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| OneNote Template Instructions |  |
|  | November 2022 |

How to create a notes template in OneNote

1. Create a new page in the relevant notebook in OneNote.
2. Copy and paste desired text onto that page.
3. If necessary, fix any formatting.
4. Click the Insert tab on the top of the window.
5. Click on Page Templates.

Graphical user interface, application

Description automatically generated

1. At the bottom of the new pane, select “Save current page as a template.”

Graphical user interface, text, application, email

Description automatically generated

1. Type in the name you want to use for the template and click save.

How to use a notes template in OneNote

1. Open the relevant notebook in OneNote.
2. Click the Insert tab.
3. Click on Page Templates.
4. In the new pane, select My Templates.
5. Select your custom template.
6. Rename the page, and start taking notes!

Copy and paste the text bellow to create the template for capturing notes for the Dynamic Impact Assess step OR use as a fillable Word document:

**Initial Contact**

State-Initiated and Topic Cohort questions are simply prompts, not linear, and not all are required. Develop additional questions to add if necessary.

**For State Initiated TA:**

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| **Question/Prompt** | **Notes** | **Next Steps** |
| Review state request, ask for supporting data to help TA provider better understand the context of request, and ask clarifying questions. |  |  |
| Discuss past or current work being done to address the issue currently. What strategies have worked, and which have not? What is driving the current request? |  |  |
| Request and review additional information as needed |  |  |
| Identify key ideas and ask clarifying questions to gain an initial understanding of the request and uncover potential underlying issues |  |  |
| Explain the TA process using DaSy Dynamic Impact |  |  |
| Identify/confirm state team members |  |  |
| Identify intended results of the TA |  |  |
| Discuss timelines |  |  |
| Identify next meeting date(s) |  |  |
| Identify any fiscal resources needed |  |  |

**For Topic Cohort TA:**

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| **Question/Prompt** | **Notes** | **Next Steps** |
| Review of the State’s application and asking clarifying questions |  |  |
| Discuss past or current work being done to address the issue. What strategies have worked, and which have not? What is driving the current request? |  |  |
| Request and review additional information as needed |  |  |
| Identify key ideas and ask clarifying questions to gain an initial understanding of the request |  |  |
| Explain the Topic Cohort process using the DaSy Dynamic Impact approach and review TA agreement |  |  |
| Identify/confirm team members |  |  |
| Explain the intended outcomes of the cohort |  |  |
| Explain initial timelines for individual and cross-state events |  |  |
| Identify next meeting date(s) |  |  |
| Identify any fiscal resources needed |  |  |

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