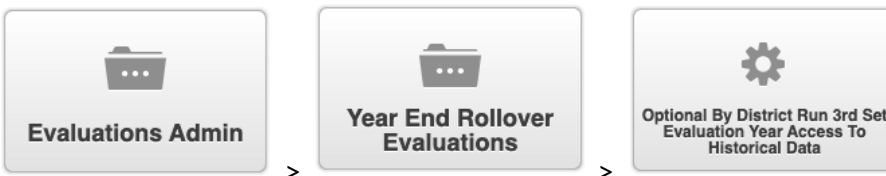


## Year Start Clean-Up Helpful Suggestions/Tips

Now that the year has begun and you have done the [Year-End Evaluations](#). **If it has not been done, it must be done before you can do another setup/clean-up.** Below are a few scenarios and helpful tips to help you change your data. If you need help with any cleanup, please remember you can contact us at [support@schooldata.net](mailto:support@schooldata.net)

### Historical Evaluation Access

- **Scenario:** Staff should be able to access their historical evaluation records, and/or Evaluators should be allowed to access historical evaluation records for their Evaluatees.
- **What To Do:** Use the procedure explained in the **Evaluations Admin>Year End Rollover Evaluations>Set Evaluation Year Access to Historical Data**. **This is an annual setting** due to the potential for change in district needs and/or bargaining agreements.



### Adding an Evaluation Record

- **Scenario:** A new staff member is hired at the district, so there wasn't an Evaluation Record for them last year.
- **What To Do:** Use the procedure explained in **Evaluations Admin >Evaluations Users and Permissions>Add Evaluation Record** or **Add Evaluation Record by Application User Names**.



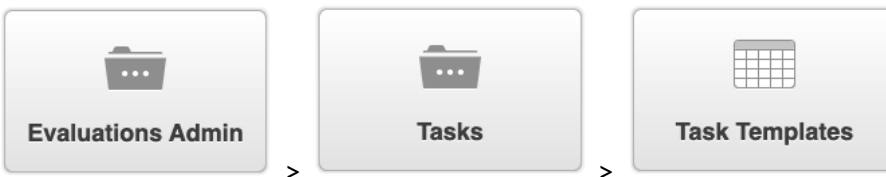
### Remove unused Evaluatee record(s) for the Current Year

- **Scenario:** Teacher(s) or principal(s) Evaluation record was rolled from the previous year to the new year, but they have left the district or retired, and the record is not needed.
- **What To Do:** Use the procedure explained in the **Evaluations Admin>Year End Rollover Evaluations>Delete Unused Current Year Evaluation Record**.



## Hide A Task Template In The List Of Choices To Add To A Task List

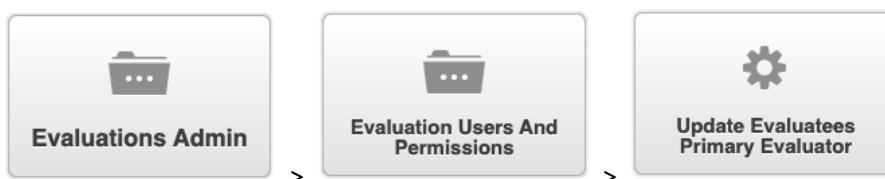
- **Scenario:** There is a Task Template that is no longer needed and shouldn't be added to someone's task list.
- **What To Do:** Use the procedure explained in the **Evaluations Admin**>**Tasks**>[Task Templates](#).



1. Locate the **Task Template** you want to hide and select it by clicking the radio button to the left of the ID.
2. Click the **edit** button at the bottom of the display to open the Webform.
3. Find the option 'Evaluation Task Is Active,' change from **TRUE** to **FALSE**.
4. Click 'submit'.
5. Repeat for each template you want to hide.

## Move Evaluatees From One Evaluator To Another

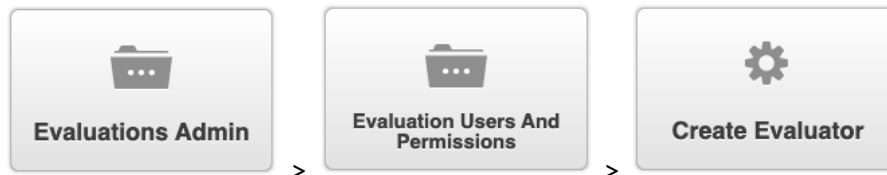
- **Scenario:** A principal left, and all their Evaluatees must be moved to a new Evaluator.
- **What To Do:** There are a few ways this can be done:
  - First, use the CSV upload steps in the Update **Evaluations Admin**>**Evaluation Users and Permissions**>[Update Evaluatees Primary Evaluator](#) procedure.



- OR impersonate the old Evaluator and switch each Evaluatee to the new Evaluator.
- OR, if you have Evaluations MONITOR access, use the edit tool on each Evaluatee to move.

## Adding A Name To The Evaluator Dropdown On Evaluator Dashboard

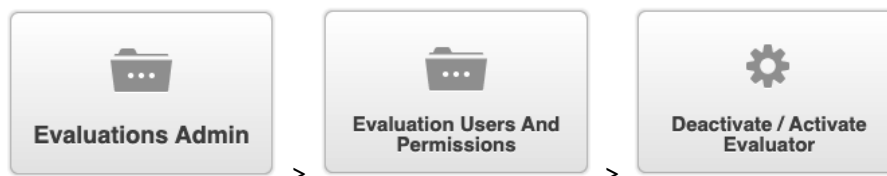
- **Scenario:** A new Principal or Assistant Principal is hired, and the plan is for another Principal to "hand off" from their Dashboard some Evaluatees.
- **What To Do:**
  1. Use the procedure explained in the **Evaluations Admin>Evaluation Users and Permissions>[Create Evaluator](#)**.



2. Search for the employee's name, then highlight their name in the list.
3. Make sure 'Is Active' is set to **TRUE**.
4. Click 'submit'.

## Removing A Name From The Evaluator Dropdown On Evaluator Dashboard

- **Scenario:** An Evaluator has left the district, so they no longer need to be someone in the dropdown to select.
- **What To Do:**
  1. Reassign anyone they are evaluating in the current year to another Evaluator
  2. Use the procedure explained in the **Evaluations Admin>Evaluation Users and Permissions>[Deactivate/Activate Evaluator](#)**.



3. Search for the Evaluator's name, then highlight their name in the list.
4. Make sure 'Is Active' is set to **FALSE**.
5. Click 'submit'.

## Adding Evaluator To Evaluate An Evaluatee

- **Scenario:** There are to be two Evaluators assigned to one Evaluatee.
- **What To Do:** Use the Supplemental Evaluator assignment process outlined in the [Evaluator/Monitor Dashboard](#) instructions.