

Getting Started and Using the NTC California FAS Electronic Toolkit (v2009-2010) in Microsoft Word

Introduction

The New Teacher Center@UCSC is providing an electronic version of its Formative Assessment System (FAS) Toolkit in Microsoft Word to the California programs it serves. A collection of templates in Microsoft Word (with one in Microsoft Excel), this solution will allow mentors to capture formative assessment data on computers. Most typically, this would be done on a laptop computer that a mentor would carry with them in the field.

This document provides information on getting started and using this version of the NTC California FAS Electronic Toolkit. Please note that as a shorthand reference, this solution is often referred to as the “CA FAS ET” throughout this document.

Requirements

To run the California FAS Electronic Toolkit you will need a computer running the Macintosh or Windows operating system as well as the Microsoft Word and Excel applications.

California FAS Electronic Toolkit Contents

The CA FAS ET contains electronic versions of all the tools found in the print version. The names of the electronic files are exactly or nearly identical to the names of the print version tools.

Appendix A at the end of this document contains a complete list of the tools included in the CA FAS Electronic Toolkit.

Distribution of FAS Electronic Toolkit Files

The complete set of FAS Electronic Toolkit files is distributed from the New Teacher Center on a CD to the lead for all programs NTC serves. Program leads are then responsible for distributing these files to participating mentors in their programs; program leads are encouraged to do so via an email with the template files attached and with instructions for mentors on how to save the attached files to their computers. These instructions are also provided below.

Alternately, program leads may distribute the template files via CD or other media, e.g., a flash drive. Please do not post these template files on a district or other website.

Installing and Organizing the FAS Tool Template Files on Your Computer

To “install” the original set of template files on the computer on which you’ll be accessing and using them:

1. First create a new folder in your preferred location on this computer. An appropriate name for this folder would be “CA FAS ET Templates”.
2. In your email program, select the message from your program lead containing the attached FAS Electronic Toolkit template files.
3. From the File menu, select Save Attachments. When prompted, navigate to the folder you created (above) and select it as the target location into which to save these files.

NOTE: If you’ll be using a different computer for mentoring than the one on which you receive your email, you will need to transfer the files between computers. This can be done using a “flash” drive.

Managing FAS Tool Documents on Your Computer

In addition to the folder you created (above) for the FAS template files, you’ll need to create a folder system for managing your caseload of participating teachers, your “caseload.” Here’s a suggested process, although you should feel free to come up with a design that works best for you.

1. Determine an appropriate location on your computer for your caseload folder (e.g., in your Documents folder, or on your Desktop).
2. Create a new folder in that location, and give it an appropriate name, for example, “My Caseload” or “My PTs”.
3. Within that folder, create a folder for each PT in your caseload.

As you create and save FAS Tool documents for each PT, you can save them in that PT’s folder. Within each PT’s folder you might care to create additional subfolders to help organize the FAS Tool documents you’ll be developing during the year.

Using the FAS Tools

The CA FAS electronic tools have been created as *forms*, meaning that each area of each tool where “content” or “data” is entered is a form field. You will be able to add, delete, and modify content in these fields. The files are also “protected”, meaning you will not be able to edit the fixed text or graphic images of the document.

Opening a FAS Tool

To open a FAS tool:

1. Locate and open the folder containing the CA FAS ET template files.
2. Select the particular tool you wish to use by pointing your cursor to it.
3. Double-click the file icon to open the tool.

There are other methods for opening these files, such as first opening Microsoft Word then selecting File > Open, locating the CA FAS ET template file on your computer, selecting and opening it, but the above method is recommended.

Saving FAS Tool Documents

The FAS tools were created and provided as “template files”. Typically when opening a document from a template file, a blank copy of the file appears with a generic file name (e.g., “Document1”). However, depending on how you open a document from this template file, and depending even on your computer platform (PC or Mac), the way the files open may vary, including in a way where you might inadvertently modify the template file.

The most reliable way to ensure you don’t modify a template file is to immediately perform a “Save as...” operation when you first open a new document from the template file.

1. From the File menu, select Save As. (Doing so ensures you will not rename the template file inadvertently).
2. Enter your preferred name for the file, and navigate to your target “save” location on your hard drive (e.g., into the folder for the PT with whom you’re working).
3. Click Save.

Remember, once a document has been originally saved, selecting Save will save any changes to the document since the last save, whereas selecting Save As will create a copy of the file in its current condition which must be renamed, saved to a desired location, and which will exist as a new separate file.

Remember also that if needed, you can always obtain an accurate copy of any CA FAS tool template file from the original distribution via your FAS program.

Resizing the View

Feel free to select different percentage views so that the tool you’ve opened displays at an appropriate size, one that is easy to read. Each blank FAS tool opens by default at a 100% view. You can increase this to 125%, 150%, whatever works best.

Navigating within a FAS Tool

To move from field to field within any FAS tool:

1. Press the Tab key to advance forward through fields or the Shift-Tab key combination to progress backward through fields.
2. Alternately, use the down or right arrow to advance forward through fields or the up or left arrow to progress backward through fields.
3. You can also point and click to insert your cursor into a particular field.

Entering Data into a FAS Tool

To add data to any FAS tool, follow these steps:

1. Using the above navigation tips, enter the field to which you wish to add data.
2. For “text” fields, simply type to enter text.
3. For “checkbox” fields, you can point and click to mark an “X” in the desired checkbox, or navigate to the desired checkbox using Tab or arrow keys, then press the Space bar or the X key to add the “X” to the checkbox.

A Note about Spellchecking and Selecting Text

As a result of the CA FAS Tools being converted to forms, two commonly used functions are impacted. Spellchecking is disabled, and the ability to select a word by double-clicking (or a paragraph by triple-clicking) is also disabled.

Providing Copies of Completed Tools to Participating Teachers

Just as when using the print/carbonless FAS tools, mentors separate the copy sheet and provide it to the participating teachers, mentors using the CA FAS ET need to provide a copy of the completed tool to PTs. There are a few options for doing this:

1. Print a hard copy for the PT.
2. Route them an electronic copy of the saved, completed tool. For example, you can email them the file as an attachment, or copy the file to a “flash” drive the PT keeps.

Remember, it is important that the PT get a copy of completed tools as soon as possible after they have been generated.

Specific Information about Using Certain FAS Tools

There are a couple tools that, based on their function, vary slightly in how they are structured and used.

Using the Seating Chart in Word

The Seating Chart – Movement Patterns, Interaction Patterns, Behavior Patterns tool is the one tool that is tricky to complete on a computer. In its print counterpart, mentors typically sketch the classroom layout, and then add symbols, graphics, including lines, arrows, etc., and text to capture data about patterns. Easier to do with a pencil on paper than using a mouse and the drawing tools in MS Word.

We recommend one of the following two approaches to using this tool:

1. Begin by opening a blank copy of the Seating Chart tool from its template file. Complete the fields of information at the top of the tool and save it, then print it out and capture the classroom layout and all “observation data” using a pencil or pen.

OR

2. Similarly begin by opening a blank copy of the Seating Chart tool from its template file, completing the fields of information at the top of the tool, then saving it. Next, “unlock” the Seating Chart tool (while originally “locked”, this tool is not fully protected so it can be unlocked). This can be done by clicking the padlock icon on the Forms toolbar (picture below), or by selecting “Unprotect Document” from the Tools menu.



Now you can use the Microsoft Word drawing tools to add shapes, graphic elements, even text boxes to the Seating Chart. You can use the drawing tools to create the classroom layout ahead of time **before** printing out the tool for capturing observation data. If you’re exceedingly nimble, you may be able to use Word tools to capture observation data, but otherwise, we recommend you print the tool and capture the data by hand.

Using the Class Profile Tool in Excel

The Class Profile tool was developed in Excel to better support the ability to sort data once entered.

PLEASE NOTE: The file extension for an Excel template file is .xlt. Sometimes Microsoft Excel running on a Mac computer will not recognize this file extension, and so when you double-click the template file to open a blank copy, it will not work. The solution? First open the Excel application, then from the menu select File > Open. Navigate to the location where your CA FAS ET template files are located, select the Class Profile tool and select “Open”. The file will open.

The Class Profile tool in Excel is not a “form” and is neither locked nor protected. As a result, you use this tool much like you would a regular Excel file. (Please note that this also means it is possible to edit/modify any part of the document, so be sure to not modify the document structure or functionality as you work.)

1. You can still navigate using Tab and arrow keys, but you can also simply point and click to enter a particular field or cell and then enter data.
2. Follow the “onscreen” instructions on the right side of the tool for sorting the data once entered.

If you need further help...

With a program question, or with a technical question related to the Word or Excel template files.

- Begin by consulting other mentors in your program who are using the CA FAS ET solution.
- Contact your program lead. If your lead is unable to assist you, they in turn can contact your program’s NTC FAS Liaison, who can assist.

Please note that because of the wide range of computers and configurations in use across all NTC-supported California FAS programs, that NTC cannot provide tech support related to computer- or network-specific tech issues. Your FAS program’s NTC FAS Liaison can call on NTC Tech Support resources as necessary to respond to a technical issue related only to the Word or Excel template files.

Appendix A – List of California FAS Tools

The following outline provides a complete list of the tools found in the California FAS Electronic Toolkit. Unlike the print version, where the tools are listed in chronological order, the electronic versions of the tools are listed below in the order (folder/file structure) they appear when viewed on your computer.

Collaborative Assessment Log

Examining Practice Through Inquiry

Analysis of Student Work Tools

- Analysis of Case Study Student Work
- Analysis of Student Work Pre-Assessment
- Analysis of Student Work Special Education
- Analysis of Student Work

- Inquiry Action Plan
- Inquiry Reflections – Pedagogy
- Inquiry Reflections - Universal Access
- Professional Development Reflections Log
- Veteran Teacher Observation

Lesson Plan Tools

- Differentiating Instruction
- Instructional Groups
- Lesson Plan - Backwards Design
- Lesson Plan - Language Learners and Equity
- Lesson Plan - Using Technology

Observation Tools

- Best Practices that Support Students with Language Needs
- Conditions for Equity
- Conditions that Support Students with Learning Disabilities
- Content, Strategies, and Alignment
- Effective Environment
- Seating Chart
- Selective Scripting
- Six Strategies for Secondary Teachers of English Learners Veteran Teacher Observation

Setting and Reflecting on Professional Goals

- Individual Learning Plan

- Mid-Year Review
- Professional Growth Reflections
- Self-Assessment Summary

Understanding Context

- Class Profile
- Context Reflections – Pedagogy
- Context Reflections - Universal Access
- Family Communication
- Pre-Assessment Iceberg: Case Study Student
- Resources Personnel Communication
- School, Family and Community Resources