

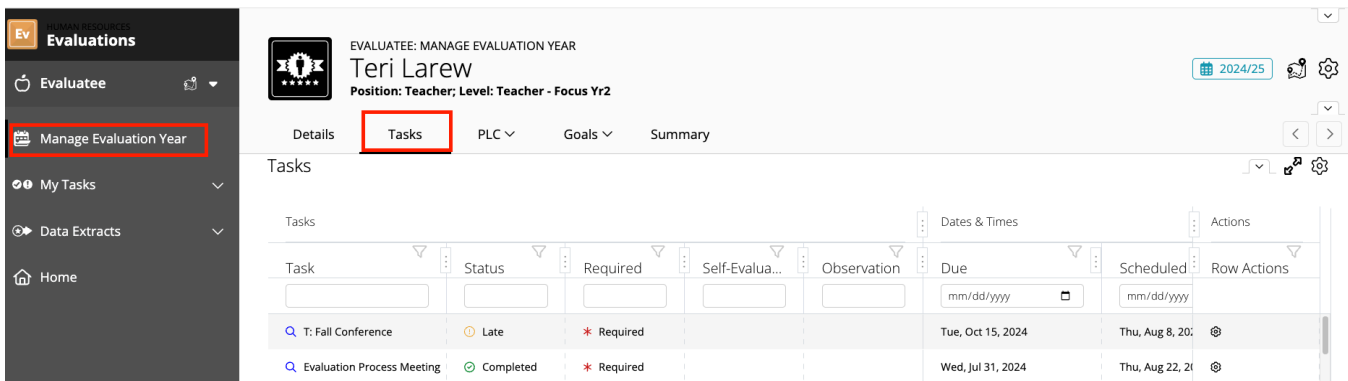
EVALUATEE: Task List Overview and Options (Connect)

The Evaluator or the Evaluatee may complete tasks. A task list is pre-populated at the beginning of the year, depending on the Evaluatee's position level (e.g., Comprehensive, Focus Year 1, etc). Each task has a due date set by the district.

1. Start under **Manage Evaluation Year** in the left navigation menu.
2. You will see the "**Manage Evaluation Year**" page, which features several subpages (tabs) across the top.
3. Click the **Tasks** tab.

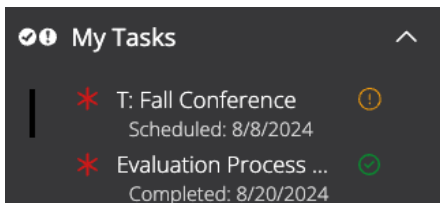
Note: Many tasks are pre-populated annually based on what was identified by the district according to the Evaluatee's position level. Due Date updates and other task changes to these pre-populated tasks are managed at the district level.

4. You will see a data table of the tasks populated for the year or any task the evaluator or the evaluatee has added.



Task	Status	Required	Self-Evalua...	Observation	Due	Scheduled	Row Actions
T: Fall Conference	Late	* Required			Tue, Oct 15, 2024	Thu, Aug 8, 2024	⊗
Evaluation Process Meeting	Completed	* Required			Wed, Jul 31, 2024	Thu, Aug 22, 2024	⊗

5. Alternatively, tasks can be opened under "**My Tasks**" in the left navigation menu.



- * T: Fall Conference (Scheduled: 8/8/2024)
- * Evaluation Process ... (Completed: 8/20/2024)

6. Click the **magnifying glass** to view a task.
7. Click the **Row Actions** gear and choose one of the following:
 - **Delete:** A popover window will appear: "**Are you sure you want to delete this task? This cannot be undone.**" Click 'Yes' or 'No' to return to the data table.
 - **Import Task Info:** This process will copy over any text that matches the fields on the current task from the task identified in the popover list. Click the **Task** field, click the **checkbox** to the left of the chosen task to import, and click **Save**.

WARNING: Any existing data on the currently selected task will be overwritten with the newly imported data. There is no undo.

Details **Tasks** PLC ▾ Goals ▾ Summary

Tasks

Tasks

Task	Required	Self-Evaluation	Observation	Status	Due	Row Actions and Options
Q T: Fall Conference	* Required			Late	Tue, Oct 15,	Delete Import Task Info
Q T: PLC+	Optional			Optional	Sun, Dec 1, 2024	⚙️
Q T: Student Growth Goal	Optional			Optional	Sun, Dec 1, 2024	⚙️
Q T: Observation	* Required		Perform Observation	Late	Sun, Dec 1, 2024	⚙️

Adding a Task

1. Click the **Add Task** button in the top right to add a task.
2. The **Reference Data** section will be automatically populated.

Reference Data

Evaluatee ⚙️ 🔍

Evaluator ⚙️ 🔍

Position Level ⚙️ 🔍

3. Click the **magnifying glass** in the **Task Template** field and click the **checkmark** to the left of the chosen task. Note: Keep permissions in mind when selecting a task. You can not delete a task you do not have permission to edit.
4. By default, the **Earliest Allowable Completion Date** is populated with the day before today, allowing it to be marked as complete at any time. If you do not want the task marked as complete until a certain day, select that date here.
5. Click the **Due Date** field and choose the date the task is due. The due date not only indicates when a task is due but also determines the order in which tasks are listed.
6. Select **Yes or No** from the **Is this task required?** Field.
 - By selecting **Yes**, the task will be reflected in the late task total once the due date has passed, and it cannot be deleted.
 - By selecting **No**, the task will not be reflected in the late task list, and whoever can edit the task can delete it.
7. Click **Save**.

Add Task

Task Template (required) ⚙️

T: Student Growth Mtg ✕

Earliest Allowable Completion Date 📅 (optional) ⚙️

Mon, May 19, 2025

Due Date 📅 (optional) ⚙️

Fri, Jun 13, 2025

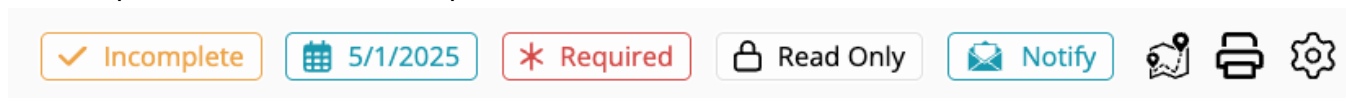
Is this task required? 📌 (required) ⚙️

Yes

Cancel
✔ Save







Task Tips

1. Once a task is complete, click the **"Incomplete"** button in the upper-right corner of the task page. A popover window will appear. Select 'Yes' or 'No' from the dropdown menu for 'Send Email' and click 'Save'.
2. The Incomplete button will now be changed to **Completed**, making it **read-only**, and sharing the task data, while also sending an email.
3. To edit the task, the user must click the Complete button at the top right to return it to the Incomplete state and make the necessary edits. Then click Complete again. Another email is sent, and the date will be updated to the current completion date.



Task Icons

* Required	A required task is added at the beginning of the year. It cannot be deleted.
<input type="radio"/> Optional	The task is optional.
🕒 Late	Past Due Required Task
✔ Completed ✔ Completed...	The task has been marked complete.
✔ Incomplete	The task is incomplete and may be edited.

 Read Only	Displays for either the Evaluator or the Evaluatee. The item has been marked complete or is only for the Evaluatee to enter data.
 10/15/2024	Due date
 Notify	Notify the Evaluator or the Evaluatee of the change.
 Task Shared	Displays when either the Evaluator or Evaluatee has shared an Evaluation type task.
 Notepad N...	Notepad is not shared.
 Notepad S...	Notepad is shared.