**District Implementation Plan**

This document walks users through the eDoctrina® implementation process. With it, there are a few things users should note:

* Some of the forms will not be required depending on which modules will be utilized. For example, the “Planning Tools” section would not be applicable to a district not using those modules.
* Timely responses to questions and data requests will ensure a quicker implementation.
* Please make your Implementation Coordinator aware of any special deadlines your school/district has early on in the setup process.

Use of this guide, coupled with the expertise of your Implementation Coordinator, will allow for a smooth, efficient project start.

**Your Implementation Coordinator is:**

Eon Verrall  
Email: [everrall@edoctrina.org](mailto:everrall@edoctrina.org)  
Office: 1 (888) 537-3348, x 5103  
Cell: (716) 548-4572

**Estimated Implementation Timeline:**

|  |  |  |
| --- | --- | --- |
| **Phase / Task** | **District Task  Target Date** | **eDoctrina® Task Target Date** |
| I: General Setup |  |  |
| II: Initial Data Import |  |  |
| III: Data Maintenance Plan |  |  |
| IV: Training & Support Plan |  |  |
| V: Scanning Setup *(if applicable)* |  |  |
| VI: OBSeRVE® Setup *(if applicable)* |  |  |

**Phase I: General Setup**

Users are asked to fill out the following information to the best of their ability. Completion of this phase may take up to one week from the date this form is filled out and returned to your Implementation Coordinator.

Please note that **BOLD TYPE** indicates the desired information is REQUIRED in order to facilitate project completion.

**Primary District Contact: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Alt. Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**SIS Data Contact *(if different):* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Scanning Hardware Contact *(if different):* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**District Name *(should match the district name used in the Student Information System (SIS)):***

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**School Name(s) *(should match the district name used in the Student Information System (SIS)):***

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**State Standards to apply: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Common Core Standards to apply (National/State Specific): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Other standards required: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Are you working with another organization that will provide support and/or training?**

** No  Yes**

If yes, organization name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Contact Person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Which of the following modules will be utilized? *(Check all that apply)***

** eDoctrina CORE™  FASTeST™ Answer Sheet Scanning**

** PROGReSS™ Online Assessments/Parent & Student Portal**

** OBSeRVE® Teacher Observations  RePORT™ Standards-Based Report Cards**

**Planning Tools Setup**

Note that this information is required only if the unit and lesson planning tools will be utilized.

**Unit Plan Template Category Names *(Up to 8):***

** Check here to use the defaults listed. Changes can be made at any time.**

**1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Essential Questions)*

**2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Content)*

**3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Resources)*

**4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Terms)*

**5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Assessment Plan Overview)*

**6. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: District Initiative)*

**7. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Foundation Skills Needed)*

**8. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Reflection)*

**Lesson Plan Template Category Names *(Up to 8):***

** Check here to use the defaults listed. Changes can be made at any time.**

**1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Objectives)*

**2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Anticipatory Set)*

**3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Procedures)*

**4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  *(Default: Resources)*

**5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Assessment)*

**6. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Closure)*

**7. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Assignments)*

**8. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Default: Reflection)*

**Assessment Setup**

This information is required only if the assessment and data reporting tools will be utilized.

**Custom Demographic Field Names *(Up to 3):***

These are extra demographic fields that can be imported for each student and allow users to conduct detailed data analysis. For example, using the extra demographic field “After School” to track data for students in a particular after-school program. Doing so would allow for the pulling of reports that would compare how students in that particular program performed compared their peers not involved with the program.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Default: Custom Demo 1)*

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Default: Custom Demo 2)*

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Default: Custom Demo 3)*

**Student Goal Categories *(Up to 3):***

Up to three categories used to track additional information about student goals can be entered.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Default: Target Description)*

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Default: Measurement Method)*

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Default: Measurement Frequency)*

**Data Sharing**

**eDoctrina® was designed so that teams of teachers could share assessment data. That said, each school/district has the option of turning this feature off. By doing so, teachers will not be able to see their colleagues’ results.**

** Leave Data Sharing On  Turn Data Sharing Off**

*--------------------------------------------------- Below for eDoctrina Corp. use only ---------------------------------------------------*

*Phase I: General District Setup*

*Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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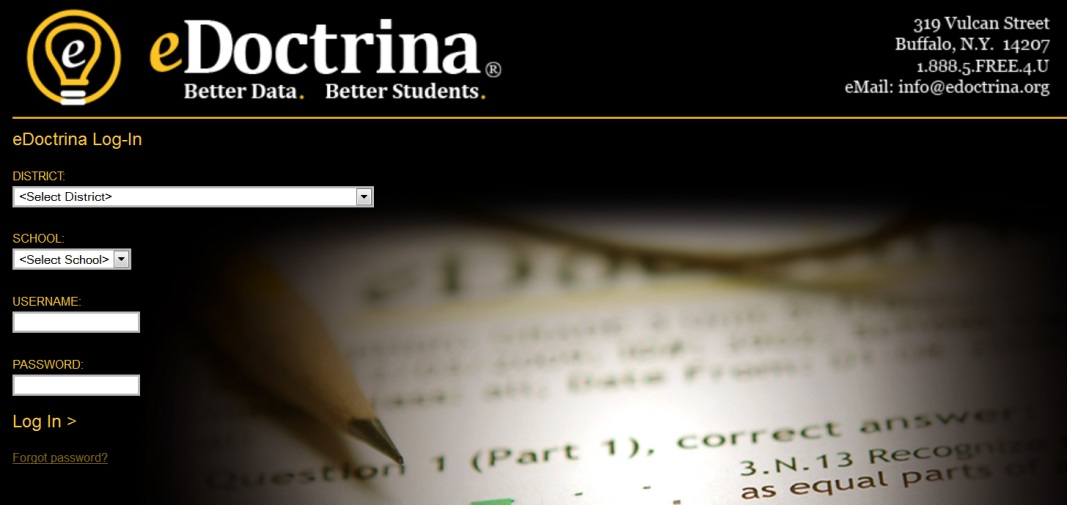
**Phase II: Initial Data Import**

Setup files must be in the exact format specified within the spreadsheet sent by the Implementation Coordinator. *Inconsistencies in data format or content can cause a significant delay in this process, so users must ensure they follow the template exactly*. This phase will be completed approximately one week after complete and accurate setup files are received.

Note: Schools/districts not utilizing the FASTeST™ or PROGReSS™ modules (or any other data-reporting feature) only need to provide “Staff,” “Course” and “Class” files.

**Data Import Confirmation**

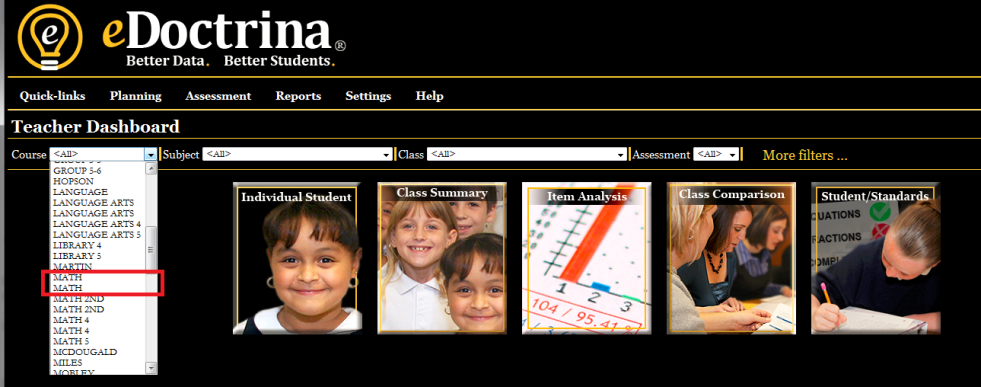
After initial data import, users should login as three (3) different teachers in each building in order to confirm that the appropriate class assignments and rosters appear when compared to the information within the school/district’s SIS. When doing so, users should enter the site from the initial eDoctrina login page *(see below)* and enter the teacher’s username and password.



For each teacher, complete the following tasks to confirm proper importing:

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Teacher 1** | **Teacher 2** | **Teacher 3** |
| **Teacher’s name** |  |  |  |
| **Navigate to Settings 🡪 SIS Data 🡪 Classes. Check that the list is correct compared to the data in the SIS.** |  |  |  |
| **Click on the “Edit” (pencil) button for at least two classes and confirm that the student roster is correct compared to the SIS (Write “NA” here if not using FASTeST™ or PROGReSS™)** |  |  |  |

Next, login as a School Administrator and navigate to the Teachers Dashboard found within “Reports.” Click on the “Courses” drop-down menu and look for duplicate course names *(see below)*. This is a common issue that can cause confusion. If there are several duplicates, the import files should be examined closely, and, in some case, should be re-done.



Initial Data Import reviewed by customer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*--------------------------------------------------- Below for eDoctrina Corp. use only ---------------------------------------------------*

*Phase II: Initial Data Import*

*Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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**Phase III: Data Maintenance Plan**

Changes happen. New students arrive, classes or courses change, etc. When that happens, eDoctrina® needs to be updated. Users are asked to indicate how they would like to handle such data maintenance. Please choose one.

**Manual Entry. A school/district representative will update eDoctrina® each time changes are made to the “Staff,” “Courses,” “Classes,” “Students” or “Student Schedules” files.**

**Internal Periodic Uploads. A school/district representative will periodically import updates into eDoctrina® using the import features of the system. To do so, this individual will need a full understanding of the necessary import methods and the possible negative impacts of using incorrect imports.**

**eDoctrina® Staff Periodic Uploads. A school/district representative will send updated files directly to eDoctrina® support staff periodically for them to import. To do so, the school/district will need to purchase support time.**

**eDoctrina® Automated Imports. The school/district will implement an automated extract of the required information and send files on a periodic (e.g. nightly) basis directly to eDoctrina® servers for automated importing.**

**SIF: The school/district will investigate the possibility of having eDoctrina® automatically updated through a SchoolsInteroperability Framework (SIF) agent.**

*--------------------------------------------------- Below for eDoctrina Corp. use only ---------------------------------------------------*

*Phase III: Data Maintenance Plan*

*Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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**Phase IV: Training & Support Plan**

Based on the scope of the implementation, eDoctrina® is recommending the following training and support for the school/district:

|  |  |  |
| --- | --- | --- |
| **Qty** | **Item** | **Notes** |
|  | “Super User” Certified User Training Seminar |  |
|  | On-site Professional Development |  |
|  | 20-Hour Block of Remote Training / Support |  |
|  | Other |  |
|  | Other |  |

Training plan reviewed with district by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*--------------------------------------------------- Below for eDoctrina Corp. use only ---------------------------------------------------*

*Phase IV: Training & Support Plan*

*Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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**V: FASTeST™ Scanning Setup**

Note that this information is only required in those schools/districts that will be utilizing the FASTeST™ scanning module. Users are asked to work with their Implementation Consultant to complete the table below.

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*Copy this page as needed if additional scanners are set up.*

*--------------------------------------------------- Below for eDoctrina Corp. use only ---------------------------------------------------*

*Phase V: Scanning Setup*

*Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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**VI: OBSeRVE® Setup**

Note that this information is only required if the school/district is utilizing the OBSeRVE® Teacher Observation module.

Which Rubric(s) will be in use? Select one.

eDoctrina® Teacher Observation Rubric

Marshall’s Teacher Evaluation Rubric

NYSUT Teacher Practice Rubric

Other – Attach additional rubric. It is the customer’s responsibility to ensure they have authorization to use any custom rubrics.

*By signing, I certify we have the right to use this rubric electronically*

*--------------------------------------------------- Below for eDoctrina Corp. use only ---------------------------------------------------*

*Phase VI: OBSeRVE® Setup*

*Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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