

# FY16 FINAL EVALUATION

## *PeopleSoft Processing Guide*

Teacher & School-Based Leader Guide



GROWING. STRONG.

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# Introduction

*The School District of Palm Beach County will be processing Teacher, Assistant Principal and Principal Evaluations in PeopleSoft as of FY16. This manual will provide the guidance needed to complete this portion of the Evaluation requirements.*

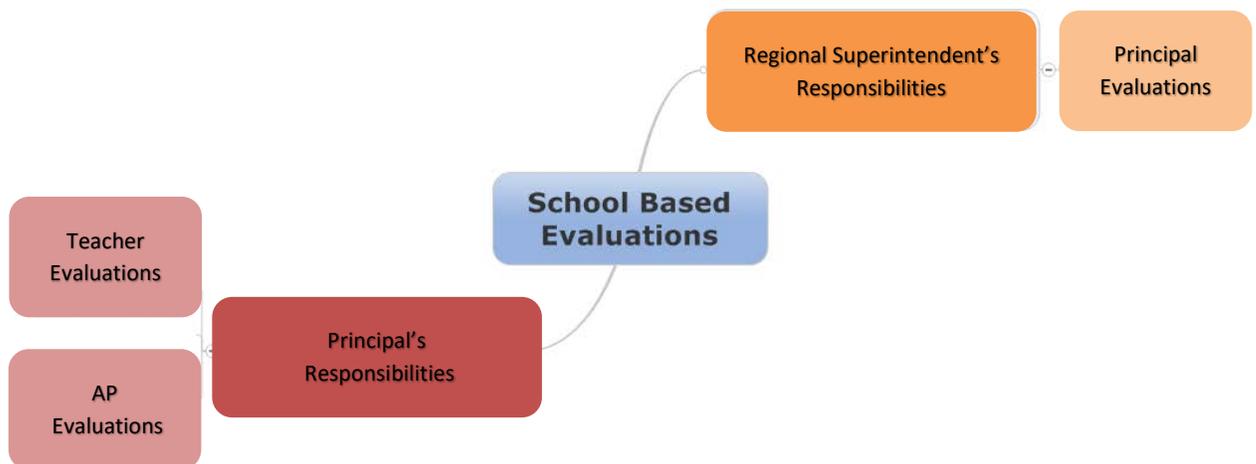
The manual will include screen shots and additional links to each processing element for easy reference.

ICON KEY	
	Valuable information
	Personal Notes
	Video Assistance

The “**icon key**” at left was produced to assist you in identifying key information throughout this guide. Valuable information and video assistance will be flagged along with areas for you to take personal notes.

## School Based Employee Evaluation Responsibilities

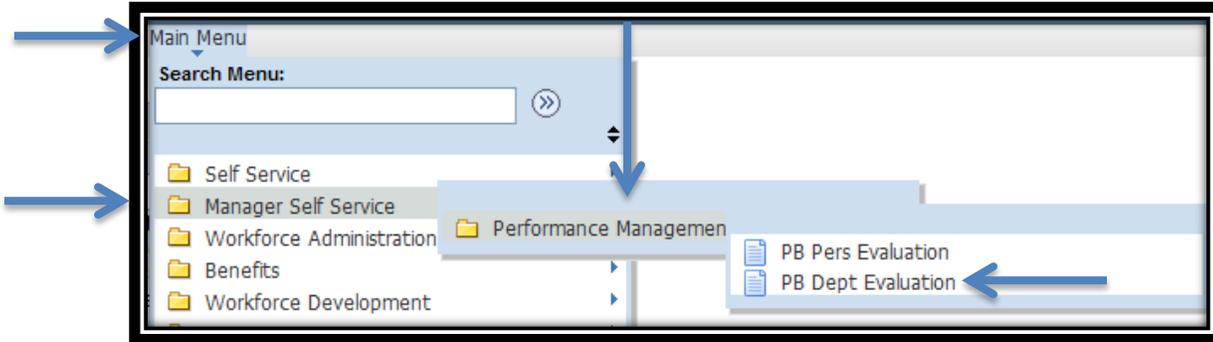
The flow chart below identifies the evaluation responsibilities for the Principal and the Regional Superintendent in the evaluation process of all School Based Employees.



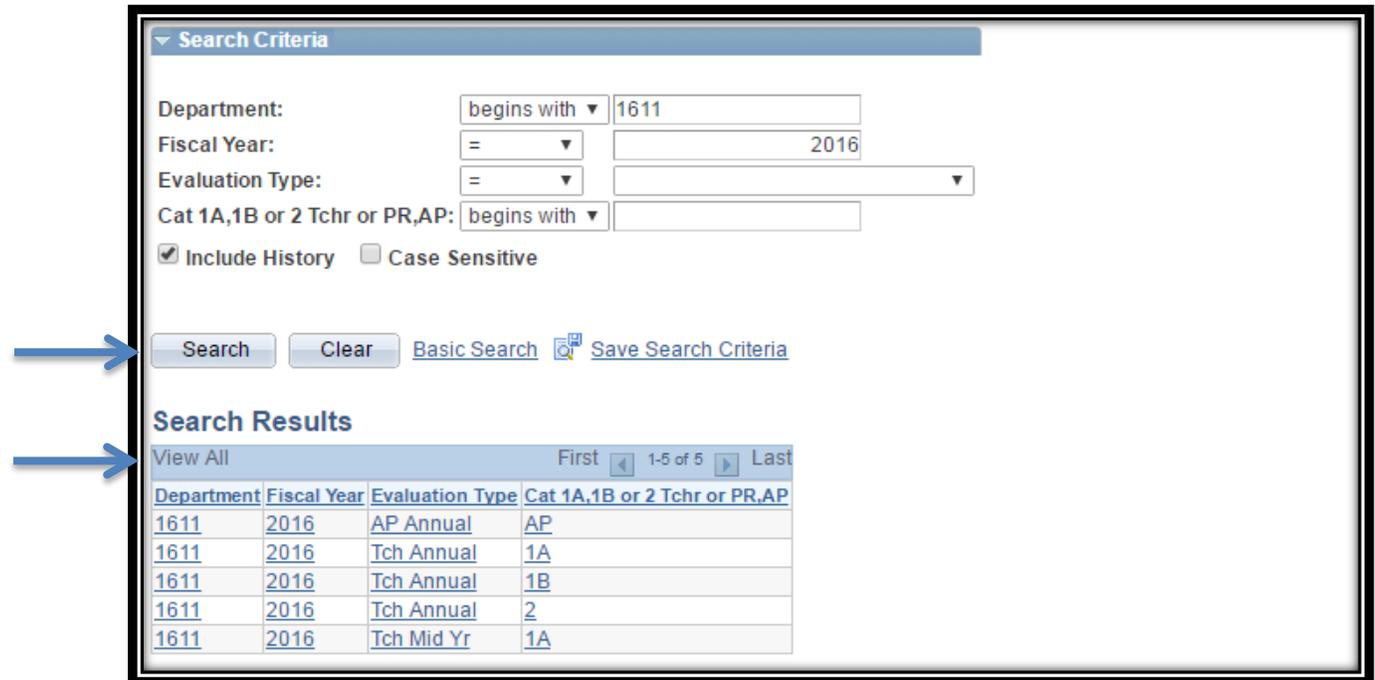
## Principal Guide for Teacher Evaluation Processing

📁 Pathway - from PeopleSoft navigate to Human Capital Management then the following:

**Main Menu→ Manager Self Service→ Performance Management→ PB Dept Evaluation**



📁 From PB Dept Evaluation screen you will be able to select the School/Department, fiscal year, evaluation type (Mid-Year, Annual), and the employee category.



📁 Select the type of evaluation “Tch Annual” for Final Evaluation and “Tch Mid Yr” for Mid-Year Evaluation, and then select the search. The search results will be shown below the search option when the screen refreshes. To proceed click on the Teacher category for processing.




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Processing can be done individually by employee or through a grid system shown below. Instructions are at the top of the screen with a video demonstration link for additional support.

Please check the 'Prin/Dir Approve Eval' box when you are ready to allow the employee to view and sign their Evaluation screen for their Final Evaluation result.

After the Employee signs their evaluation:  
 Select the button next to Emplid to transfer to Employee's evaluation screen to sign electronically.

[Evaluation Demonstration Video](#)

To print your entire department documents, click here [Manager Summary](#)

Press the Refresh Data button to refresh the page [Refresh Data](#)

Press the SUBMIT button below to save changes.

Select	Empl ID	Last Name	First Name	Eval Code	Prin/Dir Approve Eval	Empl Agree to Evaluation	Empl Disagree to Evaluation	Empl Signed Evaluation	Empl Unavailable to Sign	Empl refused to sign	Supporting Docs Recvd	Prin/Dir Signed	Witness Emplid	Eff Date
Select	1234567	Allen	Barry	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
2 Select	1234499	Danvers	Kara	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
3 Select	1234599	Winfrey	Oprah	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
4 Select	1234699	Hanks	Thomas	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
5 Select	1234799	Dawson	Rosario	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016

Submit

To open the evaluation for Teachers to view the Principal will complete the following process:

- Review the grid to see the evaluation data for the Teacher(s), if there are no concerns, then check the first box titled “Prin/Dir Approve Eval”, this will release the page to the Teacher for viewing. All or multiple Teachers can be selected on this screen, after the box is checked, then select “Submit” at the bottom of the screen.

Notice that from this page a Principal/Director can monitor the progress of the process, once the Teacher signs the evaluation the Principal/Director can see if the Teacher agreed/disagreed, and signed.

Upon seeing that the Teacher signed then the Principal can complete the process by clicking the “Select” button by the Teacher’s name and completing the following tasks:

- Review the individual page for the Teacher, if the Teacher has either agreed/disagreed and has signed the document the Principal/director will then select “Prin/Dir Submit Signature” and then select “Save” to complete the processing for this Teacher. See screen shot on next page as a reference.




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**Employee Evaluation & Evaluation Components** Find | View All First 1 of 1

\*Empl ID: 1234568 \*Eff Date: 05/21/2016 \*Fiscal Yr: 2016  
 \*Dept/Schl: 2631 Palm Beach Central High Sch \*Union Code: 01T Job Indicator: Primary  
 \*Job Code: 52300 TCH READING SR HIGH  
 Eval Type: Tch Annual Evaluation Level: Highly Effective

**This Section for Instructional Employees Only**

Instructional Practice Component % <i>(Teachers only)</i>	<input type="text" value="60"/>	Instructional Practice Score	<input type="text" value="4.0"/>	Final Eval Score 3.6
Prof/Job Responsibilities Component % <i>(Teachers and School Administrators)</i>	<input type="text" value="0"/>	Prof/Job Responsibilities Score	<input type="text" value="0.0"/>	
Instructional Leadership Component % <i>(School Administrators only)</i>	<input type="text" value="0"/>	Instructional Leadership Score	<input type="text" value="0.0"/>	

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\* Measures of Student Learning Growth: Statewide  
*(Teachers and School Administrators)* Student Learning Growth Assign Type: School  
 Student Learning Growth Component %: 40  
*(Teachers and School Administrators)* Student Learning Growth Score Type:   
 Student Learning Growth Percent Rank: 65 Student Learning Growth Score: 3.0

\*This field indicates the measures upon which student learning growth, as defined by Section 1012.34(7)(a)-

Employee Agree to Eval       Employee Disagree to Eval

Employee Signature \_\_\_\_\_ Date Signed \_\_\_\_\_

Employee Unavailable to Sign       Employee Refused to Sign       Supporting Document Received

Supporting Documentation Information (ie Certified Mail Receipt number and date mailed)

Principal/Director Signature \_\_\_\_\_ Date Signed \_\_\_\_\_

Witness Emplid:

Last Upd DtTm: 11/05/16 4:05:32PM

Buttons: Save, Return to Search, Prin/Dir Submit Signature, Printable Version, Add, Include History, Correct Hist

**Processing Special Circumstances:**

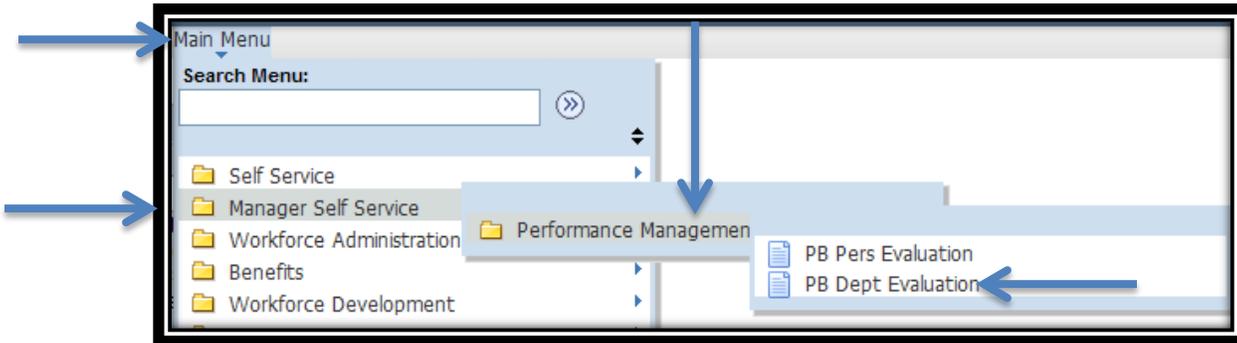
- **Teacher not available to sign evaluation:** From the grid, click the “Select” button by the Teacher’s name, go to the bottom of the form and click the box “Employee Not Available to Sign”, also select “Supporting Document Received” and enter the Certified Mail Receipt Number to indicate that the document has been mailed to the Teacher via Certified Mail, Select the “Prin/Dir Submit Signature” and then select “Save” to complete the processing for this Teacher. Select “Printable Version” to have a copy that is mailed to the Teacher.
- **Teacher Refuses to Sign:** From the grid, click the “Select” button by the Teacher’s name, go to the bottom of the form and click the box “Employee Refuses to Sign”, then proceed to the box titled **Witness Emplid** and enter the Employee Identification number of a witness to



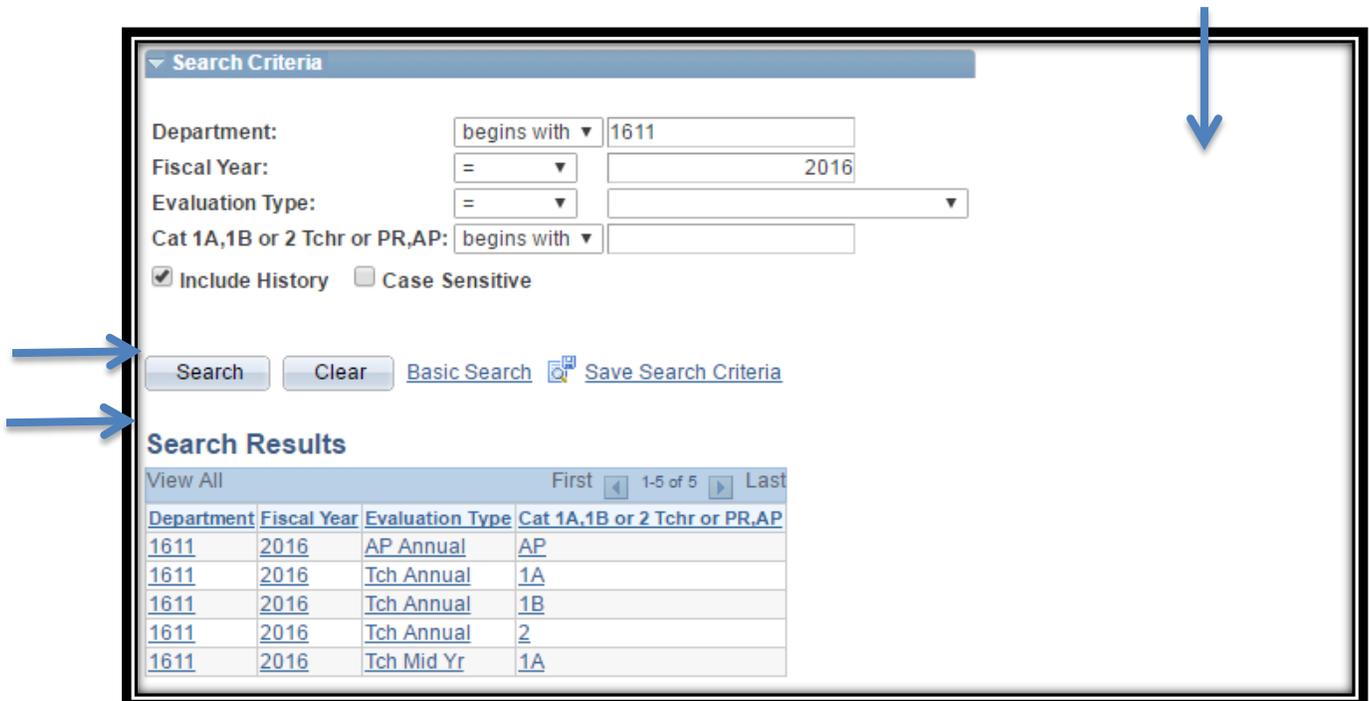
## Principal Guide for Assistant Principal Evaluation Processing

📁 Pathway - from PeopleSoft navigate to Human Capital Management then the following:

**Main Menu→ Manager Self Service→ Performance Management→ PB Dept Evaluation**



📁 From PB Dept Evaluation screen you will be able to select the School/Department, fiscal year, evaluation type (AP Annual), and the employee category.



📁 Select the type of evaluation “AP Annual” for Final Evaluation and then select the search. The search results will be shown below and click on the AP category to process.

📁 Processing can be done individually by employee or through a grid system shown below. Instructions are at the top of the screen with a video demonstration link for additional support.

Please check the 'Prin/Dir Approve Eval' box when you are ready to allow the employee to view and sign their Evaluation screen for their Final Evaluation result.

After the Employee signs their evaluation:  
 Select the button next to EmpId to transfer to Employee's evaluation screen to sign electronically.

[Evaluation Demonstration Video](#)

To print your entire department documents, click here

Press the Refresh Data button to refresh the page

Press the SUBMIT button below to save changes.

	Select	Emp ID	Last Name	First Name	Eval Code	Prin/Dir Approve Eval	Emp! Agree to Evaluation	Emp! Disagree to Evaluation	Emp! Signed Evaluation	Emp! Unavailable to Sign	Emp! refused to sign	Supporting Docs Recvd	Prin/Dir Signed	Witness EmpId	Eff Date
1	<input type="button" value="Select"/>	1234567	Allen	Barry	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
2	<input type="button" value="Select"/>	1234499	Danvers	Kara	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
3	<input type="button" value="Select"/>	1234599	Winfrey	Oprah	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
4	<input type="button" value="Select"/>	1234699	Hanks	Thomas	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016
5	<input type="button" value="Select"/>	1234799	Dawson	Rosario	Highly Eff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		06/30/2016



📁 To open the evaluation up for Assistant Principals to view the Principal will complete the following process:

- Review the grid to see the evaluation data for the Assistant Principal(s), if there are no concerns, then check the first box titled “**Prin/Dir Approve Eval**”, this will release the page to the Assistant Principal for viewing. All or multiple Assistant Principals can be selected on this screen, after the box is checked, then select “**Submit**” at the bottom of the screen.

📁 Notice that from this page a Principal/Director can monitor the progress of the process, once the Assistant Principal signs the evaluation the Principal/Director can see if the Teacher agreed/disagreed, and signed.

📁 Upon seeing that the Assistant Principal has signed then the Principal can complete the process by clicking the Select button by the Assistant Principal’s name and completing the following tasks:

- Review the individual page for the Assistant Principal, if the Assistant Principal has either agreed/disagreed and has signed the document the Principal/director will then select “**Prin/Dir Submit Signature**” and then select “**Save**” to complete the processing for this Assistant Principal. See screen shot below as a reference.

**Employee Evaluation & Evaluation Components** Find | View All First 1 of 1

\*Empl ID: 1234568 \*Eff Date: 05/21/2016 \*Fiscal Yr: 2016  
 \*Dept/Schl: 2631 Palm Beach Central High Sch \*Union Code: 01T Job Indicator: Primary  
 \*Job Code: 52300 TCH READING SR HIGH  
 Eval Type: Tch Annual Evaluation Level: Highly Effective

**This Section for Instructional Employees Only**

Instructional Practice Component % <i>(Teachers only)</i>	<input type="text" value="60"/>	Instructional Practice Score	<input type="text" value="4.0"/>	Final Eval Score 3.6
Prof/Job Responsibilities Component % <i>(Teachers and School Administrators)</i>	<input type="text" value="0"/>	Prof/Job Responsibilities Score	<input type="text" value="0.0"/>	
Instructional Leadership Component % <i>(School Administrators only)</i>	<input type="text" value="0"/>	Instructional Leadership Score	<input type="text" value="0.0"/>	

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\* Measures of Student Learning Growth: Statewide  
*(Teachers and School Administrators)* Student Learning Growth Assign Type: School  
 Student Learning Growth Component %: 40  
*(Teachers and School Administrators)* Student Learning Growth Score Type:   
 Student Learning Growth Percent Rank: 65  
 Student Learning Growth Score: 3.0

*\*This field indicates the measures upon which student learning growth, as defined by Section 1012.34(7)(a)-*

Employee Agree to Eval       Employee Disagree to Eval

Employee Signature:  Employee Unavailable to Sign       Employee Refused to Sign       Supporting Document Received      Date Signed

Supporting Documentation Information (ie Certified Mail Receipt number and date mailed)

Principal/Director Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_  
 Witness Emplid:  Prin/Dir Submit Signature

Last Upd DtTm: 11/05/16 4:05:32PM      Printable Version

Save    Return to Search      Add    Include History    Correct Hist

**Processing Special Circumstances:**

- **Assistant Principals not available to sign evaluation** From the grid, click the “Select” button by the Assistant Principal’s, go to the bottom of the form and click the box “Employee Not Available to Sign”, also select “Supporting Document Received” and enter the Certified Mail Receipt Number to indicate that the document has been mailed to the Teacher via Certified Mail, Select the “Prin/Dir Submit Signature” and then select “Save” to complete the processing for this Teacher. Select “Printable Version” to have a copy that is mailed to the Assistant Principal.
- **Assistant Principal Refuses to Sign:** From the grid, click the “Select” button by the Assistant Principal’s name, go to the bottom of the form and click the box “Employee Refuses to Sign”, then proceed to the

box titled **“Witness Emplid”** and enter the Employee Identification number of a witness to a conference where the Assistant Principal refused to sign. Select **“Save”** so the witness name is then seen on the screen, proceed to the **“Prin/Dir Submit Signature”** button and then select **“Save”** to complete the processing for this Assistant Principal. Select **“Printable Version”** and present a copy of the evaluation to the Assistant Principal.

📁 **The grid can be personalized by selecting the personalize option on the far right as seen below. You can also print an excel version of this grid by selecting the grid icon with the red arrow to the right of the personalize feature. It is suggested that the completed process be saved as an excel file and uploaded to the administrator evaluation as your proof of processing Teacher evaluations.**

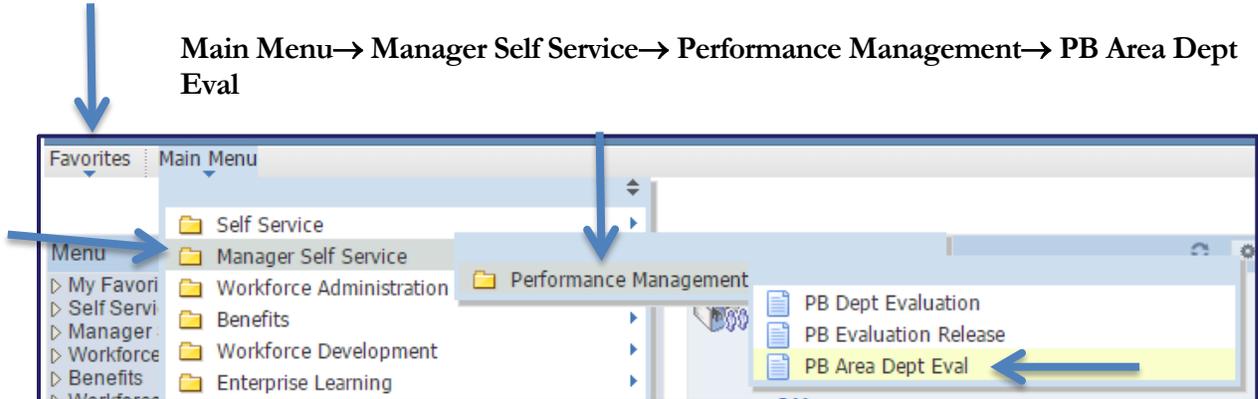


A series of horizontal lines for writing, starting from the pencil icon and extending across the width of the page.

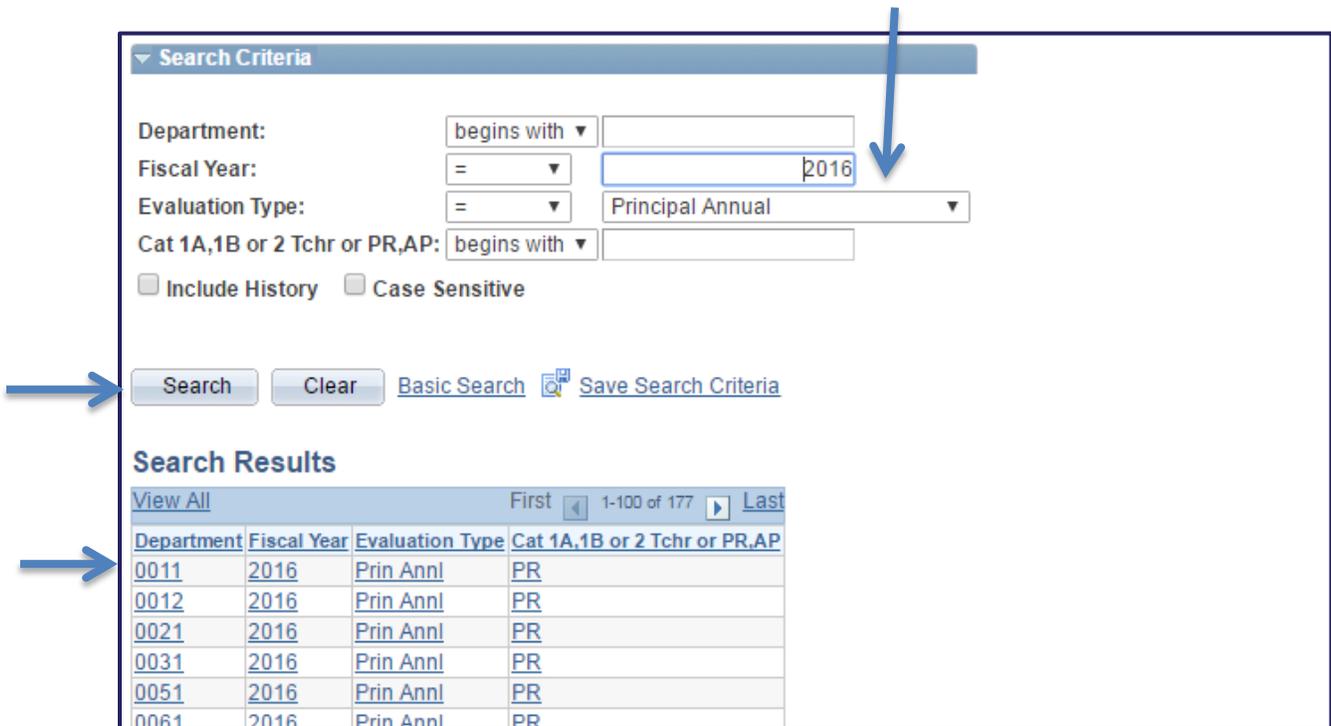
## Regional Superintendent Guide for Principal Evaluation Processing

📁 Pathway - from PeopleSoft navigate to Human Capital Management then the following:

**Main Menu → Manager Self Service → Performance Management → PB Area Dept Eval**



📁 From PB Area Dept Eval screen you will be able to select the School/Department, fiscal year, and evaluation type (Principal Annual). Select Principal Annual and then select Search to get a list of all Principals that report to you in the search results. See below.



- Select the first school number in the list to open the Principal Evaluation for processing. If the Eval Code is correct, place a check in the box “**Prin/Dir Approve Eval**” to open the evaluation up to Principal to sign. Then select “**Submit**” to save the action. Select “**Next in List**” to proceed to the next School that you supervise. Complete this process for all Schools that you supervise to open up the Evaluation for all Principals in your area.

**Submit**

Return to Search   Previous in List   Next in List

- Notice that from this page a Regional Superintendent can monitor the progress of the process, once the Principal signs the evaluation the Regional Superintendent can see if the Principal agreed/disagreed, and signed.

- Upon seeing that the Principal has signed then the Regional Superintendent can complete the process by clicking the Select button by the Principal’s name and completing the following tasks:

- Review the individual page for the Principal, if the Principal has either agreed/disagreed and has signed the document the Regional Superintendent will then select “**Prin/Dir Submit Signature**” and then select “**Save**” to complete the processing for this Principal. See screen shot below as a reference.

**Employee Evaluation & Evaluation Components** Find | View All First 1 of 1

\*Empl ID: 1234568 \*Eff Date: 05/21/2016 \*Fiscal Yr: 2016  
 \*Dept/Schl: 2631 Palm Beach Central High Sch \*Union Code: 01T Job Indicator: Primary  
 \*Job Code: 52300 TCH READING SR HIGH  
 Eval Type: Tch Annual Evaluation Level: Highly Effective

**This Section for Instructional Employees Only**

Instructional Practice Component % <i>(Teachers only)</i>	<input type="text" value="60"/>	Instructional Practice Score	<input type="text" value="4.0"/>	Final Eval Score 3.6
Prof/Job Responsibilities Component % <i>(Teachers and School Administrators)</i>	<input type="text" value="0"/>	Prof/Job Responsibilities Score	<input type="text" value="0.0"/>	
Instructional Leadership Component % <i>(School Administrators only)</i>	<input type="text" value="0"/>	Instructional Leadership Score	<input type="text" value="0.0"/>	

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\* Measures of Student Learning Growth: Statewide  
*(Teachers and School Administrators)* Student Learning Growth Assign Type: School  
 Student Learning Growth Component %: 40  
*(Teachers and School Administrators)* Student Learning Growth Score Type:   
 Student Learning Growth Percent Rank: 65  
 Student Learning Growth Score: 3.0

\*This field indicates the measures upon which student learning growth, as defined by Section 1012.34(7)(a)-

Employee Agree to Eval       Employee Disagree to Eval

Employee Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_  
 Employee Unavailable to Sign       Employee Refused to Sign       Supporting Document Received

Supporting Documentation Information (ie Certified Mail Receipt number and date mailed)

Principal/Director Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_  
 Witness Emplid:  Prin/Dir Submit Signature  
 Last Upd DtTm: 11/05/16 4:05:32PM Printable Version

Save    Return to Search    Add    Include History    Correct Hist

**Processing Special Circumstances:**

- **Principals not available to sign evaluation:** From the grid, click the “Select” button by the Principal’s name, go to the bottom of the form and click the box “Employee Not Available to Sign”, also select “Supporting Document Received” and enter the Certified Mail Receipt Number to indicate that the document has been mailed to the Teacher via Certified Mail, Select the “Prin/Dir Submit Signature” and then select “Save” to complete the processing for this Teacher. Select “Printable Version” to have a copy that is mailed to the Principal.
- **Principal Refuses to Sign:** From the grid, click the “Select” button by the Principal’s name, go to the bottom of the form and click the box “Employee Refuses to Sign”, then proceed to the box titled “Witness



## FY16 How to Access & Sign Employee Evaluations in PeopleSoft

Please use the following step-by-step directions to access your FY16 employee evaluation. Should you encounter any difficulty along the way, please contact the Department of Professional Development at 561-649-6839 or PX 46839.

**From the Portal:**

- Click on the **PeopleSoft** link.
- Click **Human Capital Management**.
- Click **Main Menu**.
- Click **Self Service**.
- Click **Performance Management**.
- Click **Evaluations**.
- Select the Fiscal Year **2016** hyperlink in the Fiscal Year Column to display your 2016 Evaluation.
- Carefully review the contents.
- Select the **“I agree with the contents”** or **“I disagree with the contents”** box.
- Click on the **Submit Signature** button.
- A Signature Confirmation window will display.
- Click the **OK** button.
- Click on the **Printable Version** button to view or print the signed evaluation.

After December 2, 2016,  
employees can simply click  
**PeopleSoft → My Evaluations**  
**→ 2016**

**Note:**

Please follow the same pathway to return after your supervisor has signed the evaluation or to view or print at a later date a signed evaluation. Navigate to: Self Service> Performance Management > Evaluations



THE SCHOOL DISTRICT OF PALM BEACH COUNTY  
**Annual Evaluation Report for Teachers**

This form is to serve as a permanent record of an administrator's evaluation of a teacher's performance during a specific period. It is based on specific criteria as it relates to the teacher's **instructional practice** using the *Marzano Model* (Art and Science of Teaching Framework) resulting in the midyear evaluation level.

Employee ID #: EMPLID      First Name: FIRST\_NAME      Last Name: LAST\_NAME  
 School/Fiscal Yr: FISCAL\_YEAR      Job Title: PB\_JOBCODE\_DESCR  
 School/Dept: DEPTID      PB\_DEPT\_DESCR

**PERFORMANCE LEVELS**

<b>Instructional Practice</b>	<b>Student Growth</b>	<b>Student Growth Score Type</b>	<b>Evaluation Level</b>
PB_EVAL_IPC_SCORE	PB_EVAL_SLG_SCORE	PL_EVAL_ASSIGN_TYP	PB_PERS_EVALUATION

Review carefully, select agree or disagree, and electronically sign.

This evaluation has been reviewed by me.     I agree with the contents     I disagree with the contents.

I further understand that by signing this form, I do not waive any right I have under the Collective Bargaining Agreement or law. My signature merely demonstrates receipt of the document and does not necessarily indicate agreement with the contents.

4.0 = Highly Effective  
3.0 = Effective  
2.0 = Developing / Needs Improvement  
1.0 = Unsatisfactory

PB\_EMPL\_SIGNATURE  
Employee Signature

PB\_PRIN\_SIGNATURE  
Supervisor Signature

PB\_EMPL\_SIGN\_DT  
Date

PB\_PRIN\_SIGN\_DT  
Date

PBSD 0019 (Rev. TBD 04/02/2013)