
ROCHESTER CITY SCHOOL DISTRICT
Unannounced Observation Process for Teachers



1.0 SCOPE

- 1.1 This work procedure describes the Unannounced Observation process for teacher observations. The evaluation template name is Unannounced Observation.

2.0 RESPONSIBILITY

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

3.0 APPROVAL AUTHORITY

- 3.1 None.

4.0 DEFINITIONS

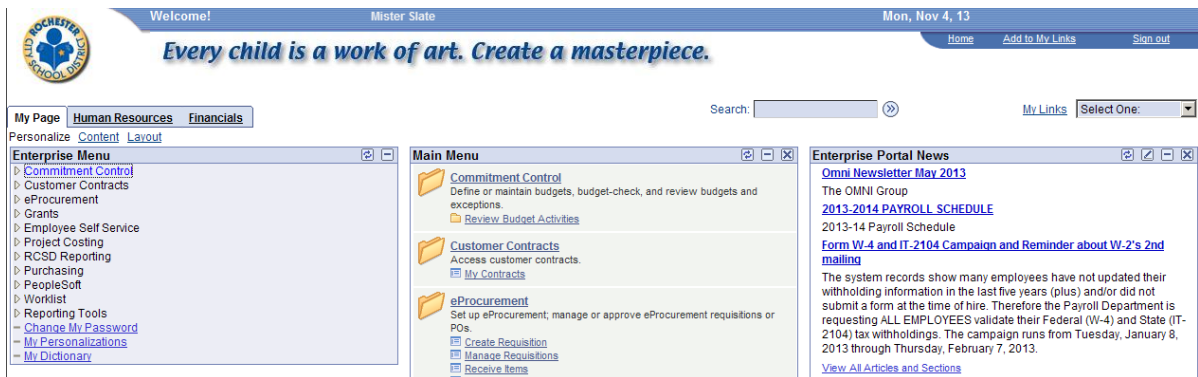
- 4.1 **ePerformance:** the PeopleSoft module used to complete and manage all District personnel evaluations beginning with the 2011-2012 school year.
- 4.2 **Performance document:** PeopleSoft performance management documents, such as an employee's Annual Evaluation, Formal Observation or Unannounced Observation document. **Beginning with the 2013-2014 school year,** the Unannounced Observation document will be used.
- 4.3 **Unannounced Observation:** the informal process of an administrator to observe a teacher in the classroom setting while providing student instruction.
- 4.4 **Required Process Steps to Complete an Unannounced Observation in ePerformance**
- 4.4.1 **Administrator step:** Write Unannounced Observation
 - 4.4.2 **Administrator step:** Mark Unannounced Observation "**Available for Review**". Note: teacher can now view the Unannounced Observation on the PeopleSoft system.
 - 4.4.3 **Administrator step:** Mark Unannounced Observation "**Review Held**". Note: teacher can now view the Unannounced 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 Unannounced Observation is marked as "Review Held".
 - 4.4.5 **Administrator step:** Mark Unannounced Observation "**Complete**".

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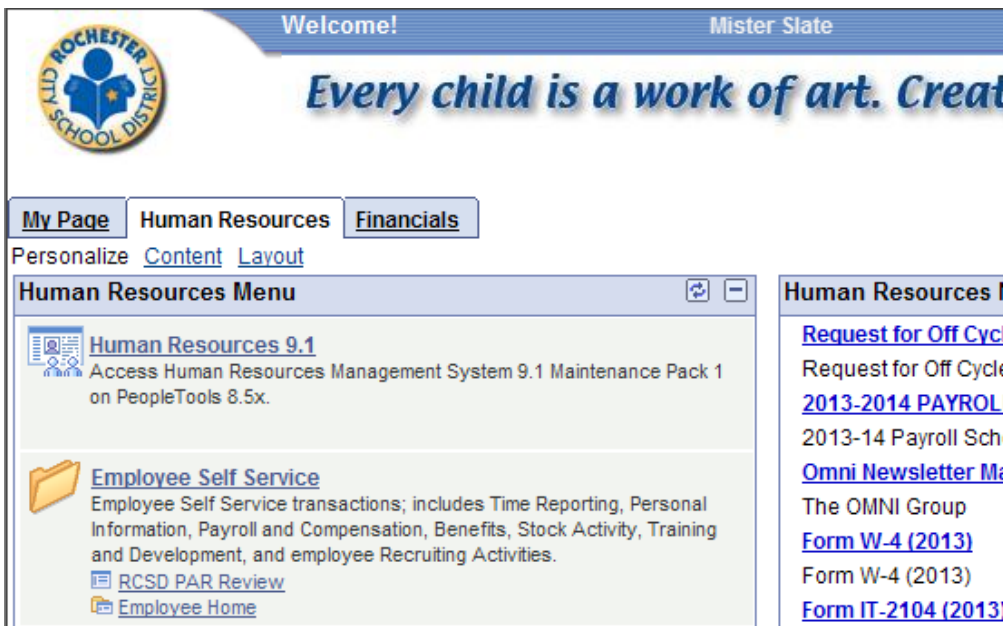


5.0 PROCEDURE

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.

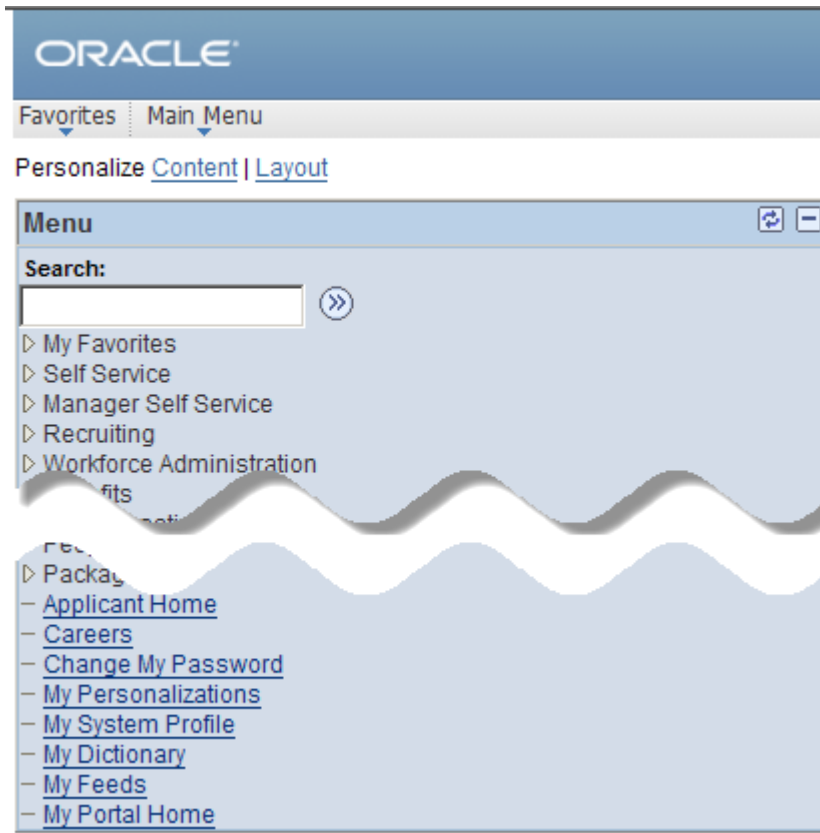


5.2 Click on the **Human Resources** tab. A page similar to the following will be displayed.

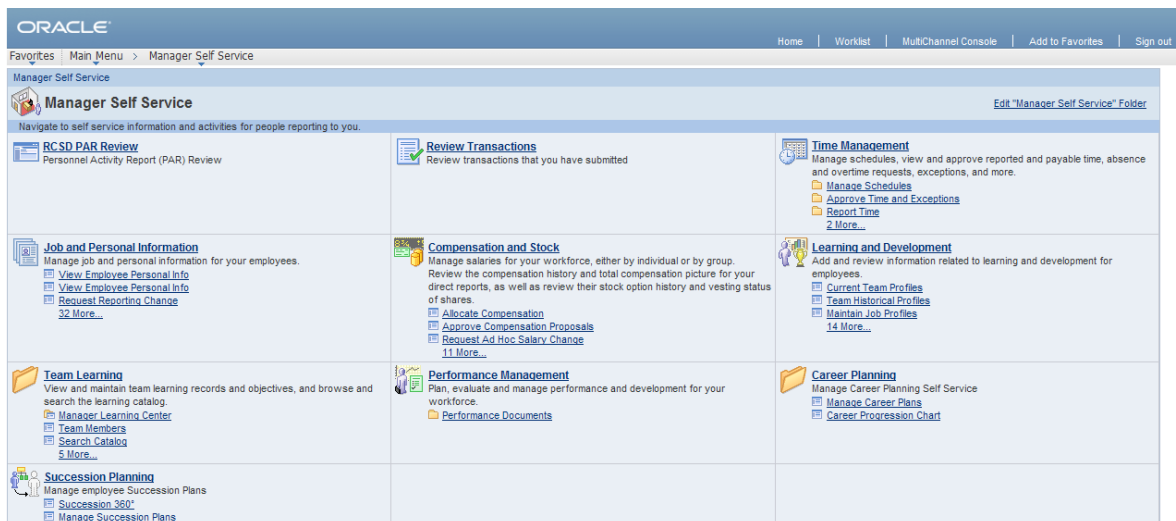


5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page). *Note:* the menu options available for your use will vary depending upon your job responsibilities and the associated system security. For brevity, a number of menu options for this manager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

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



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

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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.

Employee ID	Employee	Document Type	Evaluation Begin	End Date	Job Title	Status
9913004	Barney Rubble	Unannounced Observation	09/03/2013	05/01/2014	TCHR-SPEC ED	In Progress

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

Current Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
Unannounced Observation: 09/03/2013 - 05/01/2014

Step	Status	Evaluation End	Action	Next Action
Complete Manager Evaluation	Not Started	05/01/2014		Start

[Return to Select Documents](#)

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

ORACLE

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

Performance Document - Unannounced Observation

Manager Evaluation

Barney Rubble, Tchr-Elem 4-6

Unannounced Observation: 09/03/2013 - 05/01/2014

Author:	Mister Slate	Role:	Manager
Status:	In Progress	Evaluation End:	05/01/2014
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](#)

▶ **Observation Date**

▶ **Unannounced Observation Comments**

▶ **Post-Observation Conference**

▶ **Employee Comments/Rebuttal**

Attachments

No Attachments have been added to this document

[Add Attachment](#)

▶ **Audit History**

[RCSD Signature Page](#)

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

- 5.10 Click on the [Expand All](#) link to open all of the sections of the Unannounced 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.

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▼ 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.

Save
Available for Review

[Return to Document Detail](#)

5.12 The first section of the Unannounced 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:	Barney Rubble
Empl ID:	9913004
Employee Classification:	Tenure Teachers

Return

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

Rating History

Evaluatee:	Barney Rubble	Empl ID:	9913004
Document Type:	Unannounced Observation	End Date:	05/01/2014

Overall Rating

This Employee doesn't have any overall rating history.

Return

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

▼ **Observation Date**

Enter the actual date of the Observation.

5.18 Enter the date you conducted the Unannounced Observation in the *Observation Date Summary* field. Be sure to periodically save your comments by clicking on the **Save** button (located at either the top or the bottom of the performance document).

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.

▼ **Unannounced Observation Comments**

Please use criteria in your unannounced observation that are based upon the factors included in the employee's year-end evaluation. Please attach a document with additional comments if desired.

5.20 Click in the *Unannounced Observation Comments Summary* section of the performance document. Enter your observation comments and spell check as needed.

▼ **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.).

5.21 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.

5.22 The next section of the Unannounced Observation document is for the *Employee Comments/Rebuttal*. As the administrator or reviewer, you can only view this section of the performance document.

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Attachments
No Attachments have been added to this document

[+ Add Attachment](#)

5.23 If you wish to add any attachments to the unannounced 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 Unannounced Observation.

File Attachment [X]

[Browse...](#)

[Upload](#) [Cancel](#)

5.24 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.

File Attachment [X]

C:\Documents and Settings\9913004\My Documents\vePe [Browse...](#)

[Upload](#) [Cancel](#)

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

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
UO BR 1030.docx	<input type="text"/>	<input type="text" value=""/>	11/05/2013 11:02:47AM	Mister Slate	

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

5.27 From the drop down for the *Attachment Audience* field (example below), select the *EE and Mgr* selection. Selecting the *EE and Mgr* option will enable the employee to view the attached document. 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.


Attachment Audience

[v]

EE and Mgr

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5.28 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.

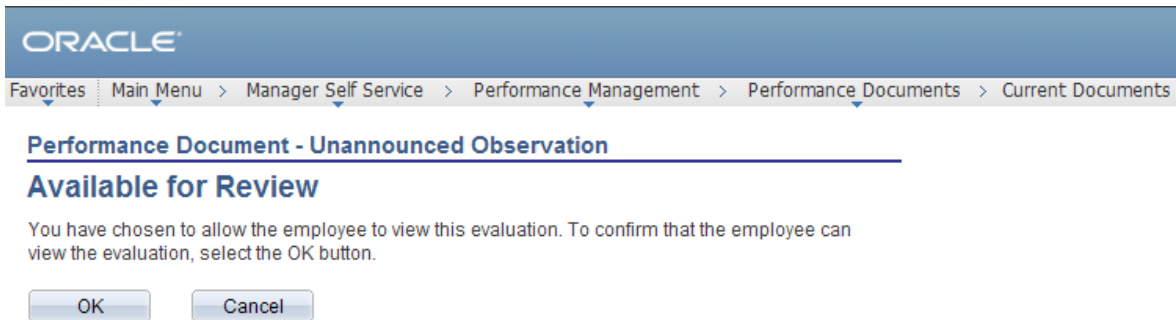


5.29 Click the **Save** button to save the Unannounced Observation.



5.30 Once you have written the Unannounced 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 Unannounced Observation assessment and enter their comments/rebuttal.



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



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- 5.32 Note the confirmation that you have successfully made the Unannounced Observation available for the teacher’s review.
- 5.33 Click on the [Return to Select Documents](#) link to return to your roster of teachers to evaluate if you have additional Unannounced Observation evaluations to write or simply **Sign out** of PeopleSoft if you have completed writing all of your Unannounced Observations.

*The following process steps must be performed to successfully **Complete** the Unannounced 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 evaluation documentation for full process step details.*

- 5.34 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 Unannounced Observation to “Review Held”.
- 5.35 As with the final, year end evaluation, the employee will be able to add their comments to the Unannounced Observation and will need to click on the [Acknowledge](#) link and complete the process steps for Acknowledging that the Unannounced Observation was completed. These are similar to the year end evaluation process.
- 5.36 The final step of completing the Unannounced Observation for the teacher must be completed by the manager and that is to click the [Complete](#) link to finalize the process for the Unannounced Observation and move the document into the Historical Documents folder.
- 5.37 Once these process steps have been done, you have completed the Unannounced 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:
11/05/13	Original	Original Document

End of Procedure