Educator Performance and Support System (EPSS) Training Packet

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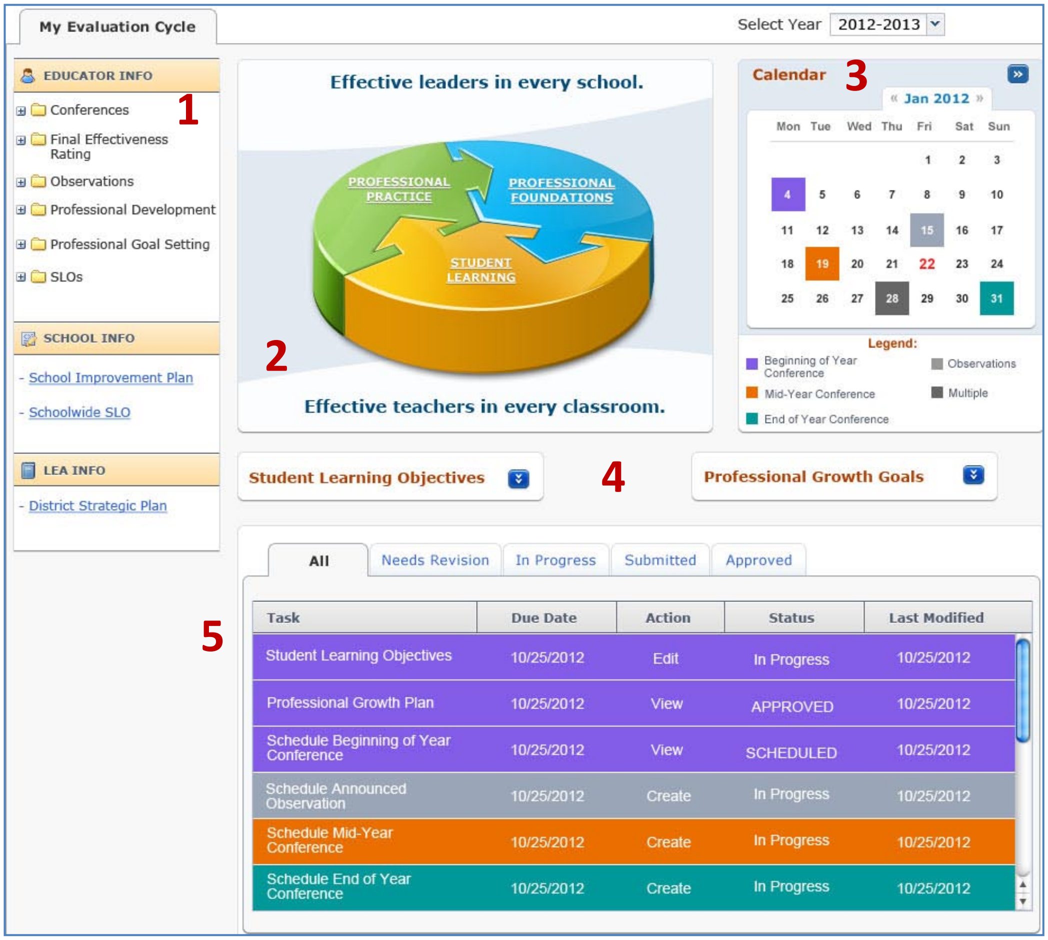
Educator Dashboard: My Evaluation Cycle (for anyone who is evaluated)



1. Left Navigation Bar: Folders with links to educator forms for review and/or completion and links to school-level and LEA-level reference documentation

2. Evaluation Components Circle Graphic: Clickable links to home pages for the three core components of the RIDE Model

3. Calendar Graphic and Legend: Quick snapshot of the month's scheduled evaluation elements with clickable dates to display a detailed calendar view

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Evaluator Dashboard: My Caseload (for anyone who evaluates others)

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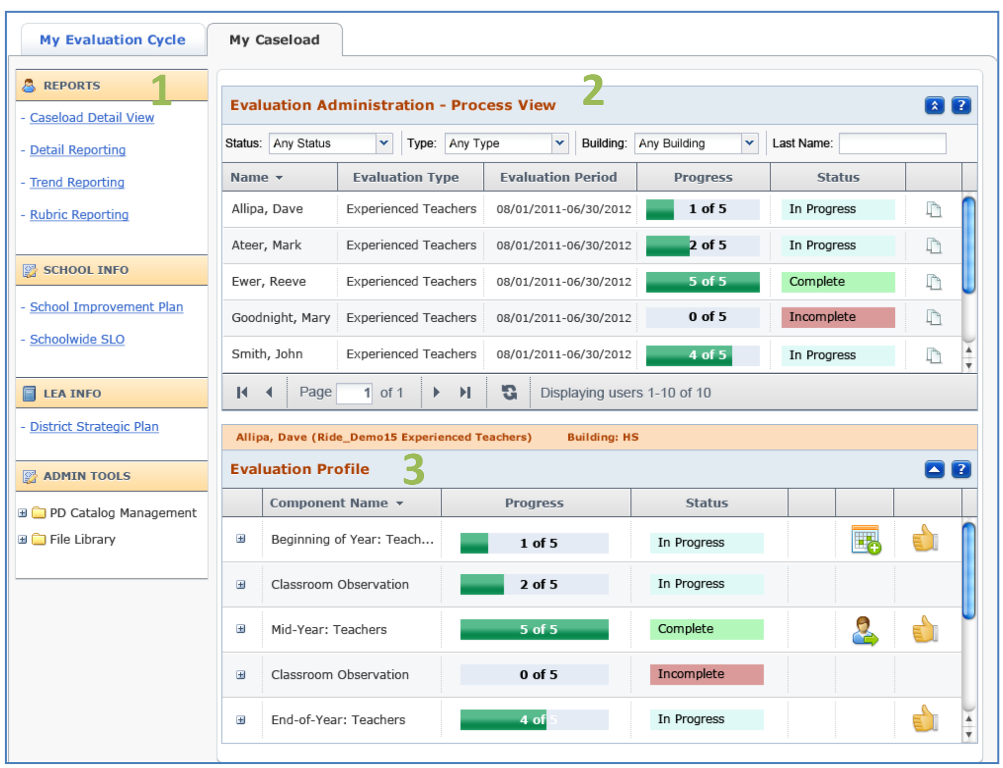
2. Process View: High level status overview of all educators within an evaluator's purview with many filter and sort options

3. Evaluation Profile: Access to all components/ forms within a teacher's evaluation cycle



Educator Performance and Support System (EPSS):

Completing an Observation or Site Visit

Within the EPSS, the process for completing an Observation or Site Visit form is as follows:

1. Schedule the form [Evaluator]
2. Acceptance of schedule [Educator]
3. Complete the form [Evaluator]
4. Form acknowledgement [Educator]
5. Finalize the form [Evaluator]

Use these steps:

1. Schedule the Form

Some forms may have meetings associated with them that must be scheduled, such as Classroom Observations, School Site Visits, or Evaluation Conferences. In addition, as part of the scheduling process, an evaluator may assign a specific form (and associated meeting) for completion by another evaluator.

The Schedule Element function is found in the **Evaluation Profile** of the **Process View.**

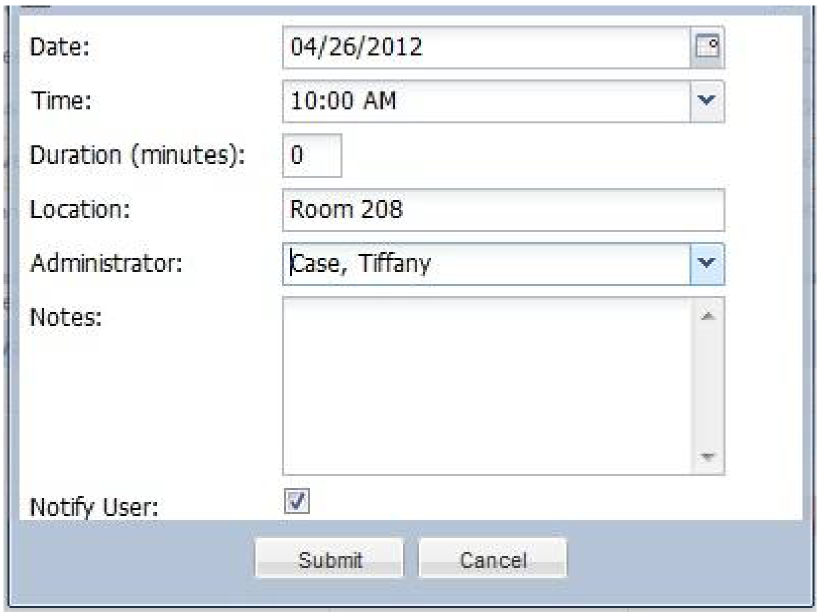
This function may also be done via the **Detail View**.

1. From the user's **Evaluation Profile,** expand components to locate the form that requires scheduling.
2. Click the Schedule (calendar) icon to the right of the Status column and to the left of the Form Finalize icon).
3. Use the Schedule pop-up window to complete the logistics for the meeting that you would like to schedule.

Notes:

A. The Administrator drop-down list may be used to assign this particular form/observation/meeting to another evaluator that has been given the rights to the user's evaluation component.

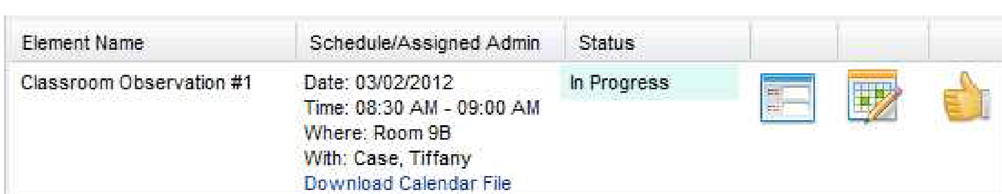
B. Some forms may be configured to provide the option to notify the user or not. The **Notify User** check box, if visible and checked, will send an automatic email to the educator with information about the scheduled event. For an unannounced observation, uncheck this box before clicking Submit.



4. If you need to re-schedule the element at any time, follow these same steps.

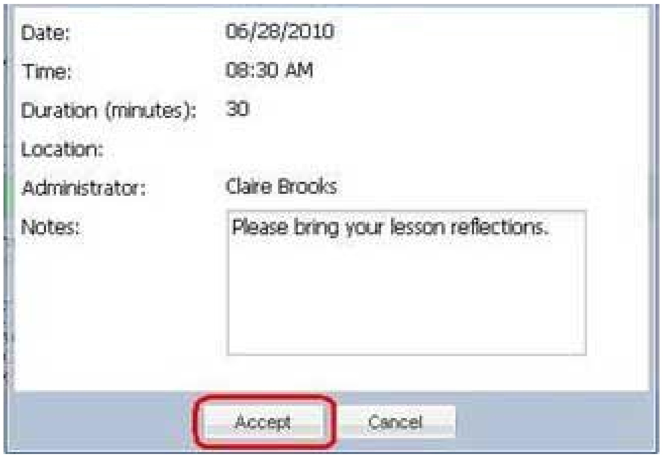
5. After scheduling, the Status for the observation form changes to **In Progress**.

6. A blue Download Calendar File link appears to enable easy adding of the event into your default calendar system.



2. Acceptance of Schedule

After proposing a schedule for the observation or meeting, the educator will receive an automatic email notification from EPSS (if that setting is available and selected.) This email will direct the educator to log in to EPSS where he/she can accept your proposed date and time.

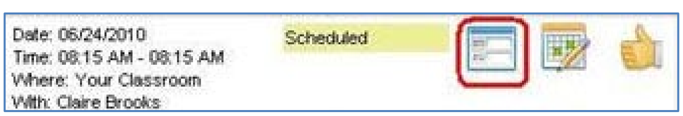


After the educator clicks **Accept**, the form's status will change to **Scheduled** and you will receive an automatic email notification alerting you to their acceptance.

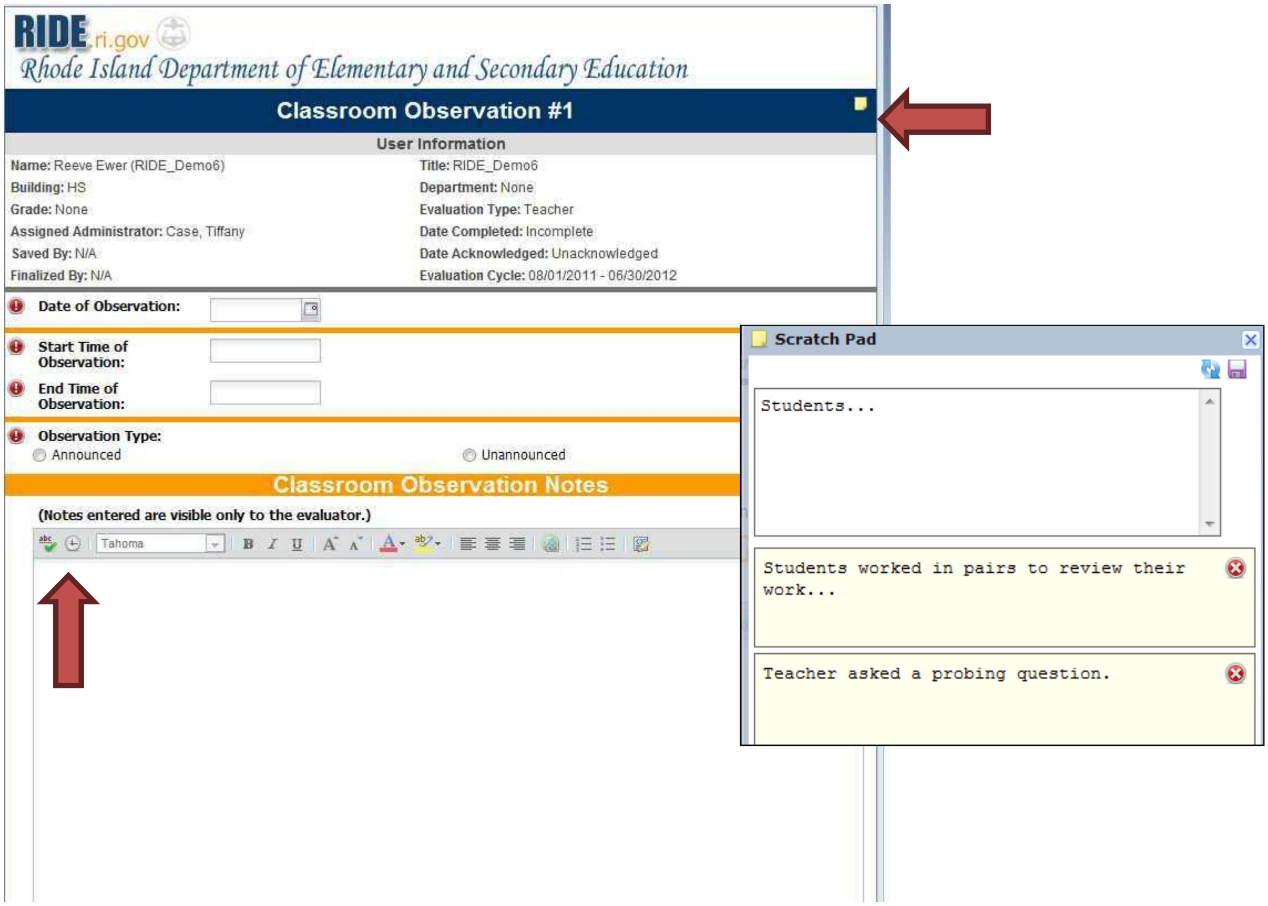
3. Complete the Form

The Complete Element function is found in the **Evaluation Profile** of the **Process View.**

1. From the user's **Evaluation Profile,** expand components to locate the form in question.
2. Click the Complete (form) icon to the right of the Status column.



3. Complete the necessary fields on the form.



- **Notes** – Use this large text box to capture notes during the observation or site visit. Rich text formatting is available as is a useful time stamp feature (clock icon) to quickly note the time.

- **Scratch Pad** – The Scratch Pad provides an alternate method for capturing notes and retains your notes until deleted. The Scratch Pad is not specific to any one form or educator, so common phrases can be stored and re-used from here. Simply drag and drop Scratch Pad notes to any text box on the form. To open, click the yellow pad icon in the top right corner of the form. The Scratch Pad will sit on top of the form and move as you scroll. It can be re-positioned on the screen and closed at any time.

4. Once the form is complete, scroll to the bottom of the form and select one of the available buttons, which may include:

- **Submit** (if you are finished with the form and wish to route it to the educator for review),
- **Save** (if you'd like to save as a draft to finish later),
- **Save & Notify** (if you'd like to save as a draft and send a message to an authorized complementary evaluator)
- **Reset** (to clear the form),
- **Print** (to print a hard copy of the form), or
- **Comment** (to add a comment about something on the form, which will be attached to the bottom of the form, but not part of the form itself).

4. Form Acknowledgement

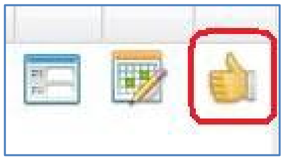
After submitting a form, the educator will receive an automatic email notification from EPSS. This email will encourage the educator to log in to EPSS, view the form, and **Acknowledge** its receipt. They also have an opportunity to **Comment**.

After the educator clicks **Acknowledge**, the form's status will change to **Acknowledged** and you will receive an automatic email notification alerting you to their acknowledgement.

5. Finalize the Form

The Finalize Element function is found in the **Evaluation Profile** of the **Process View.**

1. From the user's **Evaluation Profile,** expand components to locate the form in question.
2. Click the Finalize (thumbs up) icon to the right of the Schedule icon.



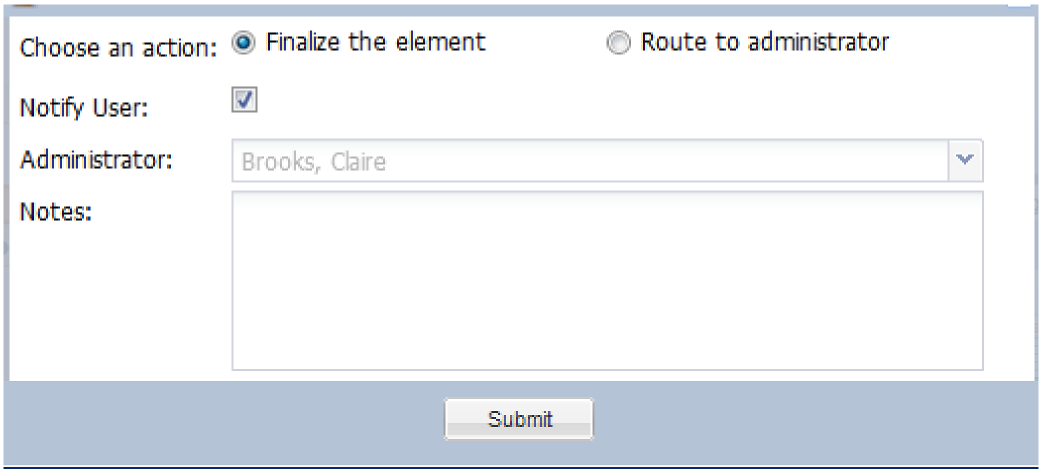
3. Select:

    - "Finalize the element" and click Submit on the pop-up window to immediately finalize the form.

    OR

    - "Route to Administrator" and click Submit in cases where another evaluator needs to review and finalize the form.

NOTE: Check the Notify User box, if you wish to send an email to the educator indicating that the form has been finalized or routed to another evaluator to finalize.



Educator Performance and Support System (EPSS):

Completing the Mid-Year Conference

Within the EPSS, the process for completing the Mid-Year Conference is as follows:

6. Schedule the form [Evaluator]
7. Acceptance of schedule [Educator]
8. Complete the form [Evaluator]
9. Form acknowledgement [Educator]
10. Finalize the form [Evaluator]

Use these steps:

1. Schedule the Form

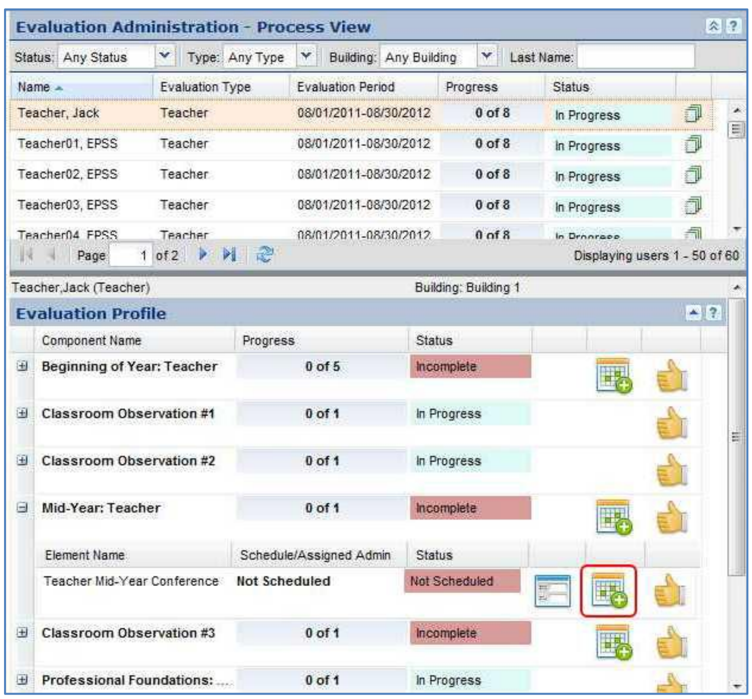
Some forms may have meetings associated with them that must be scheduled, such as Classroom Observations, School Site Visits, or Evaluation Conferences. In addition, as part of the scheduling process, an evaluator may assign a specific form (and associated meeting) for completion by another evaluator.

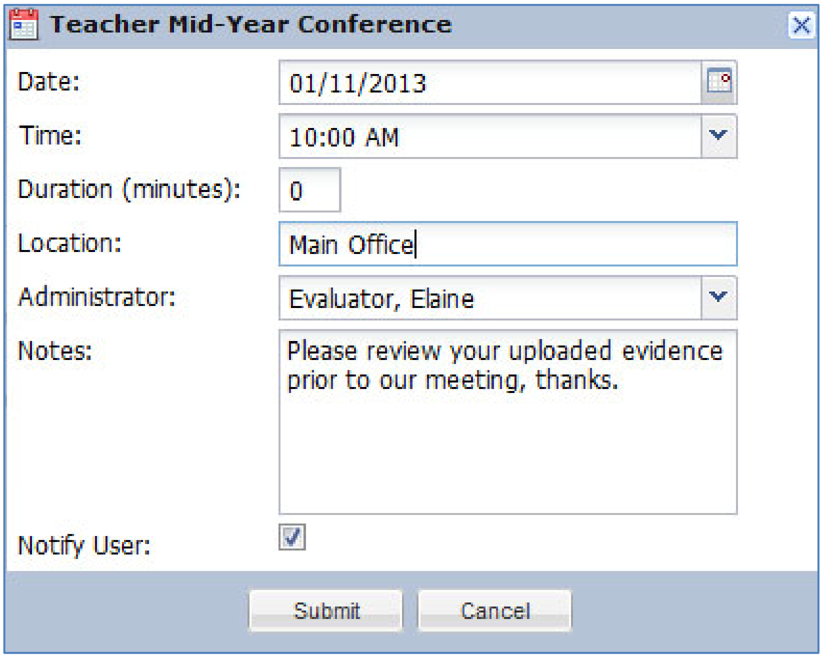
The Schedule Element function is found in the **Evaluation Profile** of the **Process View.** (It can also be accessed via the **Detail View**.)

3. From the user's **Evaluation Profile,** expand the specific component of the Evaluation Profile to locate the form that requires scheduling.

4. Click the Schedule (calendar) icon to the right of the Status column and to the left of the Form Finalize icon).

3. Use the Schedule pop-up window to complete the logistics for the meeting that you would like to schedule.





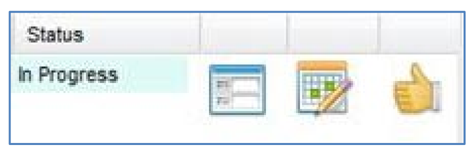
Notes:

C. The Administrator drop-down list may be used to assign this particular form/observation/meeting to another evaluator that has been given the rights to the user's evaluation component.

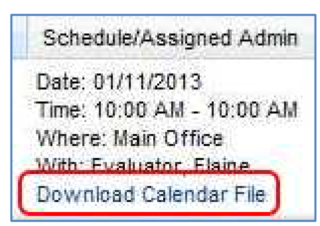
D. Some forms may be configured to provide the option to notify the user or not. The **Notify User** check box, if visible and checked, will send an automatic email to the educator with information about the scheduled event.

4. If you need to re-schedule the element at any time, follow these same steps.

5. After scheduling, the Status for the form changes to **In Progress** (or **Scheduled**, depending on the pre-determined form settings.)



6. A blue Download Calendar File link is now available. This can be used to add the event to your default local calendar application (e.g. Microsoft Outlook or Apple iCal). This file can also be uploaded into many web-based calendar applications such as Google Calendar.



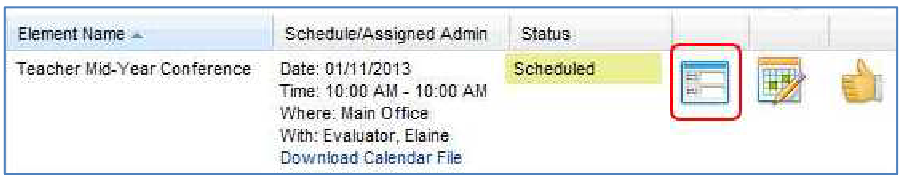
2. Acceptance of Schedule

After proposing a schedule for the observation or meeting, the educator will receive an automatic email notification from EPSS (if that setting is available and selected.) This email will direct the educator to log in to EPSS where he/she can accept your proposed date and time. After the educator clicks **Accept**, the form's status will change to **Scheduled** and you will receive an automatic email notification alerting you to their acceptance.

3. Complete the Form

The Complete Element function is found in the **Evaluation Profile** of the **Process View**. (It can also be accessed via the **Detail View**.)

5. From the user's **Evaluation Profile,** expand components to locate the form in question.



6. Click the Complete (form) icon to the right of the Status column.

7. Complete the necessary fields on the form.

   Understanding the Form

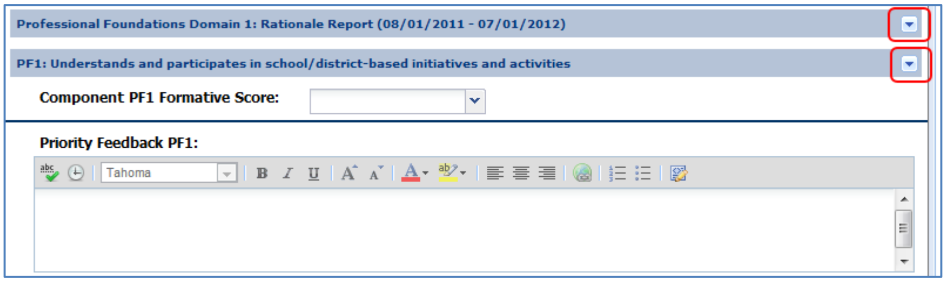
   To streamline the Mid-Year Conference process, the form brings together data from forms that have previously been completed (e.g. Observation Forms, School Site Visit Forms, etc.) as well as those still in progress (i.e. Professional Foundations Form). That data is then presented in multiple ways to help ascertain year-to-date progress. Apart from the "Additional Information" and "Acknowledgement" sections, the form is divided into three main areas:

   Student Learning Objectives – descriptions and artifacts are presented for review and a drop-down field to indicate mid-year revision status is also available.

   Professional Practice – uses a dynamically updated Rubric Report and Component Report to display previously-observed proficiency scores (teachers only). Past feedback is also displayed.

   Professional Foundations - PF artifacts are automatically displayed, as is the rationale for each domain that was entered on the PF form prior to the Mid-Year conference. Rubric tables can be collapsed to make viewing easier when entering a Formative Score and Priority Feedback.

   Note: many sections of the form can be collapsed using the "twistie" (triangle) shown below:



The **Rubric Report** presents scoring at a high level using a visual "heat map." In the examples below, focusing on component 3a, we learn that this teacher previously received a score of "4" on one of his observations. On his other observation, he received a score of "3." This is why we see "1 of 2" in both the (4) and (3) columns. For component 3b, he received a score of "3" both times he was observed. This is why we see "2 of 2" in the (3) column.

Teacher Professional Practice Rubric Report Domain 3: Instruction

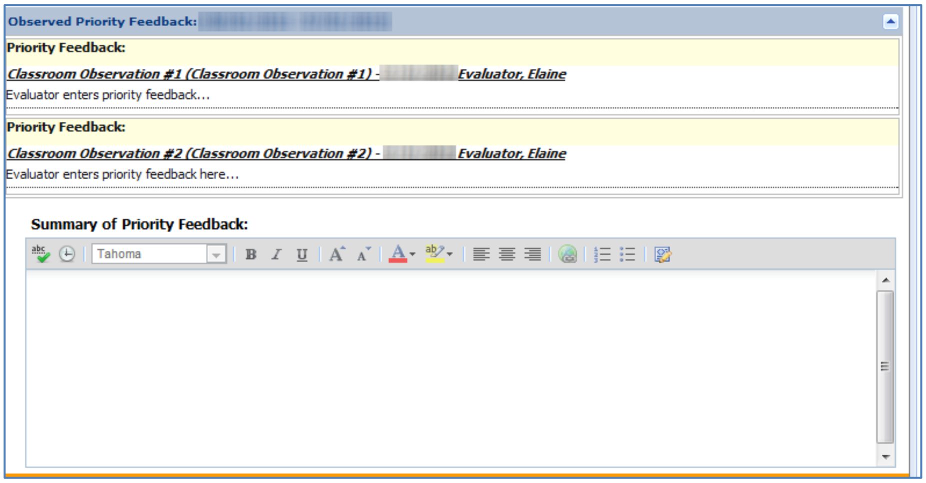
Criteria	(4)	(3)	(2)	(1)
3a: Communicating with Students	1 of 2	1 of 2	0 of 2	0 of 2
3b: Using Questioning and Discussion Techniques	0 of 2	2 of 2	0 of 2	0 of 2
3c: Engaging Students in Learning	0 of 2	2 of 2	0 of 2	0 of 2
3d: Using Assessment in Instruction	1 of 2	1 of 2	0 of 2	0 of 2

The **Component Report** presents this same past observation data, but in a different and slightly more detailed fashion. Instead of focusing on frequency, the Component Report presents scores and averages by component. Again focusing on component 3a, the below example confirms that yes, this teacher was previously scored a "3" and "4." However, we can also see <u>during which observation</u> those scores were received, thus illustrating improvement with respect to this component.

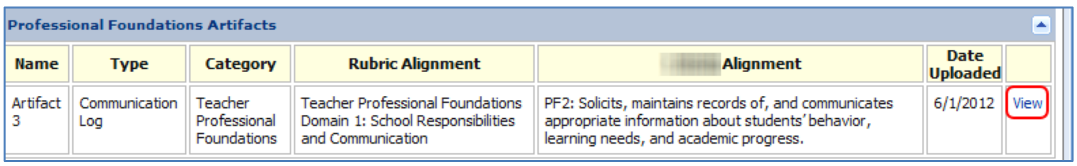
Teacher Professional Practice Component Report Domain 3: Instruction

Criteria	Classroom Observation #1	Classroom Observation #2	AVERAGE
3a: Communicating with Students	3	4	3.5
3b: Using Questioning and Discussion Techniques	3	3	3
3c: Engaging Students in Learning	3	3	3
3d: Using Assessment in Instruction	4	3	3.5
TOTALS:	13	13	
	26/32		

Past Feedback - In addition to aggregating scores from previous forms, the Mid-Year Conference Form also brings together any previously-communicated priority feedback. In the below example, we see the feedback that was captured and communicated during Classroom Observations #1 and #2. These read-only reminders of what was previously said will help inform what you enter in the **Summary of Priority Feedback** here at the mid-year point.



Artifacts - In multiple areas on the form, you will see an artifacts report. This provides fast and easy access to relevant artifacts previously uploaded by the educator. In the below example, we see a communication log which has been uploaded in support of Professional Foundations component PF2. To launch or open the file, click the **View** link in the right-most column.



Professional Foundations Artifacts

Name	Type	Category	Rubric Alignment	[redacted] Alignment	Date Uploaded	
Artifact 3	Communication Log	Teacher Professional Foundations	Teacher Professional Foundations Domain 1: School Responsibilities and Communication	PF2: Solicits, maintains records of, and communicates appropriate information about students' behavior, learning needs, and academic progress.	6/1/2012	View

8. Once the form is complete, scroll to the bottom of the form and click:

- **Submit** (if you are finished with the form and wish to route it to the educator for review),
- **Save** (if you'd like to save as a draft to finish later),
- **Save & Notify** (if you'd like to save as a draft and send a message to an authorized complementary evaluator)
- **Reset** (to clear the form),
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4. Form Acknowledgement

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5. Finalize the Form

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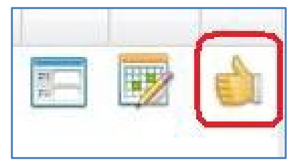
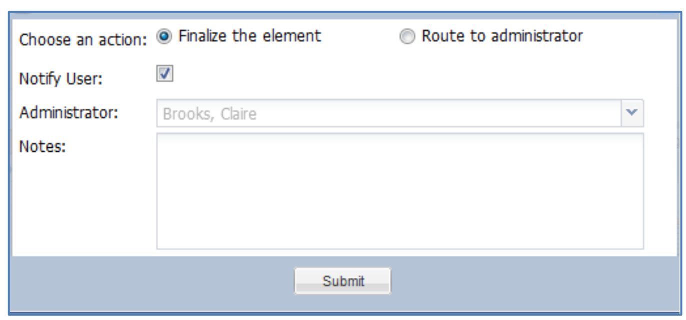


4. From the user's **Evaluation Profile,** expand components to locate the form in question.
5. Click the Finalize (thumbs up) icon to the right of the Schedule icon.
6. Select:
   - "Finalize the element" and click Submit on the pop-up window to immediately finalize the form.

   OR

   - "Route to Administrator" and click Submit in cases where another evaluator needs to review and finalize the form.

NOTE: Check the Notify User box, if you wish to send an email to the educator indicating that the form has been finalized or routed to another evaluator to finalize.



Educator Performance and Support System (EPSS):

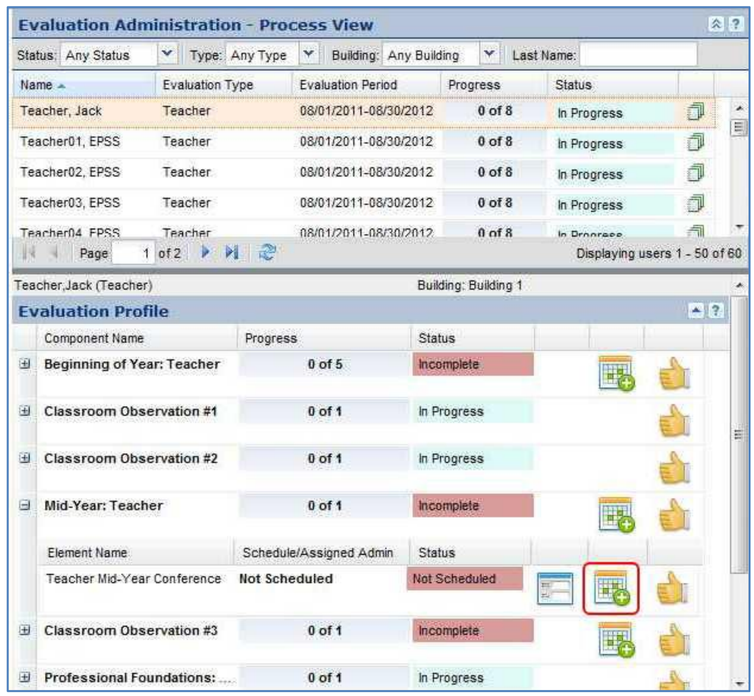
Using the Calendar Export Feature

Within EPSS, some forms may have meetings associated with them that must be scheduled, such as Classroom Observations, School Site Visits, or Evaluation Conferences. After an EPSS event is scheduled, you may wish to add that event to your default personal calendar. This help document will illustrate some common scenarios and offer guidance for accomplishing this personal calendar integration.

Important Note: Depending on your district's email and calendar installation/configuration, as well as the browser and file association settings on your device (e.g. laptop, desktop, tablet, etc.) you may experience different on-screen behavior than what is outlined in the steps herein. To achieve the smoothest possible integration of EPSS calendar events within your personal calendar application, please consult your technology support department for district-, building-, and/or device- or computer-specific guidance.

Schedule a Form

The Schedule Element function is found in the **Evaluation Profile** of the **Process View.** (It can also be accessed via the **Detail View**.)



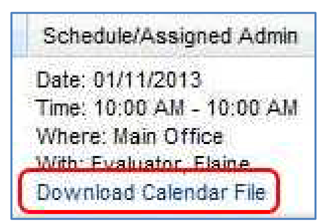
5. From the user's **Evaluation Profile,** expand the specific component of the Evaluation Profile to locate the form that requires scheduling.

6. Click the Schedule (calendar) icon to the right of the Status column and to the left of the Form Finalize icon).

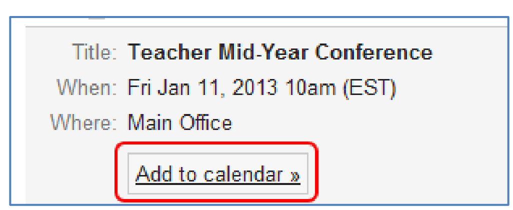
7. Use the Schedule pop-up window to complete the logistics for the meeting that you would like to schedule.

8. After scheduling, the Status for the form changes to **In Progress** (or **Scheduled**, depending on the pre-determined form settings.)

9. Once scheduled, a **Download Calendar File** link is presented within EPSS to the person doing the scheduling. This can be used to add the event to your default local calendar application (e.g. Microsoft Outlook or Apple iCal). This file can also be uploaded into many web-based calendar applications such as Google Calendar.



10. At the same time, if applicable, the person you've scheduled this meeting with and the assigned evaluator, if selected from the Administrator list, will receive a system-generated calendar invite via email re: this upcoming event. Within that email will be an option to **Add to Calendar**.



Download Calendar File (via EPSS)

As outlined in step 5 above, the Download Calendar File link within EPSS is presented to the evaluator when an event is scheduled. This allows you to download an iCalendar or ".ics file" to your device. If your device is using Microsoft Outlook or Apple iCal as its default calendar application, the computer's handling and import of this .ics file should be quick and seamless.

If, on the other hand, you use a web-based calendar application such as Google Calendar, you'll need to perform a few additional steps to import the file into your calendar. Consult your calendar application's online documentation for how best to accomplish this. For your convenience, below are the published steps for doing this with Google Calendar, obtained from support.google.com:

To import events from iCalendar or CSV files, just follow these steps:

1. Click the down-arrow next to **Other calendars**
2. Select **Import calendar**
3. Click **Choose file** and find the file that contains your events, then click **Open**.
4. Select the Google Calendar where you'd like to import events, then click **Import**.

Attention Chrome Users: If you are using Google Chrome as your internet browser, there is a free Chrome extension in the Chome Web Store entitled "Add to Google Calendar." This extension simplifies the process by skipping the download/upload process. However, this solution only works within Chrome and, like most Chrome extensions, it is neither endorsed nor supported by Google.

Add to Calendar (via email)

As outlined in step 6 above, assigned meeting participants will receive a system-generated calendar invite via email after scheduling the event. Within that email will be an option to add the event to your calendar.

Unlike downloading the .ics file from within EPSS, this calendar invite is typically being viewed within your native email/calendar application, be it Outlook, iCal, or Gmail. As a result, clicking Add to Calendar will typically work smoothly with no additional steps required.

Google Sync - Advanced Integration for Google Calendar Users

One additional solution for bringing EPSS calendar events into your Google Calendar is to use your locally-installed Microsoft Outlook or Apple iCal client as a bridge to Google Calendar. Google calls this process Google Sync and you read their full support documentation at http://google.com/sync

Remember: Depending on your district's email and calendar installation/configuration, as well as the browser and file association settings on your device (e.g. laptop, desktop, tablet, etc.) you may experience different on-screen behavior than what is outlined in the steps herein. To achieve the smoothest possible integration of EPSS calendar events within your personal calendar application, please consult your technology support department for district-, building-, and/or device- or computer-specific guidance.