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## Year-End Evaluations

ALL the School Data Solutions Applications share the same current year. Therefore, when the new year starts for all Homeroom and the other SDS Applications, the new year also starts for Evaluations.

When the year has rolled over for Evaluations, edits can NOT be made to the previous year's evaluation records. So it is important to contact those using Evaluations when planning the end-of-year dates PRIOR to the end of the year.

Contact [support@schooldata.net](mailto:support@schooldata.net) to set up a free consultation if you want to work through this process with an Evaluations setup specialist.

### Items to consider/prepare before the new year

- **Review your Current Setup** for the Teacher and Principal. - What didn't work or needs to be slightly changed? Consider the feedback from staff: principals, teachers, and administrators.
- **Staff Changes** are known for next year – Is the Evaluator/Evaluatedee changing or staying the same?
- **Verify Succeeding Positions are Set Up Correctly (Position Level)** – Is the position level given for the Evaluatedee ready for the "Promote" process to be done? It can be found in **Data Admin: Evaluations Admin > Position & Levels > Position Levels**.
- **Task Templates** – Are there any new tasks to **Add or Change**? Do any task need to be **Deactivated**?
- **Automatic Task Lists for the New Year** – This can be a brand new list if desired, slightly different or the same per Position Level.
  - How many of which templates, due dates, orders, required vs. not-required, etc.?
  - If decided on a brand new list, **STEP 1** below would be skipped; instead, a new task list would be uploaded.
- **District Setting Annually** - Provide historical access to the previous year's evaluation data to Evaluators or Evaluatedees in the Evaluations Application.

Once the new year has started, the following need to be done for the new year in this order. Until these steps are done, no one can get into Evaluations:

**STEP 1: Setup up Automatic Evaluation Tasks** - see "**Copy Automatic Evaluations Task**" below.

OR instead of this process, if there are many changes, a file with the new automatic tasks could be uploaded before proceeding to STEP 2—contact [support@schooldata.net](mailto:support@schooldata.net). **Allow enough time for this process to run before starting the next process.**

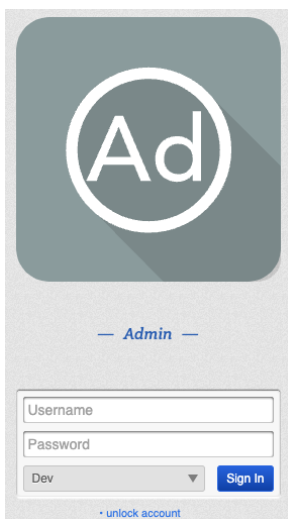
**STEP 2: Evaluation Year Records** - see "**Promote All Evaluations Years to Next Year**" below for more on how. OR instead of this process, a file with the appropriate associations can be uploaded. Contact [support@schooldata.net](mailto:support@schooldata.net).

**ADDITIONAL STEPS** depending on the need or district preferences:

- [Set Evaluation Year Access to Historical Data](#) - for staff to access previous year evaluation info, this is an ANNUAL setting
- [Delete Unused Current Year Evaluation Record](#) - to remove staff that left the district or aren't being evaluated in the new year.
- [Year Start Clean-up and Helpful Suggestions/Tips](#) article.

Automatic tasks **MUST** be created before the Evaluation year records, which can't be done until the new year starts. **If done in the wrong order, the production of the evaluation year records will not run correctly and cause errors when users attempt to get to their Tasks.**



Log into **Data Admin**: [\[yourdistrictname\].schooldata.net/admin](#)







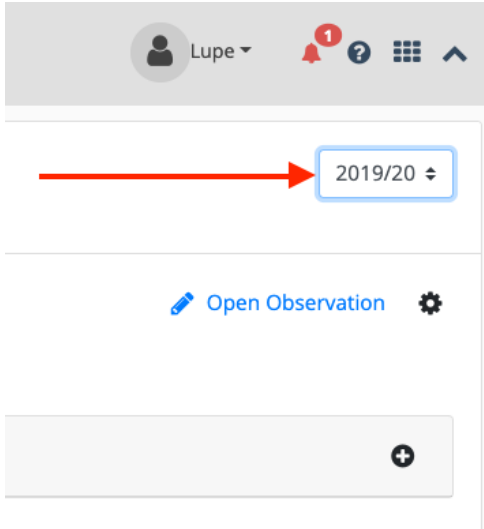
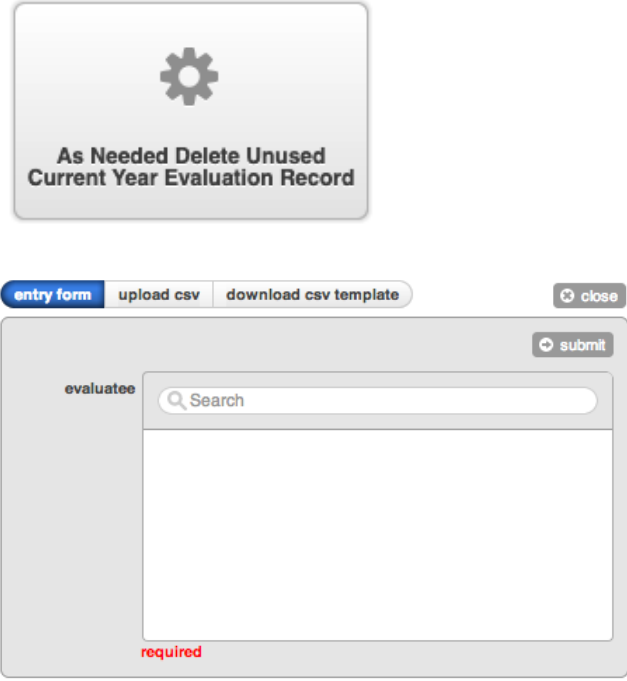
Navigate to **Evaluations Data Admin > Year End Rollover Evaluations**.



Read [Admin Overview](#) and [Interfaces Overview](#) for more information on navigating the Admin.

<div style="text-align: center;">  <p><b>Run 1st Copy Automatic Evaluation Tasks</b></p> </div> <div style="margin-top: 20px;"> <p>entry form   upload csv   download csv template   close</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: right;">submit</p> <p>copy from school year</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>2000/01</td></tr> <tr><td>2001/02</td></tr> <tr><td>2002/03</td></tr> <tr><td>2003/04</td></tr> <tr><td>2004/05</td></tr> <tr><td>2005/06</td></tr> <tr><td>2006/07</td></tr> </table> </div> </div>	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	<h3>Run 1st Copy Automatic Evaluation Tasks*</h3> <p>This process will copy all <b>Automatic Tasks</b> for <b>ALL Position Levels</b> from the selected year to the current school year, incrementing each task by a year.</p> <ol style="list-style-type: none"> <li>1. From the drop-down menu, select the <b>school year</b> you wish to copy <b>from</b>; <u>it is crucial you select the correct school year.</u></li> <li>2. Click <b>submit</b>.</li> </ol> <p>Once the process is complete, close the window. You will be returned to the Year End Rollover interface.</p> <p>*If drastic changes need to be made to your <b>Automatic Task</b> list from last year to the new year, it is advised NOT to use this procedure. Instead, a new Automatic Evaluation Task list can be uploaded. Contact <a href="mailto:support@schooldata.net">support@schooldata.net</a> to speak with a representative.</p>
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<div style="text-align: center;">  <p><b>Run 2nd Promote All Evaluation Years To Next School Year</b></p> </div> <div style="margin-top: 20px;"> <p>entry form   upload csv   download csv template   close</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: right;">submit</p> <p>promote from school year</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>2000/01</td></tr> <tr><td>2001/02</td></tr> <tr><td>2002/03</td></tr> <tr><td>2003/04</td></tr> <tr><td>2004/05</td></tr> <tr><td>2005/06</td></tr> <tr><td>2006/07</td></tr> </table> </div> </div>	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	<h3>Run 2nd Promote All Evaluation Years to the Next School Year*</h3> <p>*If drastic changes need to be made to Evaluation Records from last year to the new year, contact <a href="mailto:support@schooldata.net">support@schooldata.net</a> to speak with a representative.</p> <p>Prior to running this, <b>Automatic Evaluation Tasks</b> for <b>ALL Position Levels</b> must exist.</p> <p>This process will establish new Evaluation Year Records for all Evaluatees and move them to the next position level identified in the Position Level setup**.</p> <ol style="list-style-type: none"> <li>1. From the drop-down menu, select the <b>school year</b> you wish to copy <b>from</b>; <u>it is crucial you select the correct school year.</u></li> <li>2. Click <b>submit</b>.</li> </ol> <p>Once the process is complete, close the window. You will be returned to the Year End Rollover interface.</p>
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	<p>** To review the Succeeding Level setup, view Data Admin: <b>Evaluations Admin &gt; Position &amp; Levels &gt; Position Levels</b></p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;">         Evaluations Admin     </div> <span style="font-size: 24px;">&gt;</span> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;">         Positions And Levels     </div> <span style="font-size: 24px;">&gt;</span> <div style="border: 1px solid #ccc; padding: 5px; text-align: center;">         Position Levels     </div> </div>
<div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px; text-align: center;">   <b>Optional By District Run 3rd Set Evaluation Year Access To Historical Data</b> </div> <div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">entry form</span> <span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px;">upload csv</span> <span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px;">download csv template</span> <span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px;">close</span> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: flex-end; align-items: center;"> <span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px;">submit</span> </div> <div style="margin-top: 10px;"> <p>historical data is viewable by evaluatee <span style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 5px;">True</span> <span style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 5px;">False</span> <span style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 5px;">N/A</span></p> <p>historical data is viewable by evaluator <span style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 5px;">True</span> <span style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 5px;">False</span> <span style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 5px;">N/A</span></p> </div> </div> </div>	<h3>Optional By District, Run 3rd Set Evaluation Year Access to Historical Data</h3> <p>This was created to suppress access due to Teacher Union contracts written to avoid New Year Evaluators accessing ALL previous year tasks/data. They want to keep true to what they had gone through when it was a paper process. Unfortunately, that detail was often shredded at the end of the year, and all that was available was their Final Evaluation.</p> <p><u><a href="#">This has to be done each year for historical records to be accessible in the new year.</a></u></p> <p>To turn on historical access for users, meaning evaluatees will be able to see previous years' evaluations, and/or evaluators will be able to see their evaluatees' historical evaluations, follow these steps.</p> <ol style="list-style-type: none"> <li>1. Historical access is viewable by Evaluatee (True/False). <b>True</b> provides access to Historical records.</li> <li>2. Historical access is viewable by Evaluator (True/False). <b>True</b> provides access to Historical records.</li> <li>3. Click <b>Submit</b>.</li> </ol> <p>Users then, in the Evaluations Interface, can view historical years by selecting the year selector to switch between years.</p>

	
	<h3>As Needed Delete Unused Current Year Evaluation Record</h3> <p>(Optional). This process works on current-year records. Use to clear out individual Evaluation records for Evaluatees that aren't to be evaluated in the new year or have left the district. <u>It will delete all data attached to an Evaluatee.</u> <b>THERE IS NO UNDOING.</b></p> <ol style="list-style-type: none"> <li>1. Type in part of the Evaluatee's name in the search and hit enter on the keyboard.</li> <li>2. Highlight the Evaluatee's record you wish to remove from the current school year.</li> <li>3. Click <b>submit</b>.</li> </ol> <p>Once the process is complete, you will be returned to the Year End Rollover interface.</p> <p>To Verify, Use the <b>View Evaluation Records Table</b>.</p>