

PERFORM – Administrator Instructions, Support Staff

Accessing Perform

Under the Employees tab on the District homepage, administrators should click on **Login** under the Perform section. This will generate the TalentEd login page.

Administrators logging in for the first time should click on the **“Logging in for the first time?”** link. This link will take them through the steps to set up their password by sending the individual administrator a link to their district e-mail account.

Once they have their password set, they will log in to this page using their full district e-mail address as their username (i.e. jsmith@wcskids.net).

Four Products. One Login.

Introducing an easier way to access all of your TalentEd products.

 ☐ Remember username on this computer[Logging in for the first time?](#)[Forgot your password?](#)

If you are an applicant and have reached this page in error, please go to our [Careers Homepage](#).



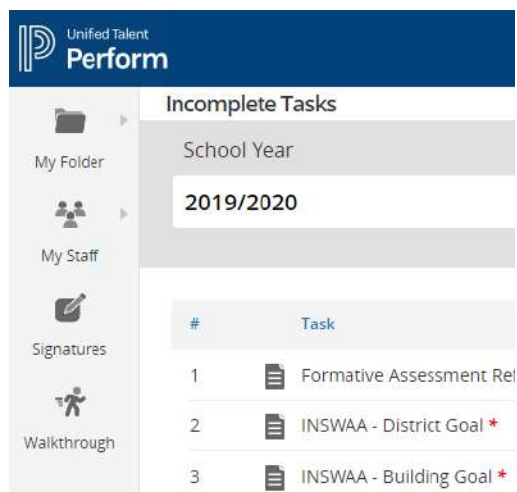
Once you are logged in, if the system defaults to Applicant Tracking, click on the ‘waffle’ in the upper right hand corner and select **Perform**.

Welcome to TalentEd Hire [Sign Out](#)



Evaluation Tool

Administrators will have four icons on the menu bar on the left side of the screen – My Folder, My Staff, Signatures, and Walkthrough.



My Folder contains the following:

Tasks – The system defaults to the My Folder/Tasks display when first logging in. This shows any pending tasks that are assigned to the administrator for their own personal evaluation and need to be completed

History – tasks that have been completed

Attachments – documents that have been uploaded

Profile – employees personal information including links to change their password and e-mail preferences

Evidence – evidence/documents supporting evaluation ratings for their own person evaluation that have been uploaded

My Staff contains six sub sections:

Dashboard – provides an overall summary of evaluation information

Staff – lists direct reports and provides access to their evaluation (this section is address in detail below)

Schedule – not addressed at this time

Reports – allows you to run pre-set system reports

Analysis – not addressed at this time

Evaluation Dashboard – provides a graphical view of the status of direct report evaluations (note: you must filter by Process to view)

Signatures will provide a list of any signatures that are awaiting a signature. Administrators can also check the envelope icon on the upper right side of the screen for pending signatures. If any documents are awaiting the administrator's signature, the number of documents pending will appear in a red circle

next to the envelope. Administrators can click on either the Signature icon or the envelope icon to access documents to sign.



Walkthrough is not applicable to support staff.

Staff Screen

The screenshot shows the 'Staff' evaluation interface. At the top, there's a 'Staff' header. Below it, a tab bar with five tabs: 'All Staff', 'Not Evaluated', 'Evaluation' (which is selected and highlighted with a blue underline), 'Action Plan', and 'Evaluation Dashboard'. Below the tabs is a search bar labeled 'Search' with the placeholder text 'Enter any part of the name, employee id, building, or process name to search'. To the right of the search bar is a checkbox labeled 'Show Direct Reports of My Direct Reports'. Below the search bar are two buttons: 'Collapse Filters' and 'Reset Filters'. At the bottom, there are several filter dropdowns: 'School Year' (set to '2019/2020'), 'Process' (set to 'All Evaluations'), 'Job Type' (set to 'All Job Types'), 'Tenure Level' (set to 'All Levels'), and 'Responsible' (with a text input field and a clear 'x' button).

- Section A: All Staff – provides a list of all staff assigned to administrator
- Not Evaluated – provides a list of staff who does not have an evaluation assigned to them
- Evaluation – provides a list of staff who have an evaluation assigned to them
- Action Plan – provides a list of employees on an action plan rather than evaluation (currently not in use)
- Evaluation Dashboard – provides the same graphical view of the status of direct report evaluations (note: you must filter by Process to view)
- Section B: Allows you to search by name, employee ID, building or type of evaluation
- Section C: Allows you to filter by school year, process, job type, or administrator who is responsible to complete the evaluation (tenure level not in use)

Below the filters, the list of assigned employees is displayed and provides the following Information:

<input type="checkbox"/>	Last	First	Employee ID	Process	Progress	Responsible	Deadline	
<input type="checkbox"/>	AIELLO III	SALVATORE	471340	Bus Driver - Evaluation	0/1	A. POMAVILLE	06/11/2020	View Folder
<input type="checkbox"/>	BARR	CANDACE	379238	Bus Driver - Evaluation	0/1	R. SELBY	06/11/2020	View Folder
<input type="checkbox"/>	BARR	CANDACE	379238	Bus Driver - Evaluation	0/1	R. SELBY	06/11/2020	View Folder

Name

Employee ID

Process: the evaluation that is assigned to the employee

Progress: completed/total steps in evaluation

Responsible: the name of the administrator that is responsible to complete the evaluation

Deadline: due date

View: view and open the employee's evaluation

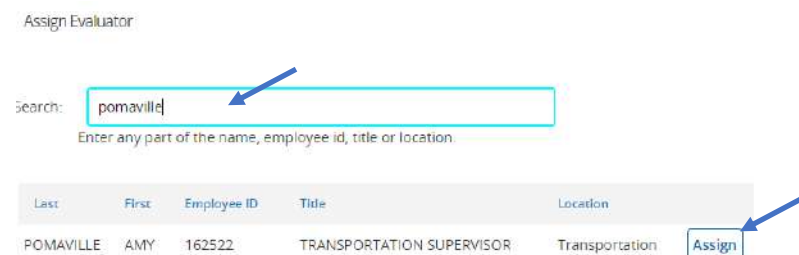
Folder: view multiple evaluations assigned to that employee and open processes

Changing Assigned Administrator

Administrators can change the person responsible for completing the evaluation by selecting the check box for that employee on the left side and selecting **Assign Evaluator** from the Bulk Action field at the bottom of the screen and clicking **Go**.



A prompt will then appear to search for the appropriate evaluator. Click **Assign** and the evaluation will then appear on that administrators list of employees to evaluate.



Completing an Evaluation

To start an employee's evaluation, click on the **View** button at the right of the employee's information. Click on **Go To Form**.

Teacher1 Training - Operations - Evaluation (Custodial/Maint/IT/WH)

☐ Show information at time of process completion

Walkthrough

Evidence

Folder

#	Task	Sched	Comp	Responsible	Resp Type	1 Tasks			
1	 Operations - Evaluation			P. Training	Supervisor	Go To Form	Schedule	Assign	Remove

Attachments can be uploaded to support or provide evidence of any sub-section or overall rating.

The screenshot shows the attachment section of an evaluation form. It contains three rows for attachments, each with a 'Choose File' button, a 'No file chosen' status, and a 'Delete' link. Below the attachments is a note: 'If the attachment will not upload properly, [click here](#) to try the alternate version.' Below this is a dashed box containing a workflow summary: 'Attached Workflow: EE Sign + Super Approve', 'Current Status: Draft', and 'Workflow Steps'. The steps are: 1. 'Signature by Direct Report: Teacher1 Training' (status: Forthcoming) and 2. 'Approval by Supervisor/Evaluator' (status: Forthcoming). At the bottom of the form, there is a status bar with a checkmark icon, 'Autosaved at: 9:58:16am', and four buttons: 'Back', 'Save Progress', 'Form Sharing' (with an info icon), and 'Save & Submit' (with an info icon).

Workflow shows status of the final evaluation signature/approval process

Back returns you to the employees Folder without saving information

Save Progress saves all information entered but does not submit, you can save and return to the evaluation to edit and/or add any additional information at a later time

Form Sharing allows you to share information saved in the evaluation with the employee. You have the options to allow the employee to edit or read only, as well as enter comments.

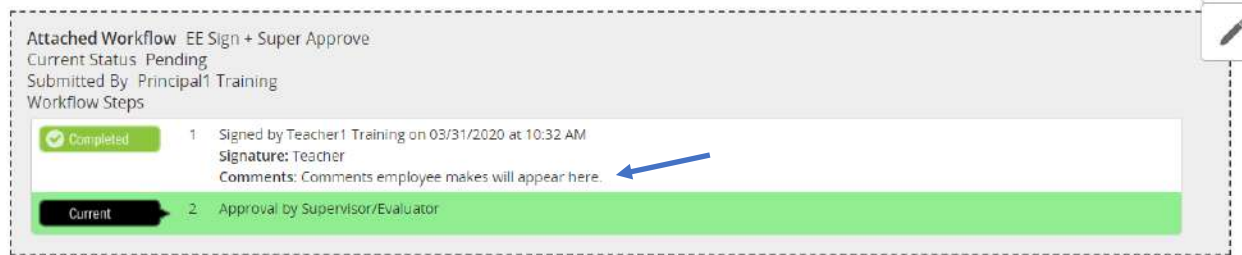
Share Draft with Teacher1 Training

The screenshot shows the 'Share Draft with Teacher1 Training' form. It has a 'Permissions:' section with three radio button options: 'Teacher1 Training can edit my draft.', 'Teacher1 Training can view a read-only copy.', and 'Do not share/remove share.' (which is selected). Below the permissions is a text area labeled 'Comments for Teacher1 Training:'.

Save Form and Share will save the form and share it with the direct report. Once the direct report saves the form as complete, a notification will be sent and the sharing will be removed.

Save & Submit locks the evaluation and submits it to the employee for final review and signature. Once the employee has signed it, it will return to the administrators Signature tab for final approval.

Completed workflow steps will be highlighted and display the date and time the employee signed the evaluation as well as any comments that the employee made prior to his/her signature.



Attached Workflow: EE Sign + Super Approve
Current Status: Pending
Submitted By: Principal1 Training
Workflow Steps

Completed	1. Signed by Teacher1 Training on 03/31/2020 at 10:32 AM Signature: Teacher Comments: Comments employee makes will appear here.
Current	2. Approval by Supervisor/Evaluator

The administrator can then make any final comments and will then have three options:

Cancel keeps the evaluation in the evaluator's Signature tab for review at a later time

Revision Needed allows the administrator to make revisions which will then be resubmitted back to the employee for review/signature

Approve finalizes the evaluation

Decision

Current User
Principal1 Training
Date
3/31/2020

Comments

Cancel

Revision Needed

Approve