

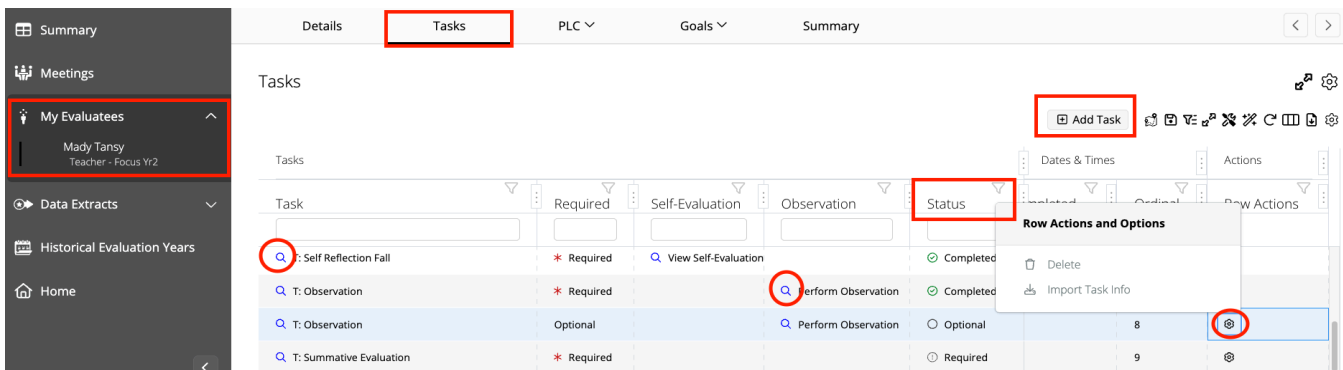
EVALUATOR: Task List Overview and Options (Connect)

Tasks may be assigned to the Evaluator or the Evaluatee for completion. 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 by navigating to '**My Evaluatees**' in the left navigation menu.
 - The 'My Evaluatees' list is also accessible on the left navigation menu under '**Summary**'.
2. Click the **arrow** to reveal the list of evaluatees assigned to you for management.
3. Click the name of the Evaluatee you want to manage.
4. You will default to the **Manage Evaluation Year page** and see a data table for that evaluatee's tasks.

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.

5. Click the **Add Task button** in the top right to add a task.
6. Click the **magnifying glass** in the **Task Column** to view the **task page**.



7. Once a task is complete, click the **"Incomplete"** button in the upper right corner of the task page. A popover window will appear.
8. Select **Yes** or **No** from the dropdown menu for **Send Email**.
9. Click **Save**. The Incomplete button will now be changed to **Completed**, making it **read-only**, and sharing the task data, while also sending an email.
10. To return to an incomplete task or edit it again, click the **Completed button**. It will return to incomplete, and you may now edit again. Upon completing it again, another email will be sent, and the date will be updated to the current completion date.

✓ Incomplete
📅 5/1/2025
* Required
🔒 Read Only
📧 Notify


11. Click the **magnifying glass** in the **Observation** column to view the **Perform Evaluation Task** page.

12. The **Status** column indicates whether a task is complete, optional, or late.

Observation	Status
<input type="text"/>	<input type="text"/>
	🕒 Late
🔍 Perform Observation	🕒 Late
🔍 Perform Observation	🕒 Optional
	✅ Completed

13. Click the **Row Actions** gear and choose one of the following:

- **Delete:** This will remove the task. This option is only available on tasks you add and can edit. A popover window will appear: “**Are you sure you would like to delete this task? This cannot be undone.**” Click 'Yes' or 'No' to return to the data table.
- **Import Task Info:** This process copies any text that matches the fields on the current task from the task identified in the pop-up list and replaces the text on the current task where Import Task Info was clicked. Click the **Task** field, select the **checkbox** to the left of the chosen task to import it. And click **Save**.

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

Completed	Ordinal	Row Actions
mm/dd/yyyy 📅	<input type="text"/>	
	2	⚙️

Row Actions and Options

- 🗑️ Delete
- 📄 Import Task Info

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
Tansy, Mady U	Larew, Teri U	Teacher - Focus Yr2


3. Click the **magnifying glass** in the **Task Template** field and click the **checkmark** to the left of the chosen task.
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 anyone who can edit the task can delete it.
7. Click **Save**. The task has been added, and you can continue to edit it if necessary.


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 

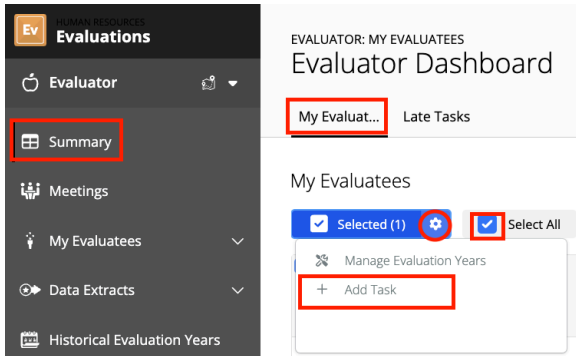


Cancel 












Evaluator: To Add A Task To Multiple Evaluatees Simultaneously

1. To simultaneously add a task to multiple evaluatees, click **Summary** in the left navigation menu.
2. You will default to the **My Evaluatees tab** of the **Evaluator Dashboard**.
3. Select the **checkbox** at the top left of one or more Evaluatees or click the **Select All checkbox** at the top.
4. Click the **Selected Gear** in the top left and choose **Add Task**.

5. Complete is similar to adding a task above.



The Task's Current Status

 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 Evalutee 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.