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Preface

Welcome

Thank you for purchasing Instruction Planner™ of Collaborative Learning Inc.™ This manual contains instructions for setting up and using your new web-based productivity program.

Tip • It is important to remember that after logging in to Instruction Planner™ one is no longer browsing the Internet, but interacting with software located online. For this reason, it is imperative to use the navigation tools of Instruction Planner, not the Internet Explorer or Firefox, or other browser toolbars.

Collaborative Learning

Collaborative Learning Inc., founded in 1999, is the leading company in productivity software enabling schools to plan, monitor, and analyze instruction and curriculum with targets, benchmarks, and standards.

From our roots in curriculum mapping (Curriculum Mapper) to the July 2009 release of the “next generation,” Curriculum Improvement Studio – an integrated suite of programs – we remain dedicated to outcomes-based planning of instruction, the refinement and publishing of curricula, and the analyzing of student performance, all web-based, in real-time.

Used by thousands of schools and over one million educators, we guarantee successful implementation for every school, with a team of professional development consultants who are experts in curriculum, mapping, instructional planning, and assessment. They have highly valued academic and real-world classroom experience to work with you to reach your achievement goals.

Research has shown that the variance in student learning is directly related to curriculum and instruction that is aligned, or misaligned, to desired outcomes and standards. We strive to produce programs that provide quality tools necessary to the critical decisions that improve student performance, making schools, teachers, students, and communities more successful.
About this manual

This manual is designed to help you get started using Instruction Planner. It contains the following:

- Customer service information
- Introduction to Instruction Planner
- Detailed directions for setting up the system
- Detailed instructions for creating, revising, and using your plans and sending them to Curriculum Mapper
- Administrative Functions of Instruction Planner

Logging into the System
Preface

Logging into the System

Part One: First Time Logging In

To log in for the first time:

1. Use an approved Internet browser to navigate to the website – login.clihome.com
2. Enter the User ID (Universal ID) and Password provided. (All passwords are case sensitive)
3. Click Log In.
4. Enter primary email address, either school or personal.
5. Change Password. (Passwords are case sensitive; must be 6-12 characters in length, and include only letters and numbers.)
6. Accept the terms and agreement when requested.
7. Click Continue.
8. The Personal Profile Page will appear.
9. Complete the Personal Profile Page and SAVE the profile
10. The Product Selection Page will appear

Part Two: Confirmation of Email Address

To confirm your email address:

1. A Confirmation Link will be sent from Collaborative Learning to your email address. This is the “Confirmation” step. Click on the Link provided within the email.
2. Clicking this link confirms your email address and you will see a pop-up window notification that your email address is now confirmed. This means that you can now use your email address as your User ID.
3. Close out of the email once completed.

Tip • Should you not confirm your email within 72 hours, when you attempt to log in to the program, you again will be asked for your email, which will generate a second confirmation email to which you must respond.
Preface

Creating Your Profile

Part Three: Ongoing Login Instructions

To log in later:

1. Go to www.clihome.com and click on Login at the top of the page.
2. Enter your new User Name (your email address) and new Password (if you changed it).
3. Click Log In.
5. Click on Instruction Planner

Tip • Keep in mind:
• For future logins, the Universal ID or primary email may serve as the user name
• Confirmation of the email address must occur in order to use your email.
• Until confirmation occurs, the User ID (Universal ID) may be used.

Creating Your Profile

Users have the ability to provide information that will customize their program and help Collaborative Learning communicate information relevant to their grade, subject or interest.

Your Profile may be accessed from any page by clicking on My Account.
Preface

Select Instruction Planner to Begin...

Select Instruction Planner to Begin...

Getting assistance

Collaborative Learning, Inc is committed to assisting our customers. The Help system is simple. The system is designed to provide you a variety of tools for finding answers to your questions using a variety of resources:

- Call: 800.318.4555 and speak with an Account Manager
- Email: support@clihome.com
- Call our Tech Support Hotline at 630.282.1646 – we are available from 8 am to 10 pm Eastern time
- Contact your Sales associate

- Grab a variety of resources from our online help indicated by a question mark on most pages
- Download complete manuals and Quick Guides from our Resource and Help menus.
Conventions

Some or all of the following conventions appear in this guide:

<table>
<thead>
<tr>
<th>Symbol or Type Style</th>
<th>Represents</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>a new term</td>
<td>...called a <strong>source object</strong>.</td>
</tr>
<tr>
<td><strong>Alternate color</strong></td>
<td>(online only) hotlinked cross-references to other sections in this guide; if you are viewing this guide online in PDF format, you can click the cross-reference to jump directly to its location</td>
<td>...see Chapter 3, Data Migration.</td>
</tr>
<tr>
<td><strong>Italic</strong></td>
<td>words that are emphasized</td>
<td>...the entry after the current entry...</td>
</tr>
<tr>
<td></td>
<td>the titles of other documents</td>
<td><strong>PLATINUM General Facilities Reference Guide</strong></td>
</tr>
<tr>
<td></td>
<td>syntax variables</td>
<td><strong>COPY filename</strong></td>
</tr>
<tr>
<td><strong>Monospace</strong></td>
<td>directories, file names, command names, computer code</td>
<td>&amp;HIGHLVL.SRCLIB</td>
</tr>
<tr>
<td></td>
<td>computer screen text, system responses, command line commands</td>
<td>Copy file? Y/N</td>
</tr>
<tr>
<td><strong>Monospace bold</strong></td>
<td>what a user types</td>
<td>...enter <strong>RUN APP.EXE</strong> in the Application field</td>
</tr>
<tr>
<td>▶️</td>
<td>choosing a command from a cascading menu</td>
<td><strong>File ➤ Import ➤ Object</strong></td>
</tr>
<tr>
<td><strong>Highlighted Screen Text</strong></td>
<td>used to callout screen text on character-based screen captures. (When viewed online, the screen text will be blue.)</td>
<td><strong>Dataset...</strong> <strong>Product...</strong> <strong>Pamlib...</strong></td>
</tr>
</tbody>
</table>
Instruction Planner™ User Manual

Step-by-Step to Get Started:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Welcome to Instruction Planner</td>
</tr>
<tr>
<td>2</td>
<td>Set Up Classes: Assign a name for each class or course</td>
</tr>
</tbody>
</table>
| 3    | Build A Unit: Create a Unit of Study using a template  
      • Includes naming the unit, determining class/subject, etc.  
      • Includes choosing the classes to which you plan to teach the unit |
| 4    | Select Standards: Attach from list for each unit developed  
      • Includes 21st Century Technology Skills  
      • Includes State Standards (based on your individual state) |
| 5    | Add Lesson Details: Type your intended lesson details into each block  
      • Includes Objectives, Focused Questions, etc.  
      • Includes all Instructional Elements you choose for your unit |
| 6    | Add Reflections: After the unit is taught—to update any changes or notes  
      • Includes Reality Check feature  
      • Includes Notes in Reflections element |
Step 1: Welcome To Instruction Planner

- **Dashboard** - shows an overview of available plans, messages from Collaborative Learning Inc.™, important dates and reports, as well as helpful information on program features.
- **My Plans** - is directly connected to the list of plans a teacher has in Instruction Planner™.
- **Reports** - lists a variety of reports available to gather information from plans.
- **Resources** - links to a document library and this Teacher Guide.
- **Setup** - allows teachers to select the classes and sections, calendar, and templates (if permission is given by the administrator) for the current school year, as well as facilitates copying units from one school year to the next school year.
- **Support** - provides a link to help with the program.

Your Dashboard

When users log into the Instruction Planner program from the Login page they will navigate to their Dashboard. This page is divided into a variety of sections, which display content from the User’s Instruction Planner™ program. Users can see Daily Plans with associated Standards and Instructional elements along with report results, message boards and access to webinar events. Users will navigate into the Instruction Planner™ program via the menu bar located at the top of the screen.

**Today’s Overview** allows teachers to select from plans available for each day. The courses are listed in alphabetical order and can be accessed by clicking on the back and forward arrows. The Previous Day and Next Day arrows navigate to other days. If items are checked off in the daily plans for the day, the information will appear in the columns of the Overview.
- **My Reports** shows the Assessment Types that have been checked off in the current plan.
- **Message Board** displays Announcements and Product Updates from Collaborative Learning Inc.™
- **Collaboration Station** provides quick informational videos on various aspects of Instruction Planner.
- **Countdowns** are set from the Administrators Calendar and indicate the number of days or weeks remaining in the school year and the number of days or weeks remaining until important testing dates.
- **To Do List** provides a place for teachers and administrators to record, track, or edit important dates. Past due items are shown in red.
- **My Curriculum Maps** shows the maps available in Curriculum Mapper™ for any particular course. These maps can be accessed by clicking on the month below the course title.

### Step 2: Set Up Classes

**Important** • Classes or courses must be set up prior to creating any lesson plans or units of study. Your school Administrator may have completed this before your initial login. To be prepared, select the classes with which you plan to work and have that information available when you start working with the program.

1. Classes must be established prior to creating units. If units will be created for a variety of classes, it is suggested that all classes be entered at this time.
2. Under the tab **Setup** choose **Class**.
3. Confirm the school year from the drop-down menu in the top left corner.
4. In the top right corner, click **+Add New Class**. Select the class from the drop-down list. A section name is also required. The section name can be the class period, section number, and/or teacher name. For example, 1<sup>st</sup> period or Mrs. Johnson’s class.
5. Click **Add Class**.
Step 2: Set Up Classes

6 Multiple sections/periods can be added by clicking **Add Section**. As many sections/periods can be added as needed.

Set up a Calendar

Important dates can be entered into the calendar. The District or School Coordinator will also enter dates that affect the whole school.

1 From **Setup** choose **Calendar**.

2 Click **+Add New Events**.

3 Select the start and end date of the event.

4 Click **Submit Dates**.

5 Select the **Event Type** from the drop-down list.

6 Type the description that will appear under **Description** in the list of events.

7 Click in the box next to **Blocked Dates?** if the dates should not be used for a daily plan.
Step 3: Build a Unit of Study

Create Unit of Study by Adding a New Unit

Note • Your school or district should have already created Unit Templates for building Units of Study. If no templates appear, please check with you district administrator to have templates created.

1 From the menu bar, click My Plans.

2 Across from Unit Plan List, click +Add New Unit.

3 Enter the Title for the unit.

4 Select the Class from the drop-down list.
   • All sections are pre-selected but may be de-selected if the unit does not apply to a section.

5 Select the Template to be used for the unit from the drop down menu:

6 Select the school Calendar year.
Step 3: Build a Unit of Study

7. To select unit **start and end dates**, click the **calendar**. In the next window, select the **start date and end date** of the unit. Click **Submit Dates**.

![Image of calendar and select teacher interface]

8. If the teacher plans to **Share Unit With** other teachers, click on **Select Teacher**, select the **School, Course** and mark the **checkbox** to the left of a teacher’s name. Click **Add Teachers**.

9. Click **Add Unit**.

**Important Considerations**

**Unit Titles** – All daily lessons are created within a unit. This can be a unit of time (April 20 – April 24), a book unit (Chapter 4: The American Revolution), or a concept/content unit (Rocks and Minerals). A unit can be as short as one day or last as long as you choose. However, a unit must be given a start date and an end date.

**Note** • The title of the unit will not be sent into Curriculum Mapper®.

**Templates** – The Administrative account creates templates that can be used by all teachers in a school. A template must be selected when adding a new unit. **Once a unit has been added**, it is **not** possible to select a different template for that unit. If a different template is desired, a new unit must be added, in which case a different template can be selected and the older unit can be deleted (depending on unit deletion permissions set by the Administrative account). A Blank Template will allow a user to only include Standards and Content, Skills, Assessment blocks.

**Blocked Dates** – Some days may be blocked by the Administrative account. Blocked dates may be marked on the calendar as a holiday (Labor Day), term start and/or end dates, or special school dates (Parent/Teacher Conferences). Teachers will have a choice to cancel or use the blocked date in the unit.
Step 3: Build a Unit of Study

Share Unit – The Share Unit option allows teachers to share the design of an instructional unit within a grade level, department, or across subject areas for interdisciplinary connections. Units can be shared within one building or across multiple buildings in a district. If the choice is made to share the unit development with other teachers, those teachers have real-time access in order to collectively build the unit. Once the Unit Plan is built, each teacher involved in the development will copy the unit into his or her own Unit Plan List. That allows each teacher to make revisions and modifications based on the needs of the students in his or her classroom for his or her own Daily Plan, without disrupting or changing the basic plan. When sharing a unit, it may be wise to develop a plan for the team’s work since the last person to make changes and save the unit may overwrite the work of other collaborators. The teacher who originated the unit will see a “P” under the shared heading to represent Primary author, and those who are sharing the unit will see an “S” under the shared heading.

Shifting Units – Whole units or parts of units can be shifted forward or backward. This feature is useful when a unit is longer or shorter than anticipated. Shift the unit forward to establish a new start date. If school is cancelled for a day, any part of a unit not yet taught can be moved to show that no teaching occurred on that date. Click on the day on the left calendar and then specify the number of days to shift earlier or later. This can be done at any time during the unit.

Actions: Unit Menu Functions

Edit - edit a unit title, start and end dates, as well as Share Unit With selections

Copy - copy current unit

1. Select Copy from the Unit Menu.
2. Enter the New Unit Title.
3. Select the school year.
4. Select the class from the drop-down list.
   - All sections are pre-selected but may be de-selected if the unit does not apply to a section.
5. Select whether to **Copy Unit Plan with Daily Plans** or **Copy Only Unit Plan**.

6. Select unit **start date** by clicking on the **calendar**.

7. Click **Copy Unit**.

8. In order to share the unit with other teachers, select **Edit** in the **Actions** drop-down to select the teachers with whom to share.

**Shift Unit/Daily Plan** – adjust the start and/or end date of the Unit/Daily Plans to lengthen or shorten the unit.
Delete – delete an entire unit (function may be disabled by the Administrative account.)

**Note** • A unit cannot be deleted if its start date is before the current date. A solution is to shift the unit to a future start date, return to My Plans, open the unit, and select Delete from the Action drop-down.

• A unit cannot be deleted if data has already been selected or entered on any Daily Plan. Individual Daily Plans would need to be deleted first.

• Individual Daily Plans need to be deleted prior to a Unit Plan.

• A Shared unit can only be deleted by the primary author.

Deactivate – make unit inactive for the school year

Convert to PDF – Converts Unit or Daily Plans to PDF.

Add to Plan Library – Include unit as a plan for other teachers to use.

**Sharing a Unit Function**

**Tip** • Units can be shared between teachers.

If a unit is to be developed collaboratively, it must be shared with other teachers during the unit-planning phase.

Teachers can be added from other school buildings to enable sharing across a district.

1. Select **Edit** from the Unit Menu.
2. To share, click **Share Unit With**.
3. In the next window, select the **School** and **Course** from the drop-down lists to locate the teacher(s) with whom to share.
4. Select the **teacher(s)** then click **Add** to add names from the left **Teachers** box, to the right **Selected Teachers** box.
5. To add teachers from a different school, select the school from the **School** drop-down list and continue steps 8a and 8b.
6. To remove teachers from sharing, select the teacher(s) then click **Remove**.
Step 3: Build a Unit of Study

7 When complete, click **Add Teachers**.
Step 4: Select Standards

This process adds standards to the Unit Plan, allowing the standards to be attached to the Content, Skills, or Assessment areas in the Unit and Daily Plans. Follow these steps:

1. Click **Add Standards** in the Standards section.
2. Select the **Set, Subject, and Level** from the drop-down menus.
3. Use **Search** to isolate standards containing a word or word part.
4. Place a check in the box (es) next to the desired standard(s).
5. Click **Add Standards** to add selected standards to the unit.
6. Repeat steps 1-5 to add standards from another Set, Subject, and/or Level.
7. To remove standards, select the **Set, Subject, and Level**; click in the box(es) to remove the check. Click **Add Standards**.
8. The Standards Box can be collapsed by clicking **Hide** and expanded by clicking **Show**.

Important Considerations

Standards are added to units to set priorities regarding what students need to know and be able to do. Unit and Daily Plans should be developed with the standards in mind. It is necessary to add standards to the Unit Plan or Daily Plan in order to attach standards to Content, Skills, and/or Assessment. Standards cannot be tracked unless they are attached to Content, Skills, and/or Assessment.
Step 5: Add Unit Details

**Tip** • This Step includes typing in the information about what you plan to teach. It involves adding this information to both the C/S/A blocks and Instructional Element blocks.

5A. Customized Your Unit by Adding Information to Instructional Element Blocks:

1. To add information into any Element, click **Edit**.
2. The toolbar can perform a variety of functions for customizing the content of an Element.

![Toolbar with options for editing text]

3. Hyperlinks may be added to any text box Element:
   - Click **Hyperlink Manager** icon—
   - Type or copy the URL
   - In **Link Text**, enter a name associated with the link
   - Click **OK**
4. The Element box may be collapsed by clicking **Hide** and expanded by clicking **Show**.

![Instructional Element with activities]

**Activities**

- **Instructional Strategies**
  - Engaging Students & Engaging Activities
  - Summarizing & Note-Taking
  - Reinforcement & Providing Recognition
  - Homework & Practice
  - Nonlinguistic Representation
  - Cooperative Learning
  - Setting Objectives & Providing Feedback
  - Generating & Testing Hypotheses

- **Additional Resources**
  - Weather website: www.weather.com

- **Assignments/Homework**
  - Weather Game
  - Cloud Identification Worksheet

**Performance Tasks/Projects**

- Cloud Scape worksheet is a set printouts activity. Groups will cut-out cloud types from magazines, create a “map” for their own. Groups will exchange activities and multiply the correct cloud type.
Important Considerations

Instructional Elements are components of a school/district template that allows teachers and administrators to track, monitor, and analyze various instructional elements within the Daily Plans. Instructional Elements may be placed in the Unit Plan, but only the Daily Plan data generates reports.

<table>
<thead>
<tr>
<th>Monitored and Analyzed</th>
<th>Tracked and Analyzed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Checkbox</td>
</tr>
<tr>
<td>List</td>
<td>Drop-down List</td>
</tr>
</tbody>
</table>

1. There may be any number of Instructional Elements in a Unit Plan or Daily Plan.
2. The information entered into Instructional Elements in the Unit Plan reflects aspects of the overall unit.
3. The information entered into Instructional Elements in the Daily Plan reflects aspect of each day’s instruction. The Daily Plan data generates reports.

**Note** • Instructional Elements are not transported to Curriculum Mapper®.

5B. Customize Your Unit by Adding Information to Content, Skills, and Assessment Blocks:

To add Content and Skills:

1. Locate Content, Skills, Assessment section. Click Add New Block.
2. Choose a title for the block.
3. Click in Content to begin entering content statements.
4. Hit the Enter key for the next letter in the outline (A, B, C, etc).
5. Hit the Tab key for the next level in the outline, if desired (1, 2, 3, etc).
6. Hit the Shift and Tab keys to return to the previous level in the outline.
Step 5: Add Unit Details

7 The Block Editing Toolbar also allows a user to format the **Content, Skills, Assessment** section.

![Block Editing Toolbar Diagram]

**Tip** • The outline structure of the Content and Skills columns is pre-determined:

<table>
<thead>
<tr>
<th>Content: 1 Level; Skills: 2 Levels</th>
<th>Content: 2 Levels; Skills: 3 Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content</strong></td>
<td><strong>Content</strong></td>
</tr>
<tr>
<td>A. Level 1</td>
<td>A. Level 1</td>
</tr>
<tr>
<td>1. Level 2</td>
<td>1. Level 2</td>
</tr>
<tr>
<td></td>
<td>1. Level 2</td>
</tr>
<tr>
<td></td>
<td>a. Level 3</td>
</tr>
<tr>
<td><strong>Skills</strong></td>
<td><strong>Skills</strong></td>
</tr>
<tr>
<td>A. Level 1</td>
<td>A. Level 1</td>
</tr>
<tr>
<td>1. Level 2</td>
<td>1. Level 2</td>
</tr>
<tr>
<td></td>
<td>1. Level 2</td>
</tr>
</tbody>
</table>

Below is an example -- **Content**: 2 Levels; **Skills**: 3 Levels.
Important Considerations

Guidelines for writing Content, Skills, and Assessments:

<table>
<thead>
<tr>
<th>Content</th>
<th>Skills</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Express as descriptive nouns or noun phrases</td>
<td>- Express as measurable verbs (Bloom’s Taxonomy)</td>
<td>- Express as defined nouns that clearly describe the assessment tool: product or performance</td>
</tr>
<tr>
<td>- Write in phrases rather than sentences</td>
<td>- Use precise and exhibit active demonstrations of learning</td>
<td>- Write in measurable and recordable terms</td>
</tr>
<tr>
<td>- Avoid use of chapter headings, page numbers, acronyms, and abbreviations</td>
<td>- Focus on the skills students learn rather than activities</td>
<td>- Include the tools used to provide evidence of learning</td>
</tr>
<tr>
<td>- Use enough detail to inform others; yet limit to two outline levels</td>
<td>- Write in the language of skills, not a restatement of the standards</td>
<td>- Format to match skills</td>
</tr>
</tbody>
</table>

The content being taught, the skills students are learning, and the assessments used to determine mastery of the skills are all entered in blocks under the heading of Content, Skills, and Assessment. Blocks are used to segment instruction, identify areas of emphasis, or place instruction within a specific timeframe. A unit can be placed within one or multiple blocks depending on preference. Blocks can be named for easy reference. For example, a unit on the American Revolution might have the following blocks: Causes, Events, and Effects. In Language Arts, blocks can be used to separate Reading, Writing, Listening, and Speaking while keeping Language Arts within a unit. Blocks help in the organization of thinking and teaching.

Text entered in the Content column automatically populates the Skills column in order to maintain consistency and ensure that columns align. Thought must be given to the outline structure illustrated on Page 17. If the Level One structure in the Content area is selected and data is entered into the Content and Skills column using that structure, a Level Two structure cannot be added in the Content field without first deleting the data in those columns. The Assessment column is unique in that it does not follow the same outline structure. Assessments are typically grouped to match the skills being assessed. Any Content, Skills, and/or Assessments that are added later to the Daily Plan will populate the Unit Plan.
To add Assessments:

1. Click Edit Block.

2. Click Add Assessment.

3. Enter a name for the assessment. This text will appear in the Assessment column. Letters and numbers are recommended in the name to visually identify the skills that are measured using an assessment (example above, “Cloud Activity 1”).

4. If your school/district has included Assessment Types, select the most appropriate. These assessment types are tracked by the system.

5. Specific Standards, Content and Skills, and Documents can be attached to the assessment.

6. Click Save Assessment.

Important Considerations

The Assessment column does not follow the same outline structure as Content and Skills, because the assessment may measure a number of skills over multiple content areas. When the Assessment is named, use text to match it to the skills being measured. In the example below, the Analysis of the Jungle assessment measures the skills in both A and B, so the teacher placed A-B before the name of the Assessment to make the visual correlation.
In addition, standards can be attached to each Assessment, reflecting the specific standards measured by the Assessment. Reference also can be made to the specific Content and Skills with which the Assessment is associated.

To add Standards within Blocks:
1. Standards can be associated with any block and may be attached to Content, Skills or Assessments.
2. Click Edit Block
3. Click on the Add Standards button.
4. Standards chosen during creation of the unit will populate the Standards window.
5. Click on the content or skill where the standard will be attached. A green line will appear around that item. See the Assessment information for attachment of Standards to Assessments.
6. Choose the standards that are associated with the Content or Skill.
7. The teacher may also choose the instructional level of the Standard by selecting Introduced, Developed, or Reinforced in the dropdown menu next to the Standard’s checkbox.
8. Once standards are chosen click the word Attach Standards in the top right corner
9. To close out the standards section, simply click on Close Standards.
10. Click on the Save, or Save and Close to save the Block.
To edit Standards:
1. Click Edit Block
2. Click on the Content or Skills box that has the enclosed standard.
3. Click on the Standard icon. This will show the standards previously checked.
4. Change or delete whatever Standard(s) the teacher needs to address by checking or un-checking the Standard(s).
5. Click the words Add/Remove Standards in the right corner.
6. Click Close Standards
7. Click on the Save, or Save and Close to save the Block.

Important Considerations
Standards can be attached to every Content or Skill statement; or they can be attached to the last statement in a series, in which case it can be assumed that the standard is associated with all Content and/or Skills statements above it. Thought must be given to the consistency of how standards will be attached for the school/district. When a standard is clicked, the drop-down to the right is activated and can be used to choose the level of the standard addressed. Be sure when editing to always click Add/Remove Standards in the top right corner.

Any Instructional Element, Standards area, or Block may be hidden to focus viewing to a specific area of the page by clicking Hide. Click Show to see the section again.
Attaching Documents within Blocks

To attach documents to the Content or Skills column:

1. To add a document or files to a Unit or Daily Plan in the Content or Skills columns, click on the Add Document icon.

2. If the file needs to be added to the Document Library, click Add New File.

3. Scroll to the top of the computer window if the Add New File dialog box does not appear. It will be located at the top of the screen.

4. Click Browse to locate the file.

5. Choose Share Option. (Remember: Global Access is free space.)

6. Enter Document Title and Description; select Category, File Type, and Library.

7. Click Add File.

8. Click in the Content or Skills column. Document(s) will attach where the cursor has been placed.

9. Place a check in the box next to the desired document(s).

10. Click Attach Document and Save the block. An icon will appear in the column indicating the document is attached.

11. To close the Document Library, simply click on Add Documents Icon again.

12. Click on the Save, or Save and Close to save the Block.

13. Delete documents from Content or Skills in the same manner as standards. (Page 22)
Important Considerations

Documents, images, and other types of files can be attached to Instruction Planner™ in a variety of areas, making the Document Library useful as a repository for items used to teach, reinforce, or assess. Multiple documents may be attached to the Unit Plan or Daily Plan at the same time. However, only one document can be uploaded at a time to the Document Library.

To manage a document library:

1. Choose Resources tab; click Document Library.

2. Create folders for file management. For example, create a folder for a unit and upload files to the folder. That will keep the document library organized.
Step 6: Reality Check

1. Click **Reality Check** tab at the top of the unit page.

2. Content, Skills, and Assessments selected in Daily Plans throughout the unit will have checkboxes selected. If an item appears grayed out, it was not selected in any of the Daily Plans.
   - If instruction *occurred* and *is not checked* here, return to the date the instruction occurred in the Daily Plan to select desired items.
   - If instruction *did not occur* and *is checked* here, de-select desired items.

**Tip** • Items marked with checkboxes in Reality Check are sent to Curriculum Mapper® as curriculum map data.
Important Considerations

What do you mean by Reality Check?

Reality Check is just that -- it identifies what really happened in the classroom. Many times items within plans never see the light of day. Response to student needs can alter what was initially planned. Additionally, circumstances like assemblies, fire drills, and illnesses within the school can affect anticipated instructional timelines. Reality Check monitors the progress of the unit to review what was planned and what was accomplished.

Notice the example below in which Skill 2 appears not to have been addressed. If it was taught and simply not checked, it can be selected on any day within the Daily Plan.
Working with Daily Plans

Any information placed in Content, Skills, and Assessment in the Unit Plan will be available under the tab, Daily Plan. The purpose is to match the Content, Skills, and Assessments to each day, as well as to add additional Content, Skills, and Assessments as needed during implementation of the instruction.

1. Click Daily Plan tab.

2. Click a specific day in the calendar. The whole day block will now appear green.

3. Identify the days (block(s)) associated with the instruction that occurred.

4. For each set of Content, Skills and Assessment block, click Edit Block.

5. Place a checkmark next to each item corresponding to the instruction.

6. Content, Skills, Assessment Block(s) can be edited to reflect the day’s lessons actually taught.

7. Click Save, or Save and Close, to exit each block or element.
Important Considerations

**What is the difference between a Unit Plan and a Daily Plan?**

Consider a Unit Plan similar to a road atlas: a tool that assists the traveler in the overall journey over a period of time. Consider Daily Plans the daily itineraries: tools that identify the specific events, locations, and routes for each day. Both are vital to the success of the journey. With that in mind, the Unit Plan serves as an overall guide while the Daily Plans are the day-to-day experiences in the classroom. Instruction Planner tracks the data entered in Daily Plans.

Keep in mind that any Content, Skills, and/or Assessments added later to any day within the Daily Plan will populate the Unit Plan.

If instruction for a specific day extends into the next day, select **Copy** in the tool bar at the top right. Click the day to which the plan will extend; select **Copy** Daily Plan.
Reports

Instruction Planner Reports provide overview information for teachers on specific parts of each unit. Teacher may use this information to document and reflect on the instruction that actually occurred in the unit, and print that information to a PDF document. Data for these reports are gathered from the Daily Plans.

Elements Report (Which elements have I used in my unit?)

A teacher can run this elements report for specific elements to document the instruction for each instructional element of the daily plan. A report can include elements related to a particular purpose, such as sharing differentiation strategies with an administrator or parent. A teacher can use the information from the report to review their own instructional strategies, ensuring that a variety of strategies are used in the instruction. Children learn in different ways, so the teacher’s review of the strategies will help document and inform others about meeting the learning styles of the children in the class. Daily view of instructional activities allows the teacher to review flow of instruction. Listing of all independent practice will aid the teacher in setting up assignments in StandardsScore or any other grading program. The teacher can easily see her notes and evaluation of each day’s progress through the unit, to be a reminder for the next day, or the next year of any changes to be made for the next time the unit is taught.

All elements are listed in alphabetical order, then by date.

1. Click Reports on the menu tab.
2. Choose “Which elements have I used in my unit?”
3. Select Class and Unit Plan.
4. Choose desired Element(s) for the report.
5 Click Run Report.

![Image of the interface showing the option to select elements for the report.]

Daily Plan Report (Where can I find my daily plans?)

This report enables teachers to run daily plans to be printed to a PDF document.

1 Click Reports on the menu tab.

2 Click on Where can I find my daily plans?

3 Select the appropriate date on the calendar. All plans available on that date will appear in the chart.

4 Choose the Element and/or Content, Skills, Assessments on which the report will be run.

5 Click the box Check All Elements at the top right to include all information in the report.

6 Click Run Report.
The results will appear directly below the report setup.

Assessment Report: (Which assessment types have I used in my units?)

The Assessment Report tracks the types of assessments teachers check off in the Daily Plans in the Assessment column. The teacher can use the information from the Assessment Reports to review their own use of assessments, ensuring that a variety of assessments are being used in the instruction. These reports provide detailed information on the types and frequency of assessments. These reports can also be printed for documentation of assessment. A comparison report How have assessment types changed over time? can be run comparing assessments for two different time periods. This report may be accessed through the Which Assessment Types have I used in my units? or by selecting the How have assessment types changed over time? report.

1 Select Reports from main menu.
2 Select Which Assessment Types have I used in my units? from the available reports.
3 When the report opens, select a Start Date and End Date from the calendars, indicating when the reporting period should begin and end.
4 To run an assessment comparison report, check the box next to the Click here to include a second date range.
5 Select Would you like to run this report based on: Class or Unit button.
6 Select the check box for the desired Unit or Units.
7 Click on Run Report
Frequency of use of each type of assessment is displayed as a pie chart, unless there are more than 20 types of assessments, the results are displayed as a bar graph. In the Data Chart are the Number of Occurrences and % Percentage of each assessment typed checked off in the Daily Plans.

Assessment Report: What assessment types were used for the skills taught in this unit (New)?

This report details the relationship between the assessments given and the skills those assessments are addressing for a particular time period or unit. The report provides detailed information about the frequency and type of assessment with which students are being assessed, related to the skills being taught and allows for export of the data to various file formats for archiving and further analysis.

The chart includes totals in the first column and results for each assessment type in the remaining columns for ease of comprehension and analysis.

1. Select **Reports** from the main menu
2. Select the time period from which to choose units and select the Unit Plan from the drop down listing of all Units.
3 Click Run Report.

This report will show a summary of assessment types that were used for the skills taught in this Unit including

- The total number of assessments in the unit plan
- The total number of assessments given in the unit (Note: specific assessments may have been used two or more times).
- The number of assessment types

The graph displays the assessment types used displayed as percentage of total.
**Skills Summary by Assessment Type** may be viewed by scrolling down the report. The information for this report is available if a teacher has checked the Content and Skill associate with each assessment in the Assessment Details.

Data from this report may be exported as several different file formats. For exporting data select the format and click on Export

**Assessment Report: (How have assessment types changed over time?)**

**Tip** • If you included types of assessments as part of your Instructional Elements and checked them as part of the Daily Plan you can create reports to determine how they were implemented or monitor the selection.

**Assessment Types over Time:**

1. Click Reports on the menu tab.
2. Choose *How have assessment types changed over time?*
3. Choose a beginning and end date range.
4. Choose a second date range, click in the box for second range then choose dates.
5. Choose to run the report on a Class(es) or Unit(s).
6. Click Run Report.
Reports - Important Considerations

The Instructional Elements Report provides information from each element within the Daily Plans. The Daily Plan Report provides details for a specific day within a Daily Plan and is an excellent source for a substitutes’ lesson plan or for providing thorough information to those who may need more detail on specific aspects of the daily lesson. These reports can be printed for use in Admission, Review, and Dismissal (ARD) meetings, Response to Intervention (RtI) meetings, as well as team and/or faculty meetings.

<table>
<thead>
<tr>
<th>Monitored and Analyzed</th>
<th>Tracked and Analyzed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Checkbox</td>
</tr>
<tr>
<td>List</td>
<td>Drop-down List</td>
</tr>
</tbody>
</table>

**TRACKED**

![Instructional Strategies - Marzano](image)

**MONITORED**

Report Results  Print

Which elements have my teachers used in their units?

Teacher Name:

Instruction

3.4.11
1. Provide any necessary background information on WWI as well as influential people involved in the war.
2. Students work independently or in pairs using the Treaty of Versailles handout, text, and web sites to organize information on key attributes of the treaty.

3.7.11
1. Provide any necessary background information on WWI as well as influential people involved in the war.
2. Students work independently or in pairs using the Treaty of Versailles handout, text, and web sites to organize information on key attributes of the treaty.
My Plans Menu

When viewing the My Plans home page of Instruction Planner, all current units will be displayed.

- To view completed units, future units, or current units, select from the drop-down list.

- To view and edit a unit, click on the name of the unit.

Add New Unit from Plan Library

Tip • Units can be published as ‘master units’ and shared between schools within a district.

School or district teacher teams may create model or master units that can be used by other teachers throughout the school or district. These units are created and saved by teachers, but published to the Plan Library by an Administrative account. Teachers then can add a unit into their Unit Plan list from the Add New Unit From Plan Library link on the My Plans home page.
1. Click **Add New Unit From Plan Library**.

2. Select the **Course**.

3. Select the **Plan Library Unit** associated with the course.

4. Enter new **Title** (if desired)

5. Select **Class, Sections, and School Calendar**.

6. Select a different **Start Date** and **End date**

**Note** • **Unit dates can be edited only if the setting is allowed by Administrative account.**

7. Select teachers to **Share Unit With** (if applicable).

8. Click **Add Unit**. The unit will be added to the Unit Plan list and can be revised.

**Important Considerations**

When a teacher adds a unit from the Plan Library, all information in the elements and blocks is maintained, allowing him or her to revise the Unit Plan to meet the needs of his or her students.

**Send to Curriculum Mapper**

1. Click **Send to Curriculum Mapper** tab at the top of the unit page.

2. Click **Preview Map** for a preview of the curriculum map before sending to Curriculum Mapper.
Note • The title of the unit is not transported to Curriculum Mapper® and the title of the block can only be viewed by the author of the unit.

Click Send to Curriculum Mapper. All items checked in Reality Check will be sent to Curriculum Mapper®.

Important Considerations
What will a map look like if a unit takes place over more than one month, or begins in the middle of the month and ends in the middle of the following month?

This situation is controlled by what is checked in each Daily Plan, where the system tracks the Content taught, Skills addressed, and Assessments used by date.
Curriculum Mapper® places information in the correct month based on the dates associated with the Daily Plan.

### March 2010

<table>
<thead>
<tr>
<th>Content</th>
<th>Skills</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Tammany Hall</td>
<td>1. identify and explain the reasons behind political corruption from 1870-1910</td>
<td>A-C. Rhetorical Chart</td>
</tr>
<tr>
<td>B. Railroads, Steel and Oil</td>
<td>2. analyze the effects of political corruption</td>
<td></td>
</tr>
<tr>
<td>C. Anti-Trust Movement</td>
<td>1. Discuss the impact of the railroad, steel and oil industry on the United States</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Analyze the positive and negative effects of major industries in the 19th century</td>
<td></td>
</tr>
</tbody>
</table>

### Working Conditions

<table>
<thead>
<tr>
<th>Content</th>
<th>Skills</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Conditions within factories</td>
<td>1. compare and contrast working conditions during the 19th century</td>
<td>A-B. Analysis of The Jungle</td>
</tr>
<tr>
<td>B. Pay and Work Day</td>
<td>1. compare and contrast pay and the work day of the 19th century</td>
<td>A-B. Rhetorical Chart</td>
</tr>
</tbody>
</table>

Information Sent to Curriculum Mapper®

To entering data into additional columns in Curriculum Mapper®:

1. Under the Maps tab select My Maps.
2. Click the month name to edit (example below, “Aug” in Grade 7 Social Studies).
3. The screen will refresh and display data of the current month, by block.
4. Click Edit to add information into the additional columns.
5 Click **Save** or **Save and Close** before moving on to another block or month.

**Reports (Administrator)**

**School Building Reports**

These reports allow administrators to review all aspects of any teacher’s Plans within their school. A district coordinator can access all daily plans within their district.

**Elements: Which elements have my teachers used in their units?**

This report allows the School or District Coordinator review Elements entered into a Daily Plan by a teacher.

1. Select **Reports** from the Main Menu.
2. Select **Which elements have my teachers used in their units?**
3. Select **Which teacher would you like to select for this report?**
4. Select **What class would you like to select for this report?**
5. Click on **Select a start date for this report** and **Select an end date for this report**.
6 Click Run Report.

Daily Plan: Where can I find my teacher’s daily plans?

This report allows the School or District Coordinator access Daily Plans taught by a teacher.

1 Select Reports from the Main Menu.
2 Select Where can I find my teacher’s daily plans?
3 Select the Calendar Year, Teacher Name, Course and Units to Display.
4 Click on the desired Unit, the Unit will open.
5 Click on Daily Plan and the desired date.
Unit Plan: What units of study have my teachers developed?

This report allows the School or District Coordinator access Unit Plans taught by a teacher.

1. Select Reports from the Main Menu.
2. Select What units of study have my teachers developed?
3. Click on the Calendar, Teacher Name, desired Classes, and Units to be displayed.
4. Click on the Unit title to open the desired plan.

Assessment: Which assessment types have my teachers used in their units? and How have assessment types in my teacher’s units changed over time?

This report allows the School or District Coordinator to review and compare Assessment types used by a teacher through a period of time or compare periods of time.

1. Select Reports from the Main Menu.
2. Select Which assessment types have my teachers used in their units? or How have assessment types in my teacher’s units changed over time?
3. Select Start and End dates for the report.
4. Click here to include a second date range for a second date range for comparison reports.
5. Select Which school would you like to select for this report?
6. Select Which courses would you like to select for this report?
7. Select Which teachers would you like to select for this report?
8 Click Run Report

Administrative Settings

Administrative settings allow administrators to control certain permissions within Instruction Planner, as well as set naming conventions for the Content, Skills, Assessment block and three levels of standards coverage.
Assessment Types

Assessment Types are created by the Administrative account. Once these types are created, teachers click the type(s) that match the assessment they have entered in the Unit and/or Daily Plans.

Note • Administrators’ dashboard allows the administrator select a teacher’s dashboard from a drop down menu.

1 Select Admin from the Admin Menu
2 Select Assessment Types
3 District Coordinators will need to select the school to which the Assessment Types will be added
4 Click on Add Assessment Type in the upper right hand corner
5 Enter the assessment type Name
6 Click on Add Assessment Type
7 Repeat for each desired Assessment Type

Assign To Do Item

School and District Coordinators may add items to teachers Dashboard To Do Lists. This is a convenient way of reminding teachers of important dates and events.

A District Coordinators will have the ability to Choose a School, School Coordinators will not see the selection drop down for various schools.

1 Select Admin from the Admin Menu
2 Select Assign To-Do Item
3 Choose School (for District Coordinators only)
4 Choose Users (Check All or Clear All options available)
5 Enter To-Do Item
6 Choose Due Date from the Calendar icon
7 Click on **Send To-Do Item**

School Calendar

Administrators set up a calendar for the current or next school year and can enter events to a school calendar. These events display when teachers select start and end dates for units, reminding them of special events, such as end of semester, holidays, etc.

- Select Admin in the menu bar, click **School Calendar**.
- Ensure the desired school and calendar year is selected. (School calendar must be completed for each building in the district.)
- Click **Add New School Events**.
- Select the start and end dates of the event.
- Click **Submit Dates**.
- Select the **Event Type** from the drop-down list.
- Title the **Event** to indicate its purpose.
- Check **Block Dates**? if the event is a non-teaching day.
- Click **Add Event**.
School Courses

Administrators can add courses to the list pre-populated during the CLI school setup.

*To Deactivate, Edit, or Delete a course:*

1. Click on the Option to the right of the course name.
2. Select Admin in the menu bar, click School Courses.
3. Click Add New Course.
4. Enter the Course Title the Course Name.
5. Enter Course Number. (Enter 111 if the course does not have a specific number associated with it.)
6. Select Subject Area from the drop-down list.
7. Check Grade Level(s).
8. Enter a Course Description (not required)
9. List Textbook & Materials (not required)
10. List PreRequisites (not required)
11. Enter Notes related to the class (not required)
12. Define Credit Earned (not required)
13. Check College Credit? (not required)
14. Indicate Course Level (for weighted grades) (not required)
15. Determine Length of Course (not required)
16. Select whether the Course is: Active, Inactive (Active is the default)
17. Click Add Course
School Plans

District and School Administrators can view the Unit and Daily Plans of any Teachers in the District or School. This is convenient, since teachers will not have to submit plans to the Administrators.

1. Select Admin from the Admin Menu
2. Select School Plans
3. Select the desired Calendar, Teacher or All Teachers, Class or All Classes and the Units to be Displayed
4. Check Show Inactive/Unpublished Plans to see all Units
5. Click on the Title of a Unit to see the contents of the Unit and Daily Plans
6. Select Reality Check from the Unit or Daily Plan to see what Content, Skills and Assessments have been checked in the Daily Plan

School Settings

Administrative settings allow administrators to control certain permissions within Instruction Planner, as well as set naming conventions for the Content, Skills, Assessment block and three levels of standards coverage.

1. Select Admin in the menu bar, click School Settings
2. Select a School from the drop-down list. (For District Coordinators)
3. Make desired changes to Permissions and Conventions (see below)
4. Click Update
5 District Administrators may also **Lock All Controls** so School Administrators cannot change School Settings

School Templates & Elements

This is the design area for templates. District or School Administrators may design Elements and Templates to be used by the teachers in the School or District. Elements are designed first, and then entered into the template. In the experience of Collaborative Learning Inc™, Text, Dropdown List and Checkbox Elements are easier for teachers to work with than List Elements.
Creating Instructional Elements

Instructional Elements are components of a school/district template that allows teachers and administrators to track, monitor, and analyze various instructional elements within the Daily Plans. Elements may be placed in the Unit Plan, but only the Daily Plan data generates reports.

Multiple elements can be created and named for their intended use (Interventions, Strategies, Reflections, Resources, etc.) Currently, only administrative accounts can design Elements. Elements are not transported to Curriculum Mapper®.

- Select Admin in the menu bar, click School Templates and Elements
- Under Elements, click Add Element.

![Add Element Image]

- Title the Element to indicate its purpose.
• Four types of elements are available:
  • **Text** - provides a blank box for text
    • Enter text for the Element Name
    • Click **Add Element**
  • **List** - allows user to enter new information in a bulleted or numbered format
    • Enter text for the Element Name
    • Select List Type
    • Click **Add Element**
  • **Checkbox** - provides multiple items that can be selected
    • Enter text for the Element Name
    • Click **Add New Item**
    • Enter text for the first item in the checkbox
    • Continue to click **Add New Item** until all choices for the checkbox have been entered
    • When finished, click **Add Element**
  • **Drop-Down List** - provides a drop-down list for single item selection
    • Click **Add New Item**
    • Enter text for the first item in the checkbox
    • Continue to click **Add New Item** until all choices for the drop-down list have been entered
    • When finished, click **Add Element**

**Create Template**

Administrative accounts use Elements to build Templates that teachers use to construct Unit and Daily Plans. The default template is titled “Blank” and contains no elements. Districts and Schools can design unique templates containing elements teachers use to plan, track, monitor, and analyze robust instructional units. These templates can be simple or complex – depending on their intended use. Several different templates can be developed for various purposes (Primary Template, Special Education Template, Backward Design, etc.) or one template can be created to guide the entire school or district.

1. Select Admin in the menu bar, click **School Templates & Elements**
2. Click **Add Template**
3. Title the **Template** to indicate its purpose.
4 Drag and drop the Elements created into the chosen area of the template from the list of Available Elements.

5 Each Template Area can be named, and by default, has one row with 3 spaces for elements. Additional rows of 3 can be added to each Template Area.
   - Template Area 1 displays in the unit under the Setup Area
   - Template Area 2 displays in the unit under Standards
   - Template Area 3 displays in the unit under Content, Skills and Assessment

6 To remove an Element, drag the Element back to the Available Elements List

7 Click Save Template

![Add Template screenshot]

**Note** • Once teachers are using a template, it is important to remember that they are actually entering information into a relational database. Therefore, it is extremely important to not only plan the templates thoughtfully, but also to consider strongly the effect of any changes to a template.

For instance, if teachers created units last year using a particular template, they will not be able to use the Copy feature within Instruction Planner™ to quickly copy the units into the next year, if that template has been altered. This restriction happens because the fields in the database associated with the previous template would not know where to go in the altered template.
School Profile

The District or School Administrator can create a School Profile, which will populate certain areas in the Teacher Profile.

1. In addition to Personal information in the Profile, adding dates of state or other important tests allows the Countdown to become visible on the Instruction Planner Dashboard showing how many weeks until each test occurs. Enter the Test Name and select the Test Date from the Calendar Popup. Click Save.

2. Answering question areas on the profile will further inform Collaborative Learning Inc™ and the teachers of the information unique to the district or school.

3. Click Save Profile to confirm the settings.

---

EasyStart

EasyStart is an account management tool that allows program administrators to control a variety of functions and permission levels in all three products. This new functionality replaced the User Accounts options previously located in the Admin Menu of Curriculum Mapper.

To access this area:

- Log in; click the EasyStart logo on the Product Selection Page
- Or
- While in Instruction Planner™, hover over Admin menu and select EasyStart.
**EasyStart** allows School/District Coordinators to do the following:

- Manage User Account
- Create and Print User Reports
- View the number of paid, active, and available subscriptions
- Transfer or Request Subscriptions
- Import Users
- Deactivate Users to remove teachers from the active, temporarily or permanently, list so they will no longer be able to log in and create/edit maps.
- Create New Accounts and add a new teacher to a school. This can only be accomplished if enough accounts are available.

**SAMS**

Standards Alignment and Management System
While in Instruction Planner, hover over Admin menu and select SAMS.

This system is designed to help manage the standards that teachers use in their classroom each day.

Select from the menu items below to manage standards sets; select the icon to view a short 1-2 minute instructional video on the many functions of the SAMS system.

- Create and Revise Standards Sets
- Manage Subject Areas
- Create a New Custom Standards Set
- Align Standards and Benchmarks
- Manage Standards Set Display
- Manage Standards Icons
Support

Feedback and Technical Support

- Select Support in the menu bar, click Feedback & Technical Support.
- Select Type of feedback from the drop-down list. (Question, Comment, Problem)
- Enter feedback into Comments text box.
- Click Submit Feedback.

My Suggestions

- Select Support in the menu bar, click My Suggestions.
- A new window will open.
- Complete the form.
- Click Done

My Suggestions can also be accessed from the Feedback & Technical Support page by clicking Click here to share your ideas and suggestions with Collaborative Learning.

Phone support

- Call 800.318.4555
- Monday – Friday
- 7am ET to 10pm ET
Notes/Action Plan/List of Units Created
Notes/Action Plan/List of Units Created
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