

1.0 SCOPE

- 1.1 This work procedure describes the Teacher Formal Observation process for an administrator, peer or their designee. The evaluation template name for teachers is RTA Formal Observation. The Formal Observation process for Teaching Assistants is very similar to this process – with minor exceptions that are noted herein. The evaluation template name for Teaching Assistants is RAP Formal Observation.

2.0 RESPONSIBILITY

- 2.1 The administrator will be responsible for ensuring that the minimum number of formal observations, as required by law, are conducted for each teacher under their supervision.

3.0 APPROVAL AUTHORITY

- 3.1 None.

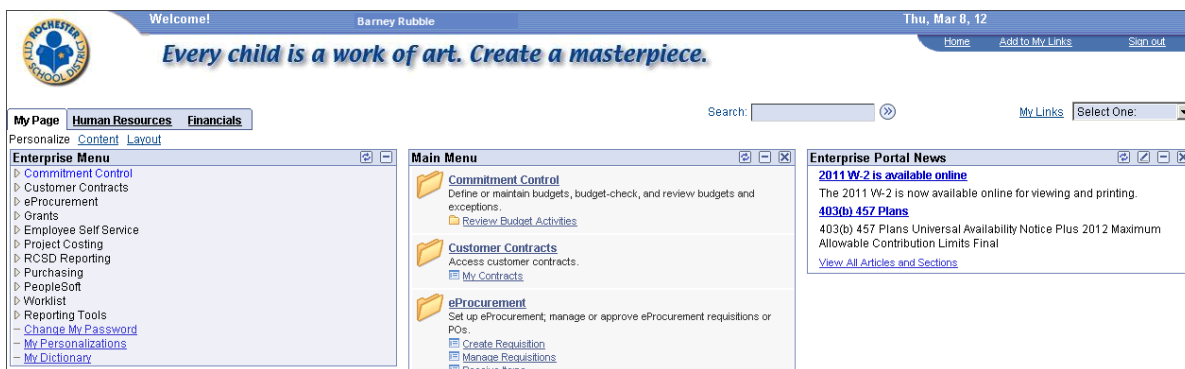
4.0 DEFINITIONS

- 4.1 **ePerformance:** the PeopleSoft module used to complete and manage all District personnel evaluations beginning with the 2011-2012 school year.
- 4.2 **Performance document:** PeopleSoft performance management documents, such as an employee’s Evaluation or Formal Observation document. **Beginning with the 2012-2013 school year**, the Goal Setting process has been integrated into the annual performance evaluation document.
- 4.3 **Formal Observation:** the planned, formal process of an administrator, peer or their designee, to observe a teacher in the classroom setting while providing student instruction.
- 4.4 **Required Process Steps to Complete a Formal Observation in ePerformance (in order)**
- 4.4.1 **Administrator/Reviewer step:** Write Formal Observation
 - 4.4.2 **Administrator/Reviewer step:** Mark Formal Observation “**Available for Review**”. Note: teacher can now view the Formal Observation on the PeopleSoft system.
 - 4.4.3 **Administrator/Reviewer step:** Mark Formal Observation “**Review Held**”. Note: teacher can now view the Formal Observation in PeopleSoft and they can “Acknowledge” that a review meeting has been conducted.
 - 4.4.4 **Employee step:** Add comments and “**Acknowledge**” that the review meeting was held by clicking Acknowledge button in PeopleSoft. Acknowledge button is **not available** until the Formal Observation is marked as “Review Held”.
 - 4.4.5 **Administrator/Reviewer step:** Mark Formal Observation “**Complete**”.



5.0 PROCEDURE

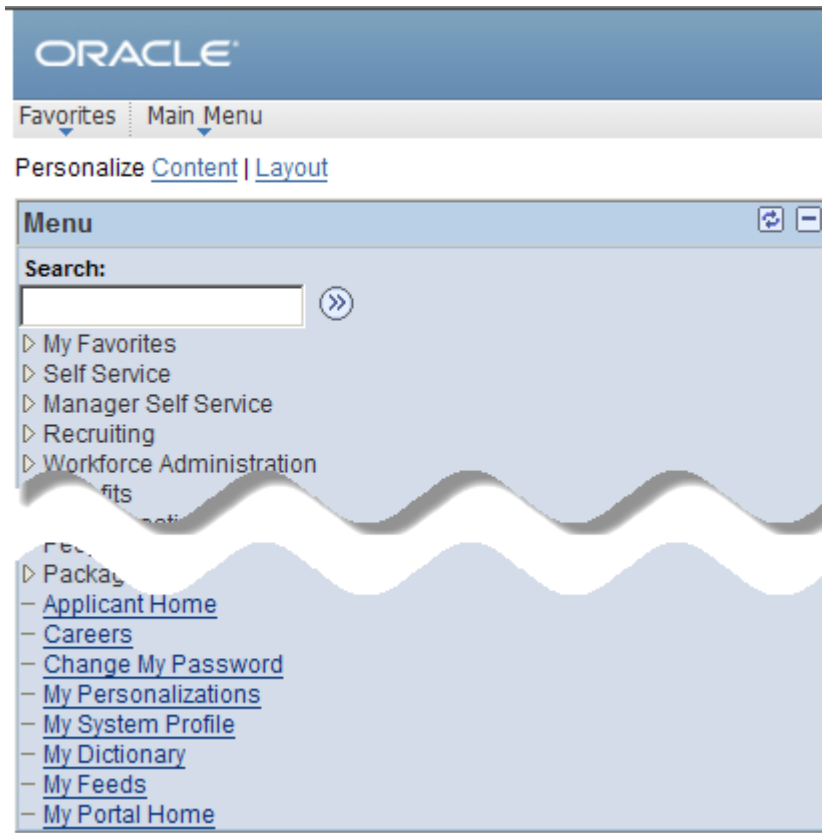
5.1 **Log in to PeopleSoft.** This example shows the PeopleSoft Portal page as the starting point as there are numerous ways to access the PeopleSoft Portal (e.g. from SharePoint, directly from a web browser window, etc.). The PeopleSoft Portal page is shown below. *Note:* your home page is likely to be different from anyone else’s home page, but the common PeopleSoft functionality should be visible. Specifically, you should see the *Human Resources* tab next to the *My Page* tab and Employee Self Service on your Enterprise Menu.



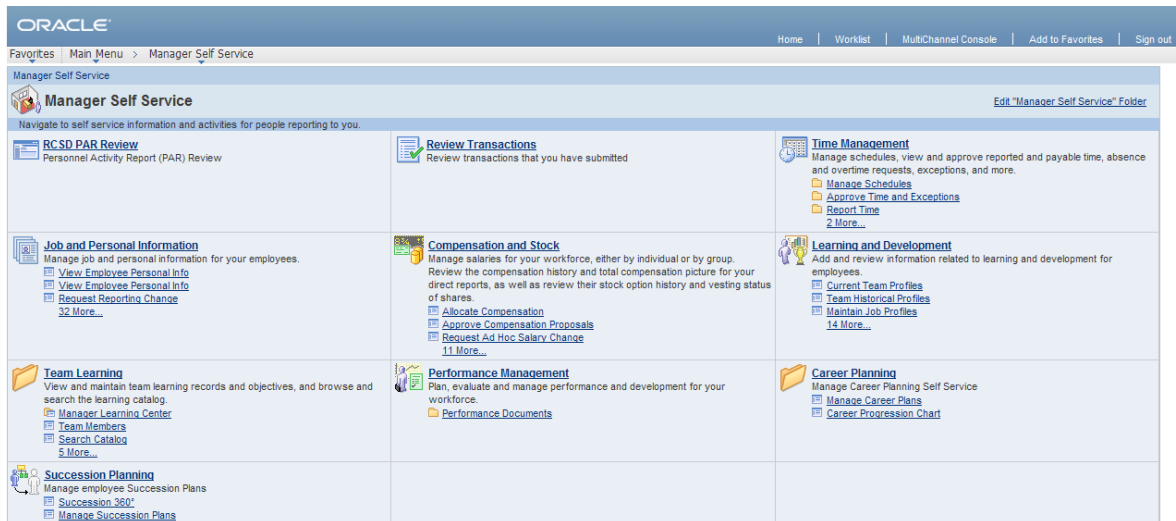
5.2 Click on the **Human Resources** tab. A page similar to the following will be displayed.



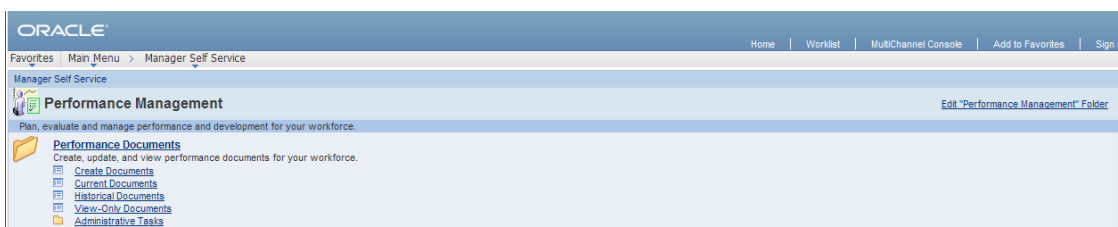
5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page). *Note:* the menu options available for your use will vary depending upon your job responsibilities and the associated system security. For brevity, a number of menu options for this manager are not shown in the graphic below.



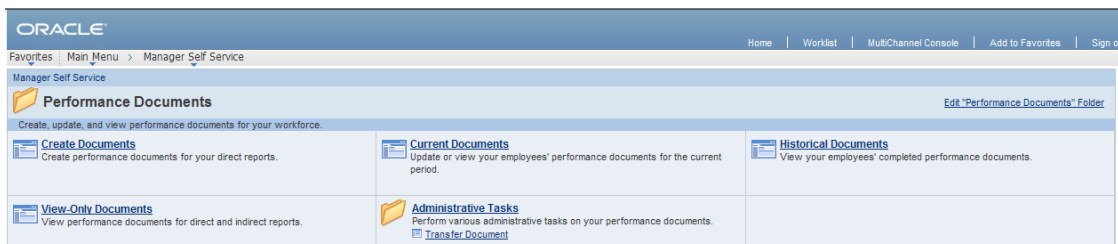
5.4 Click on the **Manager Self Service** menu option.



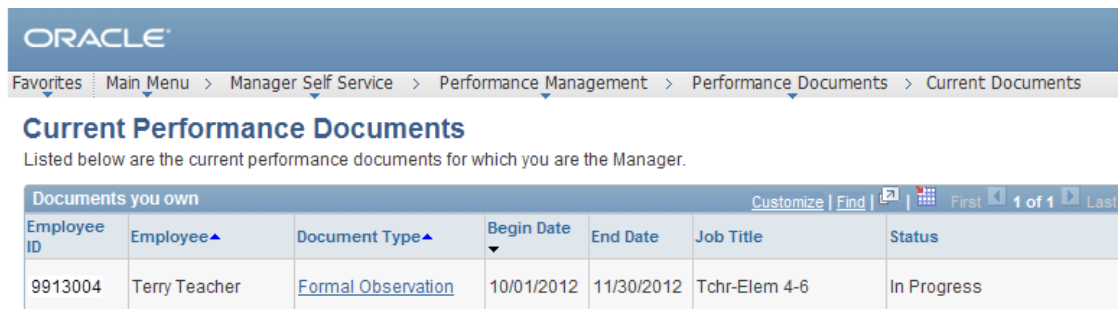
5.5 Click on the [Performance Management](#) link.



5.6 Click on the [Performance Documents](#) link.



5.7 Click on the [Current Documents](#) link. A roster of the employees whose evaluations are assigned to you will appear as shown below.



5.8 Click on the [Formal Observation](#) link next to the teacher or teaching assistant whose observation you are ready to complete.



[Return to Select Documents](#)



- 5.9 Click on the [Start](#) link in the *Action* column for the *Complete Manager Evaluation* step. The Formal Observation document will open. All of the sections of the Formal Observation document for teachers are illustrated in the “collapsed view” shown below. Note: there are fewer sections for the Teaching Assistant Formal Observation.

ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Performance Document - Formal Observation

Manager Evaluation

Terry Teacher, Tchr-Elem 4-6
 Formal Observation: 10/01/2012 - 11/30/2012

Author: Deborah Department-Manager**Role:** Manager
Status: In Progress **Due Date:** 11/30/2012
Approval: Not Required

Employee Data

Rate each element and enter comments for each section in this evaluation.
 At any time you can save any entries you make on the evaluation by selecting the **Save** button.

Save Available for Review [Return to Document Detail](#)

[Expand All](#) [Collapse All](#) [Expand Sections](#)

- ▶ **Pre-Observation Conference**
- ▶ **Observation Date**
- ▶ **Domain 2: Classroom Environment**
- ▶ **Domain 3: Instruction**
- ▶ **Reflective Questions**
- ▶ **Focus/Suggestions for Continued Growth**
- ▶ **Does This Observation Raise Serious Concern?**
- ▶ **Post-Observation Conference**
- ▶ **Employee Comments/Rebuttal**

Attachments
 No Attachments have been added to this document

[+ Add Attachment](#)

Audit History

[RCSD Signature Page](#)

- 5.10 Click on the [Expand All](#) link to open all of the sections of the Formal Observation or click on the “twistie” (▶) next to the section(s) you wish to open..



5.11 For purposes of this work procedure, all sections will be expanded. Click on the [Expand All](#) link to begin.

Employee Data

Empl ID:	9913004	
Department:	11202	#12 - James P B Duffy - ES
Location:	112	School 12
Plan/Grade:	RTA	A

[RCSD Empl Class](#)

[Rating History](#)

Rate each element and enter comments for each section in this evaluation.
At any time you can save any entries you make on the evaluation by selecting the **Save** button.

[Return to Document Detail](#)

5.12 The first section of the Formal Observation to review is the *Employee Data* section. Carefully review and verify that the Employee ID, Department, Location and Plan/Grade are correct. ***If any of this information is incorrect for the teacher being observed, contact your administrator or HCI Zone Director before proceeding.***



5.13 Click on the [RCSD Empl Class](#) link.

RCSD Employee Class

Evaluatee:	Terry Teacher
Empl ID:	9913004
Employee Classification:	Tenure Teachers



5.14 Verify that the employee classification is correct. ***If incorrect, notify your administrator or HCI Zone Director so the Employee Classification can be corrected.***

5.15 Click on the **Return** button to return to the *Manager Evaluation* page.

5.16 If desired, click on the [Rating History](#) link to view prior year performance documents for this employee. If this is a new employee, there may not be any historical rating information available.

Rating History

Evaluatee:	Terry Teacher	Empl ID:	9913004
Document Type:	Formal Observation	End Date:	11/30/2012

Overall Rating

This Employee doesn't have any overall rating history.




5.17 Click on the **Return** button to return to the *Manager Evaluation* page.

▼ **Pre-Observation Conference**

Enter the actual date of the Pre-Observation Conference as well as any additional comments.

Pre-Observation Conference Summary	
Comments:	The Pre-Observation Conference was held on 10/4/2012. The formal observation is planned for 10/12/2012.

5.18 Enter the Date of the Pre-Observation conference that was conducted with the teacher in the *Pre-Observation Conference Summary Comments* box. You may also want to include any comments from the pre-observation conference with the teacher. From a timing perspective, you may want to enter your Pre-Observation Conference notes shortly after the conference with the teacher and then complete rest of the Formal Observation after the Formal Observation is completed. Be sure to save your comments by clicking on the **Save** button (located at either the top or the bottom of the performance document). Note: The first section of the Teaching Assistant Formal Observation is the *Employee Tenure Status Summary*. Follow the on-screen instructions for each of the Teaching Assistant sections.

5.19 As is the case throughout the PeopleSoft application, you can spell check what you have written by clicking on the spell check () icon.

▼ **Observation Date**

Enter the actual date of the Observation.

Observation Date Summary	
Comments:	Date of the Formal Observation was 10/12/2012 as planned.

5.20 Enter the date you conducted the Formal Observation in the *Observation Date Summary* field.

▼ **Domain 2: Classroom Environment**

Describe evidence of how the teacher creates an environment of respect and rapport; manages classroom procedures and instructional groups; orchestrates behavior and utilizes resources to create a safe/productive learning environment.

Domain 2: Classroom Environment Summary	
Comments:	

5.21 Enter your comments and evidence for the *Domain 2: Classroom Environment* section of the Formal Observation per the instructions provided. Spell check as needed.



▼ **Domain 3: Instruction**

Describe evidence of how the teacher clearly and accurately communicates goals/expectations, supports critical thinking through effective questioning and discussion techniques, engages students in learning, chooses suitable materials/resources, structures/paces the lesson, provides assessment criteria, provides feedback, and flexibility to make adjustments to lesson when necessary.

Domain 3: Instruction Summary

Comments:

5.22 Enter your comments and evidence for the *Domain 3: Instruction* section of the Formal Observation per the instructions provided. Spell check as needed.

▼ **Reflective Questions**

Reflective Questions Summary

Comments:

5.23 Enter your reflective questions for the teacher to consider in the *Reflective Questions Summary Comments* box. Spell check as needed.

▼ **Focus/Suggestions for Continued Growth**

Using language from all 4 Rubric Domains, the following are some suggestions for continued growth.

[Link to Rubric](#)

Focus/Suggestions for Continued Growth Summary

Comments:

5.24 Enter your suggestions for the teacher to consider for their area(s) of focus for continued growth in the *Focus/Suggestions for Continued Growth Summary Comments* box. Spell check your comments if necessary.

▼ **Does This Observation Raise Serious Concern?**

Does This Observation Raise Serious Concern? Summary

No
 Yes

Rating:

- 5.25 Respond to the Yes / No question about whether this observation raises any serious concerns regarding the teacher’s performance by clicking on the appropriate radio button. ***If you click the Yes button because you have serious concerns about the teacher’s performance, you should inform your Administrator and HCI Zone Director promptly.***



▼ **Post-Observation Conference**

Enter the actual date of the Post-Observation Conference as well as any additional comments.

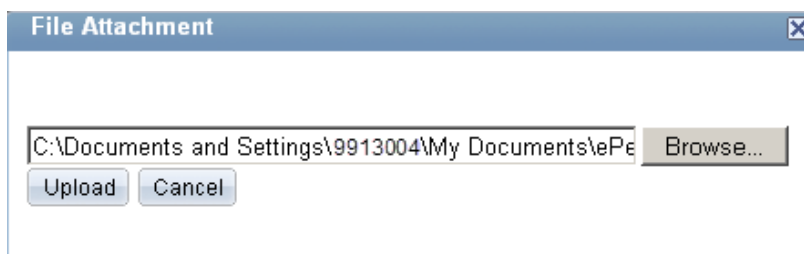
Please provide a summary of the observation process with this employee (i.e., timeliness, receptivity to feedback, participation, etc.).

- 5.26 Click in the *Post-Observation Conference Summary Comments* box. Enter the date of the Post Observation Conference and your post observation comments. Use spell check as necessary.
- 5.27 The next section of the Formal Observation document is for the *Employee Comments/Rebuttal*. As the administrator or reviewer, you can only view this section of the performance document.

[Add Attachment](#)

- 5.28 If you wish to add any attachments to the formal observation, click on the [Add Attachment](#) link. Contact your Administrator or HCI Zone Director for guidance as to what types of documents should be attached to the Formal Observation.

- 5.29 Click the **Browse** button and select the file to be uploaded from your computer or from a network drive. Once selected, the filename (and path) will be displayed in the *File Attachment* window.



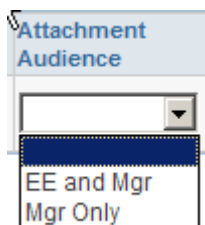
5.30 Click the **Upload** button to upload the desired file.

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
radio_button.doc	<input type="text"/>	<input type="text" value=""/>	10/02/2012 7:52:31PM	Deborah Department-Manager	

[Add Attachment](#)

5.31 Enter a description for the document that has been uploaded in the *Description* field.

5.32 From the drop down for the *Attachment Audience* field (example below), select either the *EE and Mgr* or *Mgr Only* selection. Selecting the *EE and Mgr* option will enable the employee to view the attached document. Selecting the *Mgr Only* will ensure that the document can only be viewed by the employee’s manager. If left blank, both the employee and the manager will be able to view the document. Note: HCI has requested that all attachments use the *EE and Mgr* option.



5.33 If, for some reason, the attachment needs to be deleted from the performance document, simply click on the trash can icon to delete the document.

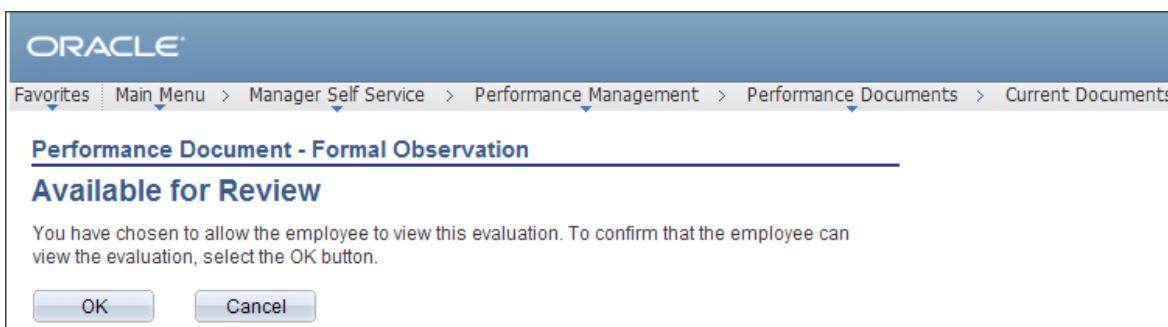


5.34 Click the **Save** button to save the Formal Observation.

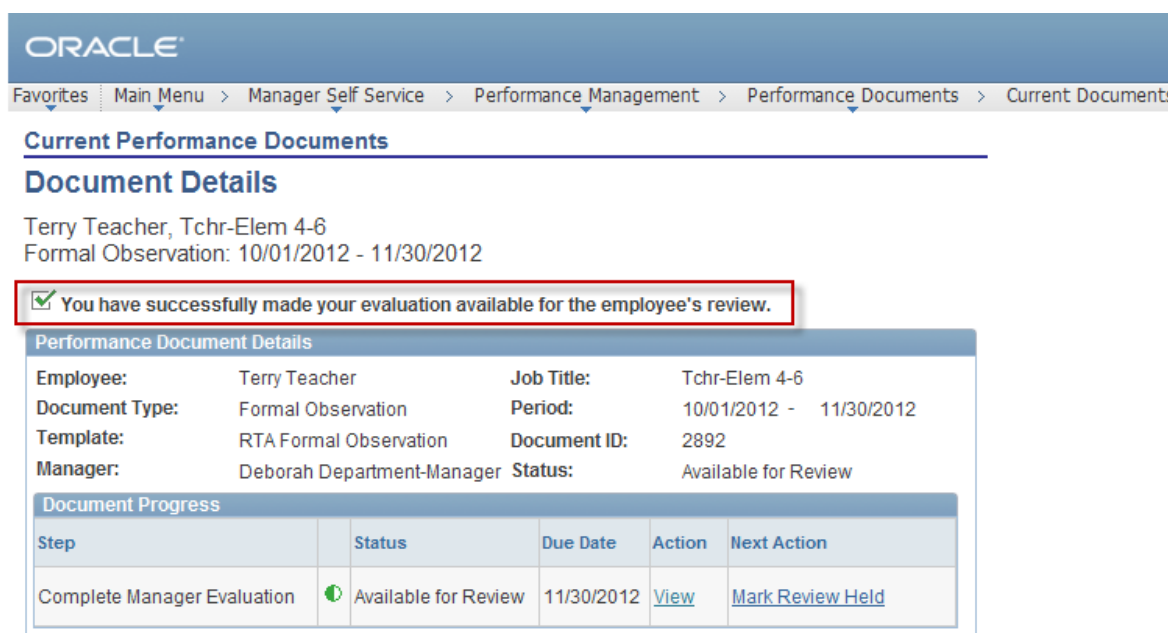


5.35 Once you have written the Formal Observation and are satisfied with the content, you may choose to click on the **Available for Review** button. However, you should **ONLY** do so when you are ready for the employee to review the performance document in PeopleSoft.

Note: if you choose to wait before making the document available for the teacher to review, you can do so, but you will eventually need to complete the following steps so the teacher can review the Formal Observation assessment and enter their comments/rebuttal.



5.36 Click on the **OK** button and the Formal Observation will now be available for the teacher to review.



[Return to Select Documents](#)

5.37 Note the confirmation that you have successfully made the Formal Observation available for the teacher’s review.

5.38 Click on the [Return to Select Documents](#) link to return to your roster of teachers to evaluate if you have additional Formal Observation evaluations to write or simply **Sign out** of PeopleSoft if you have completed writing all of your Formal Observations.

*The following process steps must be performed to successfully **Complete the Formal Observation**. They are similar to the process steps for the year end evaluation and are shown here in summary fashion only. Refer to the year end documentation for full process step details.*

5.39 Once you have conducted the post observation meeting conference with the teacher, you will need to click on the [Mark Review Held](#) link and complete those process steps to change the status of the Formal Observation to “Review Held”.

5.40 As with the final, year end evaluation, the employee will be able to add their comments to the Formal Observation and will need to click on the [Acknowledge](#) link and complete the process



steps for Acknowledging that the Formal Observation was completed. These are similar to the year end evaluation process.

- 5.41 The final step of completing the Formal Observation for the teacher must be completed by the manager and that is to click the [Complete](#) link to finalize the process for the Formal Observation and move the document into the Historical Documents folder.
- 5.42 Once these process steps have been done, you have completed the Formal Observation process for this teacher. **Congratulations!**

6.0 ASSOCIATED DOCUMENTS

6.1 None.

7.0 RECORD RETENTION

Identification	Storage	Retention	Disposition	Protection
PeopleSoft ePerformance initial implementation.	SharePoint ePerformance project site. Displayed on EngageRochester site.	Until Superseded		N/A

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
10/04/12	Original	Original Document

End of Procedure