

HUMAN RESOURCES STAFF: EVALUATIONS AND OTHER HELPFUL TOOLS V2

Here, you will learn more about evaluations and other helpful evaluation tools.

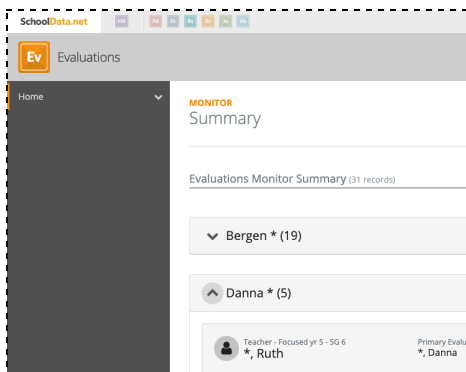
Evaluations Role Definitions

In Evaluations, Users have Roles that determine how they access data and interact with the application.

Evaluator	Evaluators are responsible for whichever evaluatees are assigned to them. The main functionality available to evaluators is as follows: • View all of their evaluatees' tasks, modify, and complete certain tasks. • Create new task templates and assign new tasks to their evaluatees anytime. • Add or remove Support Team Members for their evaluatees. • Change the Position Level of any of their evaluatees. • Reassign their evaluatees to other evaluators.
Evaluatee	Evaluatees have the following functionality: • View, modify, and complete tasks. Some tasks are required, while others are optional. • Add or remove Support Team Members from their Yearly Evaluation Profile • Add or remove goals from their Yearly Evaluation Profile.
Monitor	Monitors have a read-only role. They can only view tasks assigned to the evaluatees for whom they are responsible.

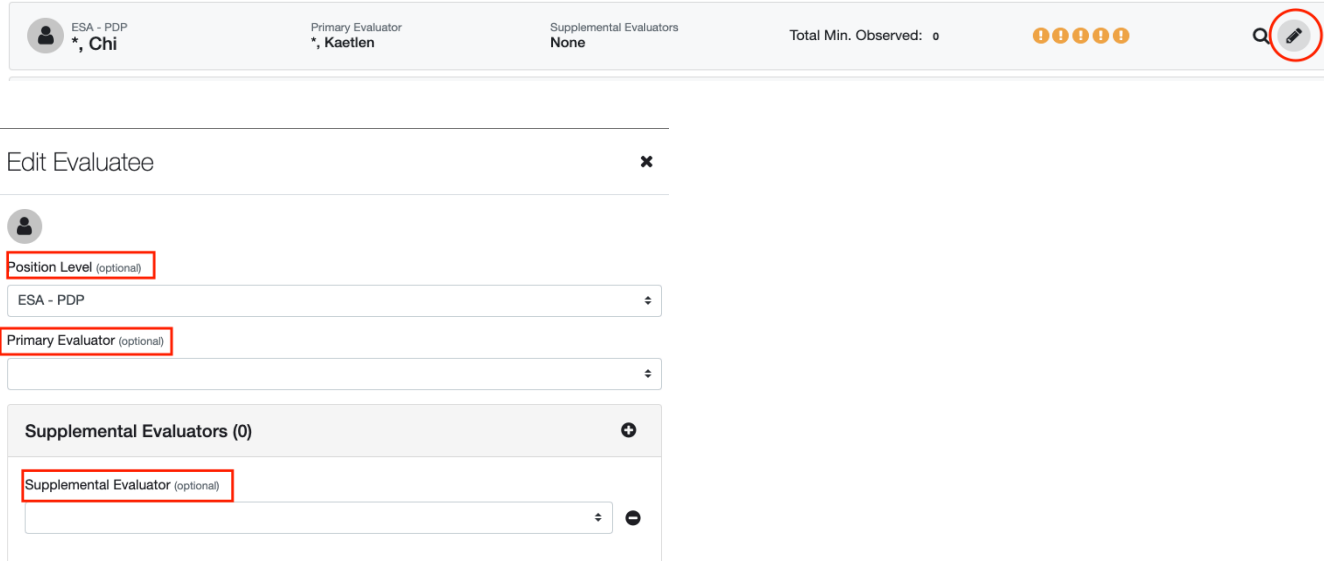
Tools Provided From The Monitor Dashboard

The monitor dashboard serves as a read-only central hub for Evaluations Monitors to oversee the current year's evaluation process. Click on the icon next to the Evaluator's name to expand to see the list of Evaluatees.



Detailed Settings on an Evaluatee

To change any of the following settings on an Evaluatee, click the **pencil** icon next to the Evaluatee's name.**



ESA - PDP
*, Chi

Primary Evaluator
*, Kaetien

Supplemental Evaluators
None

Total Min. Observed: 0

1 1 1 1

Q 

Edit Evaluatee ✕



Position Level (optional)

ESA - PDP

Primary Evaluator (optional)

Supplemental Evaluators (0)

Supplemental Evaluator (optional)

- **A Position Level** (i.e., Teacher Focused Year 5) determines the tasks automatically added to the Evaluatee's task list annually.
 - Switching should only be done if necessary, as the task list is updated and includes any tasks that have already been filled in with data. Tasks with associated data are retained, potentially resulting in duplicate tasks.
 - Position Level (Focus Yr1, Focus Yr2, etc.) is incremented according to a standard district setup sequence during the annual rollover process.
- **The Primary Evaluator** determines who has the evaluatee on their dashboard. Switching Evaluator will remove the Evaluatee from the current Evaluator's Dashboard and add it to the new Evaluator's Dashboard.
- **A Supplemental Evaluator** selected adds the Evaluatee to that selected Evaluator's Dashboard and allows them to add or edit any tasks on their list, just as the Primary Evaluator. However, they cannot edit details such as Position Level, Primary Evaluator, or Supplemental Evaluator.

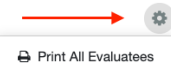
** If Monitors can't switch Position Level or Evaluator, send a request to turn on this functionality to: support@schooldata.net. This is a district-wide setting.

Printing

Final Evaluations for All Evaluatees

Click the gear at the top right of the **Monitor Dashboard**. Choose **Print All Evaluatees**.

MONITOR
Summary



On the pop-up that appears, select options to include or exclude. The print defaults to the current year. If you need a previous year, change the **school year** at the bottom. Once ready, the generated PDF can be accessed through the application notification or via the email sent to the logged-in user.

Print Options

✓ Download PDF ✕

Toggle All

☐ Show Only Focused/Required Criteria

☒ Show Criterion Components

☒ Show Non Final Notes

☒ Show Final Notes

☒ Show Commentary

☒ Show Files

☒ Show Charts

☒ Show Web Links

☒ Show Data Extracts

☒ Show Goals

☒ Show Key Indicators

☒ Show Self-Evaluations

☒ Show Evaluations

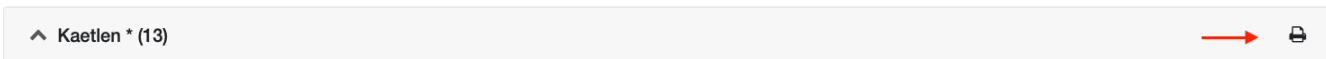
School Year (optional) [Select](#)

Font Size

☐ Small ☒ Medium ☐ Large

Printing Final Evaluations for a specific Evaluator's Evaluatees

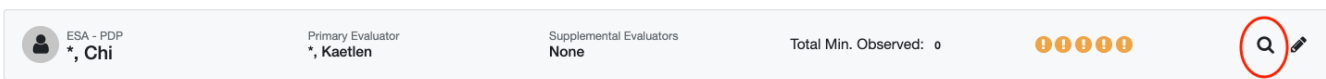
Click the printer icon in the row of the specific Evaluator you would like to print all their Evaluatees.



Like above, a pop-up appears. Select options to include or exclude. The print defaults to the current year. If you need a previous year, change the **school year** at the bottom. Once ready, the generated PDF can be accessed through the application notification or via the email sent to the logged-in user.

Viewing or Printing a Single Evaluatee's Final Evaluation

Click on the magnifying glass icon next to the Evaluatee to access their Evaluation Record.



Once it opens, click the **Summary** tab. By default, the current year's **Summary & Final Evaluation** information shows. Click on the **school year** dropdown to switch to previous years. Click the **Action Gear** icon in the Summary area to print. On the pop-up, select what you would like to include in the print. A PDF is generated and accessible via the application notification or the email sent to the logged-in user when it is ready.

MONITORING
Chi *
ESA - PDP

2022/23

Tasks ▾
PLC
Goals
Summary

Annual Evaluation Summary - Unsupported Focus

☒ Show only focused & required criteria

Print Preview Evaluation Summary

Print Evaluation Summary

Print Preview ESA Summary Print

Print ESA Summary Print

Print Preview Mid-Year Evaluation Summary

Print Mid-Year Evaluation Summary

View options
☒ Show only focused & required criteria

Useful Applications Outside Of Evaluations

Some applications aren't directly linked in the Evaluations application, which can be useful for staff. Specifically configured or compiled **Evaluation** information in these other applications can be used to generate reports that can be filed in a staff folder or submitted to the state. The two most useful below can be found in the Data Extracts (DE) bundle:

- **Reports** (direct link [https://\[yourdistrictname\].schooldata.net/v2/report-manager](https://[yourdistrictname].schooldata.net/v2/report-manager))
- **Data Tables** (direct link [https://\[yourdistrictname\].schooldata.net/v2/data-table-manager](https://[yourdistrictname].schooldata.net/v2/data-table-manager))

Since Evaluations are part of the Human Resources bundle when in the application, the bundle icon (HR) will be displayed on the left of the screen. To access the **Data Extracts** bundle and its applications. Locate and hover over the DE bundle icon on the right side of the screen. Click the "**Learn More**" link on the application.

DE

APPLICATION BUNDLE

DATA EXTRACTS

Ch

Charts

Today, education professionals have access to more and more data providing in-depth information on student, teacher and school performance. Our new Charts App is designed for you to share your data visually in a simple, easy-to-understand format.

LAUNCH APP >>

Kp

KPIs

Gain a common perspective and make informed decisions through a series of Key Performance Indicators (KPIs). They present charts in dashboards, combined with context and narrative to help superintendents and school boards make steering decisions for their district.

LAUNCH APP >>

Nl

Notification Letters

Notification Letters is an integrated solution to create, manage, and track notification letters sent to parents electronically or manually.

LAUNCH APP >>

Db

Chart Dashboards

This app provides a way to create your own custom dashboards to focus on collections of data around specific themes. Create dashboards for others to use with their data, as well as district dashboards for common views across grade levels, schools, or the district.

LAUNCH APP >>

Rp

Reports

Our Reports application is designed to help you generate form letters, produce student progress reports, and combine historical data with text to deliver meaningful reports to stakeholders in your district.

LAUNCH APP >>

Ta

Data Tables

Data Tables is a fast and easy method to generate multiple data sets using basic data input selections. Similar to Data Grids, Data Tables are comprehensive spreadsheets made up of data columns to present this information.

LAUNCH APP >>

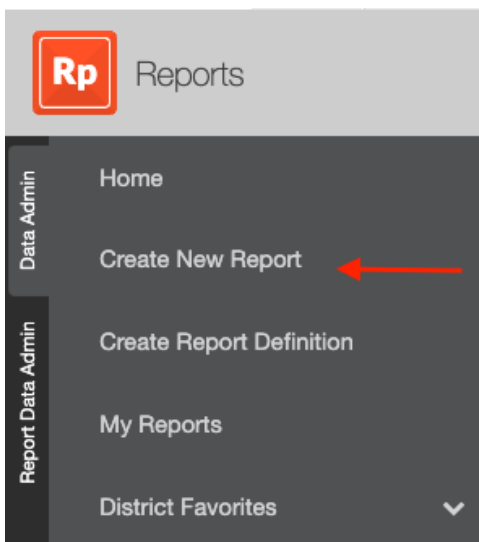
Evaluations Specific Reports

The Reports (Rp) application provides users with PDF reports for the overall group or individual users. Reports provide options for many other SchoolData.net applications; the ones specific to Evaluations are listed below.

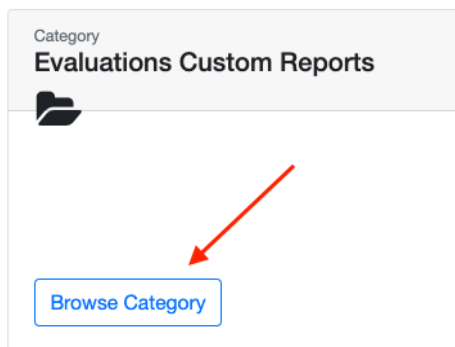
- Evaluatee Position Level Path Report
- Final Evaluation 4-Year Report
- Historical Evaluation Summary

Click **Create New Report** on the left navigation panel to locate any of these Reports.

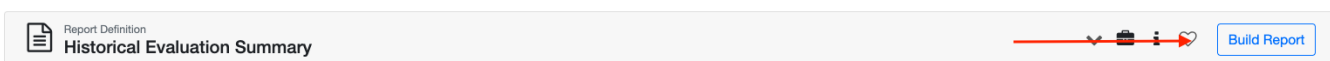
Helpful Resource: [Reports Guide V2](#)



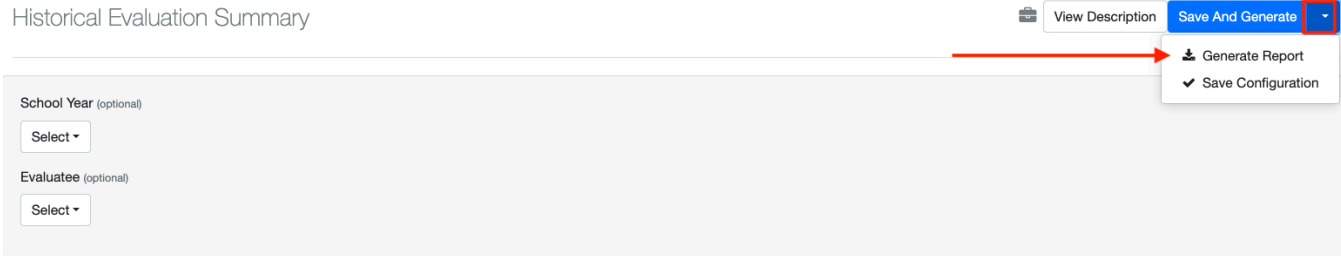
Click the **Browse Category** button for the **Evaluations Custom Reports**.



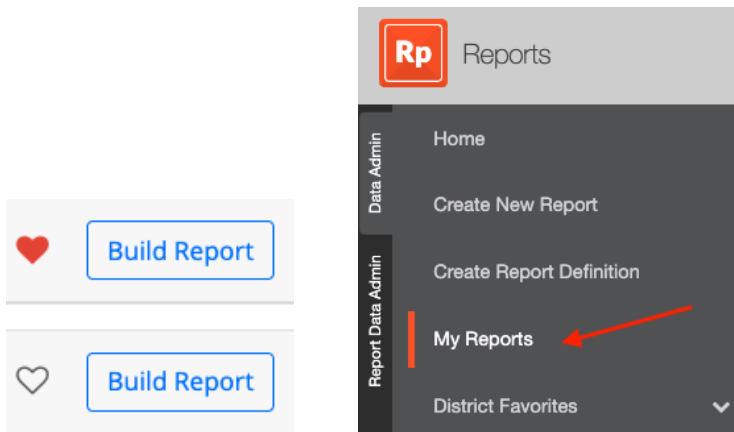
To generate and download documents from a Report, click the **Build Report** button next to your desired report.



Select options on the screen that are relevant to your needs. Click the **Save and Generate** dropdown, and choose **Generate Report** or **Save Configuration**." A PDF or XLSX workbook will be generated and either accessed via the application notification when it is ready or via the email sent to the logged-in user.



For quicker access to a **Report**, add it to **My Reports**. Click the empty heart icon to turn it red. From then on, any favorited Report can be found in My Reports.



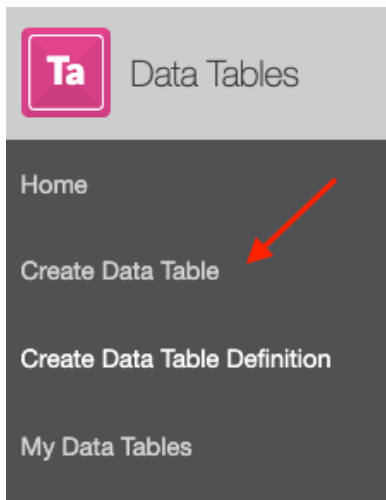
Evaluations Specific Data Tables

The Data Tables (Ta) application provides users with reports in an Excel spreadsheet format. Data Tables provides options for many other SchoolData.net applications, so below are the ones specific to Evaluations:

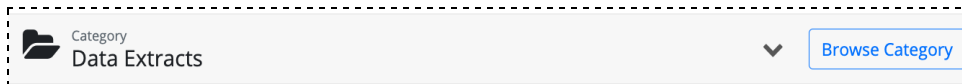
- Evaluation Criteria by Task Template
- Evaluation Task Completion
- Evaluation Year Summary

To locate any of these Data Tables, click **Create Data Table** on the left navigation panel.

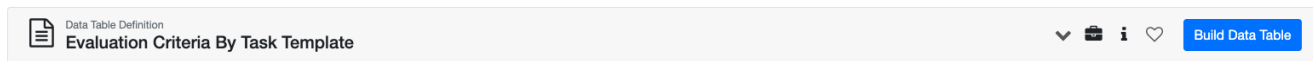
Helpful Resource: [Data Tables Guide V2](#)



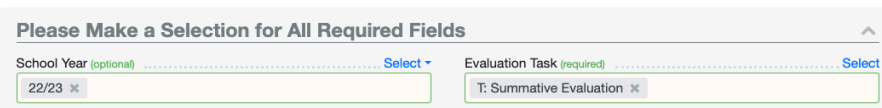
Click the **Browse Category** button next to **Data Extracts**.



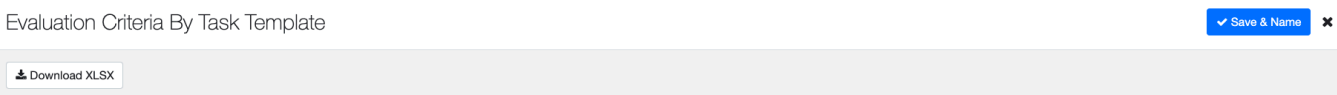
To generate and download data from a Data Table, click the **Build Data Table** button next to your desired data table.



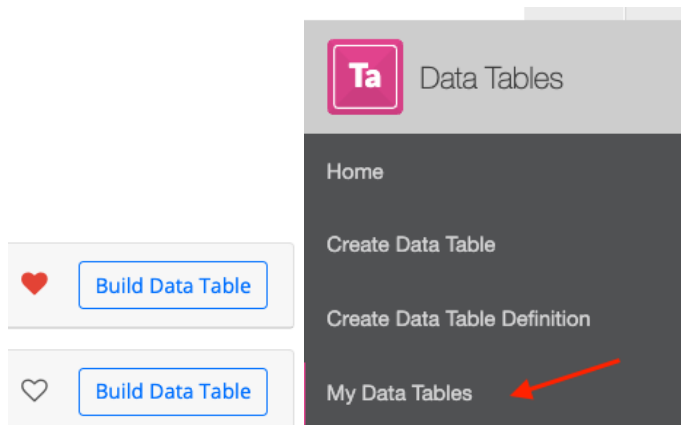
Select options on the screen that are relevant to your needs. Click **Save and Generate Data Table**.



It provides data for review or for scrolling on the screen that appears. Click on "**Download XLSX**" on the left side to download the spreadsheet to your files, or select "Save and Name" from the right side of the screen.



Add it to My Data Tables for quicker access. Click the empty **heart** icon to turn it red. From then on, any favorite Data Table can be found in the like-named category in **My Data Tables**.



If you need help, contact a customer support representative by emailing: support@schooldata.net

