



Evaluator Quick Start Guide

Unified Talent Perform

Evaluator

My Staff

The screenshot displays the 'My Staff' section of the Unified Talent Perform system. The interface is divided into several sections:

- Top Bar:** Features the 'Unified Talent Perform' logo, a user greeting 'Welcome, Test Principal', and a 'Sign Out' link.
- Left Sidebar:** Contains icons for 'My Folder', 'My Staff', 'Signatures', 'Peer Reviews', and 'Walkthrough'.
- Central Menu:** Lists 'Dashboard', 'Staff', 'Schedule', 'Reports', 'Analysis', and 'Evaluation Dashboard'.
- Main Content Area:** Displays a table of staff evaluations. The table has columns for checkboxes, last/first names, employee ID, process, progress, responsible parties, and deadlines. Each row includes 'View' and 'Folder' buttons.
- Bottom Section:** Includes a bulk action dropdown and a 'Go' button.

Callout boxes A through K point to specific UI elements:

- A:** My Folder
- B:** My Staff
- C:** Signatures
- D:** Peer Reviews
- E:** Walkthrough
- F:** Schedule
- G:** Reports
- H:** Analysis
- I:** View
- J:** Folder
- K:** Bulk Action

A. My Folder: If you are being evaluated, view your tasks here.

B. My Staff: Work with the staff you are evaluating.

C. Signatures: Electronically sign or approve forms.

F. Schedule: Sync your calendar or view meetings scheduled via the Perform system.

G. Reports: Many ways to review the status and history of your staff's evaluation progress.

H. Analysis: For completed forms, review and compare staff scores.

I. View: Fill out forms, schedule conferences, and view the direct report's entire process.

J. Folder: View a simpler list of the direct report's entire process history, including due dates.

Not Applicable for Columbus City Schools

D. Peer Reviews: Complete assigned peer feedback forms. (not present in all systems)

E. Walkthrough: *If enabled*, perform a walkthrough for any employee in the district.

K. Bulk Actions: Delegate processes to others and other management tasks.

Forms

The screenshot shows the 'Artifacts' section of a form editor. At the top right, a callout box 'A' points to a slide-out menu icon. Below it, a callout box 'B' points to the 'Add Artifact' button. The main area features a table with columns: Date Added, Added By, Associated With, Type, Title, Content, and Actions. The table is currently empty, displaying 'No data available in table'. Below the table, a callout box 'C' points to the 'Attached Workflow' section, which shows 'Standard Workflow' and 'Current Status' as '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, a callout box 'D' points to the 'Save Progress' button, and a callout box 'E' points to the 'Save & Submit' button. The 'Back' button is also visible. A status bar at the bottom left indicates 'AutoSave Enabled'.

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.

Forms

The screenshot shows a web form interface. At the top left, the word "Artifacts" is followed by a blue callout box labeled "C". To the right, there is a blue callout box labeled "G" pointing to a circular icon with a plus sign and the text "Add Artifact". Below this is a table with columns: "Date Added", "Added By", "Associated With", "Type", "Title", "Content", and "Actions". The table is empty, with the text "No data available in table" in the center. Below the table, it says "Showing 0 to 0 of 0 entries". In the middle section, there are two buttons: "Review" (labeled with a blue callout box "D") and "Draft". Below these is a section titled "Workflow Steps" with a single step: "Forthcoming 1 Review by Supervisor: Atticus Finch". At the bottom left, there is a checkmark icon and the text "Autosaved at 8:44:02am". At the bottom right, there are four buttons: "Back", "Save Progress", "Form Sharing" (labeled with a blue callout box "E"), and "Save & Submit" (labeled with a blue callout box "F").

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

B. Scripting Tool: Access a slide-out tool to type your observation notes and have them automatically time/date stamped. These notes become part of the Evidence table and are not visible to the Direct Report unless explicitly shared.

C. Attachments: Artifacts attachment area.

D. Workflow: View the signature, approval, or review steps that must be completed once the form is submitted.

E. Form Sharing: Send a copy of the form to the direct report for their review prior to locking. Not present on all forms.

F. Save & Submit: Save the form, lock it from further edits, and begin the workflow defined for the form. Only click this when you are completely finished with the form and ready to sign/file it.

G. Artifacts: Add an unlimited number of either files or URLs to the evaluation process. Artifacts become part of the overall evaluation folder and can be accessed via the Evidence table.

Evidence

Evidence for a direct report is available when viewing their evaluation process or folder.

View all evidence/attachments/notes collected throughout the process; see who said it, what they said, and when they said it. You can also organize, manage and share evidence.

Sam Teacher - 2019-2020 Teacher Evaluation

☐ Show information at time of process completion

							Evidence	Folder
#	Task	Sched	Comp	Responsible	Resp Type	5 Tasks		
☐ 1	"Teacher Plan for Growth Form..."		06/25	T. Principal	Direct Report	<button>View</button>		
☐ 2	Pre Observation Conference		06/26	T. Principal	Supervisor	<button>Unlock</button>		
☐ 3	Formal Observation		06/25	T. Principal	Supervisor	<button>View</button>		
☐ 4	Post Observation Conference		06/26	T. Principal	Supervisor	<button>Unlock</button>		
☐ 5	Summative Evaluation Form			T. Principal + 8	Supervisor	<button>Go To Form</button> <button>Schedule</button> <button>Assign</button> <button>Remove</button>		

View Evidence

Sam Teacher - 2019-2020 Teacher Evaluation

Search:

Date Added	Task	Added By	Type	Title	Content	
☐ 6/6/2019	Formal Observation	Test Principal	Note		Students arrived on time, teacher greeted them at the door. Most turned in homework and went to seats. 2 students did not have homework and talked to teacher about their situation.	
☐ 6/6/2019	Formal Observation	Test Principal	Note		Teacher began unit on Math. Introduced subject with example on.....	
☐ 6/26/2019	Summative Evaluation Form	Test Principal	Note		test 2	
☐ 6/26/2019	Summative Evaluation Form	Test Principal	Note		test	
☐ 7/12/2019	Formal Observation	System Administrator	File	Sample Artifact	Perform Quick Start Guide.docx	<button>Remove</button> <button>Edit</button>

<< < 1 > >> 1-5 of 5

0 Selected | [Select All](#) | [Clear](#)

Bulk Action

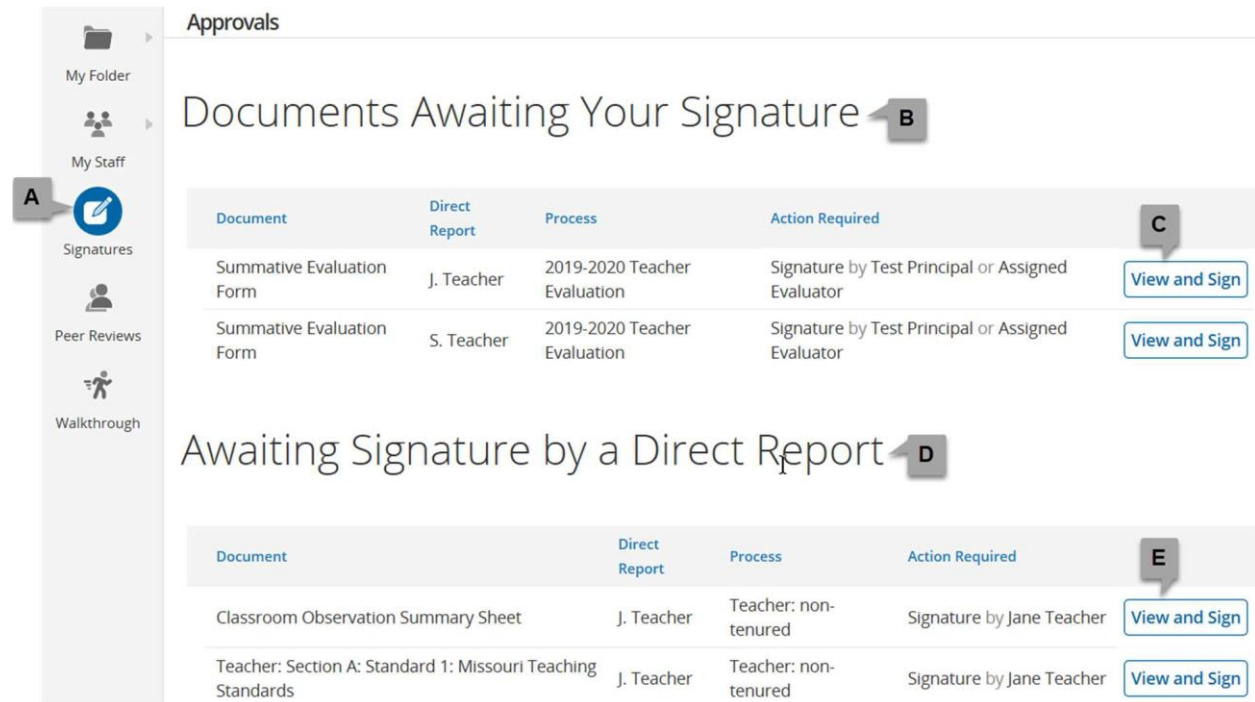
Select Action

Go

SUPPORT

Back Add Note Add Artifact

Signatures and Approvals



Approvals

Documents Awaiting Your Signature

Document	Direct Report	Process	Action Required	
Summative Evaluation Form	J. Teacher	2019-2020 Teacher Evaluation	Signature by Test Principal or Assigned Evaluator	View and Sign
Summative Evaluation Form	S. Teacher	2019-2020 Teacher Evaluation	Signature by Test Principal or Assigned Evaluator	View and Sign

Awaiting Signature by a Direct Report

Document	Direct Report	Process	Action Required	
Classroom Observation Summary Sheet	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	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. Documents Awaiting your Signature: List of documents that are awaiting your attention.

C. 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.

D. Awaiting Signature by a Direct Report: List of documents that are awaiting the direct report's attention. Use this to keep track of your direct report's workflow assignments. You can also send reminders from here (not pictured)

E. View and Sign: Click to review the form awaiting the direct report's attention.