



Direct Report Quick Start Guide

Unified Talent Perform

Direct Report

My Folder

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Welcome, Jane Teacher [Sign Out](#)

A My Folder

B Signatures

C Tasks

D History

E Attachments

Profile

F Evidence

Process Scheduled Due

1 "Teacher Plan for Growth Form ("In-House" Plan) 2019-2020 Teacher Evaluation **G** Go To Form

Completed forms and tasks can be found in the History tab

A. My Folder: View your tasks and evidence here.

B. Signatures: Electronically review, sign, or approve forms.

C. Tasks: Review the tasks assigned to you that need to be completed.

D. History: Review your completed tasks and forms.

E. Attachments: View documents shared by supervisors.

F. Evidence: Access the list of artifacts that you have attached to your forms, as well as notes shared with you by supervisors.

G. Go To Form: Click to open and complete the form.

Forms

The screenshot shows a web interface for managing forms. At the top, there's a header 'Artifacts' and a table with columns: Date Added, Added By, Associated With, Type, Title, Content, and Actions. The table is empty, showing 'No data available in table'. Below the table, there's a section for 'Showing 0 to 0 of 0 entries'. The main form area is titled 'Attached Workflow' and shows 'Standard Workflow' as the selected workflow. Below this, 'Current Status' is set to 'Draft'. The 'Workflow Steps' section lists two steps: '1 Signature by Direct Report: Dill Harris' and '2 Signature by Supervisor/Evaluator', both marked as 'Forthcoming'. At the bottom, there's a 'Back' button, a 'Save Progress' button, and a 'Save & Submit' button. A 'Form Review Tool' icon is visible in the top right corner. Callouts A through E point to specific features: A points to the Form Review Tool icon, B points to the 'Add Artifact' button, C points to the 'Attached Workflow' section, D points to the 'Save Progress' button, and E points to the 'Save & Submit' button.

Artifacts

Date Added	Added By	Associated With	Type	Title	Content	Actions
No data available in table						

Showing 0 to 0 of 0 entries

Attached Workflow: Standard Workflow

Current Status: Draft

Workflow Steps:

- 1 Signature by Direct Report: Dill Harris
- 2 Signature by Supervisor/Evaluator

AutoSave Enabled

Back Save Progress Save & Submit

A. Form Review Tool: Access a slide-out tool to view any completed forms in the process.

B. Artifacts: Add any number of artifacts/attachments up to 10mb in size. May not be present on all forms. See next page for more details on adding artifacts.

C. Workflow: View the signature, approval, or review steps that must be completed once the form is submitted. May not be present on all forms.

D. Save Progress: While the form does auto-save, it is always a good idea to Save Progress prior to exiting the form to be sure your changes are saved.

E. Save & Submit: Save the form, lock it from further edits, and begin the workflow defined for the form. Click this only when you have completed all of your edits.

Evidence

Add an Artifact

The 'Add Artifact' form includes a title field, radio buttons for 'File Upload' and 'URL', and a 'Save Artifact' button. Callout 2 points to the title field, callout 3 points to the 'Choose File' button, and callout 4 points to the 'Save Artifact' button.

Add Artifact

Title required

☐ File Upload
Valid extensions : csv,tif,tiff,doc,docx,ppt,pptx,xls,xlsx,pdf,txt,rtf,jpg,gif,png, MP4,WMV,MOV,AVI,FLV,WAV,MP3. Max size 2GB.

Choose File

☐ URL

Save Artifact **Cancel**

1. Click Add Artifact at the bottom of the form.
2. Enter the Title.
3. Select File to Upload or URL.
4. Click Save Artifact.

Signatures and Approvals

The 'Approvals' section displays a table of documents awaiting signature. A sidebar on the left shows 'My Folder' and 'Signatures'. Callout A points to the 'Signatures' link, and callout B points to the 'View and Sign' button.

Approvals

My Folder

Signatures

A

Documents Awaiting Your Signature

Document	Direct Report	Process	Action Required	
Classroom Observation Summary Sheet	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	B View and Sign
Teacher: Section A: Standard 1: Missouri Teaching Standards	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	View and Sign

A. Signatures: Review and electronically sign or approve forms.

B. View and Sign: This button name changes depending on whether you are signing, approving, or reviewing a form. Click to view the completed form, then scroll to the bottom to complete the assigned step.