



Direct Report Quick Start Guide

Unified Talent Perform

Updated: July 15, 2019

This edition applies to Release 19.6.0.0 of the Unified Talent Perform software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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Contents

Direct Report4

 My Folder 4

 Forms 5

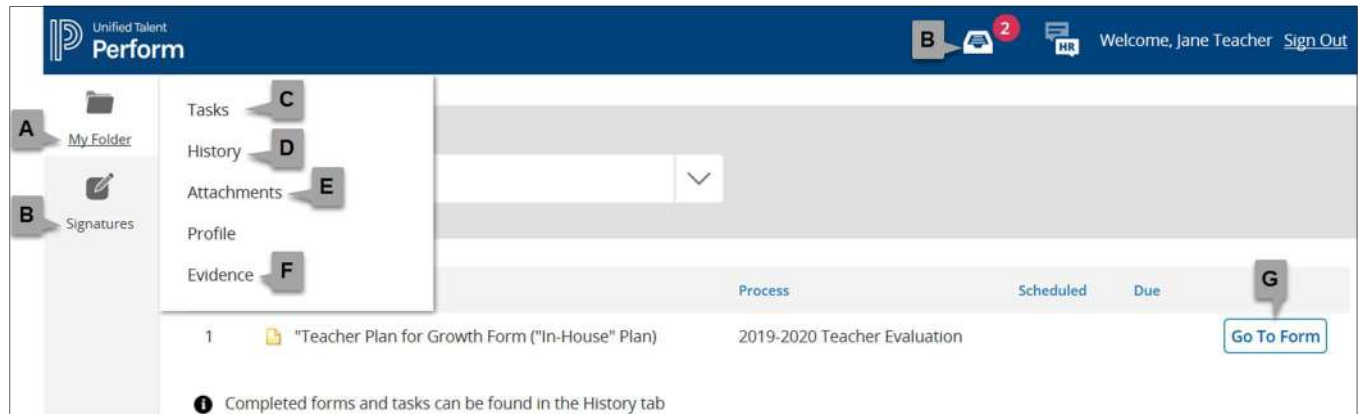
 Signatures and Approvals 5

 Evidence..... 6

 Add an Artifact..... 6

Direct Report

My Folder



- A. **My Folder:** View your tasks and evidence here.
- B. **Signatures:** Electronically review, sign, or approve forms.
- C. **Tasks:** Review the tasks assigned to you that need to be completed.
- D. **History:** Review your completed tasks and forms.
- E. **Attachments:** View documents shared by supervisors.
- F. **Evidence:** Access the list of artifacts that you have attached to your forms, as well as notes shared with you by supervisors.
- G. **Go To Form:** Click to open and complete the form.

Forms

Attachment #1 Browse... Delete

Attachment #2 Browse... Delete

Attachment #3 Browse... Delete

If the attachment will not upload properly, [click here](#) to try the alternate version.

Attached Workflow DR Signature SV Signature
 Current Status Draft
 Workflow Steps

| | | |
|-------------|---|-----------------------------------|
| Forthcoming | 1 | Signature by Direct Report |
| Forthcoming | 2 | Signature by Supervisor/Evaluator |

AutoSave Enabled [Back](#) [Save Progress](#) [Save & Submit](#)

- A. **Rubric/Form Review Tool:** Access a slide-out tool to view any rubric associated with this process, as well as any completed forms in the process.
- B. **Attachments:** Add up to three separate attachments.
- C. **Workflow:** View the signature, approval, or review steps that must be completed once the form is submitted.
- D. **Save & Submit:** Save the form, lock it from further edits, and begin the workflow defined for the form.

Signatures and Approvals

Approvals

My Folder

Signatures

Documents Awaiting Your Signature

| Document | Direct Report | Process | Action Required |
|---|---------------|----------------------|---|
| Classroom Observation Summary Sheet | J. Teacher | Teacher: non-tenured | Signature by Jane Teacher View and Sign |
| Teacher: Section A: Standard 1: Missouri Teaching Standards | J. Teacher | Teacher: non-tenured | Signature by Jane Teacher View and Sign |

- A. **Signatures:** Review and electronically sign or approve forms.
- B. **View and Sign:** This button name changes depending on whether you are signing, approving, or reviewing a form. Click to view the completed form, then scroll to the bottom to complete the assigned step.

Evidence

Add an Artifact

Evidence

| <input type="checkbox"/> | Date Added | Process | Associated With | Task | Added By | Type | Title | Content |
|--------------------------|------------|--------------------|-----------------|--------------------|--------------------|------|--------------------|---|
| <input type="checkbox"/> | 7/12/2019 | 2019-2020 Te... | | Formal Obser... | System Admin... | File | Sample Artif... | Perform Quick Start Guide.doc |
| <input type="checkbox"/> | 6/5/2019 | 2019-2020 Te... | | Formal Obser... | Test Princip... | File | Example | Lesson Plan.docx |

« < 1 > » 1-2 of 2 25 per page

0 Selected | [Select All](#) | [Clear](#)

Bulk Action Select Action Go

1 **Add Artifact**

Add Artifact

Title required

2

☐ File Upload
Valid extensions : csv,tif,tiff,doc,docx,ppt,pptx,xls,xlsx,pdf,txt,rtf,jpg,gif,png, MP4,WMV,MOV,AVI,FLV,WAV,MP3. Max size 2GB.

3

Choose File

☐ URL

☐ Associate the artifact with one or more rubric items.

4

5

Save Artifact **Cancel**

1. Click **Add Artifact**.
2. Enter the **Title**.
3. Select **File Upload** or **URL**.
4. If enabled by HR, associate the artifact with rubric items. Note that the rubric selected for the process is the rubric to which artifacts can be associated.
5. Click **Save Artifact**.