

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.

The screenshot displays the 'Evaluation Administration - Process View' interface. At the top, there are filters for Status, Type, Building, and Last Name. Below this is a table of evaluation components. The 'Evaluation Profile' section is expanded, showing a list of components with their progress and status. A red box highlights the 'Classroom Observation Fee...' component, which is 'Not Scheduled' and has a calendar icon next to it.

Name	Evaluation Type	Evaluation Period	Progress	Status
Alipppa, Dave	Educator	08/01/2011-08/30/2012	2 of 6	In Progress

Component Name	Progress	Status
Beginning of Year: Educat...	1 of 6	In Progress
Classroom Observation #1	1 of 1	Complete
Classroom Observation #2	1 of 1	Complete
Mid-Year: Educator	0 of 1	Incomplete
Classroom Observation #3	0 of 1	Incomplete
Classroom Observation Fee...	Not Scheduled	Not Scheduled
End-of-Year: Educator	0 of 1	Incomplete

The screenshot shows a web-based form for scheduling an observation. The fields are as follows:

- Date: 04/26/2012
- Time: 10:00 AM
- Duration (minutes): 0
- Location: Room 208
- Administrator: Case, Tiffany
- Notes: (empty text area)
- Notify User:

Buttons for Submit and Cancel are located at the bottom of the form.

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.

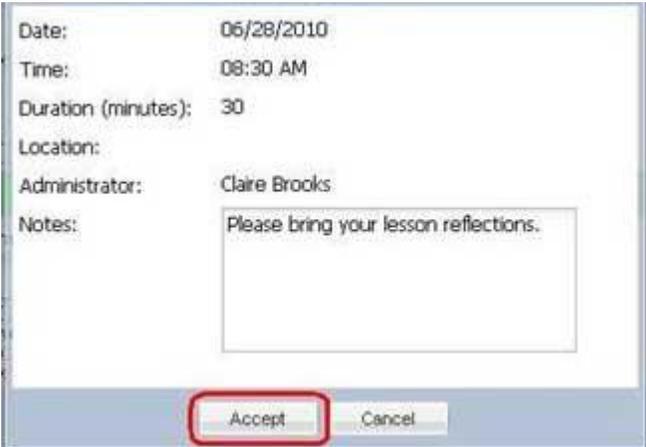
5. After scheduling, the Status for the observation form changes to **In Progress**.

Element Name	Schedule/Assigned Admin	Status			
Classroom Observation #1	Date: 03/02/2012 Time: 08:30 AM - 09:00 AM Where: Room 9B With: Case, Tiffany Download Calendar File	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.



Date: 06/28/2010
Time: 08:30 AM
Duration (minutes): 30
Location:
Administrator: Claire Brooks
Notes: Please bring your lesson reflections.

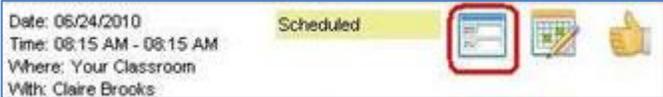
Accept Cancel

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.



Date: 06/24/2010
Time: 08:15 AM - 08:15 AM
Where: Your Classroom
With: Claire Brooks

Scheduled

Form icon, Calendar icon, Thumbs up icon

3. Complete the necessary fields on the form.

RIDE ri.gov
Rhode Island Department of Elementary and Secondary Education

Classroom Observation #1

User Information

Name: Reeve Ewer (RIDE_Demo6)	Title: RIDE_Demo6
Building: HS	Department: None
Grade: None	Evaluation Type: Teacher
Assigned Administrator: Case, Tiffany	Date Completed: Incomplete
Saved By: N/A	Date Acknowledged: Unacknowledged
Finalized By: N/A	Evaluation Cycle: 08/01/2011 - 06/30/2012

Date of Observation:

Start Time of Observation:

End Time of Observation:

Observation Type:
 Announced Unannounced

Classroom Observation Notes

(Notes entered are visible only to the evaluator.)

Tahoma

Students...

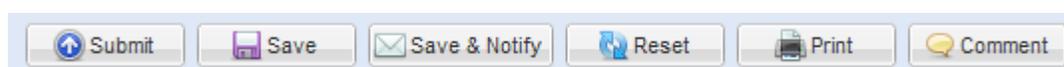
Students worked in pairs to review their work...

Teacher asked a probing question.

- **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.



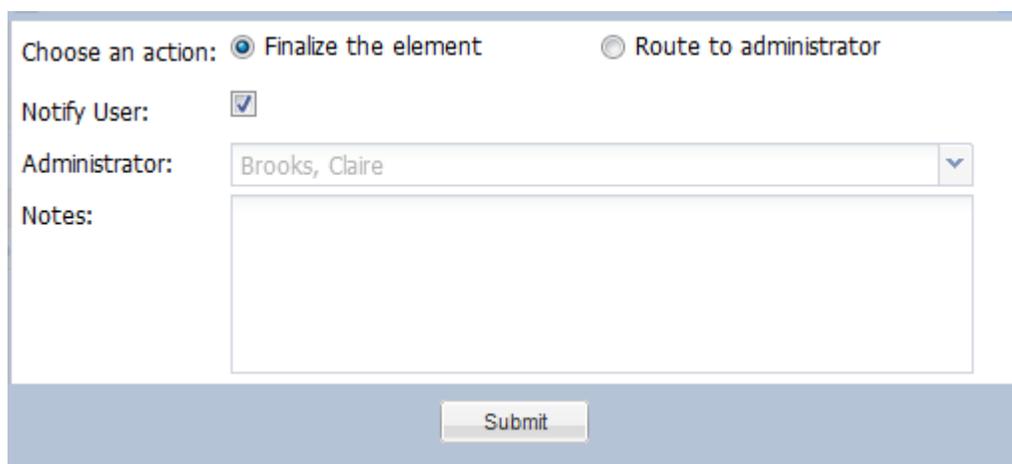
3. Select:

- “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.

A screenshot of a web form titled "Finalize the element". At the top, there are two radio buttons: "Finalize the element" (which is selected) and "Route to administrator". Below this, there is a "Notify User:" label with a checked checkbox. Underneath is an "Administrator:" label followed by a dropdown menu showing "Brooks, Claire". At the bottom of the form is a "Notes:" label and a large empty text area. A "Submit" button is located at the bottom center of the form.