students are designated as English Learners based on their results from the Initial ELPAC assessment. ELs have the opportunity to redesignate if they earn an overall score of 4 on their Summative ELPAC assessment. This assessment is only offered once annually, in the spring. Please refer to the ASSESSMENT section above for further details. The SIS identification for ELs is a red asterisk. Select the asterisk to view current status details, select "tests" to see their ELPAC assessment scores.

ELD Program Requirements

Excel Academy requires all students identified as English Learners to participate in our ELD (English Language Development) Program through both synchronous and asynchronous instruction.

Please see the [ELD Handbook for ToRs](#) for more information.

Translation & Interpretation Resources

Please refer to our [Translation & Interpretation Resources](#) for detailed information.

504 Accommodation Plans

Process & ToR Responsibilities

TK-12: 504 Coordinator: April Saade, assade@excelacademy.education

Please view [504 Plans Explained](#) for an overview of 504 Plans. It is important to remember that **504 Plans are a function of general education**, not special education. Most often, new 504 Plans will first be addressed through an SST meeting to gather more information and to determine if a 504 Plan is the proper response to the concern. 504 Plan requests should be addressed in a timely manner to best support the student, parent, and ToR. **Please notify the 504 Coordinator as soon as the possibility of a 504 Plan is discussed.**

Special Education Assessment Requests

IEP Requests: Process, Form, & ToR Responsibilities

TK-12 SPED Intake Manager: Sondra Ryan, sryan@excelacademy.education
TK-12 Assistant Director of Intervention: April Saade, assade@excelacademy.education

All special education assessment requests will begin with a *Request for SPED Referral* meeting to document concerns. **If a parent requests a special education assessment, verbally or in writing, please notify the *SPED Intake Manager* & cc *Assistant Director of Intervention* immediately**. The Special Education Referral Form will be shared with you. Please fill it out as soon as possible. A meeting will be arranged to gather more information about the referral concerns. We will also clarify how the process works in our model.

Homeless, Foster, Mobile Youth (McKinney-Vento)

TK-12 Homeless & Foster Liaison: Tamara Murphy, tmurphy@excelacademy.education

Definition of Homelessness

The McKinney-Vento Act defines homeless children and youth as individuals who lack a fixed, regular, and adequate nighttime residence.

McKinney-Vento Assistance Act

- The McKinney-Vento Homeless Assistance Act (McKinney-Vento Act) (42 U.S.C. § 11431-11435) is federal legislation that ensures the educational rights and protections of children and youth experiencing homelessness. It requires all local educational agencies (LEAs) to ensure that homeless students have access to the same free, appropriate public education, including public preschools, as provided to other children and youth.

McKinney-Vento Identification

- Identified through enrollment registration packet - McKinney-Vento Form
- SIS Label is a yellow asterisk
- ToR and/or Liaison observation - encouraging family to update MKV Form

Refer to our Homeless, Foster & Mobile Youth Rights & Support Process for detailed information.

Grade Retention & Acceleration Requests

TK-12: Assistant Director of Intervention: April Saade, assade@excelacademy.education

The general philosophy is that because Excel Academy offers personalized learning, retention & acceleration are rarely necessary. **If a parent is requesting retention or acceleration, the ToR should reach out to the *Assistant Director of Intervention*.** Please also review [Retention & Acceleration Policies & Processes](#).

[Policy Organizer](#)

COMMUNITY

Shared Drive Community Folder

Community Shared Drive
- [Excel Academy Permission Slips](#)
- [Waiver - When Parent B Takes Student A Forms](#)
- Service Hours - Spreadsheet
- [Authorized Chaperone and Non-Student Sibling List](#)

Field Trips/Community Events

In order to offer quality field trips each year, we depend on our teachers to help chaperone throughout the year. As part of your contract, Personalized Path ToRs are required to fulfill 10 service hours toward field trips and/or community events. Virtual Path ToRs are not required to complete Service Hours.

The required number of credits reflect a certain number of service hours, rather than a number of events. Only 1 park day and 2 virtual webinars may be applied toward your service hours.

- Personalized Path ToRs will fulfill 10 chaperone hours*.
- CLs will fulfill 8 chaperone hours.
- Personalized Path RLs will fulfill 8 chaperone hours.
- HQTs will fulfill 6 chaperone hours.
- Classified Staff - as needed per Community Team

*Secondary teachers- Must host a secondary community event (one per ToR in the county they serve). ToRs may use up to two service-credit hours for the event.

Please note, in order to facilitate the field trips and events in an organized way, it is essential for our ToRs to be early to an event. Parents are looking for someone "in charge" and can become concerned if the host is not there at the expected time.

The Community Team will share the Field Trips & Community Events sign up sheet. Please only sign up for the number of service credits indicated by email. Please note you do not have editing access to this sign up. You will need to comment on the blue cell with your name to sign up for the event. In the case that multiple ToRs comment at the same time, a name will be randomly drawn. Otherwise, sign ups are first come first serve.

Per legal counsel, children of staff who are not enrolled Excel Academy students, may not attend field trips. If your child is an Excel Academy student and you are signed up to chaperone, your child must have a designated guardian attending with them. Waivers should reflect the information of the guardian in attendance and tickets, when applicable, must be purchased for this guardian.

Chaperone Checklist

- **Outdoor Classroom Days** Reach out to the Community Liaison in charge of the park day with any questions.
- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your Excel Academy backpack and make sure you have your first aid kit.
- Bring Excel Academy signage, flag, and/or umbrella.
- Please take photos and send them to the Social Media Liaison (Michelle Moran).

Field Trips

- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your Excel Academy backpack and make sure you have your first aid kit.
- Double check your clipboard for extra copies of waivers. Copy included below and within the Community Folder of ToR Manual.
  - Waivers: student, parent, sibling
  - Waivers: parent B brings student A (highlighted in Red below)

- Arrive 15 minutes earlier than the time the coordinator of the event asks the families to arrive, so you can notify the venue to anticipate our group's arrival and greet the families when they arrive.
- Reserve 15 minutes for our families to gather before tours or activities start. Please use this time period to:
    - Take attendance and check in families
    - Collect waivers if any are missing
- If it is a larger group, one ToR could help call/text families who are late and wait for them if necessary, while the other chaperone(s) stay with the rest of the group and move on to participate in the field trip activities.
    - The roster will note any special circumstances regarding transportation. <u>If a student arrives with another family (that has not been noted or communicated to you previously by the coordinator), you must call the field trip coordinator.</u>
-
- Stay with the group until the field trip is over. It is our hope that the presence of Excel Academy teachers at the field trips makes the trips more intimate and allows parents to feel the support of our team, and students feel they truly belong to an incredible school.
- Some parents do not want any pictures, front or back view, of their kids to be posted. Be sure to double check with parents that it is ok to take a photo. Make sure you get the names of the students for small group photos. Please send pictures to the Social Media Liaison and the field trip coordinator of the event to be posted on Instagram and Facebook, as well as the newsletter.
- Thank the families and venue when you leave to signal that Excel Academy's field trip time has ended, and the families are there on their own if they choose to stay. Text the community coordinator of the event when you leave.
- Turn in the collected waivers (one waiver for students, another for parents and non-students, including siblings and guests) to the office the next time you are there. There is no rush.

CCP Events

- Reach out to the Field Trip Coordinator prior to the event with any questions.
- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your Excel Academy backpack and make sure you have your first aid kit.
- Arrive 15 minutes earlier than the start time of the event. Introduce yourself to the venue contact and greet Excel Academy families when they arrive.
- Please stay until the last family leaves and offer to help with cleaning up.
- Please take photos and send them to the Social Media Liaison (Michelle Moran) and Field Trip Coordinator.
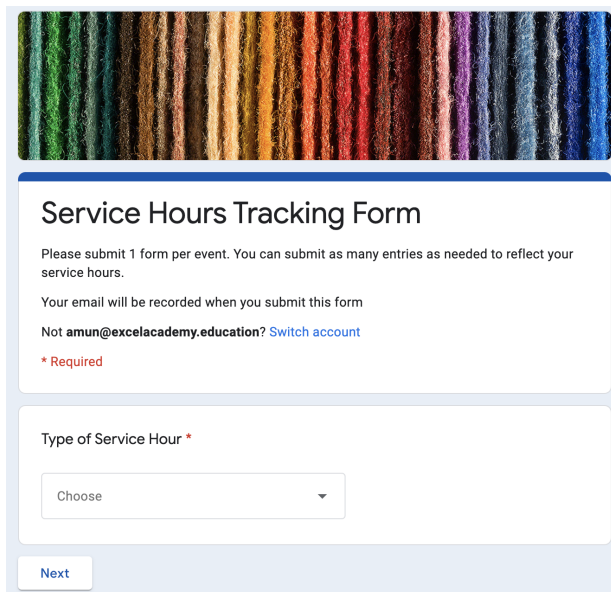- Record your Services Hours on the Service Hour spreadsheet.

Service Hours

Information and Directions to Complete the Google Form

The Service Hour Spreadsheet will be located in the shared drive and will only be applicable to ToRs on the Personalized Path. Virtual Elementary ToRs will not have any service hours. Personalized Path ToRs will each have 10 hours to complete.

Completing the Service Hour Tracker Google Form

After your service hour sign up is confirmed by Jenny or Annie, please fill out this tracker form so that we can monitor how many service hours ToRs have completed/will complete. This will help us stagger the release of field trips and events so that everyone is completing the same number of service credits. Please do not sign up for more than instructed.

Click on image above for the Google form.

Click here for a video tutorial on how to fill out the Google form.

Reimbursement for Driving

All teachers will receive mileage reimbursement at the IRS published reimbursement rate, this will cover driving expenses related to your job as a Teacher of Record. Teachers will keep track and submit reimbursement for their mileage for all work-related drives, including learning period meetings via Paycom mileage tracker application. Please see mileage reimbursement policy for additional details.

All reimbursements are to be submitted via Paycom and submitted within two weeks (10 business days) of the end of the month for which reimbursements are being requested.

Special Education Department
Students with IEPs

Every student within the Special Education Department (SPED) has what is called an IEP, or Individualized Education Program. An IEP is a document and a map that lays out the program of special education instruction, supports and services a student is required to receive in order to make progress toward grade level standards.

How do I know if I have a student receiving SPED services on my roster?

In the ToR's student roster in SIS, a variety of symbols may appear next to a student's name. If a dark blue star appears, this will indicate that the student has an IEP. The ToR will reach out to the parent and explain how our school works, following the initial phone call guidelines, just like any other student assigned to them.   The parent will sign the ***Master Agreement and Acknowledgement of Responsibilities***, officially enrolling them in our school. If the parent of a newly enrolled SPED student poses questions to the ToR that they are unsure of the answer to, reach out to the SPED Intake Manager, Sondra Ryan, for further support.
**For newly enrolled High School students, it is vital to collaborate with Sondra Ryan and the High School Counselors PRIOR to developing the student's MA.

It is imperative that you inform the SPED Intake Manager within 24 hours of the *Master Agreement* being signed. **This 24 hour notification is crucial so that the Special Education team can comply with all legal timelines for newly enrolled students. IEP services cannot begin until a signed MA is received.
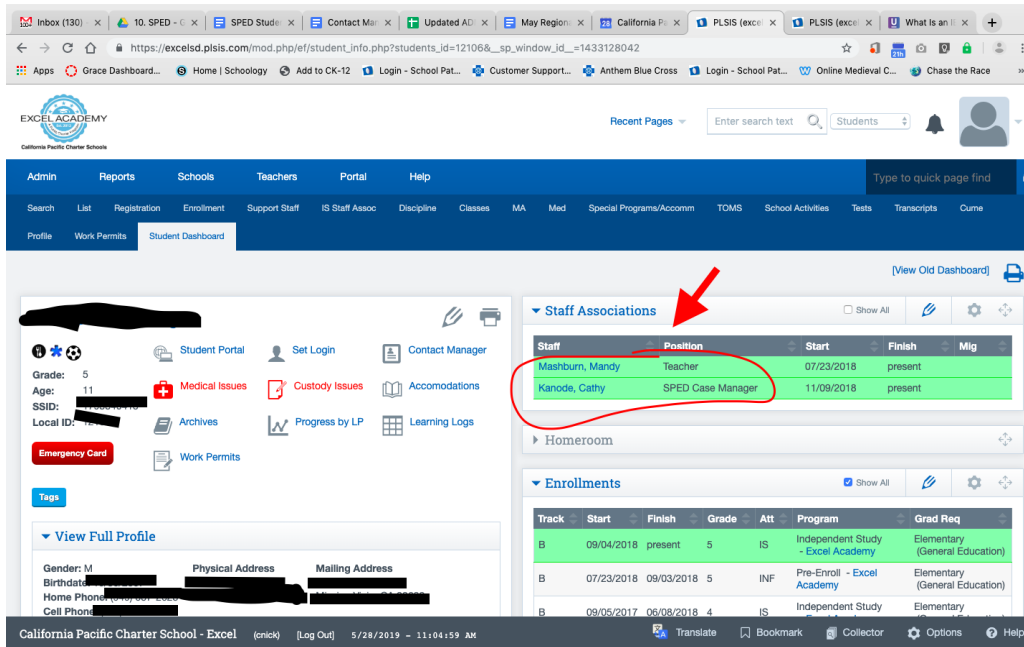
Once the MA is signed, an interim offer will be sent from the SPED Department to the parent/guardian and a 30 day IEP will be scheduled to finalize the student's IEP after a period of data gathering. *ToRs are required to participate in all portions of all IEP meetings for students on their roster, including the 30 day IEP. At the IEP all team members will be expected to speak to the students academic present levels at the time of the meeting.* ToRs are the experts in general education expectations and grade level standards at all IEP meetings. This means you will need to spend extra time getting to know the educational needs/strengths of any new students with IEPs assigned to your roster.

Any questions about a continuing student's IEP should be directed to the assigned Case Manager. The SPED Intake Manager will be the temporary CM for all newly enrolled students until the 30 day IEP is complete and a permanent CM is assigned.

You can find your student's **Case Manager** within SIS/Pathways.

To Find the Case Manager for Your Student:

❖ Click on the student name on your roster, which will take you to the student dashboard (see below).
❖ The circled names indicate the assigned teacher (yourself) and the case manager for the student.

Students with IEPs will be treated just like any other General Education student, ***except for any areas relating to their disability.***

For instance, if a student with an IEP does not attend/reschedule an LP meeting, they should receive a PIN.

❖ Please include the student's assigned **case manager and SPED Program Specialist (Leah Vides) on all concerns that may lead to a PIN so that the team can guide you through required next steps and collaborate on strategies to best support the student. An IEP meeting may be required specifically to discuss PIN concerns, per the EACS SPED PIN Policy.**

*If you are ever in doubt about a student's needs, please reach out to their assigned case manager for more information.

What are my roles/responsibilities throughout the school year?

Open communication with families during the year will assist in meaningful and fruitful IEP meetings. Prior to the first day of school, *the Case Managers will provide you with an "IEP at-a-glace" document for each student at the beginning of the school year and each time the IEP is updated throughout the year*. This document will provide you with a summary of the

student's required accommodations, goals that are being addressed through the IEP, and the services currently being provided to address the goals. If you have any questions regarding the document or its contents, reach out to the CM.

Throughout the school year you will complete all your regularly assigned ToR duties for all students on your roster, including those with IEPs. However, for students with an IEP, you will have additional responsibilities.

For all students with IEPs on your roster:
- ❖ Read, review and be aware of changes to the student's IEP throughout the school year.
- ❖ Become familiar with each student's goal areas, service areas, accommodations and modifications. Accommodations and modifications are required to be implemented throughout all general education activities.
- ❖ This IEP is active and in place **every minute of every school day.** Knowing and understanding it will support student progress and success!
- ❖ Communication, communication, communication! ***Please communicate regularly with Case Managers regarding LP meetings and input learning notes in the Contact Manager section of SIS.*** (schedules, progress, concerns) and parent questions related to their services or IEP goals. Regular communication throughout the year is crucial to a meaningful IEP process.
- ❖ Assist parents with the implementation of accommodations listed in the IEP (related to instruction and strategies.) Please consult with the assigned Case Manager as needed. You can invite Case Managers or the Special Education Coordinator to LP meetings if assistance is needed.
- ❖ Collaborate with students' assigned Case Manager prior to report card completion for support with appropriate comment selection.
- ❖ Share all concerns related to special education with the student's assigned Case Manager immediately. The special education department is responsible for addressing many parent concerns in a formal manner via IEP discussion. If a parent is expressing concerns or directing requests regarding their student's special education services to you; it is your responsibility to direct the parent to their CM.
  **If you reach out to a CM to share a concern or request on behalf of a parent, and do not receive a response within 48 hours, please reach out to the special education leadership team for further assistance.

For some students on your roster:
- ❖ In conjunction with the assigned Case Manager or Special Education Coordinator, assist parents with implementation of modifications listed in the IEP
- ❖ Provide consultation or collaboration services as listed in the IEP

What are my roles/responsibilities in preparation for the IEP meeting?

The Special Education Case Manager is responsible for scheduling the IEP meetings and will communicate options for dates and times with all members of the IEP team. Regularly anticipated IEP meetings will be scheduled at least one month prior to the meeting.

Note: Case managers will do their best **_not to_** schedule regular Plan Review and Eligibility Evaluations during LP meeting weeks. However, due to legal timelines or urgent circumstances, this cannot always be avoided.

General Education Feedback Form: This form will be located within the Shared Drive. In preparation for the IEP meeting you will need to complete it in its entirety.

- ❖ **_Please fill out every section of this form with current information that pertains to your student. You will need to add <u>as much information as possible</u> (1 or 2 sentences does not suffice.)_**
- ❖ Please remember you are the link to the parent who is doing the primary teaching and using the curriculum and the IEP. If you do not have the information to complete a particular section of the form, please reach out to the Case Manager for guidance. Gathering parent-reported information may be appropriate for some areas, however as the ToR you are expected to have a full understanding of the student's academic levels.
- ❖ Always indicate if the information was gathered via assessment, observation, work samples, parent report etc.

What is my role DURING the IEP meetings?
As the ToR, you are the student's general education teacher of record and a legally required member of the IEP team. You are vital to the educational progress of students with IEPs and considered the general education expert for that student.

The general education teacher is expected to contribute to the IEP team process by obtaining and/or contributing to the team in the areas of:
- General Education curriculum and context.
- A student's performance and engagement within the Independent Study environment.
- A student's interactions with both their peers and parent/guardian.
- The pace at which a student's curriculum is being completed with mastery. Also, _how much <u>reteaching</u> is needed to maintain that mastery._
- Relating general education assessment results, both formal and informal.
- A student's use of accommodations/modifications in their daily work.

The Case Managers will develop an agenda for each meeting so you know the sequence of topics, and when you will have the opportunity to speak.   Throughout the meeting, the facilitator will ask if there are any questions and if certain team members are in agreement with the discussion taking place. Please speak up and ask/answer questions throughout the meeting. The IEP requires input and consensus from all members of the team, and your voice is important!

What are my roles/responsibilities AFTER the IEP meeting?

After the IEP meeting you will receive the written IEP via docusign for your signature on the attendance portion of the consent page.

Please sign within 24 business hours so that all IEPs can be affirmed for compliance within the allotted timelines. You will be notified once the parent has provided consent to the IEP.

❖ If the parent contacts you after the IEP to express concerns or pose questions prior to providing their signature of consent, please immediately notify their case manager.

❖ The new IEP is in effect once consent is received and the IEP cycle will begin again. If any follow-up activities are required, you will be provided with this information.

Email Protocol

Forms of Communication Used within Excel Academy:

❖ **Email:** This is the primary form of communication between both staff and families enrolled in Excel Academy. It is important that if a question can be answered in an email, the sender uses this option. There are two reasons for this:
  ➢ Emails are a perfect way to document a conversation took place and to relocate the information if needed in the future
  ➢ Everyone is extremely busy and cannot take the time to answer the phone when an email is sufficient
❖ **Phone:** The phone should be used if the situation or question would be hard to easily describe in an email. (example: a situation with a family is so long and convoluted that it would require multiple emails back and forth.) It should also be used in the event of an emergency situation. Of course, if someone needs medical attention, dial 911 first, but then contact an administrator to apprise them of the situation.
❖ **In-Person/Face-to-Face:** This form of communication is rare and will only occur during our Professional Development and Regional Meetings as well as some performance reviews or other critical meetings.

**Any correspondence with a student *must* include the parent/guardian. At no time should a ToR communicate solely with a student.

Please Note: If sensitive information comes up in an email thread or you decide to call the individual(s) instead of continuing the thread, establish that a new form of communication will be taking place by writing something to the effect of: "I will give you a call to finish this discussion." That way, if you need to look back on the topic, you know that the conversation didn't fall through the cracks.

Please Follow the Guidelines Below:

<u>Sender</u>

- ❖ ***<u>Only include those who need to know or respond to the communication</u>***. Think through before sending. Refer to each department's Who Does What sheet if you are unsure of who to email.

- ❖ **<u>Always "BCC" emails with large groups of people</u>**.
  - ➢ **"bcc"** allows receivers to "reply" back to the sender <u>*without including anyone else in the reply*</u>. This cuts down on unnecessary replies of "thank you" to everyone.
  - ➢ **"bcc"** allows for the <u>*privacy of other receivers of the email*</u>. **Always use "bcc" when parent email addresses are involved. This will not allow anyone to see the email addresses.**
  - ➢ **"cc"** is used <u>*when you do not need to hide the privacy of someone that is needed on the email*</u>.
    - ■ **Ex.** Email to Laurie that you would like to also be seen by Noel in admissions, but the primary email is to Lauren.

- ❖ **<u>Title:</u>** The title should **reflect what you are communicating in the email**. Start a new email, rather than bring up a topic not related to the email string. *Do not attach an important conversation to the bottom of an email chain that has nothing to do with the topic. Do not start a new email chain about a topic already being discussed.*
  - ➢ **Ex:** A chain about a student not completing iReady:
    - ■ Incorrect: "iReady"
    - ■ Correct: "J. Smith Did Not Complete iReady"
    - ■ Incorrect: "Idea"
    - ■ Correct: "Idea for End of the Year Luncheon"

  - ➢ **Ex:** The email chain above turns into a conversation about concern over J. Smith's grades
    - ■ Correct: Start a new email with the title **"Question about Student Grades"** with the appropriate people attached
    - ■ Incorrect: Continue the conversation with people that do not need to be on it in a chain that has a title that does not fit the topic

- ❖ **<u>Follow-up protocol:</u>** If you do not receive a response **<u>within 48 hours</u>**, you may send a follow-up email.

- ❖ **<u>Urgent Emails:</u>** Emails that must be handled immediately due to time sensitivity. *<u>After 4 hours, you may follow up the email with another email and phone call.</u>*
  - ➢ If your request is Urgent, the title should include the word **Urgent** at the beginning, with the meaningful title following.

- **■ Ex. *Urgent: Schultz Requested SPED Testing***
  - ➢ Urgent Emails should be answered **within 4 hours** during office hours (8:30-4:30)

What emails should be considered urgent?
SPED Testing Request, time sensitive SPED situations, Reports of Self-Harm, Emotional Distress, Abuse, Emergencies, etc.

What emails should NOT be considered urgent?
Work permits, concurrent enrollment forms, enrollment or withdrawal of a student, general IEP questions, attendance questions (unless you are Cori or Keri), etc. All aforementioned items have a process in place to review such requests.

- ❖ **DNR:** (Do Not Reply) Emails that are Informational Only and Do Not need a response:
  - ➢ Title the email with DNR and then the title
    - ■ Example: ***DNR: Finished Editing the Safety Plan***

- ❖ **PR**: (Please Reply)
  - ➢ Emails in which you need a simple confirmation from the receiver of "Got It" or "Okay" in order to know they reviewed it and understand the contents
    - ■ Ex. ***PR: New Guidelines Attached***

- ❖ **AR:** (Action Required)
  - ➢ Emails that require an action to be taken [i.e. surveys, student request, inputting payroll numbers, etc.
    - ■ Ex. ***AR: Roster Requests for 2019/20 School Year***

Receiver
- ❖ Do NOT respond to emails with DNR
- ❖ Do reply to PR emails with a "Received" or other acknowledgment of receipt
- ❖ Complete the action of AR emails within a timely manner
- ❖ If a sender accidentally sends an all staff email via CC rather than BCC, do NOT "reply all" to it. This adds unnecessary emails to everyone on the email.
- ❖ Reply to all emails within 24 hours and all urgent emails within 4 hours

Things to Avoid:

- ❖ Do not use ALL CAPS, as it can be construed as anger or yelling.
- ❖ Always read through and soften up anything that could be taken in the wrong way.

Document Titles in All Departments Google Drive

Each Department Will Label Documents the Following Way:

(Education Dept)
Title-22/23-EDU
(Human Resources Dept)
Title-22/23-HRD
(High School Dept)
Title-22/23-HSD
(Student Services Dept)
Title-22/23-SSD
(Enrollment Dept)
Title-22/23-ENR
(Assessment Dept)
Title-22/23-ASMT
(English Language Learners)
Title-22/23-ELL
(Intervention)
Title-22/23-INT
(Community)
Title-22/23-COMM
(Special Education)
Title-22/23-SPED
(Compliance)
Title-22/23-CMPL
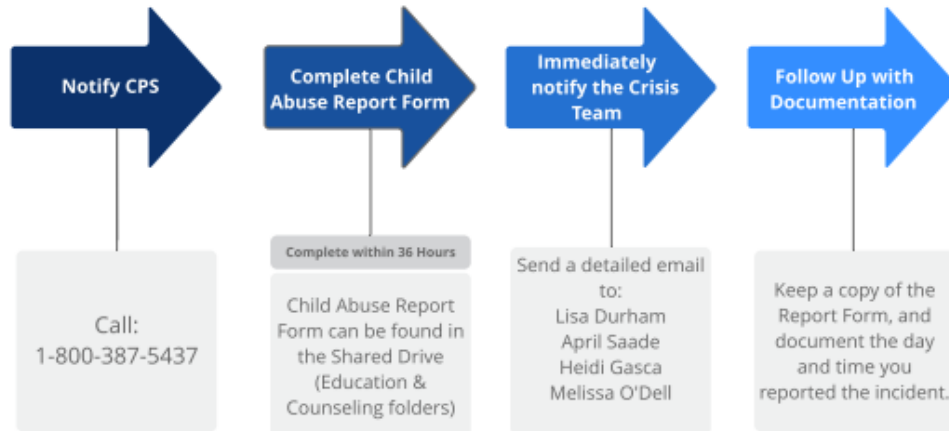***(Operations)***
Title-22/23-OPR
(WASC)
Title-22/23-WASC

CPS Protocol

CPS Protocol

In the event you witness, have knowledge of, or suspect any form of abuse occuring to a child at Excel Academy, please immediately follow the steps listed below.

Notify CPS

Call:
1-800-387-5437

Complete Child Abuse Report Form

Complete within 36 Hours

Child Abuse Report Form can be found in the Shared Drive (Education & Counseling folders)

Immediately notify the Crisis Team

Send a detailed email to:
Lisa Durham
April Saade
Heidi Gasca
Melissa O'Dell

Follow Up with Documentation

Keep a copy of the Report Form, and document the day and time you reported the incident.

Mandated Reporter Form