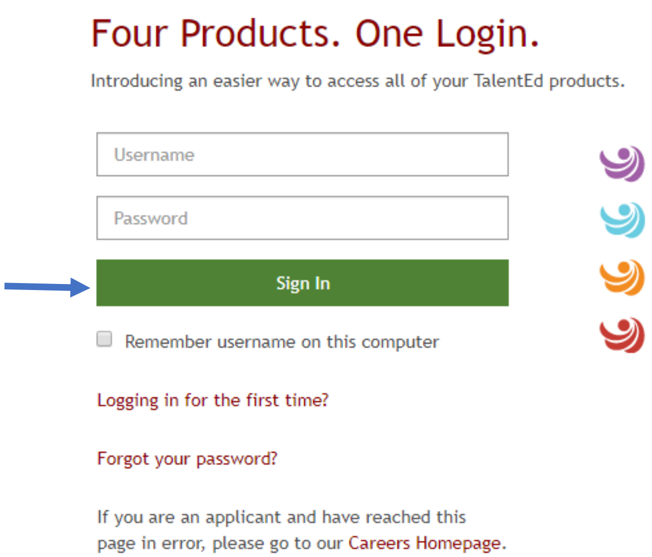
PERFORM – Administrator Instructions, Support Staff

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.

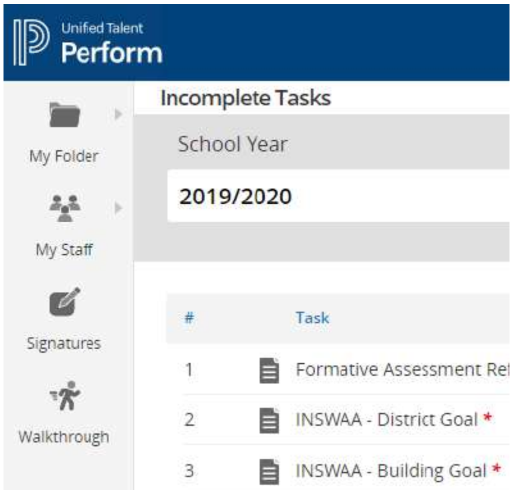
Once they have their password set, they will log in to this page using their full district e-mail address as their username (i.e. jsmith@wcskids.net).



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**.

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:

<u>Tasks</u> – 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

<u>History</u> – tasks that have been completed

<u>Attachments</u> – documents that have been uploaded

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

<u>Evidence</u> – 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)

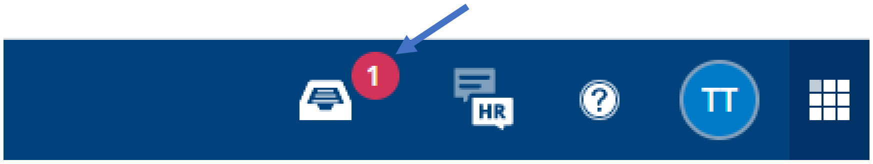
Schedule – not addressed at this time

Reports – allows you to run pre-set system reports

Analysis – not addressed at this time

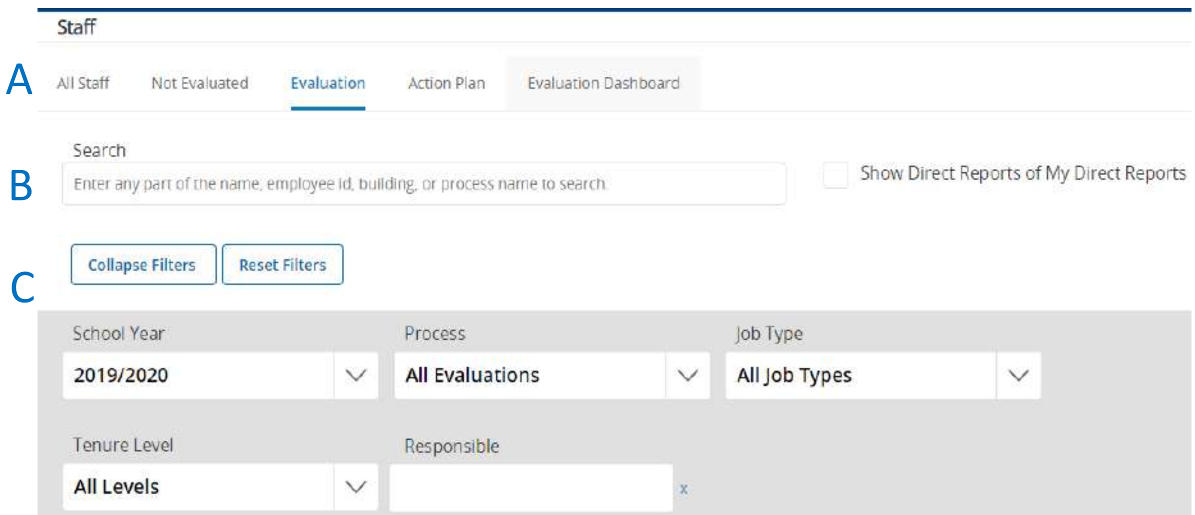
Evaluation Dashboard – provides a graphical view of the status of direct report evaluations (note: you must filter by Process to view)

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



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:

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

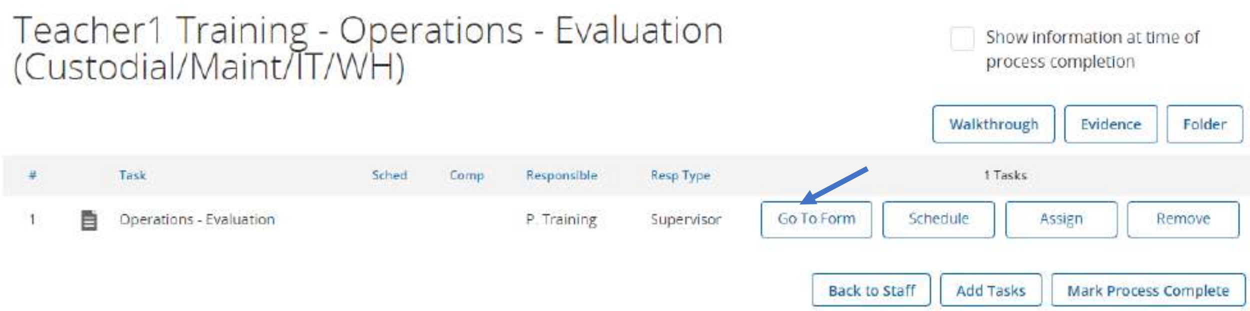
Changing Assigned Administrator

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

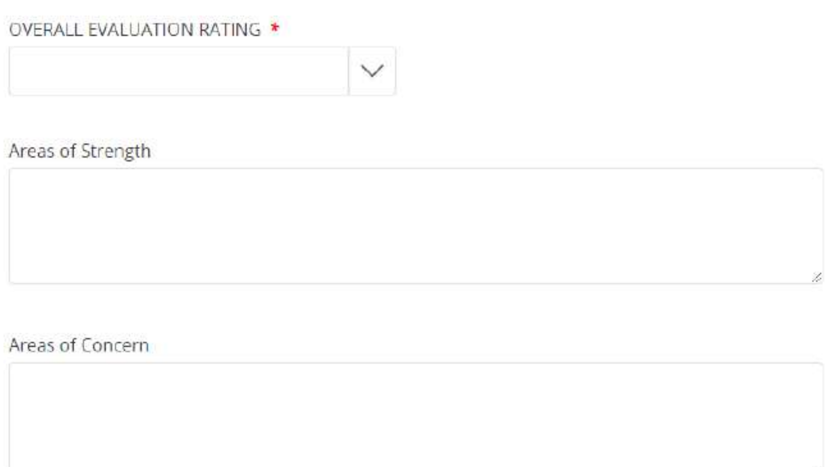
To start and employee's evaluation, click on the **View** button at the right of the employee's information. Click on **Go To Form**.



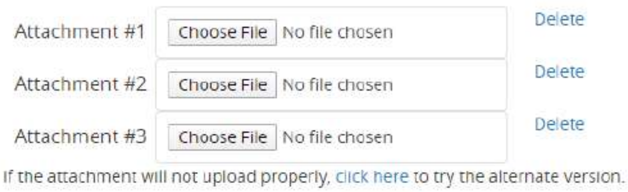
The evaluation will open. Each sub-section of the evaluation has two fields. The first is the rating for that sub-section. To select a rating, click on the down arrow, then select the rating you wish to give the employee. The rating will be required for each sub-section.

The second field is the comment/examples field. This is not a required field if a Meets Expectations rating is given. If an employee is rated Needs Improvement or Exceeds Expectations, comments and/or examples are expected.

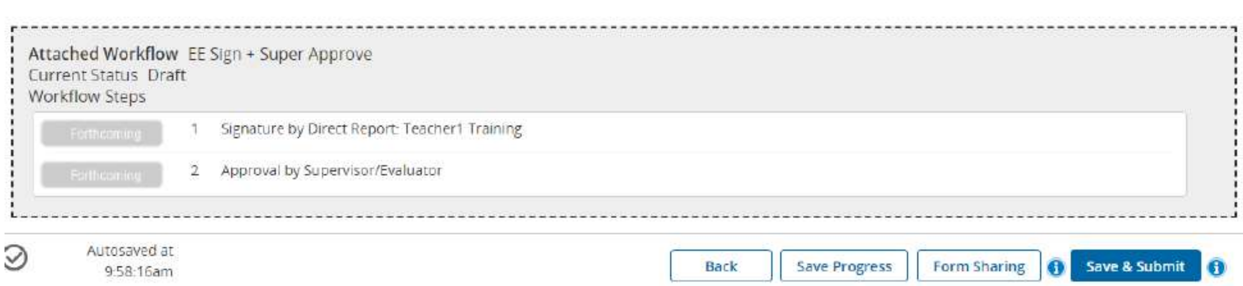
After each sub-section is completed, an overall rating is require. Two additional sub-sections are Areas of Strength and Areas of Concern. These fields are not required, but again, expected for any rating other than Meets Expectations.



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



The final section of the evaluation form provides the workflow.



Workflow shows status of the final evaluation signature/approval process

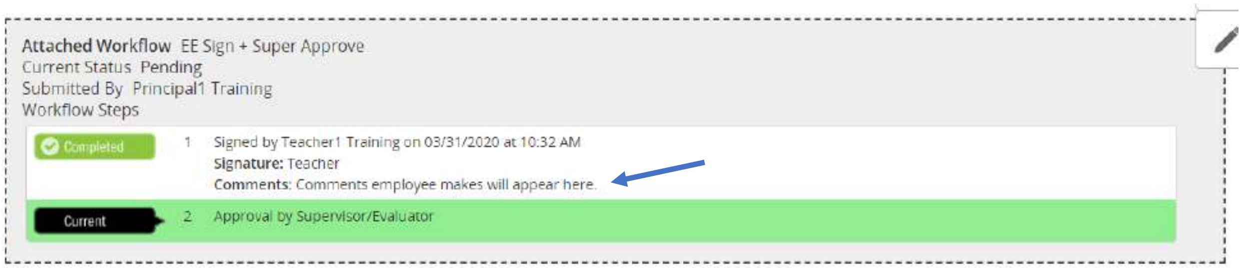
Back returns you to the employees Folder without saving information

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.

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.



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