

K-12 Evaluation Solutions



STAGES TRAINING MANUAL

EVALUATEE TRAINING MANUAL

March 2012

STAGES is optimized for Internet Explorer (9+), Firefox (3+), Safari (4+) and Google Chrome (10+)

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Evaluatee Training Manual

Common Terminology

Evaluator	Commonly a Principal or Director. Someone who evaluates someone else.
Evaluatee	Commonly a Teacher. Someone who gets evaluated.
Evaluation Process Checklist	The list of tasks that an Evaluator has to complete in order to evaluate someone. Checklists for each type of user have already been established.

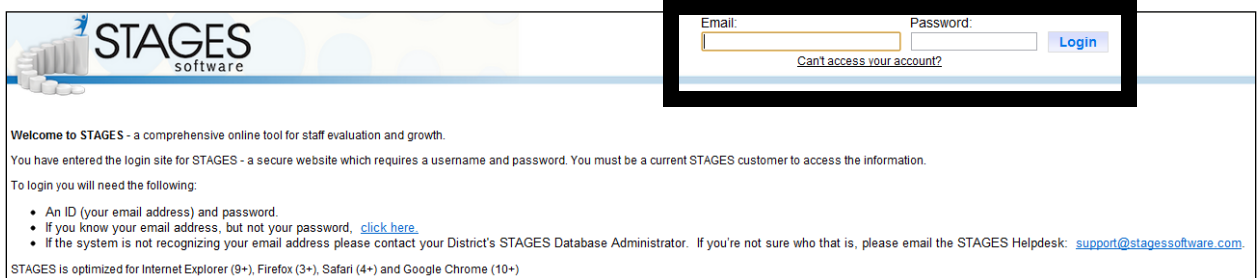
IMPORTANT NOTE

The system uses pop-up windows as a means of navigation through the site. **Using the "Back" button of your internet browser window may cause an immediate log-out.**

Logging into STAGES

You should receive an email from your evaluator informing you that your evaluation has been started and requesting that you log into STAGES to begin working on it. There are several ways you can access the STAGES Login site.

1. Log into STAGES on the internet at <https://live.stagessoftware.com/> or you can go to the STAGES home page (www.STAGESSoftware.com) and then click "Login" (you may also click on the link contained in the email).
2. Enter your **Userid** (typically your school email address) and your STAGES Password.
3. Click on "Login"

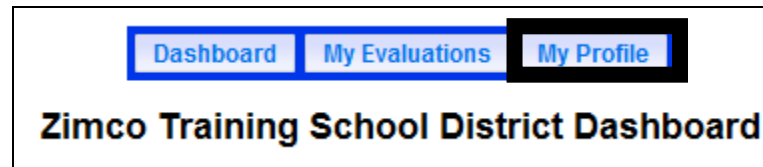


4. If you forgot your password click on "Can't access your account?"
5. If you do not have a login for STAGES contact your District STAGES Database Administrator.

Note: The password ***is*** case sensitive and may be different from your school email password.

Verifying your User Profile

Once logged in you should see the following screen.

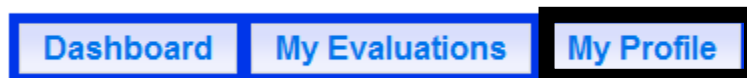


1. Click on the “**My Profile**” button and verify the information given on the Profile screen.

NOTE

The only thing an Evaluatee has permission to change on this screen is the “Password”. Any other changes must be requested through your school district’s Human Resource Department.

Changing your password from within your User Profile



1. Click on the “**My Profile**” button.
NOTE: The only item you can change on your User Profile screen is your password.
2. Scroll down to the bottom of the screen
3. Enter a **new password** in both the Password and Confirm Password boxes.
4. Click on the “**SAVE**” Button.



User Profile Information

Save

User Information

First Name: Candy * Gender: [v]
Last Name: Apple * Ethnicity: [v]
Email: capple@test.net * State ID: 0
Hired Date: [v] Termination Date: [v]
Trained Mentor: [x] Initial Certification University: [v]
Tenured: [] Highest Education Level: [v]
Highly Qualified: [] Elementary [] Secondary []
Grade(s): [] Elementary [] Middle [] High []
[] PK [] 5 [] 9 []
[] K [] 6 [] 10 []
[] 1 [] 7 [] 11 []
[] 2 [] 8 [] 12 []
[] 3 [] Sp Ed. []
[] 4 [] Vo Ed. []
[] N/A []
Building(s): No Building Groups have been created
Notes: [v]

Evaluation Setup

Evaluation Group: SATEST * Evaluation Checklist: Probationary Year 1 *
Rubric Set: Teacher Rubric - Mini Weighted-Demo * Next Evaluation Date: 05/31/2012 *
Default Expected Performance Level: Ineffective * Probationary: [v]

Access Settings

Login Email/Name: capple@test.net [x] Active
Change Password: [v] (Enter Again)
Role: [v] Principal/Evaluator [x] Teacher/Evaluatee
Save

Beginning your Evaluation

1. Click on the “My Evaluations” button.



My Evaluations

#	Eval ID	ID / E-Mail	Last	First	Checklist	Rubric	Due Date	Completed Date	
1	2650	mkart@test.net	Kart	Mario	Probationary - Year 4	Teacher Rubric - Mini Weighted-Demo	04/13/2012	Current Eval	Open

2. Click the “Open” button next to the “Current Eval” item
3. Your Evaluation Checklist will appear on the screen and look similar to the following:

Evaluation Process Checklist

EVALUATION INFO

Grid

PDF Report

Evidence

Request Review

Date Evaluation Due: 04/13/2012

Checklist Name: Probationary - Year 4









2650

Zimco Training School District: (99988)
Mario Kart (mkart@test.net)

Date	Action	Due Status	Released Status	Required Status
SELF EVALUATION				
Self-Evaluation Requested	Requested 03/22/2012	Edit		
PROFESSIONAL DEVELOPMENT GOALS				
	Set Professional Development Goals	Edit		
INFORMAL OBSERVATION FORMS				
	Walk Through Observation	Locked		
	Walk Through Observation	Start		
	Walk Through Observation	Start		
OBSERVATIONS				
	Observation 1	Not Started		
	Observation 2	Locked		
	Observation 3	Locked		
	Observation 4	Not Started		
	Observation 5	Not Started		
INDIVIDUAL PERFORMANCE EVALUATION				
	Summative Evaluation	Locked		
	Summative Evaluation Comments	Locked		
	Weighted Summary Results	Locked		
	Final Evaluation Summary	Locked		
	Teacher is Recommended for:	Locked		
SIGNATURES				
	Evaluatee Signature	Locked		
	<input type="checkbox"/> By typing my name and clicking the Submit Signature button, I acknowledge that I have completed this evaluation.	Not Completed		
NEXT EVALUATION DATE				
	Set Due Date for Next Evaluation	Open Items		

NOTE: The Evaluation Process Checklist” is customizable by District and you may not have all of the options shown on the example above.

Please refer to the CHECKLIST EXAMPLE above - Working from Right to Left:

Heading	Symbol	Description
Required Status		If there is a red arrow in this column, the module is required to complete the evaluation. If there is a green check mark in the column then the module was required – but it is now completed.
Released Status	 	If the circle is red, that line item has not been released by the Evaluator and the Evaluatee cannot view it. If the circle is green, that module has been released by the Evaluator and the Evaluatee can view that module. •
Due Status	   	If you see the amber/green arrows in this column, that module has a due date. Hover your mouse pointer over that line item to view a pop-up with the due date. A red check mark inside a box indicates that the module has not been completed. A green check mark indicates that the module has been completed
Action	Locked	Evaluator must Release the item to you in order for you to view the module
Action	Not Started	Module has not been started
Action	Not Completed	Module has not been completed
Date		Lists a date the module was last acted upon

Completing your Self-Evaluation

If your evaluator wants you to complete a self-evaluation you will see an option to “Edit” the Self-Evaluation. The Edit button will appear even if nothing has been entered into the Self-Evaluation. Your evaluator has to “Request” you complete the Self-Evaluation before it will be available to you.

1. Click on the “**Edit**” button
2. The Self-Evaluation is compiled based on the Rubric you have been assigned. You can also see your expected proficiency level on this screen.

SELF EVALUATION			
	Self-Evaluation Requested	Requested 03/22/2012	<div>Edit</div> 

- Clicking on the “**Domain Title**” (*Classroom Environment* in this example) will expand the screen to allow you to enter comments and a proficiency rating for each element. If you just want to enter comments at the Domain Level, you can click on the “Domain Title” again to collapse the self-evaluation and that will allow you to enter comments at the Domain level only

NOTE

The software does not require you to enter comments in any of the text boxes, but you are required to enter a proficiency rating. Your evaluator may request that you enter proficiency ratings at the Element level, Domain level or both.

Request Self-Evaluation for Mario Kart

Classroom Environment Expected Level: Effective

Description	Proficiency Rating
Demonstrating Knowledge of Students: Knowledge of Age Group Characteristics	Effective
<p>Element Comments:</p> <div></div>	

- Click on the underlined title of the “**Element**” to view a description of each element and their respective proficiency rating.
- You can use the **Copy** button to copy the descriptor into the “Element Comments” are of the Self-Evaluation.
- Click on the X in the upper-right corner of the pop-up window to close this window.

Proficiency Descriptions

Classroom Environment
Demonstrating Knowledge of Students: Knowledge of Age Group Characteristics

1) Ineffective
 The teacher displays minimal knowledge of developmental characteristics of age group. **Copy**

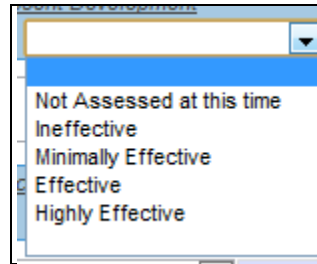
2) Minimally Effective
 The teacher displays knowledge of developmental characteristics of age group. **Copy**

3) Effective
 The teacher displays understanding of typical developmental characteristics of age group as well as exceptions to general patterns. **Copy**

4) Highly Effective
 The teacher displays thorough knowledge of typical developmental characteristics of age group, exceptions to the patterns, and the extent to which each student follows the patterns. **Copy**

Close

7. Select your proficiency rating by clicking on the drop-down button and clicking on one of the choices in the list.

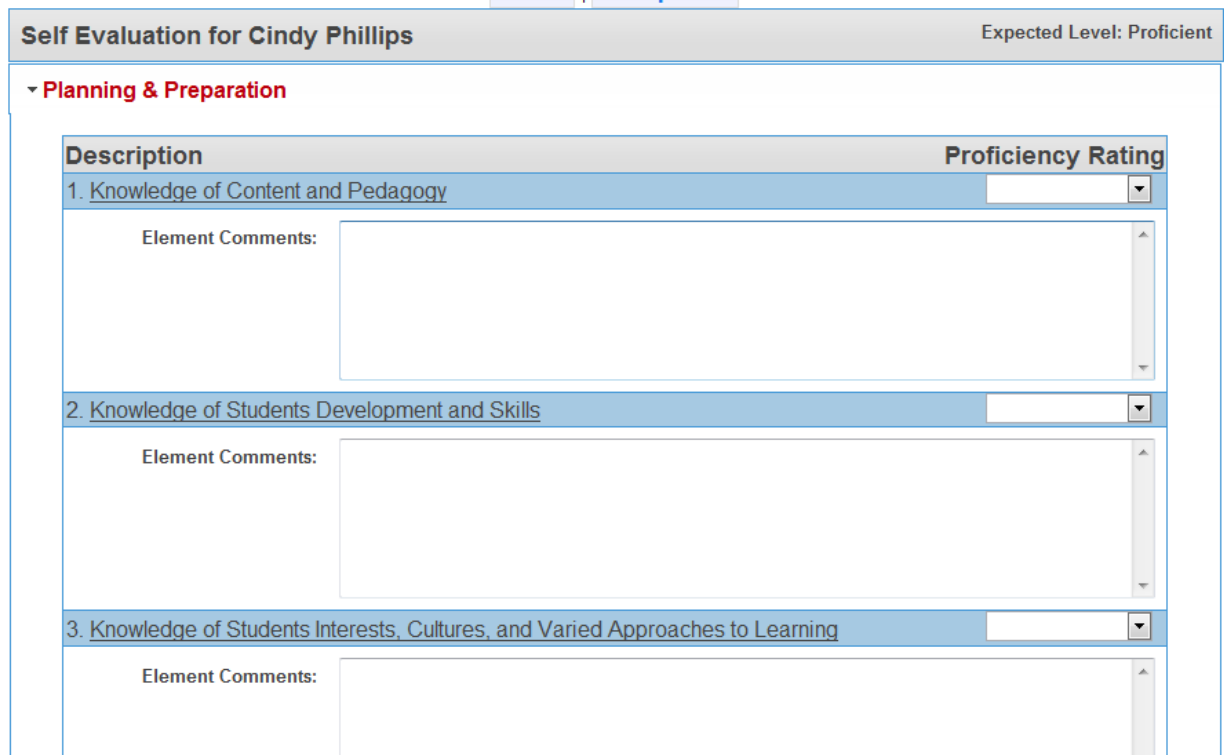


A screenshot of a dropdown menu for selecting a proficiency rating. The menu is open, showing five options: "Not Assessed at this time", "Ineffective", "Minimally Effective", "Effective", and "Highly Effective". The "Effective" option is currently selected and highlighted in blue.

8. You can select "**Save**" to allow you to finish the self-evaluation at a later time.
9. Click on the "**Completed**" button once you have completed the Self-Evaluation.
NOTE: You will not be able to edit the Self-Evaluation once you click on the "Completed" button.





A screenshot showing two buttons: "Save" and "Completed". The "Completed" button is highlighted in blue. An arrow from the text in step 9 points to the "Completed" button.



A screenshot of a self-evaluation form titled "Self Evaluation for Cindy Phillips". The form has a header bar with the title on the left and "Expected Level: Proficient" on the right. Below the header, there is a section titled "Planning & Preparation" with a red arrow icon. This section contains a table with three rows, each representing a different knowledge area. Each row has a "Description" column and a "Proficiency Rating" column. The first row is "1. Knowledge of Content and Pedagogy", the second is "2. Knowledge of Students Development and Skills", and the third is "3. Knowledge of Students Interests, Cultures, and Varied Approaches to Learning". Each row also has an "Element Comments" text area below the description. The "Proficiency Rating" column contains dropdown menus. The form is currently in the "Save" state, as indicated by the blue "Save" button and the grey "Completed" button in the header bar.

Description	Proficiency Rating
1. Knowledge of Content and Pedagogy	
2. Knowledge of Students Development and Skills	
3. Knowledge of Students Interests, Cultures, and Varied Approaches to Learning	

SELF EVALUATION	
 Self Evaluation	<div> <div>Requested Finished</div> <div>01/11/2011 01/11/2011</div> </div> <div>View</div>
 Status: Not Released To Evaluator	<div>Release</div>


10. Click on the “**Release**” button to allow your supervisor access.

NOTE

Your supervisor will not be able to view your Self-Evaluation until you click on the “Release” button.

Entering Information in Custom Forms

STAGES offers Districts the ability to automate evaluation forms that are already in use within the district. Because this is District dependent the following forms are only generic examples. Advanced Forms vary widely. But below are a few common features.

Symbol	Description
	A “Lock” next to an item indicates that the item is locked until the Evaluator/Evaluated releases it to the other party for review or completion.
<div>Start</div>	A “Start” button it indicates the item is available for the Evaluator/Evaluated to access.
<div>Save Save & Submit</div>	Forms vary so you may have permission to Save, Save & Submit or Complete a form. It is possible for you to have all permissions or limited permission.

Entering IDP Goals

You may be required to enter Goals into your Evaluation. This is done through the “**Set Professional Development/IDP Goals**” button on the Evaluation Process Checklist page.

1. Click on the “**Edit**” button next to the section titled “**Set Professional Development/IDP Goals**”



This will open the “**Set Professional Development Goals**” page

NOTE

The title of this option may vary depending on your District Settings.

Goal/Purpose of Goal

Employee's Plan to accomplish Goal/Resource Needed to Accomplish Goal

Supervisor Support

Timeline for Accomplishment of Goal

Method for Assessment

Add Another Goal

Save

Save & Submit

2. Type the “**Goal/Purpose of Goal**” in the appropriate text box.
3. Enter the “**Plan to Accomplish**” in the appropriate text box.
4. Enter the “**Supervisor Support**” and press Tab
5. Enter the “**Timelines**” and press Tab
6. Enter the “**Progress Indicator**”
7. Click on the “**Save**” or “**Save & Submit**” to release to Evaluator.

NOTE

Only an Evaluator can add an IDP Goal. Evaluatees can add “**Professional Development Goals**”

Editing an existing Goal

Goals can be edited during the Evaluation process, until the Evaluator locks the goal. Once the goal is Locked no changes can be made to the goal.

1. Click on the **Edit** button on the Goals section of the Evaluation Process Checklist.

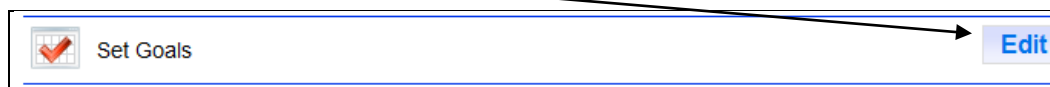


2. Make the necessary changes to the Goal and click on the **Save** button.

Deleting a Goal

Once a goal is added it is possible to delete an entire goal.

1. Click on the **Edit** button on the Goals section of the Evaluation Process Checklist.



2. Click on the **Delete Goal** button located at the bottom of each Goal.

Note: Your Evaluator will receive email notification whenever a change is made to the Goals section of the evaluation.

Uploading Evidence

Evidence to substantiate an evaluation can be uploaded to the evaluation through the button titled "Evidence" at the top of the Evaluation Process Checklist.

Evaluation Process Checklist			
EVALUATION INFO			Evidence
821	Personnel Info: Cindy Phillips	Date	Action Required
	Date Evaluation Due:	04/29/2011	

1. Click on the "Evidence" button at the top of the Evaluation Process Checklist screen.

- Click on the "Browse" button

Evidence

The evaluator is the only one who can add Evidence to this screen.

File:

- Locate the file you want to upload by navigating through your computer's directory structure and select it.
- Once the file is listed in the "File" box, click on "Add File"

Opening an Item uploaded as Evidence

Evaluation Process Checklist

EVALUATION INFO **Evidence**

821	Personnel Info: Cindy Phillips	Date	Action	Required
	Date Evaluation Due:	04/29/2011		

- Click on the "Evidence" button at the top of the Evaluation Process Checklist screen.
- Click on the "Open" button next to the item you want to view.

Evidence

The evaluator is the only one who can add Evidence to this screen.

File:

CPR Certificate.docx

Deleting Evidence

Evaluation Process Checklist

EVALUATION INFO **Evidence**

821	Personnel Info: Cindy Phillips	Date	Action	Required
	Date Evaluation Due:	04/29/2011		

- Click on the "Evidence" button at the top of the Evaluation Process Checklist screen.

- Click on the **“Delete”** button next to the item you want to delete.

Evidence

File: No file chosen

Evidence Files

Uploaded: 11/09/2011 02:37:16 PM -	Instructions for resetting your STAGES Password.pdf	<input type="button" value="Open"/> <input type="button" value="Delete"/>
------------------------------------	---	---

Viewing an observation

Once your supervisor releases your evaluation you will receive an email notification stating that your evaluation has been released. You can login to your STAGES account and view the Observations, Individual Performance Evaluations, etc.

- Login to STAGES
- Click on the **“My Evaluations”** button
- Click on the **“Open”** button next to the Current Evaluation

Welcome, **Cindy Phillips** | Logged in as Evaluatee

 | |

Dashboard
My Evaluations
My Profile

My Evaluations

#	Eval ID	ID / E-Mail	Last	First	Due Date	Completed Date	Action
1	821	CPhillips@demodistrict.org	Phillips	Cindy	04/29/2011	Current Eval	<input type="button" value="Open"/>
2	820	CPhillips@demodistrict.org	Phillips	Cindy	08/31/2010	01/11/2011	<input type="button" value="Open"/>

Rubric Review

Review Teacher Descriptions and Ratings:

- Click on the **“View”** button next to the Observation you want to view.

EVALUATION INFO
Evidence

821 **Personnel Info:**
Cindy Phillips

Date
04/29/2011

Action

Required
☒

Date Evaluation Due:

04/29/2011

SELF EVALUATION

Self Evaluation

Requested Finished
01/11/2011 01/11/2011

Status: Released To Evaluator

OBSERVATIONS

Observation 1

01/11/2011

NOTE: You cannot make any changes to the Observations screen. You can ONLY view it.

- Click on the “Close” button at the top of the screen.

Viewing your Individual Performance Evaluation

Once your supervisor releases your evaluation you will receive an email notification stating that your evaluation has been released. You can login to your STAGES account and view the Observations, Individual Performance

- Login to STAGES
- Click on the “My Evaluations” button
- Click on the “Open” button next to the Current Evaluation

Welcome, **Cindy Phillips** | Logged in as Evaluatee [Check Spelling](#) | [Print](#) | [Logout](#)

[Dashboard](#) [My Evaluations](#) [My Profile](#)

My Evaluations

#	Eval ID	ID / E-Mail	Last	First	Due Date	Completed Date	Action
1	821	CPhillips@demodistrict.org	Phillips	Cindy	04/29/2011	Current Eval	Open
2	820	CPhillips@demodistrict.org	Phillips	Cindy	08/31/2010	01/11/2011	Open

Rubric Review

Review Teacher Descriptions and Ratings: [Open New Window](#)

- Click on the “View” button next to the Individual Performance Evaluation.

EVALUATION

✓ Individual Performance Evaluation 03/16/2011 [View](#)

Viewing your Individual Development Plan

Once your supervisor releases your evaluation you will receive an email notification stating that your evaluation has been released. You can login to your STAGES account and view the Observations, Individual Performance Evaluation, Goals and IDP.

1. Login to STAGES
2. Click on the **“My Evaluations”** button
3. Click on the **“Open”** button next to the Current Evaluation.

Welcome, **Cindy Phillips** | Logged in as **Evaluatee** [Check Spelling](#) | [Print](#) | [Logout](#)

[Dashboard](#) [My Evaluations](#) [My Profile](#)

My Evaluations

#	Eval ID	ID / E-Mail	Last	First	Due Date	Completed Date	Action
1	821	CPhillips@demodistrict.org	Phillips	Cindy	04/29/2011	Current Eval	Open
2	820	CPhillips@demodistrict.org	Phillips	Cindy	08/31/2010	01/11/2011	Open

Rubric Review

Review Teacher Descriptions and Ratings: [Open New Window](#)

1. Click on the **“Edit”** button next to the **“Set Professional Development/IDP Goals”** option in the Evaluation Process Checklist.

GOALS

✔ Set Professional Development/IDP Goals [Edit](#)

NOTE

Only the Evaluator can add an IDP Goal. An Evaluatee can add “Professional Development Goals”

Set Professional Development/IDP Goals for Deanna Day

Save

Save & Submit

Goal 1

Goal/Purpose of Goal

Employee's Plan to accomplish Goal/Resource Needed to Accomplish Goal

Supervisor Support

Timeline for Accomplishment of Goal

Method for Assessment

Add Another Goal

2. Enter information in the text boxes as appropriate.

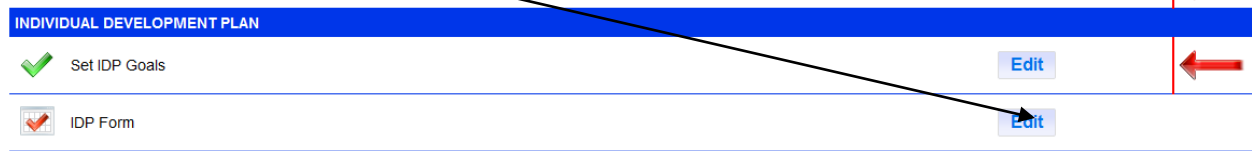
NOTE

- You can click on the **Save** button to Save your work and continue at a later time.
- You click on the **Save & Submit** button to Save the Generic Goal and Submit to the Evaluator.
- An email will be sent to the Evaluator informing them that the Goal has been created and/or updated.

Viewing an IDP Goal

Once the Evaluator has submitted an IDP Goal you will have another item listed in your Evaluation Process Checklist. It will be titled "IDP Form"

1. Click on the **"Edit"** button next to the IDP Form item in your checklist.

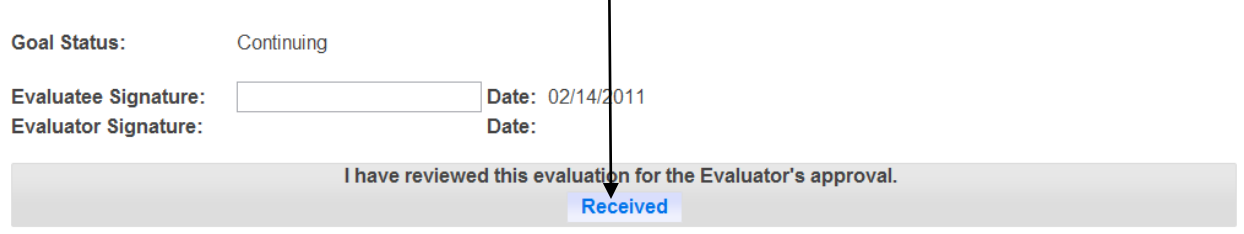


INDIVIDUAL DEVELOPMENT PLAN

✓ Set IDP Goals Edit

✓ IDP Form Edit

2. Review the information and click on the **"Received"** button.



Goal Status: Continuing

Evaluatee Signature: Date: 02/14/2011

Evaluator Signature: Date:

I have reviewed this evaluation for the Evaluator's approval.

Received

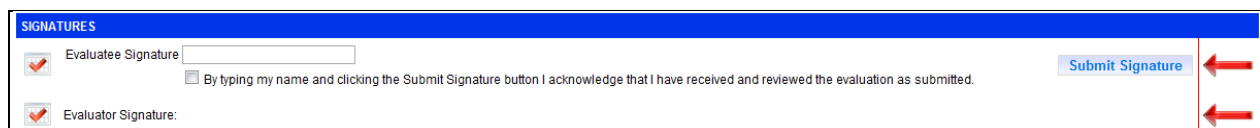
NOTE

Clicking the "Received" button acknowledges that you have received the information and sends an email to your Evaluator that you have "received/reviewed" the information.

Signing your Evaluation

An evaluation is not considered complete until both the Evaluatee and the Evaluator have signed the evaluation.

1. Type your name in the signature box
2. Click the check box next to the option to indicate that you have reviewed/received the evaluation.
3. Click the **"Submit Signature"** button



SIGNATURES

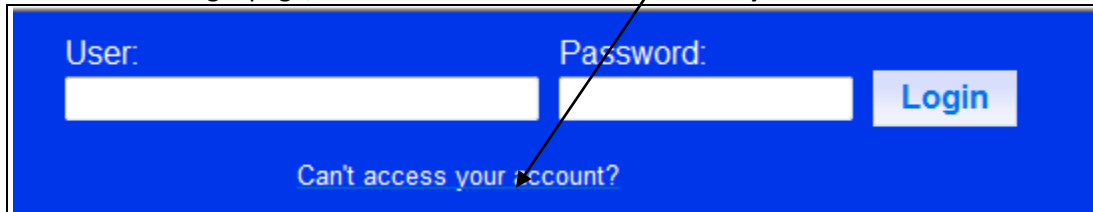
✓ Evaluatee Signature: Submit Signature

☐ By typing my name and clicking the Submit Signature button I acknowledge that I have received and reviewed the evaluation as submitted.

✓ Evaluator Signature:

Resetting a Forgotten Password

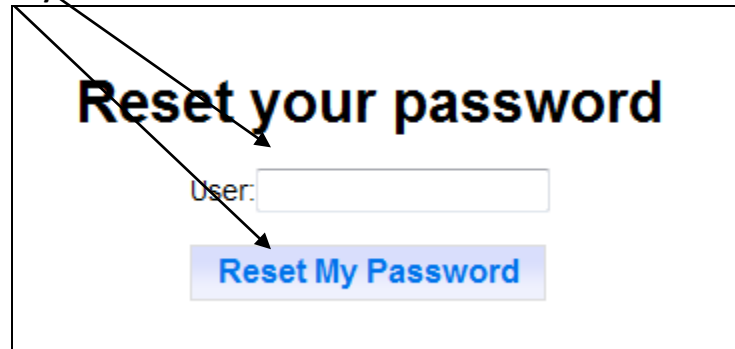
1. From the main login page, click on the link titled **"Can't access your account?"**



User: Password: [Login](#)

[Can't access your account?](#)

2. Enter your Userid (which should be your email address)
3. Click on **"Reset My Password"**



Reset your password

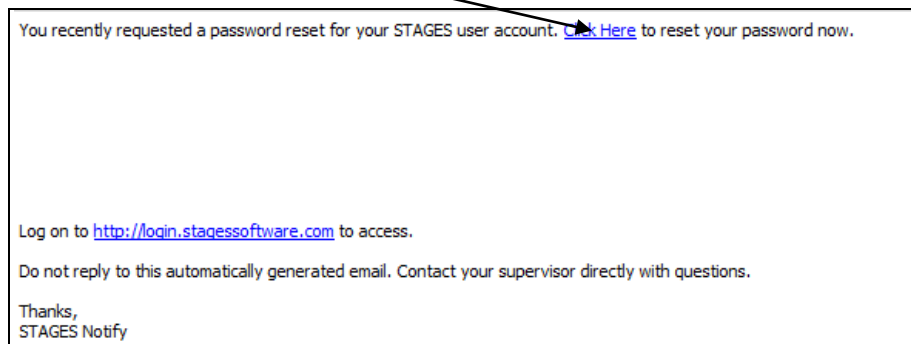
User:

[Reset My Password](#)

NOTE

You will receive an email with a link to reset your password. The email will be sent to the email address entered in Step 2 above.

4. Open your email account and click on the link. (NOTE: It can take up to an hour to receive the email).

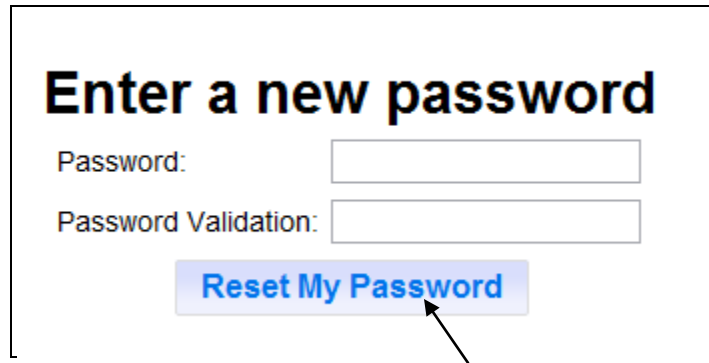


You recently requested a password reset for your STAGES user account. [Click Here](#) to reset your password now.

Log on to <http://login.stagesoftware.com> to access.

Do not reply to this automatically generated email. Contact your supervisor directly with questions.

Thanks,
STAGES Notify



Enter a new password

Password:

Password Validation:

[Reset My Password](#)

5. Enter your password in both boxes and click on the “Reset My Password” button.

NOTE

You will receive a confirmation message stating that the password was successfully changed and you can now login with the new password. The password reset link is only open until 2 a.m. the next morning.

Receiving Technical Support

It is our goal to make STAGES as easy and user-friendly as possible. However, we do recognize that there may be times when technical support is required. Your school district has an assigned District Technical Support contact. That person should be contact for any technical assistance needs you may have. If they are not able to resolve the issue, the District Support Contact will contact STAGES Software directly. If you do not know who your STAGES Technical Support Contact person is, please contact your Human Resources Department.