



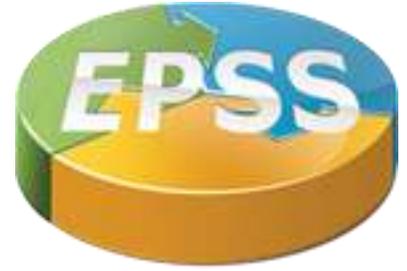
Getting Started with EPSS:
District Configuration Administrators
Alternate Models

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What is the EPSS?

The Educator Performance and Support System (EPSS) is an online statewide data system that will launch at the beginning of the 2012-13 school year. Funded by Rhode Island's Race to the Top Grant, the EPSS plays an important role in furthering RIDE's long-term commitment to support educator evaluation focused on professional growth and student learning.



The EPSS will capture all critical information associated with teacher and administrator evaluations and streamline the process for both educators and evaluators. For districts adopting the RI evaluation model(s), the EPSS will provide access to all forms, components, and scoring features required for implementation, as well as guidance to support the evaluation process. The EPSS can also be customized to fully support districts implementing other state-approved teacher and building administrator evaluation models.

EPSS Configuration Overview

- EPSS user information will be imported from the RIDE Data Mart based upon elements derived from the Single Sign-On (SSO) configuration.
- Evaluation Types will either be assigned or adjusted at the district level.
 - **Coventry Model:** The designated Config Admin(s) will assign all user Evaluation Types.
 - **Rhode Island Innovation Consortium (RIIC) Model:** The user Evaluation Types will be auto-configured to the Teacher Evaluation Type, and the designated District Configuration Administrator(s) ("Config Admins") will move users to other Evaluation Types (Non-Tenured or Tenured) only if desired for reporting purposes. (The evaluation components/forms are the same for all Innovation Teacher Evaluation Types.)

The Role of the District Configuration Administrator

Each LEA will identify a minimum of one Config Admin for the organization who will be assigned the right to manage user information, including Evaluation Types, and modify and create caseloads within their district and the right to upload LEA level files.

The Config Admin will be the point person evaluators turn to if their caseload is missing a user or if they have a user incorrectly-assigned to their caseload. The EPSS contains an Evaluation Rights wizard which will assist with these caseload assignments and modifications.

For planning purposes, the Config Admin may want to solicit information from building administrators prior to the start of each school year to determine the caseload creations needed for other evaluators.

EPSS Dashboards Overview

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

My Evaluation Cycle

EDUCATOR INFO 1

- Artifacts
- Student Learning Objectives
- Evaluation Summary

My Evaluation - Dave Allippa 2

Scheduled Components

- » None

Action Required

- Professional Growth Goal - Professional Growth Goal**
 - » Status: AWAITING FORM SUBMISSION
 - Action: [Submit Professional Growth Goal - Professional Growth Goal](#)
- Lesson Plan Template - Formal Observation**
 - » Status: AWAITING FORM SUBMISSION
 - Action: [Submit Lesson Plan Template - Formal Observation](#)
- Reflection Form - Post Observation Conference**
 - » Status: AWAITING FORM SUBMISSION
 - Action: [Submit Reflection Form - Post Observation Conference](#)

In Progress

- » None

Complete

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. Task List: Display of all of an educator's personal evaluation tasks organized by status. Blue quick links open the forms for review or editing as applicable.

Evaluator Dashboard: My Caseload (for anyone assigned a caseload within EPSS)

My Caseload

1. REPORTS

- Caseload Detail View
- Trend Explorer Reports
- Rubric Explorer Reports

SCHOOL INFO

- Administrator Student Learning Objectives

2. Evaluation Administration - Process View

Status: Any Status Type: Any Type Building: Last Name:

Name	Evaluation Type	Evaluation Period	Progress	Status
Allippa, Dave	Teacher	08/01/2011-06/30/2012	0 of 9	In Progress
Ateer, Mark	Administrator	08/01/2011-06/30/2012	1 of 5	In Progress
Case, Tiffany	Administrator	08/01/2011-06/30/2012	0 of 6	In Progress
Chovey, Ann	Building Administrator	06/01/2012-06/30/2013	0 of 7	In Progress

Page 1 of 1 Displaying users 1 - 11 of 11

Allippa, Dave (RIDE_Demo15 Teacher) Building: HS

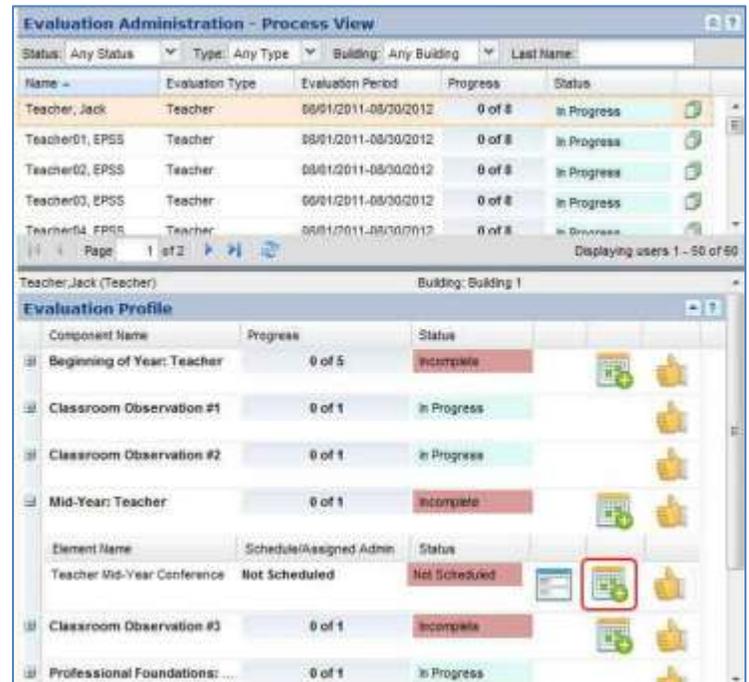
3. Evaluation Profile

Component Name	Progress	Status
Beginning of Year: Teacher	0 of 5	In Progress
Classroom Observation #1	0 of 1	In Progress
Classroom Observation #2	0 of 1	Incomplete
Mid-Year: Teacher	0 of 1	In Progress
Classroom Observation #3	0 of 1	In Progress

- 1. Left Navigation Bar:** Links to EPSS reports and to school-level and LEA-level references uploaded by schools/ LEAs, and access to EPSS System Admin Tools for designated administrators
- 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

Evaluator Caseload Management

- Evaluators will use the **Process View** (located in the top half of the “My Caseload” tab) as a status overview of the educators within their purview.
- The Process View can be sorted using the drop-down filters, or an evaluator can search for a user by Last Name.
- Selecting a user in the Process View will reveal that user’s **Evaluation Profile** in the bottom half of the “My Caseload” tab. The Evaluation Profile shows all components and forms within that user’s evaluation cycle.
- From here, evaluators can schedule forms, complete forms, review educator-submitted forms, and finalize forms.
- These form actions are initiated by first expanding the relevant component (e.g. “Classroom Observation”) and then finding the desired form (e.g. “Pre-Lesson Conference Form”).
- Adjacent to the form’s **Status** (e.g. “Not Scheduled”) are three action icons: **Complete** the Form, **Schedule** the Form, and **Finalize** the Form.



Remember:

- Until an evaluator is assigned at least one evaluatee, they will not see the “My Caseload” tab within EPSS.
- As the District Configuration Administrator, you will be responsible for managing users’ Evaluation Types, which includes the following responsibilities depending on the model:
 - **Coventry Model:** For both Teacher and Administrator Evaluatees: Assign an initial Evaluation Type to each user and modify Evaluation Type assignments at the end of each evaluation cycle and/or at the start of an evaluation cycle before any forms have been completed.
 - **RIIC Model:**
 - For Teacher Evaluatees: Review the Teacher Evaluation Types that are initially assigned by the RIDE DataMart and change users to the Teacher Tenured or Teacher Non-Tenured Evaluation Type if desired to support reporting capabilities.
 - For Building Administrator Evaluatees: These educators have their Evaluation Types automatically assigned for the Rhode Island Model, so no modifications will be necessary.
 - **IMPORTANT NOTE:** No Evaluation Type assignments should be changed when an evaluation cycle is in progress (i.e. after any forms have been completed) or all data will be lost. Evaluation Type assignments should only be changed before an evaluation cycle begins or after an evaluation cycle has ended or if a user changes a role that necessitates a mid-cycle change.
- You are also responsible for using the Evaluation Rights wizard to establish caseloads and make modifications.

The ConfigAdmin Tab

As as District Configuration Administrator, you will see a tab within EPSS entitled “ConfigAdmin.” This area provides links to the tools and functions you have been given rights to in order to perform your role.

These functions are grouped into two categories:

Caseload Management and **File Uploads**.



Caseload Management

User Management

Allows you to establish or change the **Evaluation Type** of a user and change a user’s cycle **Start/End Dates** at the start of each year/cycle as necessary.

Evaluation Rights

Used to make evaluator/evaluatee assignments. For example, if a new teacher joins your district, you will need to give the principal of that teacher’s primary building the ability to participate in the teacher’s evaluation cycle.

File Uploads

File Upload to School Info & LEA Info Sections

Brings you to the file upload utility, where the destination for uploaded files can be either “School Info” or “LEA Info.” This allows files to be visible in the Left Navigation Bar to all district EPSS users assigned to the building/school in question.

User Management Overview

Traditionally, if a user's Evaluation Type needs to change, that change is made at the end of the evaluation cycle. All changes should normally be made prior to the start of the next cycle, so that all data entered on forms for the current cycle will be retained. However, there are times when a user may need to be moved to a different Evaluation Type due to a change in role. Under these conditions, a user's Evaluation Type may be changed mid-cycle, but **note that any data entered on forms for the current cycle will be lost.**

For LEAs using a RIDE-approved Alternate Model, these changes can be done using the User Management utility. This utility is only available to the designated District Config Admin.

Managing User Information

1. From your EPSS dashboard, click on the **ConfigAdmin** tab.
2. Select **User Management**.
3. View a list of all users in your district and their corresponding **Evaluation Type** and cycle **Start/End Dates**.
4. To edit the information for a user, select the edit (pencil) icon to the right of the user's information.
5. Select a different **Evaluation Type** from the drop-down list and/or edit the cycle **Start/End Dates**.
6. Click **Update**.
7. To use **Bulk Update** to change Evaluation Types or Start/End Dates in masse, select the users and click **Bulk**.
8. Select a different **Evaluation Type** from the drop-down list and/or edit the cycle **Start/End Dates**.
9. Click **Save**.

OASYS User Management					
User	Eval Type	Start Date	End Date	Building(s)	
Admin, MLP	Unassigned	Not Set	Not Set		
Akw, Barb	Unassigned	Not Set	Not Set	HS	
Allippa, Dave	Teacher	08/01/2011	06/30/2012	HS	
Ateer, Mark	Administrator	08/01/2011	06/30/2012	HS	

Allippa, Dave	Teacher	08/01/2011	06/30/2012		
Ateer, Mark	Administrator		2012	HS	
Biologist, Maureen	Unassigned	Not Set	Not Set	DO	
Case, Tiffany	Administrator	08/01/2011	06/30/2012	MS	

Bulk Update

Start Date: 04/15/2012

End Date: 05/15/2013

Eval Type: Building Administrator

Save Close

Evaluation Rights Overview

Within EPSS, evaluators must be assigned the rights to participate in an individual's evaluation process. These rights can be assigned in one of two ways. The first is a blanket assignment, where you give the evaluator rights to all components and all forms for the selected individual(s). This blanket assignment is called **Evaluation Rights**, and is used most often.

Alternatively, these rights can be assigned at the more discrete component level. For example, you might be asked to give an evaluator rights for one specific component (e.g. Classroom Observation #2) in a teacher's evaluation process, but that evaluator should not be able to submit other forms, such as a Mid-Year Conference form. These targeted assignments are called **Component Rights**.

IMPORTANT NOTE: If both **Evaluation Rights** and **Component Rights** are assigned for a given evaluator, evaluate, and component, the **Evaluation Rights** will always trump or (over-write) any assigned **Component Rights**.

Furthermore, you also have the ability to grant **Submit (edit)**, **View**, or **Comment** rights on the component(s) in question. For example, an evaluator may request the ability to view and comment on a teacher's Classroom Observation component, but he/she is not the evaluator performing the observation and submitting the related forms. In that scenario, you might assign View and Comment rights, but *not* assign Submit rights.

What to Ask Before Modifying Evaluation Rights

Since rights can be assigned in these different ways, it is important to fully understand what is being requested when you are asked to make a change. When an authorized district person asks you to add or change evaluation rights, here are some questions to ask:

“Do you need the ability to participate in all components in this person's evaluation process? Or just one? If applicable, which components do you need to access?”

“Do you require the ability to submit the form(s), or is simply viewing the form(s) sufficient?”

“Do you need the ability to comment on the form(s) using the Comment feature?”

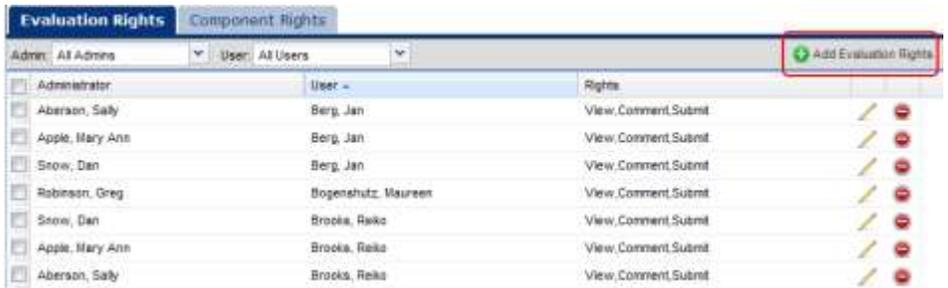
(Note: The Comment feature allows the evaluator (and the evaluatee) to enter a note that is appended to the bottom of the form, and visible for the educator (or evaluator) to review. Submitting a Comment triggers an automatic email to the educator (or evaluator) with the Comment content in the body of the email. The system saves all comments with the associated date and time stamp.)

Managing Evaluation Rights

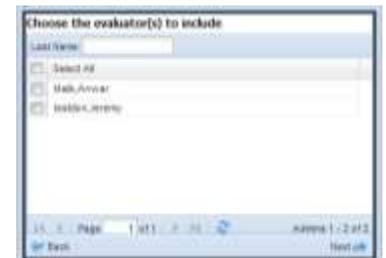
10. From your EPSS dashboard, click on the **ConfigAdmin** tab.

11. Under the Caseload Management Section, select **Evaluation Rights**.

12. Click the **Add Evaluation Rights** button.

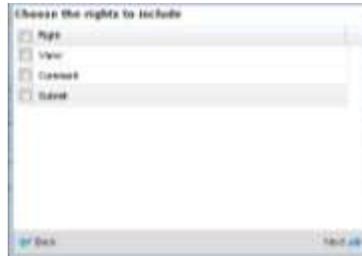


13. First the wizard will ask if you wish to make changes at the User, Building, or Department level.* Typically you will make changes at the User Level (default). Make your selection and click **Next**.



14. Now select the evaluator(s) to whom you are assigning rights. Click **Next**.

15. Next select the user(s) you wish to add to the selected caseload(s). (Filter by building if desired.) Click **Next**.



16. Finally, select whether the evaluator should be given View, Comment, and/or Submit rights to this user. Click **Next**.

17. If you need to edit the assigned View, Comment, and/or Submit rights, click the **Edit** (pencil) icon for that row in the table.

18. If you need to delete an evaluator's Evaluation Rights, simply click the **Delete** (minus sign) icon for that row in the table.



*Building level rights and Department level rights are used to assign rights for an entire building or department.

Managing Component Rights

- From your EPSS dashboard, click on the **ConfigAdmin** tab.
- Under the Caseload Management Section, select **Component Rights**.
- Click the **Add Component Rights** button.
- First you will be prompted to select the components for which you would like to assign rights.
- Next the wizard will ask if you wish to make changes at the User, Building, or Department level.* Typically you will make changes at the User Level (default). Make your selection and click **Next**.
- Now select the evaluator(s) to whom you are assigning rights. Click **Next**.
- Next select the user(s) you wish to add to the selected caseload(s). (Filter by building if desired.) Click **Next**.
- Finally, select whether the evaluator should be given View, Comment, and/or Submit rights to this user. Click **Next**.
- If you need to edit the assigned View, Comment, and/or Submit rights, click the **Edit** (pencil icon) for that row in the table.
- If you need to delete an evaluator's Component Rights, simply click the **Delete** (minus sign) icon for that row in the table.

Component	Administrator	User	Rights
Data Analysis: Teachers (Teach...	Combs, Elizabeth	Smith, Robert	View, Comment, Submit
Data Analysis: Teachers (Teach...	Snow, Dan	Smith, Robert	View, Comment, Submit
Observation Process #1: Teach...	Combs, Elizabeth	Smith, Robert	View, Comment, Submit
Observation Process #1: Teach...	Snow, Dan	Smith, Robert	View, Comment, Submit

Choose the components to include

- Select All
- IPEDS Documentation Cover Log (Chester Fawcett)
- 1st Formal Observation (R/Innovation Teacher)
- 2nd Formal Observation (R/Innovation Teacher)
- Additional Observations (R/Educator)
- Beginning of Year (R/Educator)
- Beginning of Year Conference (Demo)
- Classified End (Para)
- Classroom Observation (Chester Fawcett)
- CT End of Year Conference (CT Teacher)
- CT Goal Setting (CT Teacher)

Choose the component rights level
User Level rights

Building Level rights

Department Level rights

Choose the users to include

Last Name Building

- Select All
- Mark, Amy
- Nathan, Jeremy

Choose the evaluator(s) to include

Last Name

- Select All
- Mark, Amy
- Nathan, Jeremy

Choose the rights to include

- Right
- View
- Comment
- Submit

Component	Administrator	User	Rights
Classroom Observation #1 (Tea...	Admn, MLP	Admn, MLP	View, Comment, Submit
Classroom Observation #1 (Tea...	Admn, MLP	Alex, Barb	View, Comment, Submit
Classroom Observation #1 (Tea...	Admn, MLP	Alipha, Dave	View, Comment, Submit
Classroom Observation #1 (Tea...	Admn, MLP	Ateer, Mark	View, Comment, Submit
Classroom Observation #1 (Tea...	Admn, MLP	Biologist, Naureen	View, Comment, Submit

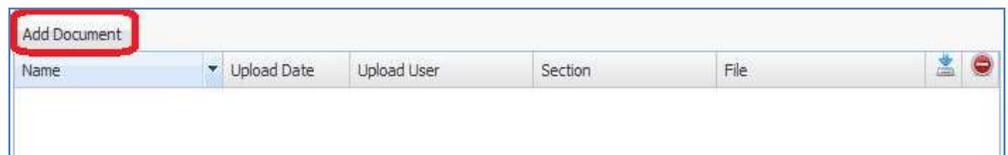
*Building level rights and Department level rights are used to assign rights for an entire building or department.

Uploading Files

To provide reference documents that support the evaluation process, files may be uploaded for access via either the School Level or the LEA Level sections of the Left Navigation Bar.

1. From your EPSS dashboard, click on the **ConfigAdmin** tab.
2. From your **Config Admin tab**, select **File Uploads**.
3. Click the **Add Document** button.

4. Enter a **Name** for the file.
(This should be as short as possible since it will display as a link in the **Left Navigation Bar**.)

A screenshot of the EPSS interface showing a table with columns for Name, Upload Date, Upload User, Section, and File. The 'Add Document' button is highlighted with a red box in the top-left corner of the table area.

5. Select which Section the file should be uploaded to: **School Level** or **LEA Level**.
6. **Browse** to locate the file.
7. Click the **Upload** button.

A screenshot of the 'Add Document' dialog box. It contains a 'Name' text field, a 'Section' dropdown menu with 'Select Section' as the current selection, and a 'Document' field with a 'Browse...' button. At the bottom right, there are 'Upload' and 'Cancel' buttons.

Online EPSS Help Resources

Within EPSS

Within EPSS, all users will always have a “Help” link in the top-right corner of the screen. This will launch the EPSS online help system. This support documentation knowledgebase features a context-sensitive search along with convenient buttons for quick access to online videos and manuals.

Additional Information

For more information and to access training guides and videos, please visit RIDE’s official EPSS website:
<http://www.ride.ri.gov/educatorquality/educatorevaluation/EPSS.aspx>