



*Teacher of Record  
Training Manual  
2024-2025 School Year*

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# Highlights of Policy or Procedure Changes for 2024/25

## Admissions

- *Early TK Admittance: Students who turn 4 years old between June 1 - Sept 1 will be allowed to enter TK at the start of the school year for Early TK Admittance. For regular TK admittance, as it was last year, students who turn 5 years old between Sept 2 - June 2 can start TK at the start of the year.*
- *Content & Community Providers Acknowledgement Form: This year, parents will sign their CCP Form alongside their MA and AOR.*

## Community

- *We're making Field Trip and Community Event sign ups easier! No longer will you have to rush to "comment" with your name—we will now be using Sign Up Genius to make the process easier, and more streamlined!*
- *Community Requirements for Personalized ToRs will remain in the same format as last year, however, the option templates have changed. Like 23/24, throughout the school year each ToR will document what they have completed in each column and change the pink cell to **green**. By the end of the school year, each column that is highlighted in pink should appear in green. Ex:*

Option 2		
Community Event	Field Trips	Virtual Lessons
Back to School Event	Medieval Times	Zoom Week - 9/18
Bowling Bonanza	Chino Youth Museum	Zoom Week - 10/20
Edupreneur's Expo		Zoom Week - 12/6

Below are this year's options:

<p><b>Option 1:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 3 Field Trips</li> <li>• 1 Virtual Lesson</li> </ul>	<p><b>Option 2:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 2 Field Trips</li> <li>• 3 Virtual Lessons</li> </ul>
<p><b>Option 3:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 1 Field Trip</li> <li>• 2 Speciality Events</li> </ul>	<p><b>Option 4:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 2 Field Trips</li> <li>• 1 Speciality Event</li> </ul>
<p><b>NHS Option:</b></p> <ul style="list-style-type: none"> <li>• 2 Community Events</li> <li>• 2 Field Trips</li> <li>• NHS Duties</li> </ul>	<p><b>SSC Option:</b></p> <ul style="list-style-type: none"> <li>• 2 Community Events</li> <li>• 2 Field Trips</li> <li>• SSC Duties</li> </ul>
<p><b>Pali Option:</b></p> <ul style="list-style-type: none"> <li>• Pali Overnight (5th-8th graders)</li> </ul>	<p><b>Catalina Option:</b></p> <ul style="list-style-type: none"> <li>• Catalina Overnight (7-12th graders)</li> </ul>

## Crises

The Crises Teams are now split into Elementary & Secondary:

### Secondary Crisis Team

Lorrie Wood, Secondary Principal: (805) 931-6720 lwood@excelacademy.education

Larissa Allen-Jefferson, School Counselor: lallenjefferson@excelacademy.education

Daniel Favela, School Counselor: dfavela@excelacademy.education

### Elementary Crisis Team

April Saade, Elementary Principal: (949) 774-6231 asaade@excelacademy.education

Caroline Forester, Elementary Counselor: (619) 786-8270, cforester@excelacademy.education

## Documentation:

Contact Manager requirements have been adjusted:

### 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, rescheduled LP Meetings with reason or concerns

- ❖ Documenting a phone call that pertains to an issue that might lead to a BIP or PIN
- ❖ Conversations with parents about complaints, or them refusing to comply with school expectations (samples, assessments, WIN, curriculum, etc)
- ❖ Document meetings that are held and include the date: SST, AIM, 504 Plan, Best Interest (PIN3), IEP, Manifestation, etc.
- ❖

## Secondary

- Rosters will be considered full time with a maximum of 25 students.
- For Secondary students new to Excel, please follow the process outlined in the [New Secondary Student Checklist](#). These students will need to meet with their counselor before the MA can be written.
- The graduation policy has been updated for all incoming Freshman to include the “soft” requirement of choosing one of the six College and Career Indicators to complete: CTE courses, CAASPP standards met; concurrent enrollment, Seal of Biliteracy, A-G completion, or AP courses.
- WIN requirements will continue for 7th-8th grade and there are [updated requirements](#) for high school..
- Quarterly progress reports will be issued by ToRs for quarter 1 and quarter 3 for any student falling below 70%.
- Turnitin.com will replace Google for the plagiarism checker and authentic, proctored writing samples will be required within the first LP More information to come.
- Advanced Junior High students can add Honors designation by following the [SOAR requirements](#).

# Department Highlights

## Intervention

### Who to Contact

<i>WIN List &amp; Interventions Program</i>	<i>Sarah Horikawa</i>	<i>WIN Classes</i>	<i>Tamara Murphy</i>
<i>WIN Compliance</i>	<i>Sarah Horikawa</i>	<i>ELD Classes</i>	<i>Tamara Murphy</i>
<i>SST Meetings TK-6</i>	<i>Tamara Murphy</i>	<i>Homeless/Foster Youth</i>	<i>Assigned Counselor</i>
<i>SST Meetings 7-12</i>	<i>Alison DeSchaine</i>	<i>SPED Referrals</i>	<i>Noell Scott &amp; Tamara Murphy</i>
<i>504 Meetings TK-6</i>	<i>April Saade</i>	<i>Acceleration/Retention</i>	<i>Principal</i>
<i>504 Meetings 7-12</i>	<i>Assigned Counselor</i>		





# *Staff 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 listed below. Additional information can be found in our [Suicide Prevention Policy](#)*

## *Alarming Concerns of Any Kind*

*Crisis Team should be notified immediately of any student involved in a crisis or tragedy of any kind, including but not limited to:*

- ❖ potential child abuse/neglect*
- ❖ drug use or overdose*
- ❖ hospitalization of any kind (psychiatric, eating disorders, other medical, etc)*
- ❖ death of a family member*
- ❖ hostage situations*
- ❖ car accidents resulting in serious injury*
- ❖ run away from home*
- ❖ student/parent arrest*
- ❖ police activity*

## *Crisis Team:*

*The Crisis Team will support, guide, and intervene on behalf of students, families, and staff during or after crisis situations. Due to the virtual nature of EACS, the Crisis Team relies on staff to swiftly inform them of concerning situations.*

*Monday-Friday 8:00-5:00: Contact CORE Crisis Team*

Outside of School Hours: Contact Keri Schneeweiss or Heidi Gasca

Secondary Crisis Team

Lorrie Wood, Secondary Principal: (805) 931-6720 lwood@excelacademy.education

Larissa Allen-Jefferson, School Counselor: lallenjefferson@excelacademy.education

Daniel Favela, School Counselor: dfavela@excelacademy.education

Elementary Crisis Team

April Saade, Elementary Principal: (949) 774-6231 asaade@excelacademy.education

Caroline Forester, Elementary Counselor: (619) 786-8270, cforester@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

Keri Schneeweiss, Director of Educational Services: (949) 742-2399,

kschneeweiss@excelacademy.education

Heidi Gasca, Executive Director: (949) 412-3122, hgasca@excelacademy.education

## **Staff Contacted when Student is in Immediate Crisis**

- 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

## ToR Protocol *After Crisis*

If the ToR learns of an attempted suicide, harm to self/others, admittance to a treatment program, or any other alarming concern 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, Elementary Principal
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 Harm to Self/Others with Excel Staff Present*

In the case Excel Staff is present when a student attempts 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, Elementary Principal
  - 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.

## Reporting All Homicidal Threats is Required by Law

The new statutes require any school district employee interacting with students in grades 7 through 12, inclusive, who observes a threat or perceived threat that a student is going to "commit a homicidal act related to school or school activity" to immediately report such threat to local law enforcement. (Ed. Code, § 49393.) Any report of a homicidal threat must include any evidence associated with the threat or perceived threat. If two or more school employees observe the same concerning conduct, a report by one of the employees is sufficient to meet the obligation of all of the employees.

A "threat or perceived threat" is defined by the law as: "any writing or action of a pupil that creates a reasonable suspicion that the pupil is preparing to commit a homicidal act related to

school or a school activity.” (Ed. Code, § 49390(e).) A threat or perceived threat may be based on a student’s “possession, use, or depictions of firearms, ammunition, shootings, or targets in association with infliction of physical harm, destruction, or death in a social media post, journal, class note, or other media associated with the pupil.” A threat or perceived threat may also be based on “a warning by a parent, pupil, or other individual.”

If local law enforcement is notified of any threat or perceived threat, SB 906 requires the law enforcement agency or school site police—with LEA support—to immediately conduct an investigation and assessment of the reported threat. The investigation must include “a review of the firearm registry of the Department of Justice” and if justified by reasonable suspicion, a search of the school site. (Ed. Code, § 49394.)

SB 906 mandates each LEA provide all parents TK-12 “information related to the safe storage of firearms” in the required annual notification, which means an LEA’s first disclosure would be required in the upcoming 2023-2024 school year. This is included in the Parent/Student Handbook. (Ed. Code § 49392.)

### 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 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 recently died by suicide
- 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 "IMPORTANT: (first initial). (last name)" 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:*

*[Click here for a link to Mental Health Referrals by County](#)*

**Care Solace**

*EACS provides Care Solace service for students, staff, and their families. Care Solace is a mental health care coordination service that connects people to mental health care covered by their insurance or on a sliding scale. Care Solace connects clients to more than counseling. They also connect people to substance use treatment centers (rehab), inpatient/residential programs, outpatient programs, psychological evaluations, and intervention services.*

*<https://caresolace.com/site/excelacademy>*

**CalHOPE Warm Line:**

*The CalHOPE warm line connects callers to other people who have persevered through struggles with stress, anxiety, depression—emotions triggered by circumstances and events in everyday life. The peer counselors listen with compassion, provide non-judgmental support and guide you to additional resources that can give hope and help them cope.*

*Call: (833) 317-HOPE (4673)*

**Live Chat**

*<https://www.calhope.org/>*

**National Suicide Prevention Lifeline:** *The lifeline is a 24-hour, toll-free suicide prevention service available to anyone in suicidal crisis or their friends and loved ones. Call or text 9-8-8. Callers are routed to the closest possible crisis center in their area.*

*<https://988lifeline.org/>*

**Suicide online Chat format (similar to texting):** *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/>*

**The Trevor Lifeline:** *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](http://www.thetrevorproject.org)*

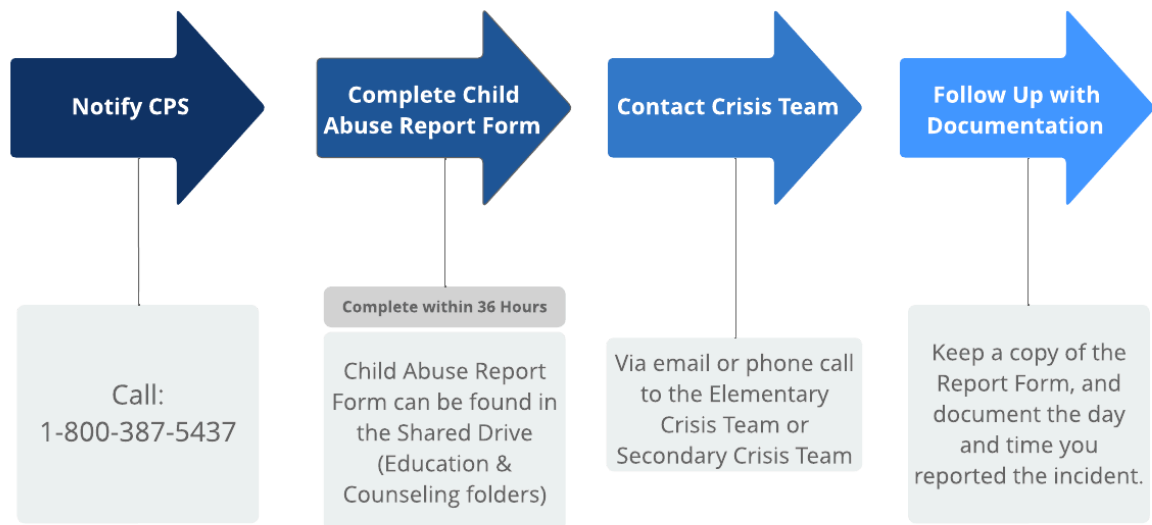
Crisis Text Line is a free, 24/7, confidential text message service for people in crisis. Text HOME to 741741 in the United States

<https://www.crisistextline.org/>

# CPS Protocol

## CPS Protocol

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



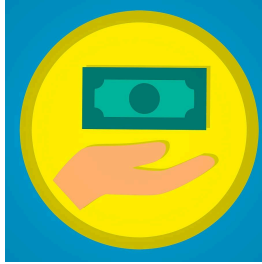
## Mandated Reporter Form

### 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*





# *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 24/25 school year, the maximum IF appropriation for each student on the personalized path is \$3,400 for TK-8, and \$3,900 for Grades 9-12; and 1-8 virtual path students is \$2,100, for those students who are enrolled for the entire 175 school days. The IF's are placed into the fund account in multiple disbursements throughout 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 4, 2025 is the deadline for orders to be submitted and approved in OPS. 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 the parent will no longer have access to them.*
- *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.*
- *Students must reasonably be able to use all items by the last day of school. If the Business Services Department (also called Student Services) 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 \$50+	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
- (4) Must be taking an ETL/VCI Music Class & Needs to be Returned at the end of School Year
- (5) Need to include an explanation for sticker purchase in the internal notes.
- (6) Please explain the reason or need to purchase knitting materials, cannot be purchased in excessive amounts

### *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 Technology 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 8 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, and recital fees.*
- Excel Academy cannot pay for uniforms, belts, costumes, makeup, and/or ticket costs.*
- All non-core/elective VCLs over \$500/mo must have a ToR note on the PO stating the student is doing well academically and has a 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 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 23/24 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 23/24 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 repellent, or fertilizer.*



#### *LEGO® Education*

*LEGO® provides educational kits that are subject to the following guidelines in the 23/24 - school year:*

- *All orders must be placed for kits from the [LEGO® Education Website](#).*
- *All orders must have clear educational value (no minifigure kits allowed).*
- *Any LEGO® Education orders 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*

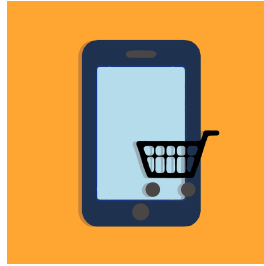


*must be notified, by the parent or guardian, of cancellation prior to orders being canceled in OPS.*

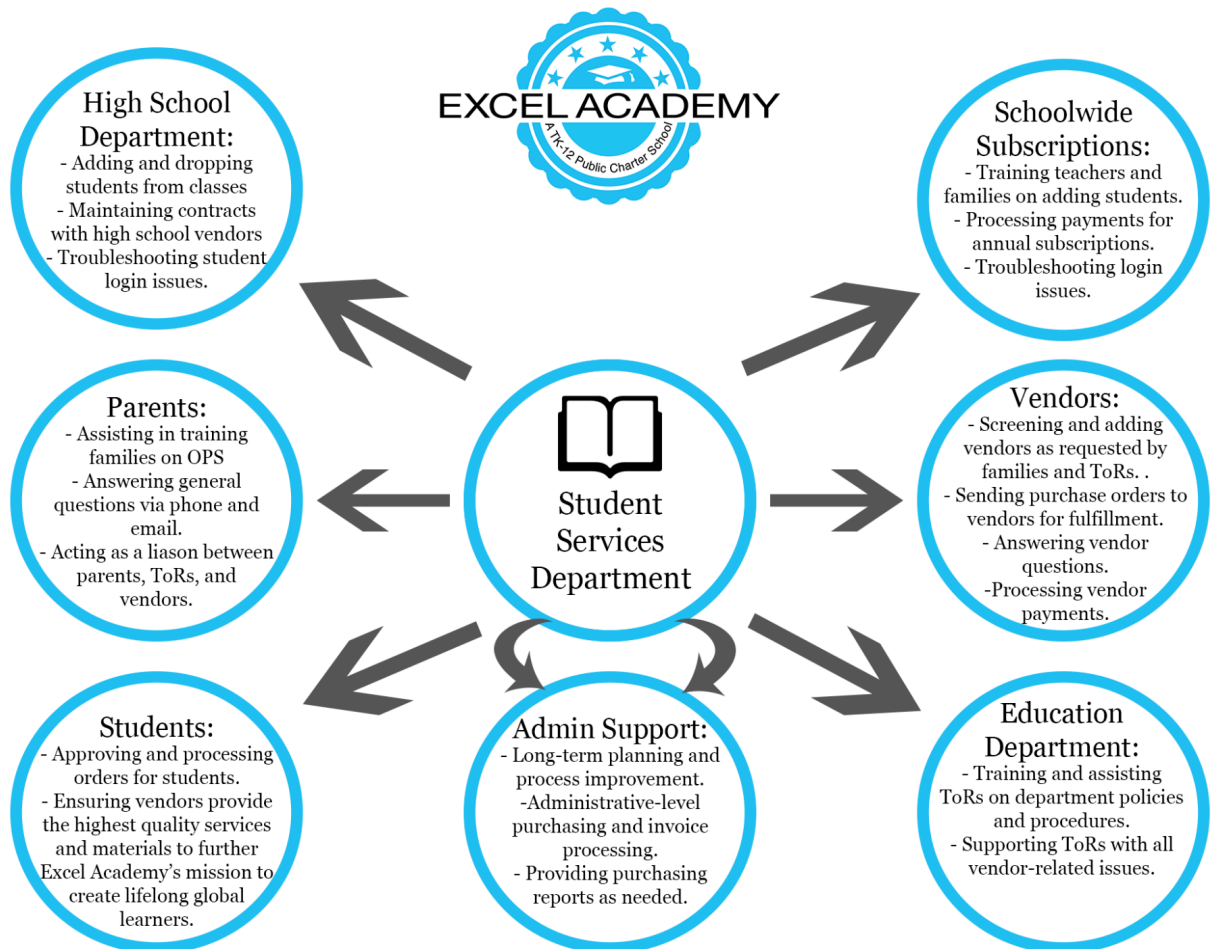
#### *Disallowed Educational Activities*

*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*
- *SkyDiving*
- *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



## 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. As of 2023/24, all new families have signed this document during the registration process. Returning families need to go back into their student's RegOnline account to re-sign, or you can send them the paper version. 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\*\***

The screenshot shows the OPS dashboard for a user named Tina. The top navigation bar includes links for SEARCHES, PURCHASING, DOCUMENTS, REPORTS, ONLINE HELP, CHANGE PASSWORD, and LOG OFF. The dashboard is divided into several sections:

- Searches Tab:** A callout box states, "You can use this tab to look up a student and their orders."
- Purchasing Tab:** A callout box states, "Use this tab to place orders."
- Pre-Pending Orders:** A callout box states, "Pre-Pending Orders: Orders placed by parents that need to be approved by ToRs". Below this, there are buttons for "View 0 Pre-Pending Orders", "View 0 Processed Orders", and "View 0 Received Partial Orders".
- Outstanding Orders:** A callout box states, "Outstanding Orders: Orders that were approved and processed by Student Services and are yet to be marked Received In Full by ToRs". Below this, there are buttons for "View 0 Processed Orders" and "View 0 Received Partial Orders".
- Alerts:** A section titled "Alerts" shows "You have 113 alerts" and a "View Alerts" button. A callout box states, "Alerts: Check Order Alerts here. Some may come from Student Business Services and VCI orders may have alerts from CCP. Please respond to alerts at a timely manner."
- Student Inventories:** A section titled "Student Inventories" shows a dropdown menu with "Al Hajj Omar, Assem - 70012722" selected and a "Select" button.
- Student Spending:** A bar chart showing spending over time, with a prominent purple bar reaching approximately 300,000.

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.**

The screenshot shows the 'PARENT PURCHASING' interface. At the top, there are navigation tabs: SEARCHES, PURCHASING, DOCUMENTS, REPORTS, ONLINE HELP, CHANGE PASSWORD, and LOG OFF. The main content area is titled 'Please use the form below to enter a purchase request into the system.' It includes a 'Select Student' dropdown menu (currently showing 'Student, John - 0 EUs') and a 'Date' field (showing 'Apr 24, 2023'). Below this is the 'Available Funds' section, which displays 'Student Totals' with 'Available: \$0.00', 'Pending: \$0.00', and 'Net Balance: \$0.00'. A red box notes that 'Available funds are total funds available' and that 'Totals do not include tax and shipping for the current request.' Another red box explains that 'Net Balance are funds remaining after Orders placed'. A third red box points to the 'Number of line items' field, stating 'Number of line items, 1 line per material, you can select quantity on next page.' The 'Requests' table has columns for 'Type of Request', 'Vendor', 'Number of Items', and 'Make Request Form'. Red annotations identify 'Materials Vendors' and 'Service vendors' on the left, and a red box labeled '\*\*DO NOT USE\*\*' points to the 'Select Vendor' dropdown for 'CC Requests'. Another red box points to the 'Request' button for 'Shopping Cart', noting 'Amazon Punchout Request will open a new web page, click on Request.' The 'Request Total (excluding tax and shipping)' is shown as '\$0.00'. A 'Proceed to Checkout' button is at the bottom.

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, LIFE PAC, 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 )

Category	Item	Description	Consumable	Qty	Cost	Total
Select Category ▼			Y ○ N ○	1	\$	\$
Select Category ▼			Y ○ N ○	1	\$	\$
Select Category ▼			Y ○ N ○	1	\$	\$
Select Category ▼			Y ○ N ○	1	\$	\$
Select Category ▼			Y ○ N ○	1	\$	\$
Select Category ▼			Y ○ N ○	1	\$	\$

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".

Select Category ▼			Y ○ N ○	1	\$	\$
Select Category ▼			Y ○ N ○	1	\$	\$
Select Category ▼			Y ○ N ○	1	\$	\$
Request Total (from request page) \$ 1.00		Add to Request Saves, but does not submit				

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.

1	Request
Request Total (excluding tax and shipping). \$1.00	

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."

VCI Catalog Requests	Select Vendor ▼
COLLEGE COURSE Requests	Select Vendor ▼
COMPUTER/ISP/SOFTWARE Requests	Select Vendor ▼
ACTIVITY Requests	Select Subject ▼
<input type="button" value="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."

<input type="button" value="Confirm Request"/> <input type="button" value="Delete Request"/>			
<b>EMR Requests - Rainbow Resource Center [P] - V_ship is Ship</b>			
Remove	Category	Item	Description
<input type="checkbox"/>	Math ▼	0000	TEST ITEM
<b>EMR Requests - Amazon - V_ship is Ship</b>			
Remove	Category	Item	Description
<input type="checkbox"/>	Language Arts ▼	0000	TEST ITEM
<input type="button" value="Update Order"/>			
<input type="button" value="Confirm Request"/> <input type="button" value="Delete 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: <a href="#">263210704</a>						
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: <a href="#">263210705</a>						
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](#)

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](#)

<b>Student</b>	Test Testson - Gr. emr	<b>Order Notes:</b>	<a href="#">Add internal note</a>   <a href="#">View/Add PO note</a>					
<b>Available EU's</b>	67.84							
<b>Vendor</b>	Rainbow Resource Center [P]							
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019							
<b>Order Type</b>	EMR							
<b>Order Status</b>	Pending <input type="button" value="Update Order"/> <input type="button" value="Return To List"/>							

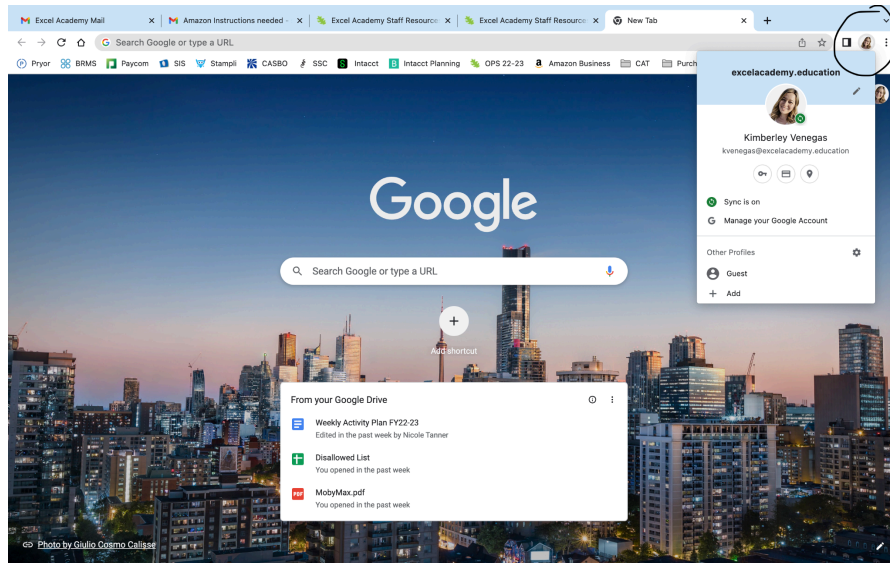
Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pending	0000	TEST ITEM	Math	<input checked="" type="checkbox"/>	1	1.00	1.00
								<b>Tax:</b> 0.08
								<b>Shipping:</b> 15.00
Tax and shipping may change when invoice matched.								<b>TOTAL:</b> 16.08

**Invoice Info:**

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.

*How to place an Amazon Punchout Order*

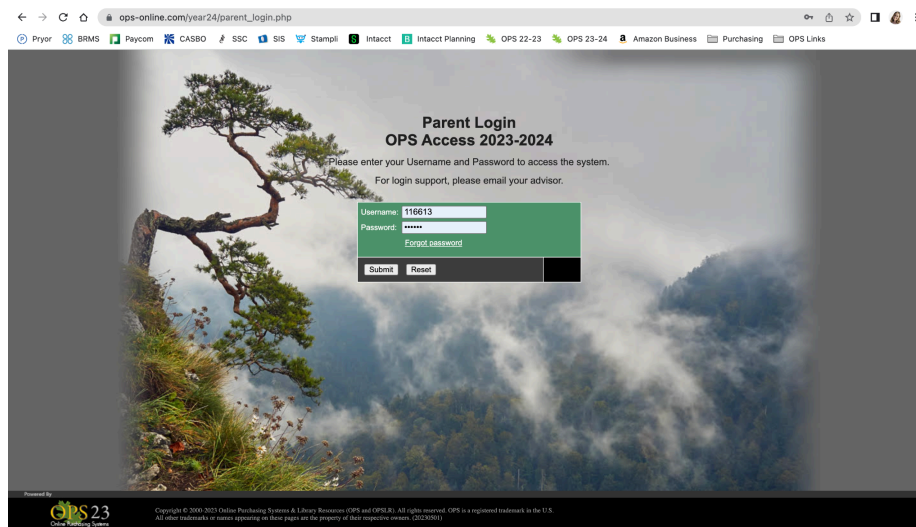
First, you need to make sure they have their school issued email ending in "[@excacsstudent.org](mailto:excacsstudent.org)" with the corresponding password. If they need to reset the password because you do not have it, please contact Lauren Hansen or Alex Han (IT) to have it reset. Once you have their email login credentials and OPS login information, please have them download Google Chrome and sign in to their Google Account in their web browser like it shows on this screenshot using their school email.



Next, copy and paste this OPS Parent Link to that web browser link after they sign in to their school Google account/email:

[https://www.ops-online.com/year24/parent\\_login.php](https://www.ops-online.com/year24/parent_login.php)

Then have them sign in to OPS.



Once Signed in to OPS -> Go to the Purchasing Tab , select the student and click the Amazon Icon, Request Button it will prompt you to a new page and follow these instructions.  
[Amazon Punchout Instructions Link](#)

## Rainbow Resource Punchout

1. Login to [OPS](#) portal.

<https://www.ops-online.com/year24/excel/>

Parent - [https://www.ops-online.com/year24/parent\\_login.php](https://www.ops-online.com/year24/parent_login.php)

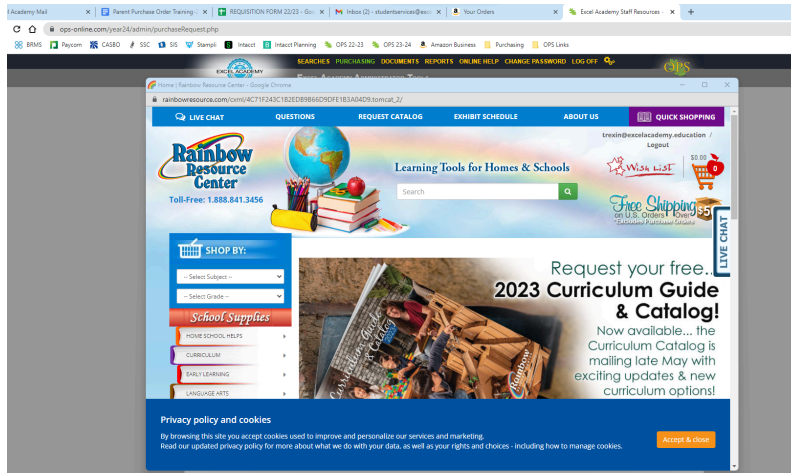
2. Click on the Purchasing Tab

The screenshot shows the 'Request Form' interface in the OPS system. At the top, there are navigation links: SEARCHES, PURCHASING, DOCUMENTS, REPORTS, ONLINE HELP, CHANGE PASSWORD, LOG OFF. Below that, it says 'EXCEL ACADEMY ADMINISTRATOR TOOLS' and 'ADMIN PURCHASING'. The main content area is titled 'Request Form' and includes a greeting: 'Hello, Tina Teacher'. There are fields for 'Select Student' and 'Date: Jun 6, 2023'. Below that, there are sections for 'Available Funds' and 'Requests'. The 'Requests' section is a table with the following data:

Type of Request	Vendor	Number of Items	Make Request Form
EMR Requests	LookUp Select Vendor	10	Request
VCI Requests	LookUp Select Vendor	1	Request
VCI Catalog Requests	LookUp Select Vendor	.	Request
CC	LookUp Select Vendor	2	Request
COMPUTER/SP/SOFTWARE Requests	LookUp Select Vendor	4	Request
Shopping Cart	Amazon	Amazon Punchout	Request
Shopping Cart	Rainbow Resource Center	NEW! Rainbow Resource Punchout	Request

At the bottom of the form, there is a 'Request Total (excluding tax and shipping), \$0.00' and a 'Proceed to Checkout' button. On the left side, there are two informational boxes: one for 'EMR Vendor Requests' and one for 'VCI Vendor Requests'.

3. Click "Request" next to the Rainbow Resource PunchOut Icon to access the RRC website



4. Add items to cart and proceed to check out. Once you are done shopping in Rainbow Resource, checkout and it should take you back to OPS and generate a Purchase Order. The TOR will then approve the order and move forward to Administration for approval.

### 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."

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

<b>Student</b>	<a href="#">Test Testson</a> - Gr. emr	
<b>Available EU's</b>	51.76	
<b>Vendor</b>	Rainbow Resource Center [P]	
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019	
<b>Order Type</b>	EMR	
<b>Order Status</b>	<div style="border: 1px solid black; padding: 2px;">         Processed ▼          Processed  <b>Received Full</b> <a href="#">Return To List</a>          Received Partial       </div>	
<b>Line#</b>	<b>Status</b>	<b>Item</b>
1	Processed ▼	0000
Tax and shipping may change whe		
<input type="button" value="Update Order"/> <input type="button" value="Return To List"/>		
<b>Invoice Info:</b>		

For damaged or missing items, *leave status as "Processed"* and place an internal note for our Business Services department and send an 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 was received. Place a note and alert the 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.

**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: 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 ▼	<input checked="" type="checkbox"/>	1	10.00	10.00
2	Pre-pending ▼	40938	Toy	Multi-Subject ▼	<input type="checkbox"/>	1	50.00	50.00
3	Pre-pending ▼	54921	Math Book	Science ▼	<input type="checkbox"/>	1	15.00	15.00
4	Pre-pending ▼	32981	J	Office/School Supp ▼	<input type="checkbox"/>	1	0.00	0.00

Tax: 5.81  
 Shipping: 15.00  
**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."

Pre-pending ▼

Update Order    Return To List

Status	Item	Description
Pre-pending ▼	34092	Art Book
Pre-pending ▼	40938	Toy
Pre-pending	54921	Math Book
Pending		
<b>Canceled by Teacher</b>	32981	J

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

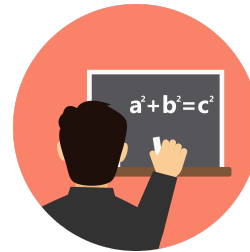
- These item descriptions are incomplete. All orders must have the full name of the product in order to be approved and processed. Full Description of items must be in the Description section.
- Line item 4 has an incomplete item description and price. Look up the item number on the Rainbow Resource 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.

<b>Select Student:</b>		<b>Date:</b>	
Testson, Test, test - 955.95 EUs ▼		Jul 3, 2019	
<b>Available Funds:</b>			
<b>Student Totals</b>			
Available:	\$955.95	<< Totals do not include tax and shipping for the current request.	
Pending:	\$144.05		
Net Balance:	\$955.95		
Tax and shipping may apply (unless vendor has been designated as "pickup" or 0% tax rate).			
<b>Requests:</b>			
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
<b>Request Total (excluding tax and shipping). \$0.00</b>			
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
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	September	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	October	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	November	100.00	100.00
<input type="checkbox"/>	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: (#fest) - 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:

### Please enter a valid address to send this document to:

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

### Email Subject:

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](https://www.ops-online.com/cgi-bin/year20/teacher/edmat_agreement.pl?request_id=8888test3210764)

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.

## Purchasing Online Courses

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.**

### Internal Notes

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.

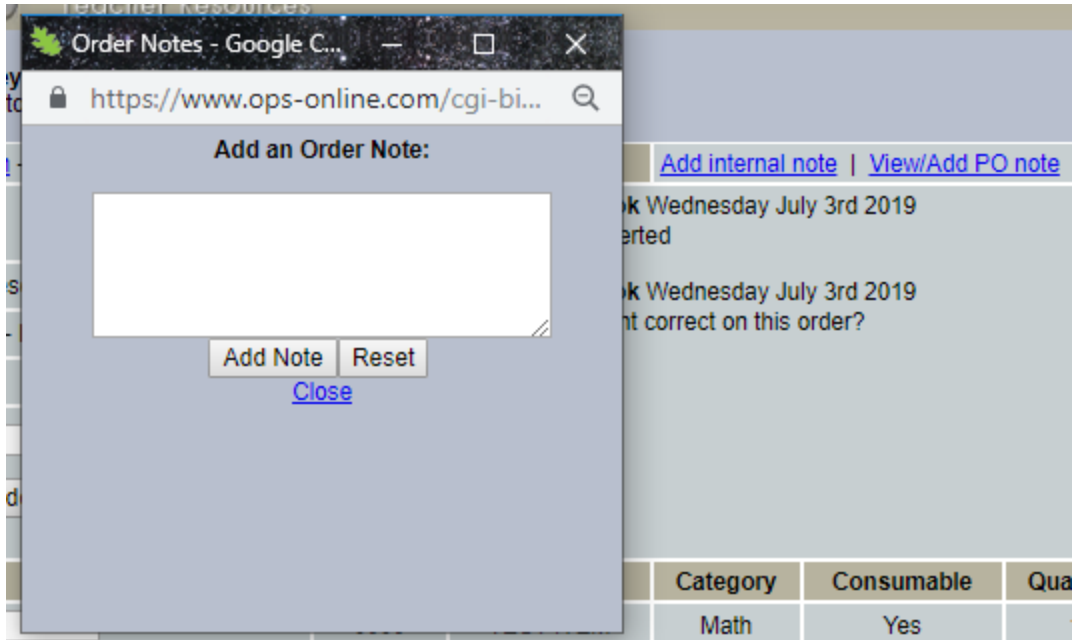
2. Then find the purchase order that needs the internal note and click on the Purchase Order number. You will be taken to the order summary page.

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

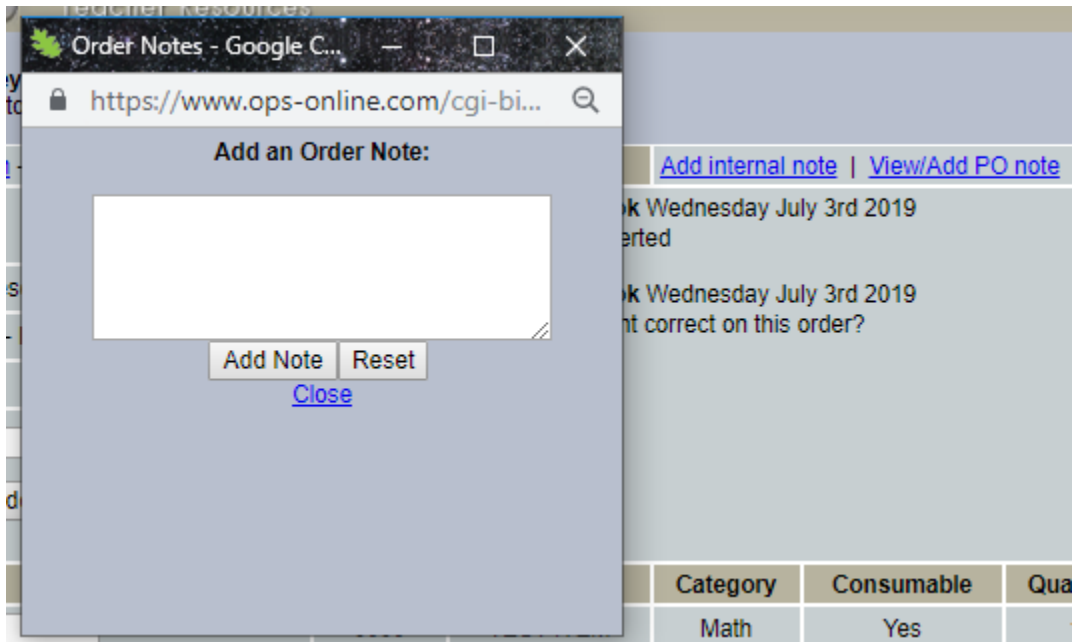
<b>Student</b>	Test Testson - Gr. emr	<b>Order Notes:</b>	<a href="#">Add internal note</a>   <a href="#">View/Add PO note</a>						
<b>Available EU's</b>	555.95	Charles McCook Wednesday July 3rd 2019 Teacher was alerted							
<b>Vendor</b>	Rainbow Resource Center [P]	Charles McCook Wednesday July 3rd 2019 Hi, is the amount correct on this order?							
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019								
<b>Order Type</b>	EMR								
<b>Order Status</b>	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	
<b>Tax:</b>								0.08	
<b>Shipping:</b>								15.00	
Tax and shipping may change when invoice matched.								<b>TOTAL:</b>	16.08
Update Order Return To List									
<b>Invoice Info:</b>									

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."



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



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](#)

<b>Student</b>	<a href="#">Test Testson</a> - Gr. emr	<b>Order Notes:</b>	<a href="#">Add internal note</a>   <a href="#">View/Add PO note</a>			
<b>Available EU's</b>	555.95	<b>Guy StokleyTeacher</b> Wednesday July 3rd 2019 Admin was alerted				
<b>Vendor</b>	Rainbow Resource Center [P]	<b>Guy StokleyTeacher</b> Wednesday July 3rd 2019 No. I will update.				
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019	<b>Charles McCook</b> Wednesday July 3rd 2019 Teacher was alerted				
<b>Order Type</b>	EMR	<b>Charles McCook</b> Wednesday July 3rd 2019 Hi, is the amount correct on this order?				
<b>Order Status</b>	<input type="text" value="Processed"/> <input type="button" value="Update Order"/> <input type="button" value="Return To List"/>					
Line#	Status	Item	Description	Category	Consumable	Quantity
1	<input type="text" value="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 ...	<input type="text" value="Choose Status"/> <input type="button" value="Search"/>
Status:	<input type="text" value="Choose Type"/>
Type:	<input type="text" value="Select Vendor"/>
Vendor:	
Select Student:	<input type="text" value="Select Student"/> <input type="button" value="Select"/>
P.O. Number:	<input type="text" value="Select Student"/> <input type="text" value="Testson, Test - test"/> <input type="button" value="Search"/>
View Teacher Inventory:	<input type="button" value="View Teacher Inventory"/>
View Student Inventory:	<input type="button" value="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
<a href="#">8888test3200186</a>	<a href="#">263200186</a>	Canceled	EMR	05-01-2019	<a href="#">Test Testson</a>		0.00	0.00	0.00	0.00	0.00	05-01-2019
<a href="#">8888test3200187</a>	<a href="#">263200187</a>	Canceled	VCI (Sept)	05-01-2019	<a href="#">Test Testson</a>		0.00	0.00	0.00	0.00	0.00	05-01-2019
<a href="#">8888test3200187</a>	<a href="#">263200188</a>	Canceled	VCI (Oct)	05-01-2019	<a href="#">Test Testson</a>		0.00	0.00	0.00	0.00	0.00	05-01-2019
<a href="#">8888test3200187</a>	<a href="#">263200189</a>	Canceled	VCI (Nov)	05-01-2019	<a href="#">Test Testson</a>		0.00	0.00	0.00	0.00	0.00	05-01-2019
<a href="#">8888test3200264</a>	<a href="#">263200264</a>	Canceled	VCI (Sept)	05-03-2019	<a href="#">Test Testson</a>		0.00	0.00	0.00	0.00	0.00	05-03-2019
<a href="#">8888test3210704</a>	<a href="#">263210704</a>	processed	EMR	07-02-2019	<a href="#">Test Testson</a>	<a href="#">Rainbow Resource Center [P]</a>	1.00	0.08	0.00	15.00	16.08	07-03-2019
<a href="#">8888test3210704</a>	<a href="#">263210705</a>	Pending	EMR	07-02-2019	<a href="#">Test Testson</a>	<a href="#">Amazon</a>	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.

**Orders**

Combination Search ...

Status: Choose Status ▼ Search

Type: Choose Type ▼

Vendor: Select Vendor

---

Select Student: Select Student ▼ Select

---

P.O. Number:  Search

---

View Teacher Inventory: View Teacher Inventory

---

View Student Inventory: View All Student Roster Inventory

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 <input type="text"/>	To Student <input type="text"/>	Amount: \$ <input type="text"/>	Request Budget Transfer
Funding Drop Request:	For Student <input type="text"/>	Amount: \$ <input type="text"/>	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:

The Business Services 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

### *Instructional Funds Amounts*

Personalized Path

TK-8th \$3,400

High School \$3,900



The IFs are disbursed in multiple allotments:

TK - 8th \$1,700 in August, \$1,700 in November

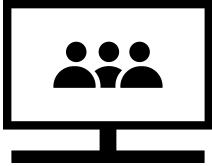
High School \$1,950 in August and \$1,950 in November

Virtual Path

1st - 8th \$2100

The IF's will be disbursed in multiple allotments:

1st - 8th \$1050 in August, \$1050 in November





### 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. This needs to be explained to the parent at the initial meeting. Please collect materials at the time of withdrawal.

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."

Orders	
Combination Search ...	Choose Status ▾ Search
Status:	Choose Type ▾
Type:	Select Vendor
Vendor:	
Select Student:	Select Student ▾ Select
P.O. Number:	<input type="text"/> Search
View Teacher Inventory:	View Teacher Inventory
View Student Inventory:	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 the 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.

**ORDER SUMMARY**  
Ordered under, **Guy Stokley**Teacher  
Please use the form below to change an order's status.  
[alert admin](#) | [turn off alert](#)

<b>Student</b>	<a href="#">Test Testson</a> - Gr. emr	<b>Order Notes:</b>	
<b>Available EU's</b>	555.95		
<b>Vendor</b>	Rainbow Resource Center [P]		
<b>PO Number</b>	263210760 - Date Requested: 07-03-2019		
<b>Order Type</b>	EMR		
<b>Order Status</b>	<div style="border: 1px solid black; padding: 2px;"><span>Pre-pending ▼</span> Pre-pending Pending <b>Canceled</b></div> <input type="button" value="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 12th, 2024 is the deadline for the parents to get PO requests submitted for review. ToRs will submit all approved orders requests no later than April 26th, 2024. 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, the parent will no longer have access to 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: Students 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](#).*

# Virtual Path

## Grade Level Classrooms:

*First Grade: Kristen Stawniczy*

*Second Grade: Kaylee Khaki*

*Third Grade: Heather Craven*

*Fourth Grade: Lori Levine*

*Fifth Grade A: Tamara Rexin*

*Fifth Grade B: Tiffany Young*

*Sixth Grade: Shondra Rogers*

*7th Grade: James Owens (Teaches Math/Science for Junior High)*

*8th Grade: Joanie Stubbs (Teaches History/English for Junior High)*

*7th Grade Essentials: Kelsey Lima (Teaches History/English Essentials for JH)*

*8th Grade Essentials: Frank Filipponio (Teaches Math/Science Essentials for JH)*

Link to [Virtual Teacher Contacts/Google Classrooms](#)

# VP Weekly Learning Schedule

## 1st & 2nd Grade Schedule

Monday 8:15-10 AM	Tuesday 8:15-11:45 AM	Wednesday 8:15-11:45 AM	Thursday 8:15-11:45 AM	Friday 8:15-10 AM
8:15-10:00 Math & ELA	8:15-9:00 ELA Whole group	8:15-9:00 ELA Whole group	8:15-9:00 ELA Whole group	8:15-10:00 Math & ELA
	9:00-9:15 ELA Group A	9:00-9:15 ELA Group A	9:00-9:15 ELA Group A	
	9:15-9:30 ELA Group B	9:15-9:30 ELA Group B	9:15-9:30 ELA Group B	
	9:30-9:45 Spelling/ Handwriting	9:30-9:45 Spelling/ Handwriting	9:30-9:45 Spelling/ Handwriting	
	9:45-10:00 BREAK	9:45-10:00 BREAK	9:45-10:00 BREAK	
	10:00-10:45 Math	10:00-10:45 Math	10:00-10:45 Math	
	10:45-11:00 BREAK	10:45-11:00 BREAK	10:45-11:00 BREAK	
	11:00-11:45 Science/Social Studies	11:00-11:45 Science/Social Studies	11:00-11:45 Science/Social Studies	
	Independent Study	Independent Study	Independent Study	

\*\*\*Please note: While the main class schedule ends at 11:45 pm, students will be required to complete independent work outside of class hours and may have intervention requirements that fall outside of the bell schedule listed above.

### 3rd-5th Grade Schedule

<i>Monday 8:15-10 AM</i>	<i>Tuesday 8:15-11:45 AM</i>	<i>Wednesday 8:15-11:45 AM</i>	<i>Thursday 8:15-11:45 AM</i>	<i>Friday 8:15-10 AM</i>
<i>8:15-10:00 Math &amp; Reading</i>	<i>8:15 - 9:30 ELA</i>	<i>8:15 - 9:30 ELA</i>	<i>8:15 - 9:30 ELA</i>	<i>8:15-10:00 Math &amp; Reading</i>
	<i>9:30 - 9:45 BREAK</i>	<i>9:30 - 9:45 BREAK</i>	<i>9:30 - 9:45 BREAK</i>	
	<i>9:45-10:30 Math</i>	<i>9:45-10:30 Math</i>	<i>9:45-10:30 Math</i>	
	<i>10:30 - 10:45 BREAK</i>	<i>10:30 - 10:45 BREAK</i>	<i>10:30 - 10:45 BREAK</i>	
	<i>10:45-11:15 Science</i>	<i>10:45-11:15 Science</i>	<i>10:45-11:15 Science</i>	
	<i>11:15- 11:45 Social Studies</i>	<i>11:15- 11:45 Social Studies</i>	<i>11:15- 11:45 Social Studies</i>	
	<i>Independent Study</i>	<i>Independent Study</i>	<i>Independent Study</i>	

*\*\*\*Please note: While the main class schedule ends at 11:45 pm, students will be required to complete independent work outside of class hours and may have intervention requirements that fall outside of the bell schedule listed above.*

## 7th and 8th Grade Schedule

M/F: 8:00 AM-10:00 AM (Early Out)

Monday 8-10 AM	Tuesday 8AM-12PM	Wednesday 8AM-12PM	Thursday 8AM-12PM	Friday 8-10 AM
8:00-9:00  English 7 & 8	8:00-9:00  Science 7 <hr/> English 8	8:00-9:00  Science 7 <hr/> English 8	8:00-9:00  Science 7 <hr/> English 8	8:00-9:00  Math 7 & 8
9:00-10:00  Math 7 & 8	9:00-10:00  Math 8 <hr/> Social Studies 7	9:00-10:00  Math 8 <hr/> Social Studies 7	9:00-10:00  Math 8 <hr/> Social Studies 7	9:00-10:00  Study Hall (Required)
Independent Study	10:00-11:00  English 7 <hr/> Science 8	10:00-11:00  English 7 <hr/> Science 8	10:00-11:00  English 7 <hr/> Science 8	Independent Study
	11:00-12:00  Math 7 <hr/> Social Studies 8	11:00-12:00  Math 7 <hr/> Social Studies 8	11:00-12:00  Math 7 <hr/> Social Studies 8	
	12:00-1:00 Lunch & Clubs (Optional)	12:00-1:00 Lunch & Clubs (Optional)	12:00-1:00 Lunch & Clubs (Optional)	
	Independent Study/Electives	Independent Study/Electives	Independent Study/Electives	

T/W/Th 8:00 AM-12:00 PM

(\*Optional Clubs and Electives in the afternoon)



*\*\*\*Please note: While the main class schedule ends at 12:00 pm, students will be required to complete independent work outside of class hours and may have intervention requirements that fall outside of the bell schedule listed above.*



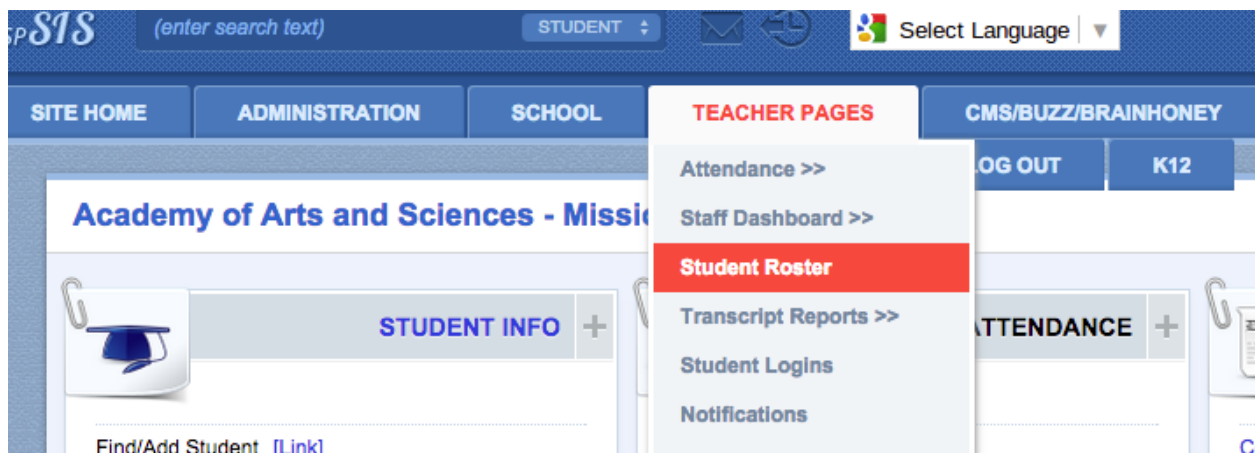
## How to Access Student Roster in SIS

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 ToR needs to forward this email to [admissions@excelacademy.education](mailto:admissions@excelacademy.education). The student will NOT be able to start school until the day they turn in their withdrawal email verification to our admissions clerk and are not fully enrolled in our school. A finalized master agreement is what finalizes their enrollment. ToRs should communicate this to a new family. Additionally, most secondary students need an unofficial transcript before MAs can be created ([please see below](#)).

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 08/28/2023)

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.

Attendance Forms													
Form #9f - LP 1, Track C													
Printed													
6 Student(s)													
<a href="#">[View]</a> <a href="#">[Edit]</a>													
#	Mig?	St #	LocalID	Name	Grd	Track	Street	City	Zip	Phone	Birthdate	Counselor Oversight	
<input type="checkbox"/>	<input type="checkbox"/>	1609505741	10142	Anderson, Yohan	2	C	26 San Nicholas	Rancho Santa Margarita	92688	(949) 636-0281	07/06/2009	Grad Data	Send E-mail
<input type="checkbox"/>	<input type="checkbox"/>	2575118788	10366	Crawford, Ezekiel	7	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	03/31/2004	Grad Data	Send E-mail
<input type="checkbox"/>	<input type="checkbox"/>	8638905058	10545	Crawford, Stephen	11	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	09/14/1999	Grad Data	Send E-mail
<input type="checkbox"/>	<input type="checkbox"/>	2631450925	10524	Hsu, Kaitlyn	10	C	15642 Sand Canyon Ave. #50506	Irvine	92619		08/02/2002	Grad Data	Send E-mail
<input type="checkbox"/>	<input type="checkbox"/>	7988545866	10226	Hsu, Micah	5	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	02/24/2007	Grad Data	Send E-mail
<input type="checkbox"/>	<input type="checkbox"/>	9904208613	10368	Hsu, Nathan	7	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	11/23/2004	Grad Data	Send E-mail
<input type="checkbox"/>	<input type="checkbox"/>	-	11635	Roberts, Raquel			73 Cottage Ln	Aliso Viejo	92656	(949) 374-0771	02/02/2002	Grad Data	Send E-mail
<input type="checkbox"/>	<input type="checkbox"/>		11442	Student, John	10	C	123 First Street	Vista	92081		01/01/2000	Grad Data	Send E-mail
<input type="checkbox"/> Check All													
<a href="#">Email Selected Students</a>							<a href="#">Labels for Selected Students</a>						

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. Parents 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.

All incoming secondary students must submit their academic records including an unofficial transcript and report card in order to process the Course of Student and create the MA. The only exception is for foster, homeless (McKinney Vento) youth - these students must be enrolled immediately. ToRs should remind families to submit these. They may email the ToR or send to the Registrar - registrar@excelacademy.education.

**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. [All new-to-Excel Secondary students MUST meet with their counselor to have their MA written.](#)

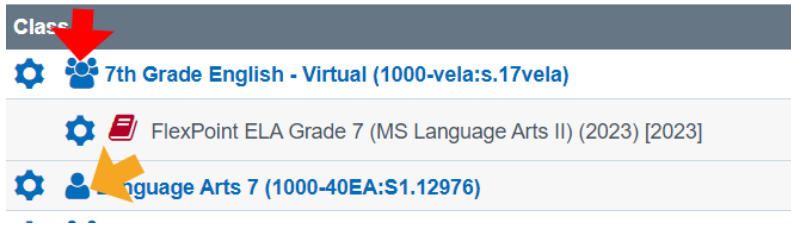
**GREEN-** You did it! You have successfully enrolled your student with Excel Academy.

## 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 for returning 7th-12th graders and for honors Junior High classes. TK - 8th grade students, including Virtual Path, 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, except for the Virtual Path, should have five classes for their grade level: math, language arts, science, social studies and PE.



Virtual Path students will show classes, but they will be CMS classes (multiple heads next to the class title in the PLS roster-see red arrow in screenshot below vs PLS class marked by yellow arrow). Virtual Path students in 1st-6th grade will have only one class added-the grade level classroom title. (Example: "Virtual First Grade Classroom") 7th and 8th grade Virtual Path students will have English, Math, Science, Social Studies & PE classes visible for each student.

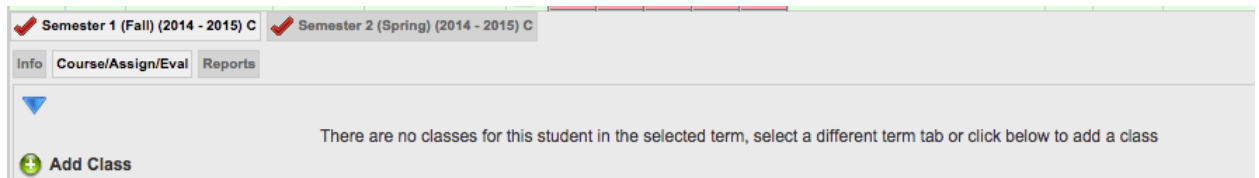


If you need to add an advanced curriculum for 5th or 6th graders, please use the instructions below. If you need to add a HS course for an [advanced 7th or 8th grader](#), please use the instructions in the linked bookmark. Upon approval, junior high students may enroll in a high school math and/or world language course.

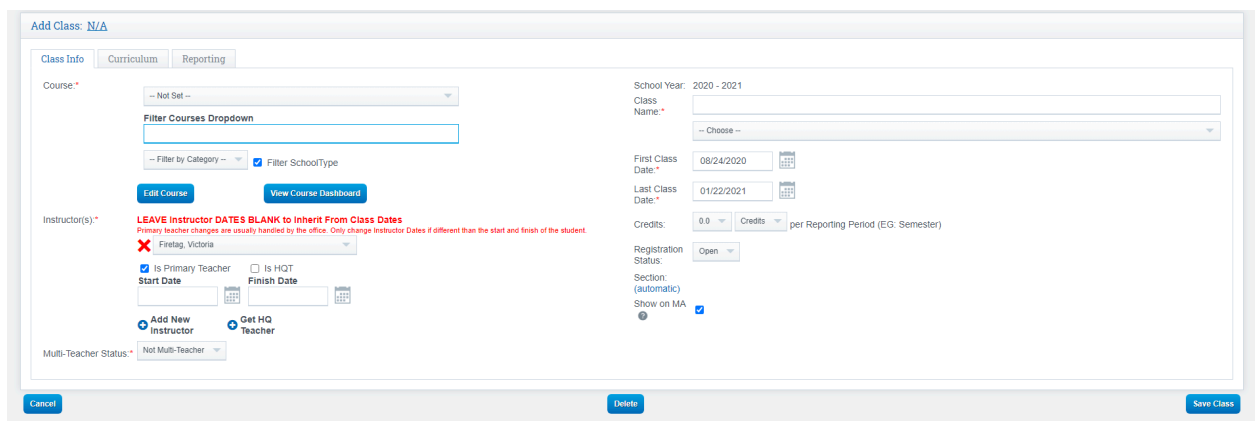
High school courses for both semesters need to be added at the beginning of the year to create the Master Agreement. Consult the [High School Course Catalog](#) for course descriptions, codes, for prerequisites. Please watch this video for [Adding Classes to SIS](#) before creating a master agreement.

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 Create a Master Agreement*

*The Master Agreement (MA) is a student-parent-teacher contract outlining the conditions and responsibilities of all parties for our independent study at Excel Academy. When a student opts into independent study, Ed Code requires that there is an agreement as to how it will be completed. This document fully enrolls a student.*

*The MA lists all of the courses that a student is attempting during the school year. For the Personalized Path, TK-6th grades students will have courses loaded automatically by the back office. ToRs will add classes for 7th through 12th grade students. In the Virtual Path, all classes will be added by the back office. 1st-6th grade Virtual Path students will show only one CMS class on the Master Agreement (Example: "Virtual First Grade Classroom") 7th and 8th grade Virtual Path students will have five CMS classes added to the MA (Example: "English 7 Essentials")*

*If a TK-8th grade student is missing their preloaded courses, please add their names and the needed information onto the [TK-12 Missing Students Classes/Curriculum doc](#). Important: An MA cannot be completed for a student if the student is missing classes!*

*Dates and signatures on a master agreement are very important:*

- *The student's signature date marks the first day of attendance for that student.*
- *Dates should NEVER be altered on a master agreement.*
- *The parent and student must sign/type first and last names in the designated areas. Last names must be included for parents and students older than 1st grade. You must send it for a new signature if it is not signed correctly.*
- *Any parent or guardian who will sign attendance must be listed as a signatory on the MA.*

*Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum.*

#### *Resources*

[\*How to Create a Master Agreement- video\*](#)

[\*Step-by-Step directions for TK-8 paper\*](#)

[\*Step-by-Step directions for HS- paper\*](#)

Signed MA's bridge with the ordering system overnight.


## How to Add Curriculum Content to a Course in SIS

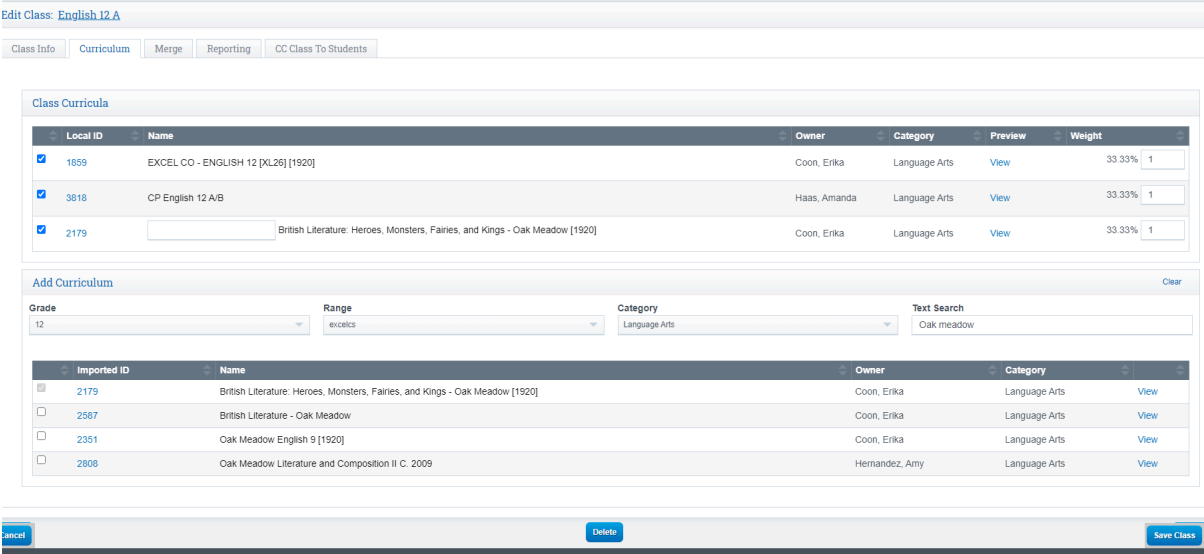
Curriculum content must be added to all classes. Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes, or the state standards. Curriculum content can be added at any point and is not needed prior to sending the MA. Some TK-8 curriculum content will be pre-populated when classes are added. Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum.

Virtual Path-The AWRs for your classroom are completed prior to the school year beginning based on the class pacing in Buzz. The assignments should exactly match the assigned work in Buzz. Any AWR completed for a student in a CMS class is automatically copied to all students enrolled in the class.

Please watch these helpful videos and read the directions below:

- [Introduction to Curriculum Content](#)
- [Adding Curriculum Content to Courses in SIS](#)

- To add/edit curriculum content from the dashboard, choose the green  icon next to the student's course.
- 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	
<input checked="" type="checkbox"/>	1869	EXCEL CO - ENGLISH 12 [XL26] [1920]	Coon, Erika	Language Arts	View	33.33% 1
<input checked="" type="checkbox"/>	3818	CP English 12 A/B	Haas, Amanda	Language Arts	View	33.33% 1
<input checked="" type="checkbox"/>	2179	British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	View	33.33% 1

### Add Curriculum

Grade: 12 | Range: exotics | Category: Language Arts | Text Search: Oak meadow

Imported ID	Name	Owner	Category	Preview	
<input checked="" type="checkbox"/>	2179	British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	View
<input type="checkbox"/>	2587	British Literature - Oak Meadow	Coon, Erika	Language Arts	View
<input type="checkbox"/>	2351	Oak Meadow English 9 [1920]	Coon, Erika	Language Arts	View
<input type="checkbox"/>	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 Create an Addendum

Addendums are created for a variety of clerical purposes that are a change to the original MA:

- A transfer of a student to a new ToR
- An update to the student's classes (adding or changing a class)
  - Addendums are not needed when a student drops a class.
- Adding an additional parent or guardian signatory
- Changing the student's grade level

Addendums are dated the date of change. This is very important that the date is correct because it affects attendance, samples, and all ancillary documents in SIS.

Addendums are only created after the first day of instruction. If an adjustment is needed prior to the first day of instruction a new MA is created. The teacher, parent, and student will all sign the addendum. Teachers will need to add the parent email to one of the "other" spaces, as there is no designated space for the parent to sign on the MA Addendum.

Please see the [High School 10-Day Add/Drop Deadline](#) for changing and adjusting curriculum before creating an addendum for high school students. Remember to include a parent and the student for signature.

Resources:

[How to create and save an addendum](#)

### 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.

Learning Period	Attendance	Work Summary	AWR	Learning Logs
[1] 08/26/2021 - 09/17/2021				
[2] 09/20/2021 - 10/15/2021				
[3] 10/18/2021 - 11/12/2021				
[4] 11/15/2021 - 12/10/2021				
[5] 12/13/2021 - 01/14/2022				

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).

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1						
LP: 2						
LP: 3						
LP: 4						
LP: 5						

Learning Period	Attendance	Work Summary	AWR	Learning Logs
[1] 08/26/2021 - 09/17/2021				
[2] 09/20/2021 - 10/15/2021				
[3] 10/18/2021 - 11/12/2021				
[4] 11/15/2021 - 12/10/2021				
[5] 12/13/2021 - 01/14/2022				

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

The screenshot shows a web-based form with the following fields and options:

- Schoolyear:** 2021 - 2022
- Log Type:** Grid Log - Check
- Report Title:** Student Learning Log
- Select Learning Periods:** Track: B LP 5 (15 days: 12/13/2021 - 0...
- Print Signature Lines:**
  - Parent
  - Student
  - Teacher
- Other Options:**
  - Hide Printed Calendar
  - Print in Landscape
- Buttons:** Print Logs, Archive Logs

- 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 Use the Engagement Calendar (Virtual Path)*

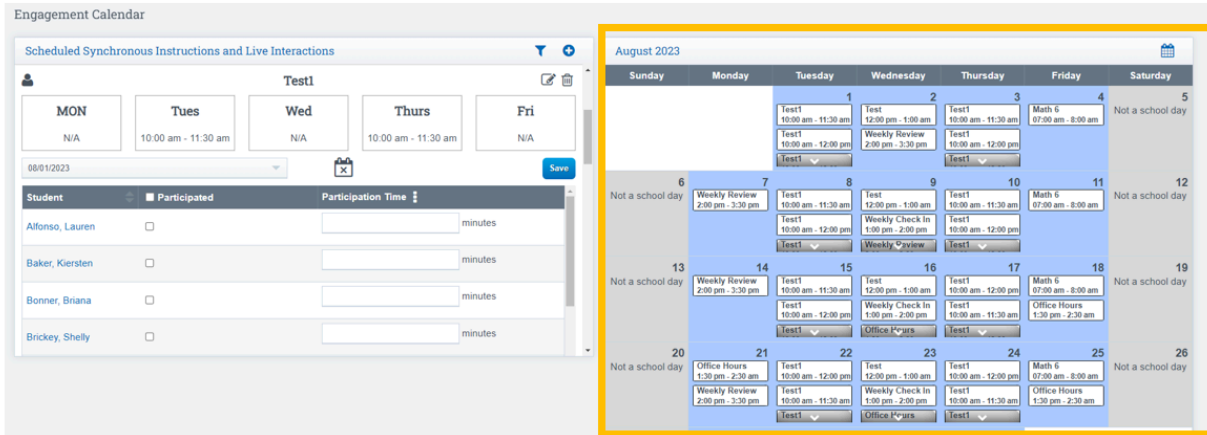
*For teachers in the Virtual Pathway, daily attendance is tracked using the Engagement Calendar.*

*Taking attendance in the Engagement Calendar will mark students as attended on the Engagement Log.*

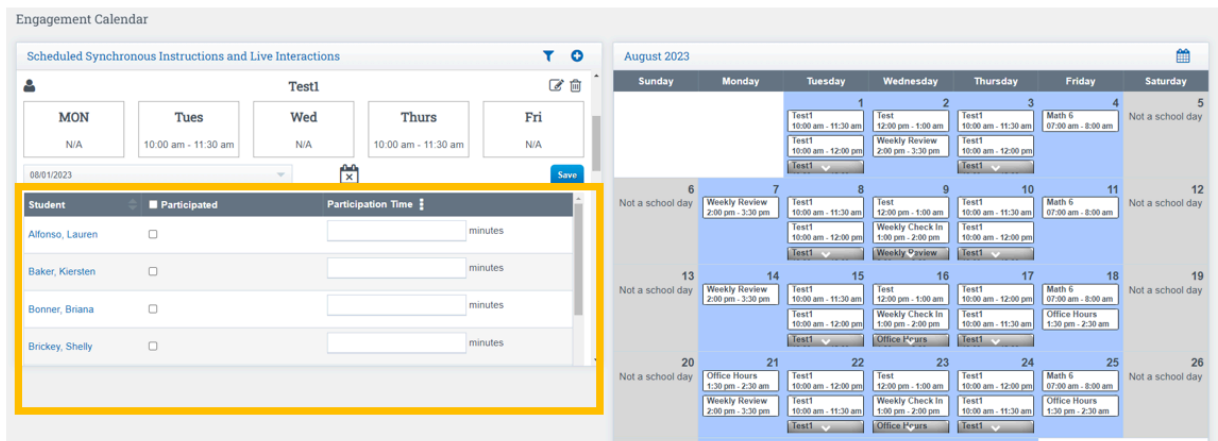
*Navigation:*

*Teachers > Engagement > Engagement Calendar*

*On the right side of your screen locate the class you want to take attendance for and click on the class name in the calendar.*



1. Left side of screen, all students enrolled in the class will appear on the screen,
2. Place a checkmark in the box next to the name of each student who attended.
3. Click "Save"



*CMS Classes that have been used to create Synchronous Instructions can now use attendance tracking from the CMS class to count as participation for the linked Synchronous Instruction.*

*To access the Engagement log return back to your Roster.*

- *Click "PLS/Student Roster"*



Admin Reports Sites Teachers Portal Help

Sync Manage Curricula CMS - Classroom Management LMS - Learning Management

- Chronic Absenteeism
- PLS/Student Roster
- Course Catalog
- School Activities
- Class Schedules
- CMS - Classroom Management
  - Compliance
  - Contact Manager
  - Logins
  - Notifications
  - PLS/RW Oversight
  - Staff Dashboard
  - Testing
  - Transcript Reports

October 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1						Not a school day
2	History 3:00 am - 4:00 am Test 4:00 am - 4:30 am Math Tutor MW	Ashley's Synchronous Instruction 8:00 am - 8:00 am Math Head Start	Math Tutor MW 8:00 am - 8:30 am Afternoon Checkin	Ashley's Synchronous Instruction 8:00 am - 8:00 am Math Head Start	Afternoon Checkin 8:00 am - 8:30 am Ashley's Synchronous Instruction	Not a school day
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						

Milzone Academy (learn) [Log Out] 10/13/2022 11:06:46 AM

Click "Mass Print Reports"



Admin Reports Sites Teachers Portal Help

Student Roster

School Year: 2021 - 2022 Track: (Any) Reporting Period: Search By Date Range

Date Range: 10/13/2022 thru 10/13/2022 Teacher of Record: Porter, Ashley 18 Primary Staff: (Any)

Staff Position: (Primary) Course: (Homeroom)

Print / Export: Search Upload Work Samples PLS Billing Report

Ashley Porter has 18 currently enrolled students (and 16 total students, including pre-reg and disenrolled), of 0 desired.

Summary **Mass Print Reports**

Showing 18 students

#	Name	Local ID	Grade	AL	Student Activity	Alt	Special Needs	Parent	Track	Street	City	Zip	Phone	Cell	Birthdate	Email
1	Abercrombie, Teresa	78924	UU		10/07 10/10 10/11 10/12 10/13				A	181 Commercial St.	Portola	96122			02/15/2010	
2	Anderson, Christan	78682	UU						A	1900 West Pintail Way	Portola	96122	(805) 555-1234		10/21/2010	

Milzone Academy (learn) [Log Out] 10/13/2022 11:23:44 AM

Click "Engagement Logs"

Learning Period	Attendance	Work Summary	AWR	Activity Logs	Learning Logs	Engagement Logs	Progress By LP	Work Samples
[1] 07/01/2022 - 07/26/2022	<input checked="" type="checkbox"/>							
[2] 08/01/2022 - 08/26/2022	<input checked="" type="checkbox"/>							
[3] 08/29/2022 - 09/23/2022	<input checked="" type="checkbox"/>							
[4] 09/26/2022 - 10/28/2022	<input checked="" type="checkbox"/>							
[5] 10/31/2022 - 12/02/2022	<input checked="" type="checkbox"/>							
[6] 12/05/2022 - 01/13/2023	<input checked="" type="checkbox"/>							

In the filter section, click the LP you wish to view.

Milestone Academy

Admin Reports Sites Teachers Portal Help

Engagement Logs

Filter Options

Staff: Porter, Ashley

School Year: 2022 - 2023

Generate Report

Opportunity Requirements: TK - 3, 4 - 8, 9 - 12

Student Interactions: Week of 10/30/2022 - 11/05/2022

Name	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Abercrombie, Teresa	No corresponding LP Not a school day	10/31/2022 LP 5 (10/31/2022 - 12/02/2022) <input checked="" type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	11/01/2022 LP 5 (10/31/2022 - 12/02/2022) <input checked="" type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	11/02/2022 LP 5 (10/31/2022 - 12/02/2022) <input checked="" type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	11/03/2022 LP 5 (10/31/2022 - 12/02/2022) <input checked="" type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	11/04/2022 LP 5 (10/31/2022 - 12/02/2022) <input checked="" type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	11/05/2022 LP 5 (10/31/2022 - 12/02/2022) Not a school day

You will see Blue Check Marks next to the students for whom you took attendance for on the screen.

Name	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	
Atkins, Jordan	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day
Brown, Michael	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input checked="" type="checkbox"/> Live Interaction <input checked="" type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day
Disney, Mini	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input checked="" type="checkbox"/> Live Interaction <input checked="" type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day
French, Jessica	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input checked="" type="checkbox"/> Live Interaction <input checked="" type="checkbox"/> Synchronous Instruction	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day


## 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 met each student, reviewed the student's body of work, and collected samples for the respective learning period.

First, make sure that all Attendance Grid Logs (not applicable to VP ToRs) 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.

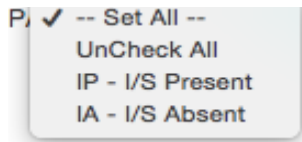
Second, once all of your attendance grid logs are returned, take attendance for your whole roster. Your signature should fall on a work day, not a weekend or holiday. (A parent signature on a weekend or holiday is fine.)

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)

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1	<input checked="" type="checkbox"/>					
LP: 2	<input checked="" type="checkbox"/>					
LP: 3	<input checked="" type="checkbox"/>					
LP: 4	<input checked="" type="checkbox"/>					
LP: 5	<input checked="" type="checkbox"/>					

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 attendance. These are [helpful slides](#) and a helpful [video](#) on this procedure .

### How to Complete AWRs

AWR= “Assignment and Work Record”

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.

AWRS must be completed before the beginning of each LP. This pre-loading of objectives and assignments creates a pacing guide for the class, and can be printed/shared with families in the Personalized Path in order to help hold the home educator accountable for progress. After

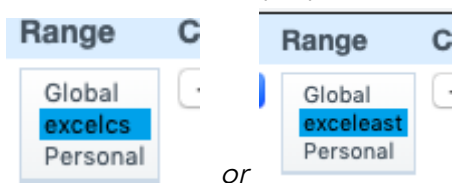
each learning period, the AWRs should be reviewed and/or adjusted to reflect the actual work completed for that subject.

#### *AWRs Fundamentals:*

- *Choose objectives/standards that were attempted and the assignments that correlate* Each module must have objectives and assignments
- *Reflect the number of days in the LP*
- *Utilize most up-to-date curriculum in SIS*
- *Add any applicable curricular that is part of the core curriculum*

*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).*



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.*
5. *For any new curricular requests, there will be a review process, a submission window and deadlines. Please contact your education coordinator for the appropriate deadline.*

*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.)

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

**\*\*Virtual Path Teachers will input AWR content for one student and it automatically copies it to the remainder of the students enrolled in the class.**

After each LP

1. Review the AWRs for accuracy against the completed learning for the subject. 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 uploaded sample for the LP. It is helpful to think of the sample as a picture and the objective & assignment as its caption. The auditor and CoCowill 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:*

*This should not be a common practice used to create AWRs. Custom comments should only be used to refine the AWRs when clarity might be needed for the auditor. They should be written so that they connect and flow within the curriculum that is being used. They should not 'stick-out' in an obvious way.*

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."*

*Students who did not complete any assignments for the LP should have it noted in the AWR for that subject.*

*Your AWRs will represent the learning the student SHOULD have been completed for the LP. But, 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."*

*Follow the instructions below:*

1. *Click on the little square at the bottom of the assigned AWRs.*

Due	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25
Assigned	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30	09/30
Module	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Category																				
Assignment Weight	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Order	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
Averages																				

2. A box will open and you will type the comment in the box. This will be repeated for any other subjects, as necessary.

## 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" or, for the Virtual Path, into the CMS classroom title. 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 

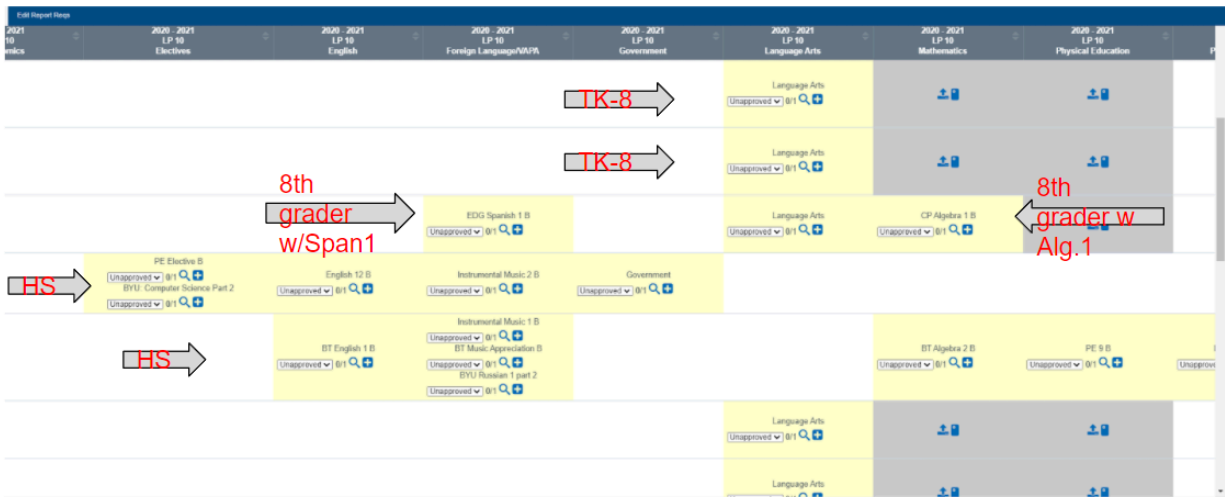
b. Option #2: Direct upload from your phone via text message: This works for

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.



The screenshot displays a grid of class samples in the Archive Compliance system. The columns represent different subject areas: Electives, English, Foreign Language/NATL, Government, Language Arts, Mathematics, and Physical Education. The rows represent individual class samples, each with a status of 'Unapproved' and a grade level indicator. Annotations with arrows point to specific samples:

- Two 'TK-8' annotations point to Language Arts samples in the Government column.
- An '8th grader w/ Span 1' annotation points to an EDG Spanish 1 B sample in the Foreign Language/NATL column.
- An '8th grader w Alg. 1' annotation points to a CP Algebra 1 B sample in the Mathematics column.
- Two 'HS' annotations point to PE Elective B and BT English 1 B samples in the Electives and English columns, respectively.

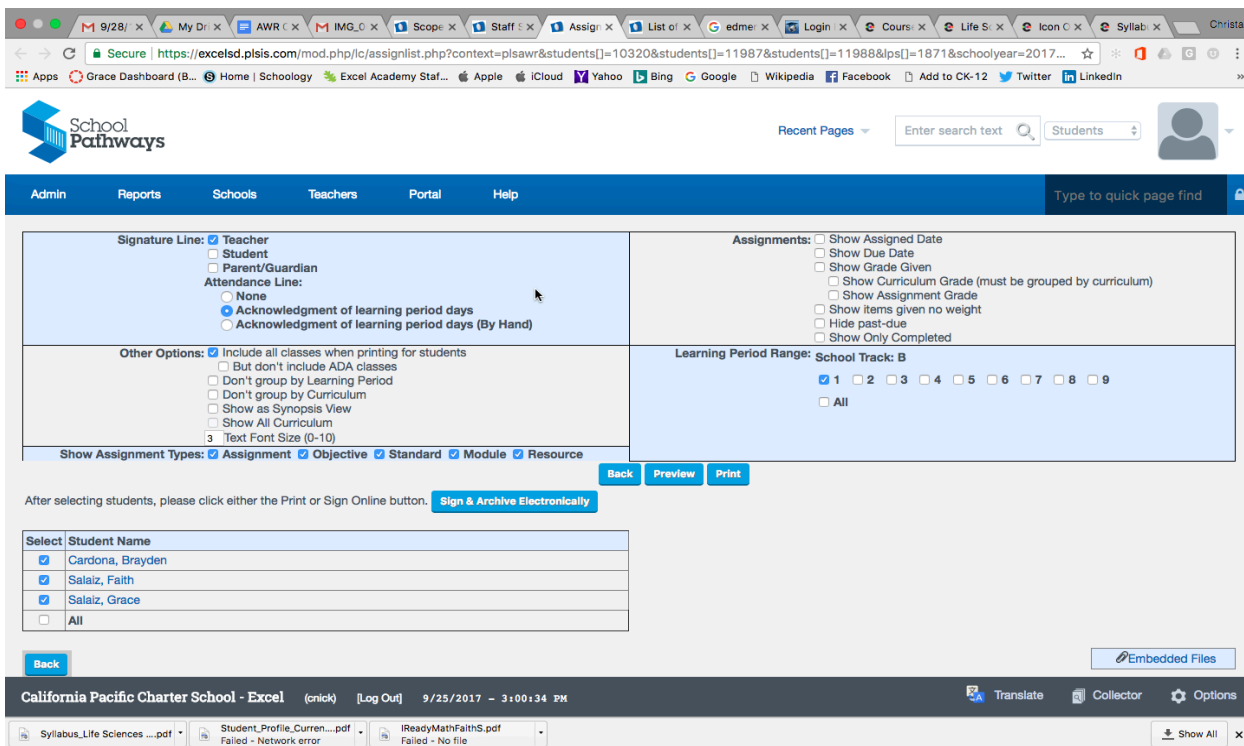
### Archiving AWRs

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).

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1	<input checked="" type="checkbox"/>					
LP: 2	<input checked="" type="checkbox"/>					
LP: 3	<input checked="" type="checkbox"/>					
LP: 4	<input checked="" type="checkbox"/>					
LP: 5	<input checked="" type="checkbox"/>					

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



The screenshot shows the 'Sign & Archive Electronically' interface. The 'Signature Line' has 'Teacher' selected. The 'Attendance Line' has 'Acknowledgment of learning period days' selected. The 'Assignments' section has several checkboxes, including 'Show Assigned Date', 'Show Due Date', 'Show Grade Given', 'Show Curriculum Grade (must be grouped by curriculum)', 'Show Assignment Grade', 'Show items given no weight', 'Hide past-due', and 'Show Only Completed'. The 'Learning Period Range' is set to 'School Track: B' with '1' selected. Below the form, there is a 'Sign & Archive Electronically' button and a student selection table with three students checked: Cardona, Brayden; Salaiz, Faith; and Salaiz, Grace.

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 same date that you signed your attendance 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.

Attendance Forms	
Form #2a0 - LP 1, Track B	
Verified	Archived
21 Student(s)	
<a href="#">[View]</a>	<a href="#">[Edit]</a>

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. AWRs are to be completed and archived after attendance has been claimed.*
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 assigned before the LP begins, 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 did not complete assigned work in 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.

The screenshot shows a web browser displaying a report card for 'Cooking A (S:11049) / Cooking - Huerta (1920)'. The interface includes a navigation menu on the left with options like 'Assign', 'Module', 'Category', 'Assignment Weig', 'Ord', and 'Average'. The main area is a grid with columns for dates from 10/25 to 11/19 and rows for 'Assigned', 'Module', 'Category', 'Assignment Weight', and 'Averages'. A red arrow points to a speech bubble icon at the bottom of the 'Averages' row for the date 10/25. A 'Comments' box is open on the right side of the grid.

	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25	10/25			
Assigned	0	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3		
Module		3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	
Category																						
Assignment Weight	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Order	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19		
Averages																						





# ToR Roster Requests:

ToR will send [admissions@excelacademy.education](mailto: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)

## 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.) For all of these situations, court papers must be on file in the office. 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 parents have joint legal custody, 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:



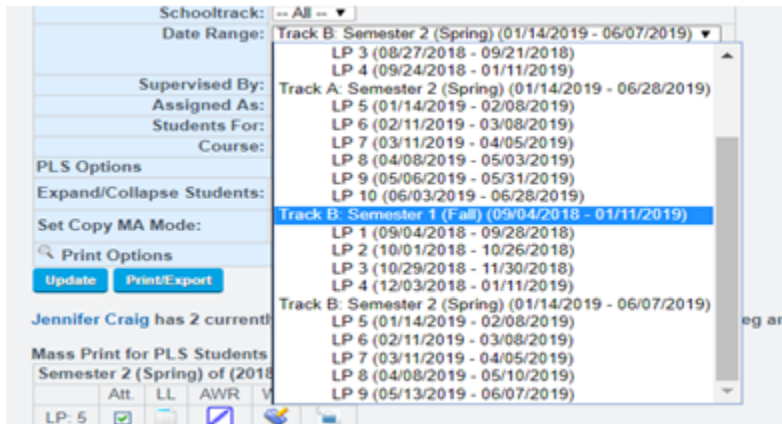
\*Please contact the Registrar's office ([registrar@excelacademy.education](mailto:registrar@excelacademy.education)) if you have any questions or need to make Excel aware of custody arrangements that are not in the system.



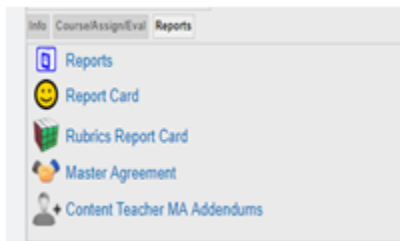
## Report Cards in SIS

**\*\*\*Please refer to the shared report card folder for pertinent information and specific details.**  
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).

Class Information	Semester 1 (Fall)			Hide			Hide All Items Click Me
	Computed Grade	Override Computed	Comments	Class	Teacher	Print	
Language Arts (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mathematics (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Science (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Studies (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Education (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Class Information	Semester 1 (Fall)			Hide			Hide All Items Click Me
	Computed Grade	Override Computed	Comments	Class	Teacher	Print	
Language Arts (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mathematics (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Science (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Studies (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Education (1000-TEA.S1.12750) PLS Teacher: Craig Jennifer	-	1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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).

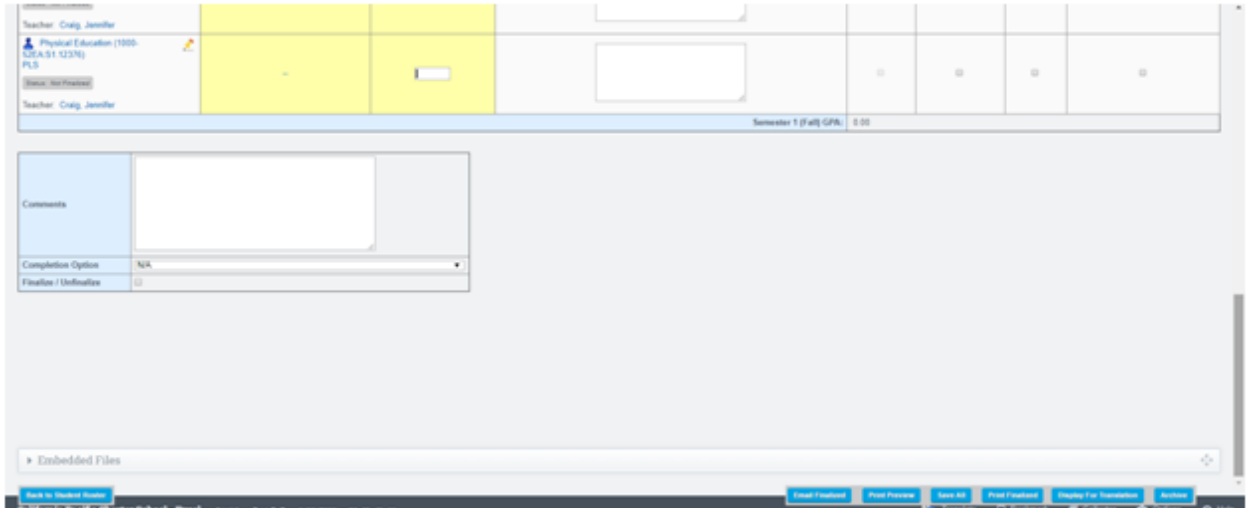
10. Grades 9-12 - Using the A-F scale, under the same column as above (Override Computed) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 9-12 will also earn credits (5 per semester) which will be indicated in the Credits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

Class Information	Credits Attempted		Semester 1 (Fall)			Comments	Hide
	Credits	Override	Computed Grade	Override <input type="button" value="Completed"/>	Credits <input type="button" value="AS"/>		
Dance 2 A (2355-3EA:S1.12301) PLS Status: <span style="color: green;">Prerequisites</span> Teacher: Mashburn, Mandy	5	<input type="checkbox"/>	--	<input type="button" value="A"/>	<input type="button" value="5"/>	<input type="text"/>	<input type="checkbox"/>
EDG: Chemistry w/Lab A (2607-14EA:S1.12301) PLS Status: <span style="color: green;">Prerequisites</span> Teacher: Mashburn, Mandy	5	<input type="checkbox"/>	--	<input type="button" value="A"/>	<input type="button" value="5"/>	<input type="text"/>	<input type="checkbox"/>
EDG: Mathematics III A (2427-1EA:S1.12301) PLS Status: <span style="color: green;">Prerequisites</span> Teacher: Mashburn, Mandy	5	<input type="checkbox"/>	--	<input type="button" value="B"/>	<input type="button" value="5"/>	<input type="text"/>	<input type="checkbox"/>

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. Prior to creating a report card, please confirm with the Case Managers the grades of students with IEPs.**

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).

Year: 2018 - 2019		Grade: 11			
Subject	Credits Attempted	Semester 1 (Fall)			Comments
		Mark	Credits		
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		

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*

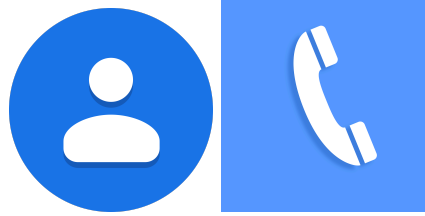
*2: Approaching Proficiency*

*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. \*\*\*ToRs will be provided with a shared folder to drop in report cards and progress reports for Admissions to put in student cumes. \*\*\*\*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.*



# *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, rescheduled LP Meetings with reason or concerns*
- ❖ Documenting a phone call that pertains to an issue that might lead to a BIP or PIN*
- ❖ Conversations with parents about complaints, or them refusing to comply with school expectations (samples, assessments, WIN, curriculum, etc)*
- ❖ Document meetings that are held and include the date: SST, AIM, 504 Plan, Best Interest (PIN3), IEP, Manifestation, etc.*

### *\*\*Examples:*

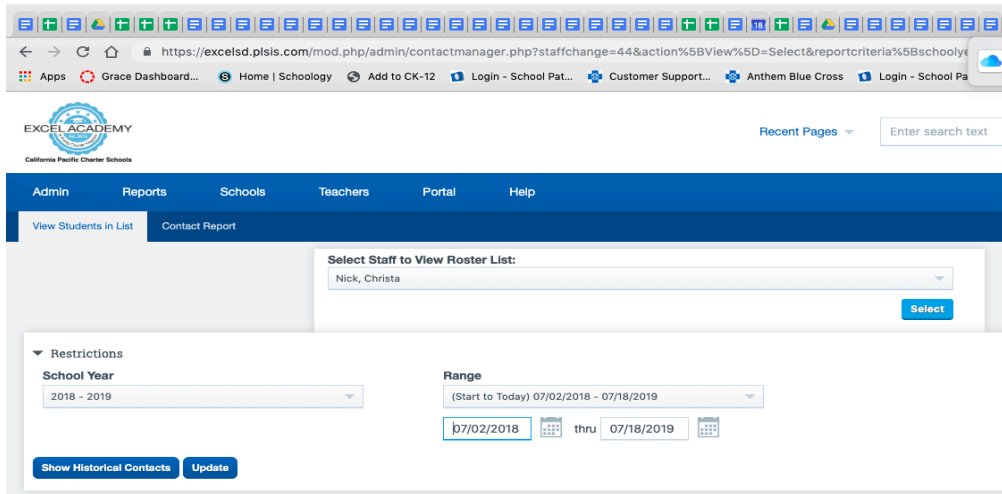
- ❖ You met with a family more frequently than the usual LP meetings*
- ❖ A first meeting with a parent who is new to Excel Academy Charter School reviewing the Master Agreement and Acknowledgment of Responsibilities.*
- ❖ Injury or Incident at a School Event/Field Trip (contact should be made with BOTH 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 assessments.*
- ❖ Dates SSTs took place.*

### *To Access Contact Manager:*

- ❖ Go To "Teachers" Tab and scroll down to "Content Manager" and Select "Contact Manager" again in the menu.*

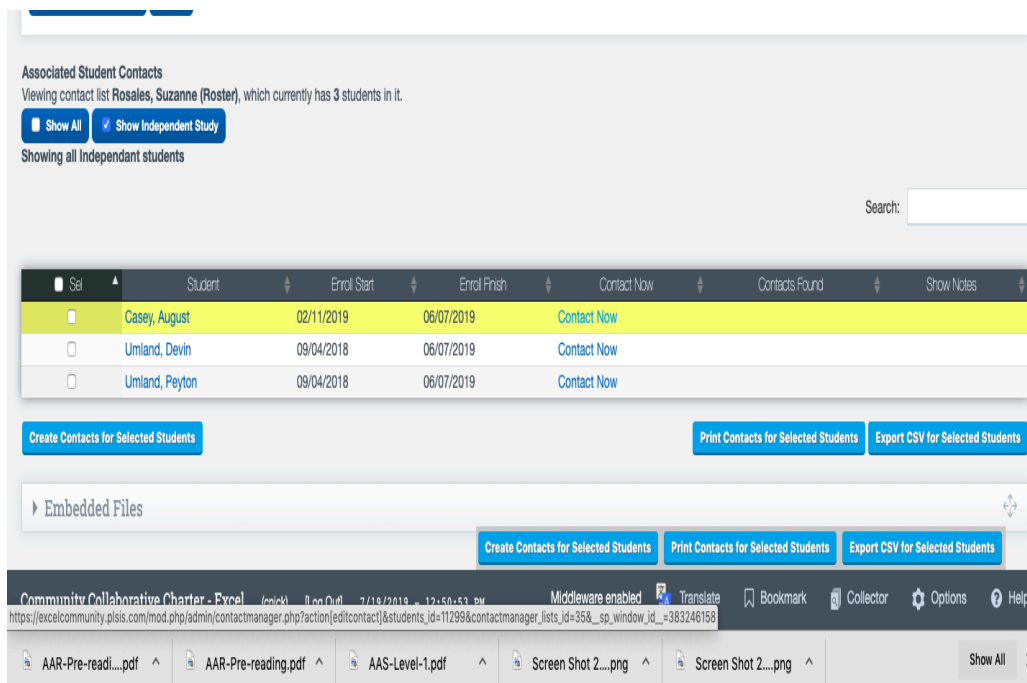
➤ You can also get to Contact Manager from the Home Screen and when on the student dashboard. Just look for the words "contact manager" and it will take you to the same place.

❖ 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.

Area/Subject of Focus:	-- Choose --
Date Contacted:	07/19/2019
Beginning Time:	12:51 <input type="radio"/> AM <input checked="" type="radio"/> PM
End Time:	1:36 <input type="radio"/> AM <input checked="" type="radio"/> PM <small>Note: If left blank when creating a new contact, the finish time is automatically set when saving the contact.</small>
Total Time:	45 <small>Total time in minutes.</small>
Contact Method?	In-Person
Successfully Made Contact?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Follow up Required?	<input checked="" type="checkbox"/> Yes
Notes:	<p>Met for LP 4:</p> <p>Only received 3 samples and parent did not show a body of work. I reemphasized my need to see a body of work and that they should come prepared to the meeting with the learning for the LP.</p> <p>Parent stated they will follow up with me next week to show learning took place.</p>
Send Notification Flag:	-- SELECT --

[Save Contact](#)

- ❖ 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
- CHYA opt-out letters from parents

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.



## GoGuardian

*GoGuardian is used by the school to monitor students using school-issued technology. Teachers in the Virtual Path, as well as those teaching other synchronous classes, use GoGuardian Teacher to monitor the live classes in real time.*

*All teachers in the Virtual Path are required to use and monitor GoGuardian Teacher during class time. In order for GoGuardian Teacher to work properly, students must be logged into their school-issued technology using the gmail account provided by the school. If students are logged into the Chrome browser using another google account, GoGuardian Teacher will not work and their screens will not be visible.*

*Each year, Student Services will create new classrooms in the system and add students to the classrooms based on enrollment. Teachers should not manually add students to the classroom, unless asked to do so, in order to avoid errors with students connecting to the application properly.*

*Once set-up, GoGuardian Teacher enables teachers to monitor students, force student applications open, chat with students in real time, record teaching sessions, and much more!*

*For help using GoGuardian Teacher, please refer to the [GoGuardian Teacher Help](#) website.*

[GoGuardian Teacher](#)-Link to Application Login



## 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. Parent logins can be found in SIS and are able to be sent by the ToR if a parent forgets their login. If the family does not have a login, please reach out to Keri Schneeweiss @ [kschneeweiss@excelacademy.education](mailto: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 on your roster. Once you receive this email, please look carefully in the SIS for any pertinent information about the student, including the receipt of transcripts for secondary students. (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.*

*For Secondary students new to Excel, please follow the process outlined in the [New Secondary Student Checklist](#). These students will need to meet with their counselor before the MA can be written.*

*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.

*The [Pathway Transfer Instructions](#) doc outlines the process and steps necessary to transfer a student between pathways once the school year has begun. Prior to the school year beginning, reach out to Admissions to make a pathway change.*

*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. Menus, [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 or classroom expectations. Let them know that the Zoom will be 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 the Registrar's office: [registrar@excelacademy.education](mailto:registrar@excelacademy.education).

- Please be sure to notify new families that the CCP classes must be ordered at least 10 business days before the student's first day of classes (ToRs must submit for processing 7 days prior to the first day of class)
- (Virtual Path) Set up a Zoom meeting to go over the expectations of the classroom & School procedures. (Refer to: [Back to School Parent Meeting Checklist](#))
- (Personalized Path) Describe the role of the parent as the primary teacher for the student
  - ◆ 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 or classes are not acceptable and are not allowed for purchase or use at Excel Academy.
  - ◆ 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.
- For Personalized Path families- et up an in-person meeting or Zoom to discuss curriculum, courses, and sign paperwork. This will need to be within a 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 choices before they meet with you. Share the TK-8 Curriculum Menu and Handbook and High School Course Catalog with the parent ahead of time.
- 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.

## *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.

---

### Student(s) Show **RED** 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 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.*

*For junior high families include - If you have not already done so, please be sure to send your child's academic records including their report cards to our Registrar - registrar@excelacademy.education.*

*For High School families include - If you have not already done so, please be sure to send your child's academic records including an unofficial transcript and report cards to our Registrar - registrar@excelacademy.education.*

*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.*

*For TK-8th - During that first meeting, we will complete your enrollment by signing a Master Agreement/Acknowledgement of Responsibility and additional paperwork. We will also discuss curriculum choices, our program's structure and guidelines to begin planning for the school 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*

*For 9th-12th - See above*

### **Documents Attached:**

- *School calendar*
- *Preparing for the school year: This is basic information to know before completing your enrollment.*
- *Curriculum Menus/Handbook*
- *Course of Study: Please use this to record your final curriculum choices.*
- *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 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 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.

*For High School families include - During our call, I will schedule your appointment to meet with our School Counselor to schedule your classes. They will also send your Master Agreement/Acknowledgement of Responsibilities for you and your student to sign. If there are still outstanding academic documents, be sure to send your child's academic records including an unofficial transcript and report cards to our Registrar - [registrar@excelacademy.education](mailto:registrar@excelacademy.education).*

**Note to ToRs: Secondary teachers send MA to new families after LP 1.**

*For TK-8th - During that first meeting, we will complete your enrollment by signing a Master Agreement/Acknowledgement of Responsibility and additional paperwork. We will also discuss curriculum choices, our program's structure and guidelines to begin planning for the school 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 Curriculum Menus/Handbook/HS catalog
- 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 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 will send the following email with the appropriate student/family information.
- 

## **No Parent Response After 5 Days**

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 Admissions(admissions@excelacademy.education) and the Registrar (registrar@excelacademy.education) 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).

## **Personalized Pathway: Initial Meeting**

The initial in-person or Zoom meeting is a time to go over the responsibilities of the parent/guardian and/or any changes in policies for the current school year for returning parents. You will introduce parents/guardians to the ordering system (OPS), Beehively, 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 for TK-8th. High school students will

sign their MA following their initial meeting with the School Counselor. Secondary ToRs should have reviewed this in their initial phone call and then be available for any follow-up questions.

This meeting may be in-person or virtual. With a shortened ordering time in August, Zoom and Google Meets are the virtual meeting platform options 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 contact your returning families with updated procedures and any additional questions. This is a yearly requirement with all families. 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](#)

[Secondary New Student Checklist](#)

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

1. Excel School Calendar- [2024-25 School Calendar](#) (Print in Color) available on the website or in EACS Handbook as well
2. [CCP Acknowledgement](#): This is signed by families in RegOnline, but if your returning students are unable to log back into their RegOnline account, feel free to email it to them.
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 TK-8 and HS 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 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 Acknowledgement 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 Master Agreement/Acknowledgement of Responsibilities for each child if it was not signed in the spring
  - ❑ Confirm the student information in SIS for accuracy (name, grade level, birthdate, telephone number, address, and email).
    - For inaccuracies, please email [admissions@excelacademy.education](mailto:admissions@excelacademy.education) with the corrections that need to be made. Email subject line: SIS Corrections
    - If the student grade level is wrong, you can have them sign an addendum later to correct this inaccuracy on the MA.

### 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 **8 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. In unique circumstances, some orders may need to come to you.

### 3. Curriculum (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/High School Course 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 a complete curriculum, for all courses, within 5 days of signing the Master Agreement if school has already begun. ToRs must order curriculum 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 curriculum in hand that they would like to use, take a picture of the [Table of Contents](#) for each course. You will need this to ensure it hits all standards 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.
    - For in-person meetings, a body of work generally includes the entire text and/or workbook demonstrating the work completed in each Learning Period.
    - For virtual meetings, a body work generally includes the ToR asking for multiple samples to be sent ahead of time. The student will need to show the work completed by holding up completed work from a wide sampling. Workbooks may also be collected at the in-person meeting.

#### 5. Recording Student Learning

- Explain 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. We recommend that all students begin the college a-g track so that they have the widest set of options when they graduate. This is why all students follow a-g curriculum. With either the college or graduation track, all students meet with a School Counselor to schedule classes. For specific and individual college requirements we remind families that 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 on the Master Agreement 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 Admissions and they 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. Make sure your LP meeting schedule is established and set before the first day of school. All LP meetings must be held during work days (M-F) and work hours (8:30am-4:30pm)
  - Read the section below on LP Meeting Scheduling before establishing your schedule. Elementary and Secondary pathways have different requirements.

## LP Meeting Scheduling (Personalized)

*\*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. For example, if an LP ends on Friday the 5th, meetings should be held the 1-4th or the previous week. Refer to the ExcelSchool 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:** ToRs will alternate LP meetings between in-person or virtual on a rotating schedule. ToRs have some flexibility on how they meet this requirement.

- Some ToRs will hold in-person meetings for their full roster one month and the next month hold all virtual meetings for their full roster.
  - Others will split their roster in half and alternate which half of their roster they are meeting with in-person, each month.
  - Important: There will be certain ToR duties that must be done in-person. All due dates for these duties must be met, regardless of your in-person LP schedule.
  - .
3. Secondary Pathway- mostly virtual
    - Must either complete two in-person LP meetings, one in the first semester (should be near the beginning of the semester) and one in the second semester. Or, if all LP meetings are virtual, attend two additional in-person school functions to meet family and student in person; one in the fall and spring semester.
  4. Locations: Pick locations central to your families, doing your best to never make a family drive over 20-25 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 for single students should be 45 minutes at minimum. If there are multiple students in a family, schedule an additional 30-45 mins for each student, depending on grade level. It is always better to allow more time than to run out of time.
    - 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.
  6. Mandatory: Stress the importance that LP meetings cannot be rescheduled unless there is an unavoidable emergency. They should schedule other appointments around monthly LP 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. If they still have not met with you and/or provided samples, follow the PIN process.,.

### 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.

*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 cannot 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 on time for scheduled time-slots, or risk having it rescheduled.
- Meetings will last approximately 45 minutes per student, depending on grade level.
- Provide a list of what families should bring with them, or should have done prior, to the LP meeting.

## Virtual Path-Teaching and Monitoring

The Virtual Path ToR is required to set up their class in the Buzz LMS (BT or FlexPoint), in addition to setting the curriculum content in SIS for each LP. The Virtual Path Coordinator will check to ensure the classroom content is set in both programs for the year, prior to school beginning. Being organized and ready for the year will provide for a smooth year.

Monitoring of assigned work and communication with families is crucial in order to keep students on track. Diligence in the first few weeks can make a big difference for students that need a lot of structure to keep on top of the learning.

### *Weekly Cycle of Monitoring*

Assignments for each school week should be due Fridays at midnight each week that school is in session. However, teachers should set the assignments to allow for late submissions for students who wish to catch up over the weekend. If late submissions are not set to be allowed, it will require the teacher to go in and override each time a student turns anything in late, which is frustrating to the parent and the teacher. However, late assignments should not be accepted more than three weeks from the date it was due, except in rare pre-approved exceptions.

Each Friday, by the end of the business day, teachers should provide families with all assignments for the following week. The details of the communication should include:

1. A Weekly Assignment Checklist (lists all assignments due by Friday at midnight the following week)
2. Any labs, projects, etc. for which parents will need to prep
3. Links to printables necessary for the following week
4. Any other pertinent information (School-spirit days, field trips, modifications of the schedule, etc.)

*Each Monday, or the first day of the work week, teachers should check Buzz to see if there are any missing assignments that students did not turn in on Friday or over the weekend. If a student has missing assignments, the teacher should notify the family of the specific missing assignments.*

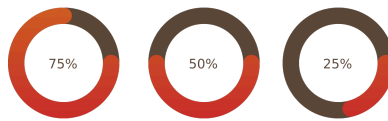
- *Students missing more than 30% of the assigned work for the previous week may be subject to a Progress Improvement Notification. Confer with the Virtual Path Coordinator to determine if a PIN is warranted. (The first week that more than 30% of work is missing, issue a warning and a chance to catch up. If a family is going through a difficult life circumstance, be sure to extend grace where needed.)*
- *All students should be afforded the opportunity to catch up on late work. However, late work must be submitted to the teacher no later than three weeks following the due date, unless an exception has been made. After that, the assignment will receive a zero.*

*Part of monitoring students is providing the school with up to date class attendance information. This is done using the Engagement Calendar or Log in SIS. (See the [How to Use the Engagement Calendar](#) section)*

*All Engagement Calendars should be fully up to date by Friday, close of day each school week. Any student that misses more than three days of class, for any reason, should be brought to the attention of the Virtual Learning Specialist. Any student missing 5 or more days of school without prior approval must receive a PIN and the Principal should be notified immediately.*

5.





## *Progress Monitoring*

*The primary responsibility of the Personalized Path 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*
- *Weekly monitoring progress in curriculum and/or 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, SST goals, and/or the implementation of 504/IEP accommodations*
- *Using Tier 1-core differentiation strategies to address academic needs*

## *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 Academy'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, which will be reviewed by the ToR at the end of each LP.
2. ToRs are required to monitor school work on a weekly basis.
3. If proof of school work cannot be provided, the ToR will begin the [PIN process](#).

#### *Synchronous Instruction and Live Interaction*

*Students are invited to participate in synchronous learning opportunities on a daily and/or weekly basis. Exact programming will vary year to year.*



## Learning Period Meetings

*Note: Learning Period Meetings only apply to the Personalized Path.*

*Learning Period (LP) meetings are required about every 20-25 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 before 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.)*

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

*Each student's curriculum is paced out by the ToR for the school year with clear expectations for what the student is to complete each Learning Period (LP). The ToR, parent/guardian, and student will meet together to review the student's body of work and academic progress at the end of each LP. Students meet with their ToR monthly for their LP meeting. These meetings may be in person or online. TK-6 students will alternate LP meetings between in person and virtual. 7-12 students and families must meet with their ToR once each semester in person, in the fall and in the spring. The 7-12 in-person meeting requirement may be met during a Learning Period meeting, a field trip, or a school event.*

*Supplemental documents for this section:*

[LP Meeting Checklist](#)

[Parent LP Meeting Checklist](#)

[Work Sample Checklist](#)

[Forms for LP Meetings folder](#)



## Purpose of the LP meeting

*The purpose is to oversee and assess student progress towards proficiency in each subject by reviewing the body of work. In our independent study model, work completion is also tied to attendance. 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 LPs. However, when parents are trained well and follow expectations, you will have meaningful and productive meetings.*

### What does a meeting look like?

*The order of a meeting is flexible, but should include these components:*

- 1. Announcements/scheduling/pressing matters*
- 2. Review of the body of work completed that LP for each child*
- 3. Collect samples from every subject (ELA, math, sci, ss, PE, etc)*
- 4. Assign work for the upcoming LP*
- 5. Parent mentoring*

*For online meetings, it is highly recommended to create a monthly PP template so that every family receives the same information and to keep the meeting on track.*

### Objectives during a meeting

- 1. Review work to assess learning for participation, mastery, and attendance*
- 2. Review the Assignment and Work Record (AWRS) to gauge pacing.*
- 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/guardian 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 engage with 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 varying levels of complexity 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 read, have them explain concepts, and much more, 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. They should have their workbooks/papers with them or have submitted them electronically. 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 20-25 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. The Pacing guide is used to monitor the progress of a student each LP. The pacing guide ensures that the student is making adequate progress and completing the yearly requirement for each core subject. It is required for the ToR to communicate with the family on a weekly basis and make adjustments if necessary.
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.)



### 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 multiple samples in each subject, in advance for 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 to six courses per their approved four-year plan ([see High School section](#)).*

- ToRs will meet with each family twice in person, once in the fall and once in the spring. If the family prefers the LP meetings to be held virtually, then these in-person meetings may be met via a field trip or other school event.

**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
- Check in on additional programs your student participates in: WIN, ELD, SAI, GATE, etc.
- If the student has an IEP ask how accommodations are being met
- 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



**Work Sample Requirements**

Teachers in both pathways must upload a sample from each content area into the Student Information System (SIS) each LP. 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 required. (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) Acceptable Samples:
  - 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).
  - iii) Multiple choice or T/F worksheets that include open response questions.
- b) Unacceptable Samples:
  - i) A photograph of the student completing a lab with NO write-up
  - ii) Multiple choice or T/F exams or worksheets
  - iii) Maps or coloring pages not accompanied by a brief description;
  - iv) Math homework which shows only the answers.
- c) For very young students (TK and K), the parent may dictate what the child says. 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 non-religious - 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 the same type of sample each Learning Period. 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 student's original work 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 while Excel Academy's school year is not in session.

Simply notify the following staff members:

1. Registrar: 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. Withdrawal Form: Have the parent sign the withdrawal form that is located in the shared drive. Or, click the link [here](#).
2. Collect non-consumable books and computers purchased with instructional school 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 the Registrar's Office. They will follow up with the family to obtain the items.
  - b. Cancel any outstanding orders in OPS.
3. Attendance Roll (Grid) Log:
  - a. Send the parent/guardian 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 date of the withdrawal.
  - 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 will be the date of the withdrawal or after (typically within one week if you are meeting in person).
4. Collect Work Samples for the days enrolled during the LP:
  - a. Reach out to the Elementary Vice Principal or Secondary Vice Principal and the Registrar if you are unable to take full attendance.



# *Discipline - PINs and BIPs*

## *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 at the beginning of each school year. 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.*

*Excel Academy has procedures in place to address violation(s) of school policies and student discipline when it comes to academic progress and behavior issues. These processes are categorized as Progress Improvement Notification (PIN) or a Behavior Improvement Plan (BIP) and detail how Excel Academy addresses a variety of respective infractions.*

### *How Do I Know When to PIN?*

*Students and parents are responsible for complying with the responsibilities as outlined in the Master Agreement, Acknowledgement of Responsibilities, and other independent study policies. If you feel that a parent or student has failed to comply with Excel Academy expectations and policies, please contact the Elementary Vice Principal, Secondary Vice Principal, or Virtual Learning Specialist respectively prior to issuing or suggesting a PIN.*

[\*Click here for the PIN Template\*](#)

*\*Instructions are included in the PIN Template*

*Some of the most common reasons PINs are issued:*

1. *Lack of work completion or failure to show work completion.*
2. *Failure to attend a learning period meeting or another mandatory school meeting. Allow a make-up for the first missed meeting.*
3. *Missed classes or no communication for more than 5 school days, despite teacher 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.*

*Prior to submitting a PIN, all ToRs are responsible to reference the Levels of Support to guide students through areas of concern. Issuing a PIN requires evidence that the ToR utilized the Levels of Support to get the student/family back on track.*

#### [Levels of Support](#)

### [Attendance](#)

*In our non-classroom based model, attendance is calculated two ways: via work progress and/or daily engagement (example: online classes). Daily engagement is recorded daily in School Pathways. Please Note: If you are unable to take full attendance for any reason, please contact the Elementary Vice Principal or Secondary Vice Principal and cc the 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. One PIN template can be used for all types of PINs. Detailed directions are on the [PIN Template](#). Always make a copy of the template and save it to your Drive before continuing with filling out the information.*

- *ToRs will send the first PIN.*
- *Any time a second PIN is issued, an AIM meeting will be required. In rare cases an SST may 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. After receiving two PINs, a Best Interest meeting may be scheduled to review if the non-classroom model is an appropriate learning environment for the student.*
- *If a student receives three PINs and a Best Interest meeting is conducted in one school year, a third party review may be held by the respective Elementary or Secondary*

*Principal in conjunction with the parent, ToR, and a neutral 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 manifestation meeting is required before any third party review is requested or held.. 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 from Excel Academy.*

[\*Click here for the BIP Template\*](#)

*Elementary - send to Elementary Principal*

*Secondary - send to Secondary Vice Principal*

*Virtual - send to Virtual Learning Specialist and the appropriate Principal*

*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, creating a plan of action for redirecting future behavior, writing a letter of apology, rewriting an assignment in question, removal from extra-curricular and/or co-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 receive an F on the assignment. A third offense may result in the student being withdrawn from the class. 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 expulsion are included in the school's Handbook.*

*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 to distinguish curriculum, CCP, or transcript distinctions..*

*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.*

*CoCo: Compliance Coordinator - Each of teachers who have been assigned either a grade level band or a subject area to review monthly work samples and AWRs.*

*HQT: Every teacher who holds a valid, single-subject credential is a Highly Qualified Teacher.*

*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 the 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 junior high or high school level rigor. Final determination on acceptance will be determined by the CoCo.
- 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 preferred 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 (LP 2, 4, 6, & 8)
- 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 junior high or high school level work/detail.
- A reflective paper (VAPA).
- Another junior high or high school-level sample as agreed upon by ToR/parent/student in advance.

## Pacing Guide Dates

### Fall Semester – starts August 22nd

9/23/24	25% complete (21 days)
10/23/24	50% complete (20 days)
11/22/24	75% complete (23 days)
11/25-11/29	Thanksgiving break
12/20/24 -1/3/25	Winter break
1/17/25	100% complete & online finals have been completed (24 days) Finals for EDG, FLV, UC Scout Last day of Sem 1

### Spring Semester – January 21, 2025

1/20-1/24/25	Career and College Readiness Week
2/21/25	25% complete (21 days)
3/21/25	50% complete (21 days)
4/7-4/11	Spring break
4/25/25	75% complete (21 days)
5/2/25	Schedule finals
5/23	Grads- 100% complete



5/30                      7th-11th 100% complete  
                                  (22 days)  
5/30                      Grad//Last day of  
                                  school

**Important Sample Due Dates:**

Each quarter the following are 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.

Week 1 - samples input

Week 2 - AWRs completed by Friday

Week 3 - CoCos check

Week 4 - Learning Period meetings

## **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. 10-day window:

Fall Semester - September 6, 2024

Spring Semester - February 3, 2025

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 10/11/2024 for fall semester or 3/21/25 for spring semester will receive a/an "F" on the report card/transcript.

Withdrawals may only be issued to students who hold a minimum of six courses prior to the withdrawal and wherein the drop will not impact graduation requirements. Seniors carrying five courses may drop to a minimum of four courses as long as they carry sufficient credits to graduate. Please speak with a counselor before dropping a senior class, as this can impact dashboard data and college enrollment.

- The minimum & maximum course policy is in place to ensure academic success.
- The minimum number of courses that high school students can register for is 5-6 courses per semester depending on the student's respective grade level (see graduation track options below for details).

- 12th graders who have earned 180 credits prior to the start of their senior year, can register for 4 courses per semester, equaling 40 credits for the school year.
- If a student is participating in concurrent enrollment, then a minimum of 4 Excel Academy high school-level courses must be taken each semester they are registered for a college course.
- The maximum number of courses high school students can register for is 8 courses per semester including concurrent enrollment courses. See below for concurrent enrollment requirements.

## Understanding A-G

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

### A-G Protocol:

- 1) Every core high school curriculum is now considered A-G approved. Therefore, students must choose and complete course curricula from the [High School Course Curriculum Catalog](#). Any deviations from the HS Curriculum Catalog must receive prior approval from the Secondary Department.
- 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 BT for some electives, CP, EDG, EDY, FLV, LB, or TGS.

## Community College Courses

### **Community College Courses - Concurrent Enrollment Policy**

Students may request concurrent enrollment courses by following these steps:

1. Students and parents/guardians discuss concurrent enrollment options with their ToR.
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). Students must be enrolled with Excel Academy at least one full semester prior to

receiving approval to enroll in a concurrent enrollment course. For any incoming student who demonstrates prior success in a college course, approval to enroll in a concurrent enrollment course will be reviewed

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 4-5 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 (7th-8th) students interested in taking community college courses are limited to math (Algebra 1 or higher math) and/or 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). It is the family's responsibility to pay for college textbooks and other required course materials if enrolled in a college course. Instructional Funds may not be used to pay for college classes, textbooks, or other course materials unless the bookstore is an approved Excel Academy provider.
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 depending upon the credits needed to remain scheduled to graduate in four years. 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 depending on their minimum course count. If an additional community college course is chosen, students must complete and submit an additional concurrent enrollment form to reinstate 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 and the CDE, only 5% of Excel Academy students per grade level can attend a community college during the summer. Priority approval will be given to those needing courses to graduate.*
15. *If a student is found to enroll in a college course that has not been approved by the School Counselor and does not meet Excel Academy's prerequisites for college courses, even if the student completes the course, they will not earn dual credit. The student will earn college credit but not high school credit. The student will be required to complete the respective high school course for graduation purposes.*
16. *Students will only receive dual college credit in courses that have prior approval from the School Counselor. This MUST be pre-approved via the concurrent enrollment form.*
17. *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. Official transcripts need to be requested at least once a year to ensure student transcripts remain up to date. 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. 1-811  
Irvine, CA 92618*

*\*\*\*If a student fails the community college class and the class/credits were planned toward graduation, then the ToR needs to alert Counselors ASAP to adjust the 4-year plan.*

### ***Honors Courses Process & Requirements:***

*Honors courses are designed to be more in-depth, challenging, and rigorous. High school students may take honors courses with prior written approval. Junior high students may take a high school, honors-level math and/or world language course with prior written approval. Junior high students do not receive a GPA bump for honors courses. The student may submit the course for approval by following these steps:*

1. *ToR will discuss honors options with students and family*
  - a. [High School Honors Requirements](#)
  - b. [Junior High Honors Requirements](#)
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). If approved, all honors courses require a quarterly project - Imagine Edgenuity and Florida Virtual are the only providers wherein students will not need to complete additional coursework.
6. ToR will assist students in meeting additional honors requirements
7. Honors credit will not be issued retroactively post the 10-day add/drop window
8. Up to 8 year-long high school courses will be eligible for a full-grade percentage bump per course that earns a passing score. GPA bumps will not be issued for honors courses beyond 8 classes, but students may enroll in additional honors courses for the academic challenge.
9. Transcripts from the online provider may be required to receive credit.

### **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 Advanced Placement course
3. ToR completes [Advanced Course Request Survey](#)
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. Excel Academy is not an AP exam testing site. Excel Academy high school students who wish to take an AP exam must go through their local public high school or visit [collegeboard.org](http://collegeboard.org) for more information on in-person AP test options. Students and parents are responsible for making this arrangement in early fall and meeting the registration deadlines and fee payments for the testing site. Instructional funds cannot be used to pay for AP exams.
6. Up to 8 year-long courses will be eligible for a full-grade percentage bump per course that earns a passing score. GPA bumps will not be issued for honors courses beyond 8 classes, but students may enroll in additional AP courses for the academic challenge.
7. Transcripts from the online provider may be required to receive credit.

### **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 a curriculum from the High School Course Curriculum Catalog with the exception of in-person provider courses 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 the process for concurrent enrollment
6. ToR will pace out the first semester into the first quarter to ensure students understand the workload requirement. If a student is not close to the 50% completion mark by the quarter, the approval to complete the year-long course in one semester will be revoked, and the student will need to finish the second half of the class in a subsequent session such as summer or the following semester. Excel Academy does not provide summer sessions but will accept transcripts for courses completed at accredited institutions.

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 Handbook](#) with the exception of in-person provider courses.

### *Junior High students:*

Qualified junior high students may take up to two, high school-level courses in either math (Algebra 1 or higher math) and/or world language.

Junior high students requesting to take a high school-level math course must meet the following eligibility requirements:

- Take a proctored and approved Algebra 1 or Integrated Math I readiness assessment with a score of 85 or higher.

And at least one of the following:

- Earn an 85% in a pre algebra course using approved pre algebra curriculum
- Earn 'exceeds standards' in math CAASP for the respective year requested
- Score 'At or above grade level' for 8th grade on 'end-of-year' view of local assessment (i.e. iReady)

Junior High students requesting to take a high school-level world language course must meet two of the following eligibility requirements:

- Student earns a "meets standards" on their CAASPP ELA for the respective year requested.
- Student earns an 85% or higher in English on their report card.
- Student completes a junior high LOTE course with an 85% or higher.
- Student demonstrates fluency in reading or writing in a LOTE.
- Student receives a recommendation from their Teacher of Record or former teacher.

*All junior high students may enroll in a junior high or middle school level language course using instructional funds without the need for approval from the high school department. No credit will be given on the transcript.*

*Junior high students may submit the requested high school course/s for approval, by following these steps:*

- *Student requests to take high school math and/or world language course/s with their ToR*
- *ToR completes the Survey for Advanced Courses*
- *High School Department will review each request to verify eligibility*
- *If approved, the high school course(s) will be overseen by the High School Department*
- *The course(s) will be indicated on the Master Agreement for credits, not weeks*
- *If a student wishes to take an honors-level math and/or world language course, in addition to requesting approval for the core course, they must also request for the honors designation. Please refer to the above honors request process. Upon approval for an honors-level math and/or world language course, students must follow Excel Academy honors requirements for this designation. The GPA will not be weighted because these courses do not count toward graduation credits*
- *Course/s must be approved by the High School Administration. Junior high school students will have to follow the same add/drop policies as high school students (see above policies).*
- *Transfer junior high students must show proof of current course enrollment from their previous school via their transcript in order to maintain a high school-level course approval.*
- *Per the [CA Dept. of Education](#), junior high students who take Algebra 1 or higher math are still required to complete courses for the CA graduation requirement the high school math while in grades 9th-12th. Thus, high school-level courses taken in junior high will give students additional graduation credit (5 per semester) but will not help clear a graduation requirement in math. Every high school student is required to complete at least two years of high school math. Grades earned will not count towards the high school GPA. World Language courses taken in 7th and/or 8th grade will help clear the LOTE/VAPA/CTE graduation requirement. These grades earned will not count towards the high school GPA.*

### **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 junior high or high school level and work must reflect the respective grade-level 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  $\frac{1}{2}$ , 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) *Online work samples do not need additional work shown; the work printed from the online assignment or activity is sufficient.*
- 13) *Refer to the ToR Training Manual Compliance section for more details and the [Compliance FAQs doc](#) for answers to difficult and common questions.*





## *The Compliance Coordinator (CoCo) Team and their role in helping ToRs*

- 1) *Checking curricula – Compliance Coordinators, in conjunction with the Education Coordinators will verify if the new curriculum is acceptable to use. Checking state standards – All curricula needs to adhere to the current CA state standards. The CoCo for each specific subject will verify that the course closely aligns with the state standards.*
- 2) *Checking monthly samples -Every month the CoCos look at each uploaded junior high and high school sample to review for compliance and credibility. Each sample is either accepted or rejected. When you open the 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 CoCo that your sample has been corrected.*

*Secondary Cocos - Use these teachers to assign "HQT" for high school classes*

*English – Forest Muther*

*Math – Wendy Pendergraft*

*PE - Lisa Durham*

*Science – Kim Platler*

*Social Studies – Jill Stowe*

*Spanish – Jill Stowe*

*VAPA – Colin Mcatee*

*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 Curriculum Handbook](#)*
- 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](#)*
- 5) *Bring the following to your first meeting: Curriculum Content for each course, copy of the [Plagiarism Academic Honesty Pact](#) for each 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 Turnitin 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](#) using [the levels of support spreadsheet](#)*
  
- 14) *Identify any high school students working at a 70% or below on a [monthly progress doc](#).*
  
- 15) *Keeping written log of concerns in the SIS Student Notes (this will make any SST meeting much more successful and productive)*
  
- 16) *Students are required to take one CHYA course in junior high and once 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.*
  
- 19) *Volunteer for one activity for either the fall/spring Parent Power Up.*

*It is the ToR's responsibility to be checking in with Secondary 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 Course Catalog](#)

[HS Curriculum Handbook](#)

[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](#)

[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.*



# 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

#### TK Benchmark Assessment Folder

Fall and spring assessment directions, assessments, and answer keys are available.

#### 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. Please have the necessary discussions with parents prior to grading so parents are aware of the grades prior to receiving the report card(s). 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 if necessary.*

*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. 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.

- 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.

If testing is in person, participation in an alternative assessment at the testing location for the required two days will need to be enforced. 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 EACH 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 Operations and Accountability if a student is opting out of the state assessments, but has agreed to take the alternative assessments?*

*Yes, the Director of Operations 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 Operations 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 each day 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 Operations 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 Operations 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 Operations 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 Operations 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 23-24- 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 Operations and Accountability, Jenny Craig at [jcraig@excelacademy.education](mailto:jcraig@excelacademy.education).

### Proctoring

- ToRs will proctor the i-Ready assessments virtually. For specific details, see Assessments-ASMT > i-Ready Information
- - i-Ready proctoring will be done by ToRs
  - Testing window #1 - 8/26 - 9/6 - ALL K- 11th GRADE STUDENTS
  - Testing window #2 - 12/9 - 12/13 OPTIONAL FOR WIN AND SHORELINE STUDENTS & THOSE WHO CHOOSE TO TAKE A MID-YEAR ASSESSMENT
  - Testing window #3 - 3/24 - 4/4 - 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 - April - 1:1 Testing - Dates TBD - General Testing - End of April into the beginning of May - Dates TBD
  - 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. It is highly suggested that ToRs work with other ToRs to create a schedule and share the proctoring responsibilities.



## *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](http://cde.ca.gov)).*

- *Grades K-12 - TK students take the kindergarten assessment*
- *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 the Spring*
- *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](http://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](http://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 with the ToR. 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.*
- *If testing is in person...*
  - *Parents are notified when students have completed testing by a proctor at the site.*

- *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 Operations 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.*

[Physical Fitness Test \(PFT\)](#) – *Testing will take place in May*



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 Operations 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 Operations 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 Operations and Accountability. 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 Operations 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 - IF APPLICABLE*

*Each year, Excel Academy participates in state testing at various locations throughout Southern California. The Director of Operations 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 Operations 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](http://cde.ca.gov)).

- [Grades 5, 7 and 9](#)
- [TESTING IN MAY](#)
- The PFT is administered by the ToRs. ToRs will provide Excel Academy's Director of Operations 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 Operations 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 Operations 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 Director of Operations and Accountability and Special Programs.

The Director of Operations 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 –*

*When we report our data, the data reflected is always in standard view. \*\*\*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.*

*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 WIN and Shoreline students will have the option of taking the winter benchmark assessment. Students who choose to test will have the opportunity to test out of WIN. Students who DO NOT choose to test, will remain in WIN and retest in the spring.*
- *This will give WIN and Shoreline students an opportunity to test out if they have made sufficient progress. See the Intervention section for details.*

- *ToRs will share the responsibility of offering test sessions for students who test in the winter. 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

## Due Diligence

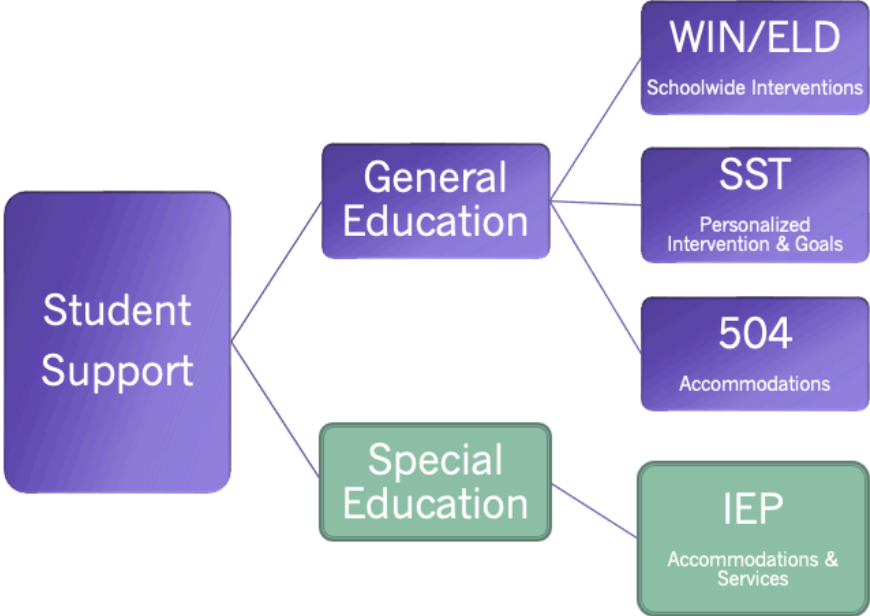
*As a Teacher of Record, it is your responsibility to ensure that students are supported and progressing adequately. It is critical that you consistently monitor your students' academic, social, and emotional needs.*

- *Be sure you support your students with WIN compliance.*
- *View lesson progress in the program 1x/month at minimum. Their lesson pathway may need to be adjusted to better meet their needs.*
- *Create a Student Support Log and choose interventions that may be helpful*
- *Share the log with your SST Contact if the interventions are not helping the student make progress.*
- *\*\*It is critical that you reach out for additional support and request SST (Student Success Team) meetings when necessary.*

## Who to Contact

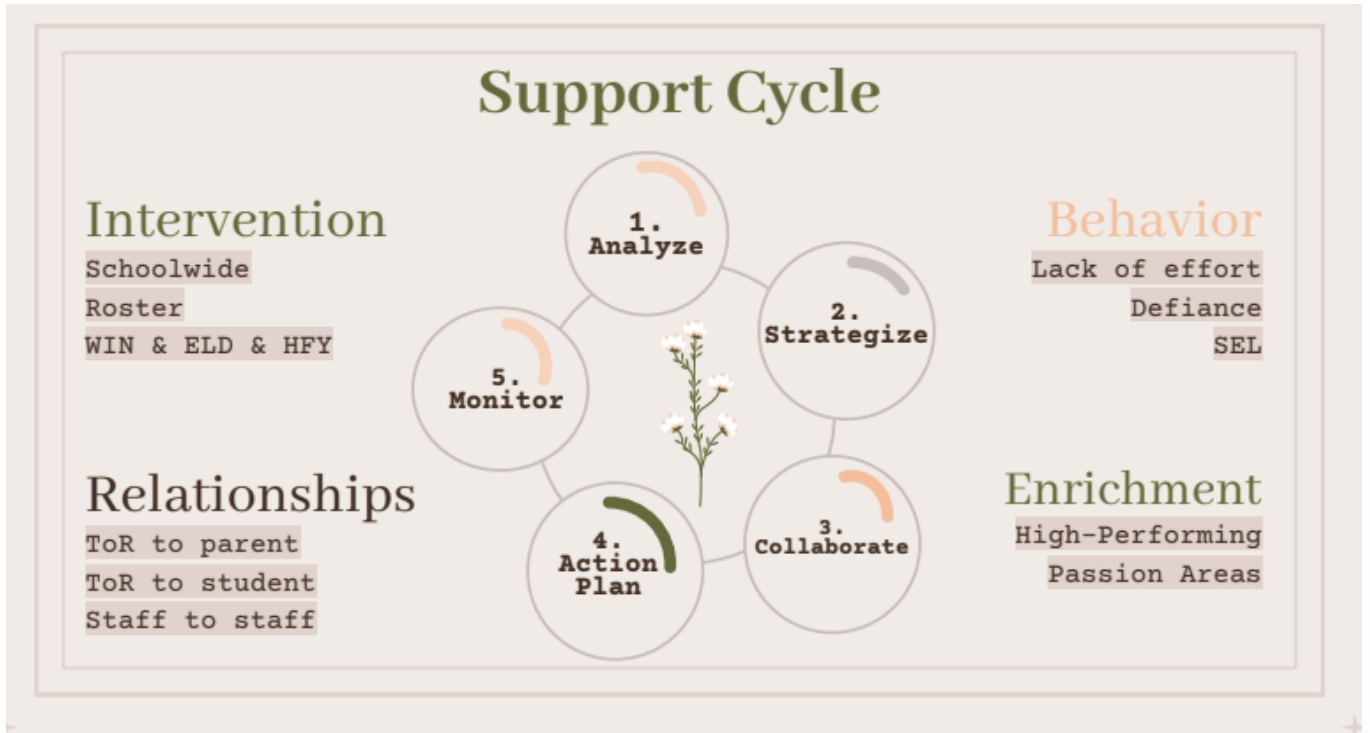
<i>WIN List &amp; Interventions</i>	<i>Sarah Horikawa</i>	<i>WIN Classes</i>	<i>Tamara Murphy</i>
<i>WIN Compliance</i>	<i>Sarah Horikawa</i>	<i>ELD Classes</i>	<i>Tamara Murphy</i>
<i>SST Meetings TK-6</i>	<i>Tamara Murphy</i>	<i>Homeless/Foster Youth</i>	<i>Assigned Counselor</i>
<i>SST Meetings 7-12</i>	<i>Alison DeSchaine</i>		
<i>504 Meetings TK-6</i>	<i>April Saade</i>	<i>SPED Referrals</i>	<i>Noell Scott &amp; Tamara Murphy</i>
<i>504 Meetings 7-12</i>	<i>Assigned</i>	<i>Acceleration/Retention</i>	<i>Principal</i>

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.*



## *WIN Intervention Program*

### *(What I Need)*

#### Who:

*WIN program is required for students in 1st-8th grade*

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

#### What:

- *The WIN Program is targeted, academic intervention and progress monitoring. Monthly plans are outlined in the [WIN Math Plan](#) and [WIN Reading Plan](#).*
- *A student's WIN program may also include recommended WIN Live class for small group instruction. Students are selected by the Intervention Team.*

### 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-risk students reach state standards and make adequate academic progress. (<https://www.cde.ca.gov/ci/cr/ri/>)

### Important:

WIN intervention/assignments are required per the Acknowledgment of Responsibilities signed in the Master Agreement. Therefore, Parent, Student and ToR communication regarding the requirement is necessary. If a student does not complete their chosen intervention/assignments, they may receive a PIN (Progress Improvement Notification).

## *Student Success Team (SST)*

### *Process, Forms, & ToR Responsibilities*

TK-6 SST Meetings: Tamara Murphy, [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education)  
7-12 SST Meetings: Alison DeSchaine, [adeschaine@excelacademy.education](mailto:adeschaine@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](mailto:jcraig@excelacademy.education)  
TK-12 Curriculum, Instruction, & Support - Tamara Murphy, [tmurphy@excelacademy.education](mailto: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

EACS 504 Coordinator: April Saade, [assade@excelacademy.education](mailto:assade@excelacademy.education)

TK-6 504 Meetings: Elementary Counselor & Elementary Vice Principal

7-12 504 Meetings: School Counselors

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. 504 Plan requests should be addressed in a timely manner to best support the student, parent, and ToR. Please notify the appropriate 504 contact (listed above) as soon as the possibility of a 504 Plan is discussed. 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.

## Special Education Assessment Requests

School Psychologist: Noell Scott, [nscott@excelacademy.education](mailto:nscott@excelacademy.education)

Intervention Coordinator: Tamara Murphy, [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education)

If a parent requests a special education assessment, verbally or in writing, **please notify Noell Scott & cc Tamara Murphy immediately**. If you have concerns regarding your student's academic progress, please reach out to Tamara Murphy through the SST Process ([Pre-SST Resources](#) & [SST Info & Directions](#)).

## *Homeless, Foster, Mobile Youth (McKinney-Vento)*

*Homeless/Foster Liaison: Tamara Murphy*

*Elementary Family Support: Caroline Forester*

*Secondary Family Support (East): Larissa Allen-Jefferson*

*Secondary Family Support (CS): Daniel Favela*

### *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 SIS Label is a yellow asterisk*
- *ToR observation or notification from family- Email Tamara Murphy and assigned counselor, with status update including any available details ;*

### *Homeless & Foster Students*

*ToRs must notify the Homeless/Foster Liaison when a family makes you aware that they are residing outside of Kern, Los Angeles, San Bernardino, Riverside, Orange, or San Diego county.*

*Refer to our [Homeless, Foster & Mobile Youth Rights & Support Process](#) for detailed information.*

# Grade Retention & Acceleration

Elementary Principal: April Saade, [assade@excelacademy.education](mailto:assade@excelacademy.education)

Secondary Principal: Lorrie Wood, [lwood@excelacademy.education](mailto:lwood@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 their Principal. Please also review [Retention & Acceleration Policies & Processes](#).



## GATE - Gifted and Talented Program

The GATE program at Excel Academy provides specialized educational opportunities for 3rd-8th grade students who demonstrate exceptional abilities or potential in academics, creative pursuits, and/or problem-solving. The program is designed to meet the specific learning needs of gifted and talented students, allowing them to develop their abilities to the fullest extent. ALL 3rd-8th grade students are invited to participate whether or not they have been identified as GATE.

The GATE Program hosts in-person enrichment activities including STEM projects, field trips, and competitions. We recognize that gifted students often have unique social and emotional needs. The GATE program encourages the development of healthy peer relationships, supports students in coping with perfectionism and academic pressure, and fosters a sense of belonging with like-minded peers.

GATE testing is provided annually and participation is voluntary.



# Community

## Shared Drive Community Folder

- [Excel Academy Permission Slips](#)
- [Waiver - When Parent B Takes Student A Forms](#)
- [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 service requirements toward field trips and/or community events. Virtual Path ToRs are not required to complete these duties, but may participate if they choose to do so.

Each ToR may choose one of the following options (see table below) to fulfill their yearly requirements. Throughout the school year each ToR will document what they have completed in each column and change the pink cell to **green**. By the end of the school year, each column that is highlighted in pink should appear in green. Ex. If a ToR attended a field trip to Banducci's Farm, the ToR would record the event and the date under the field trip column and highlight the cell green: **Banducci's Farm 10/27/24**. The ToR would continue this process by signing up for categories that will fulfill their yearly requirement.

This year, we are requiring each Personalized Path ToR to attend the May Spring Celebration in their region. If you select an option that has Community Event requirements, the Spring Celebration cannot be used to fill one of these requirements.

Option 1		
Community Event	Field Trips	Virtual Lessons



<i>Option 2</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Virtual Lessons</i>
<i>Option 3</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Specialty Event</i>
<i>Option 4</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Specialty Event</i>
<i>NHS Option</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Virtual Lessons</i>
<i>SSC Option</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Virtual Lessons</i>
<i>Pali Option</i>		

Community Event	Field Trips	Virtual Lessons
	Pali	
Catalina Option		
Community Event	Field Trips	Virtual Lessons
	Catalina	

*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 EACS Field Trip pack which will contain a flag, wristbands, and a first aid kit.*
- *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 EACS Field Trip pack which will contain a flag, wristbands, and a 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. 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.*
- *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.*

### 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 requires 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 Lara Ulmer, Director of Special Education for further support.

**\*\*For newly enrolled High School students, it is vital to collaborate with the High School Counselors PRIOR to developing the student's MA. The counseling team will contact the SPED department if they require support in determining a student's course of study.**

**\*\*It is imperative that you inform the SPED Compliance Coordinator, Sarah Tomkiel, 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. All students will be assigned to an Excel Academy Case Manager within 10 school days of the MA signature being received. For students enrolling with documentation of speech-only disabilities, their assigned CM will be a member of the speech team. You can find your student's Case Manager within SIS/Pathways.

### 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.

The screenshot displays the Excel Academy Student Dashboard. The 'Staff Associations' section is highlighted with a red circle and a red arrow. The table below shows the staff assignments for the student.

Staff	Position	Start	Finish	Mig
Mashburn, Mandy	Teacher	07/23/2018	present	
Kanode, Cathy	SPED Case Manager	11/09/2018	present	

Below the Staff Associations section, the 'Enrollments' section is visible, showing a table with columns for Track, Start, Finish, Grade, Att, Program, and Grad Req.

Track	Start	Finish	Grade	Att	Program	Grad Req
B	09/04/2018	present	5	IS	Independent Study - Excel Academy	Elementary (General Education)
B	07/23/2018	09/03/2018	5	INF	Pre-Enroll - Excel Academy	Elementary (General Education)
B	09/05/2017	06/08/2018	4	IS	Independent Study	Elementary

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 note that ToRs are NOT required to request permission from the student's CM or any other special education team member prior to issuing a PIN according to the policies and guidelines set by Excel Academy.

Please include the student's assigned case manager once a student reaches their third PIN so that the team can guide you through required next steps and collaborate on strategies to best support the student. An IEP meeting is required specifically to discuss PIN concerns, per the EACS SPED PIN Policy.

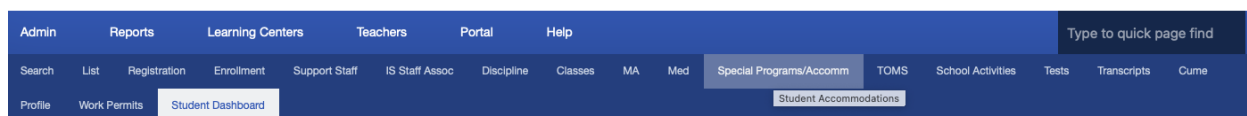
Following issuance of the 3rd PIN, please continue to issue PINs to all students if necessary, and continue to notify the CM as they accumulate.

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

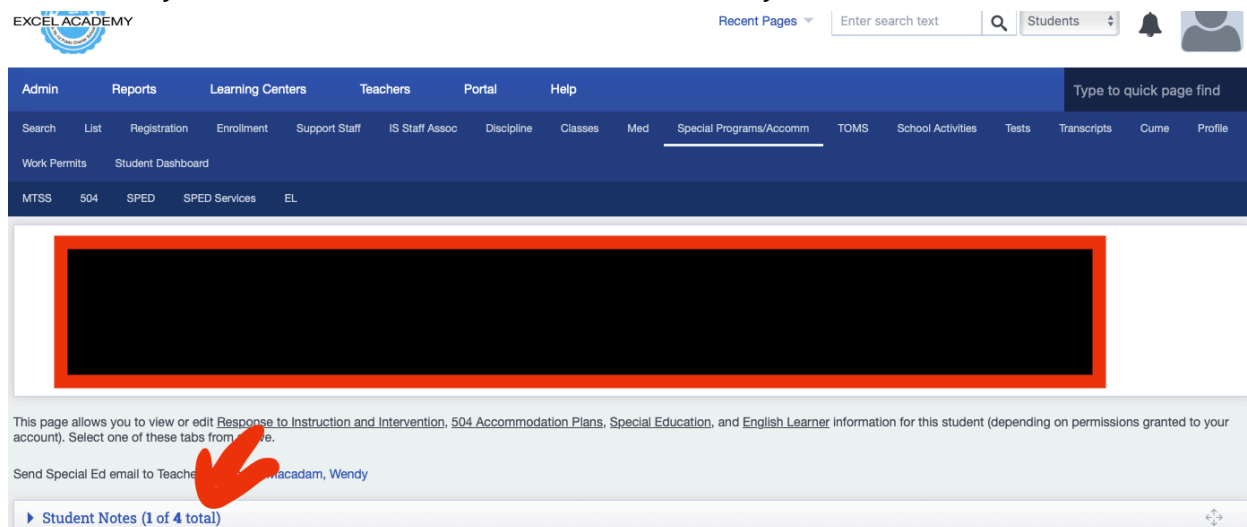
### Roles/responsibilities throughout the school year

Open communication with families during the year will assist in meaningful and fruitful IEP meetings. Prior to the first day of school, please look in SIS for the student's IEP at a Glance..

You can find it by clicking on the "Special Programs/Accomm" tab on the Student Dashboard.



From there, you will see "Student Notes". Click there and you will find the IEP at a Glance.



This document will provide you with a summary of the student's required disability 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.
- ❖ The IEP is a legally-binding document that is active and in place every minute of every school day. Knowing and understanding it will support student progress and success!
- ❖ Communication, communication, communication! 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.
- ❖ If you believe you require the assistance of the CM either in preparation for or during a LP meeting, please reach out to them well in advance. Once you have shared your concerns they will determine whether it is appropriate for them to accompany you to the LP meeting, or if a formal IEP meeting should be scheduled to address the concern with the entire team present. e.
- ❖ 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 SPED Department Program Specialist for further assistance.**

For some students on your roster:

- ❖ In conjunction with the assigned Case Manager and IEP service providers, assist parents with implementation of modifications listed in the IEP
- ❖ Provide consultation or collaboration services as listed in the IEP

### 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 as much information as possible (1 or 2 sentences does not suffice) including most recent iReady and Statewide test scores if available.*
- ❖ 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.*

### *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 content.*
- 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 reteaching 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 information being shared or recommendations being made. 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! However, it is vital to remember that in all IEP meetings, the focus of all discussions and outcomes should be driven by student needs. IEPs are not developed or modified to meet the preferences of the parent or guardian.*



## *Roles/responsibilities AFTER the IEP meeting*

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

*Please sign to confirm your participation in the meeting 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. You will receive a full copy of the student's IEP. Please refer to this if you have any questions. If a parent signs in disagreement or partial agreement, the CM will let you know which parts of the IEP are to be implemented and which parts are in stay-put.*

- ❖ 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.*



# Communication Protocol

## *Forms of Communication Used within Excel Academy:*

- ❖ *Beehively: This is the primary form of communication between both staff and families enrolled in Excel Academy. All important school wide announcements, opportunities, field trips, community events, registration sign ups, and other opportunities are posted on this platform, and will notify parents via email or text message. It is important that every Teacher's Beehively page is set up and used regularly by Teachers. ToRs who do not use this platform do a disservice to their families, as parents often follow the lead of their Teachers, and may miss out on important announcements and opportunities by ignoring communications sent by the school via Beehively to families.*
- ❖ *Email: Email is the primary mode of communication between staff members, and for one on one communications between a Teacher and a Parent/Student. 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, unless you receive written permission from the parent/guardian.**

*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:*

### Sender

- ❖ Only include those who need to know or respond to the communication. Think through before sending. Refer to each department's Who Does What sheet if you are unsure of who to email.
- ❖ Always "BCC" emails with large groups of people.
  - "bcc" allows receivers to "reply" back to the sender without including anyone else in the reply. This cuts down on unnecessary replies of "thank you" to everyone.
  - "bcc" allows for the privacy of other receivers of the email. Always use "bcc" when parent email addresses are involved. This will not allow anyone to see the email addresses.
  - "cc" is used when you do not need to hide the privacy of someone that is needed on the email.
    - Ex. Email to Lorrie that you would like to also be seen by Salmeh in admissions, but the primary email is to Lorrie.
- ❖ Title: 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
- ❖ *Follow-up protocol:* If you do not receive a response within 48 business hours, you may send a follow-up email.
- ❖ *Urgent Emails:* Emails that must be handled immediately due to time sensitivity. After 4 hours, you may follow up the email with another email and phone call.
  - If your request is Urgent, the title should include the word Urgent at the beginning, with the meaningful title following.
    - Ex. Urgent: Concerning Student Conduct
  - 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.

**Receiver**

- ❖ 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 24-48 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.

# Staff Resources

<a href="#"><u>ToR Cheat Sheet</u></a>
<a href="#"><u>Policy Organizer</u></a>
<a href="#"><u>Comprehensive Safety Plan</u></a>
<a href="#"><u>Frequently Used Excel Websites for Families</u></a>
<a href="#"><u>Staff Directory</u></a>
<a href="#"><u>IT Request Form</u></a>

# Calendar



## Excel Academy Charter Schools 2024 - 2025 Academic Calendar

July						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11		13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

May						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

LPs	Dates
1	8/22-9/13
2	9/16-10/11
3	10/14-11/8
4	11/12-12/6
5	12/9-1/17
6	1/21-2/21
7	2/24-3/21
8	3/24-4/25
9	4/28-5/30

Holidays
Sept. 2 - Labor Day
Nov. 11 - Veteran's Day
Nov. 25 - Nov. 29
Thanksgiving Break
Dec. 22 - January 3
Winter Break
Jan. 20 - MLK
Feb. 14-17 Presidents Day
Apr. 7-11 Spring Break
May 26 Memorial Day
Out of calendar holidays
7/4 and 6/19

<span style="background-color: blue; color: white; padding: 2px;"> </span> Graduation
<span style="background-color: yellow; color: black; padding: 2px;"> </span> school holidays
<span style="background-color: green; color: black; padding: 2px;"> </span> end of semester