1. Load and Set Up Rubric

a. Rubric Outline
   i. Here you can click on any piece of the rubric and edit wording or add weighting

b. Performance Levels
   i. Here you can add or edit levels, set required number of "Evaluations" for tenured/non-tenured staff based on previous ratings, include on rating forms, and create performance rules
   ii. Select "Manage Performance Descriptors" to edit descriptions of each component level
   iii. Turn on/off performance rule options and edit description

c. Student Growth
   i. Add Level including Level Name, Score Value and Decision Rule
   ii. Turn on/off Student Growth and Weighted Average
   iii. Manage Student Growth Assessments to define assessments in your content areas (created at district level on Settings tab)
   iv. Enter Professional Practice and Student Growth Weights

d. Forms
   i. Select "Manage Forms"
   ii. Select the "Group" to which you wish to add a form

iii. Select “Add Form”
iv. Enter “Form Name”, Select “Section” form goes with, Enter “Instructions” and Select whether you would like to allow “Teacher Access” (if you want the ability to email them the form for completion right in the application)
v. Select “Save” and Form will appear on the left
vi. Select “Questions” tab and click Add New Question
vii. Select “Type” - (Text, check box or yes/no)
viii. Enter question and options as needed
ix. Select “Save”
x. Use up or down arrow buttons to move questions
xi. Select “Edit” button to change question or red trash can button to delete

e. Options
   i. Set “School Year”
   ii. Choose whether you want to see Observation Summary on Informal Observations
   iii. Define Evaluation Options
   iv. Customize the Name for the Observation Summary
   v. Customize Observation Summary Comments Label
   vi. Add additional Comments area on Obs Summary
   vii. Name additional Comments area
   viii. Turn on/off teacher self rating and teacher evidence
   ix. Customize teacher evidence label
   x. Define Summative Options

xi. Choose whether you want to see average ratings on the professional practice summary part of the Summative Evaluation
xii. Choose whether you want to weight your average performance ratings
xiii. Show previous ratings even if no previous evidence present
xiv. Customize Professional Practice Comments label
xv. Turn on additional Comment Area on Professional Practice
xvi. Customize 2nd Comment Area label
xvii. Select "Duplicate Rubric" if you'd like to create multiple rubrics with only slight variations

Note: if you edit rubric, click the circular arrow button at the top left of the rubrics page (near the create rubric button) to refresh before creating a new evaluation with the rubric you edited

2. Add/Manage Teachers

a. From the "Teachers" tab or Home Screen
    i. Select "Add Teacher"
    ii. Or Select "Import Teachers"
        1. Go to https://www.evaluwise.org/support/manuals/ and download the excel csv template and template example
        2. Place your teachers into the csv template provided **(if using a mac you must save the file as a csv – windows version or it will not work)**
        3. **The following fields are required (First Name, Last Name, Email, Tenured/Non, School)**
        4. **School(s) entered in the upload file must match the schools defined at the district level on the Settings tab exactly (case, spacing) or errors will occur**
        5. When creating the csv file you should have no formatting (borders, bold, hyperlinks)
        6. Select "Choose File" to select the csv template with your teachers
        7. Select Upload
    iii. Select "Manage Teachers"
        1. Check or uncheck teachers you wish to hide or unhide on your teacher list (this simply grays out their name it does not alter their data or evaluations in any way)

3. Add Evaluations

a. Select the "Evaluations" tab
   i. Select "Add Evaluation" or "Add Informal Observation"
      1. Select the Teacher you want to evaluate
      2. Select the Rubric you want to use
      3. Select the Form Group you want to use
      4. Select Content Area ONLY if using advanced student growth, else ignore
   ii. Or Select "Add Summative Evaluation" (this would be after completing several Evaluations/Informal Observations on a teacher)
      1. Select the Teacher you want
      2. Select the Rubric you want
      3. Select the Form Group you want
      4. Select the Content Area ONLY if using advanced student growth, else ignore
      5. Select the completed Evaluations/Observations you want to include **(for formal evaluations to be available for summative inclusion they must be marked complete using the slider at the upper right of the formal evaluation near the teacher access & manage artifacts buttons)**

b. Evaluations can also be added from the home screen buttons or the individual teachers page using the + button

4. Complete Evaluations

a. Select "Set Date" to schedule the date and time of the particular evaluation section **(you must do this in order for scripting to work properly)**
b. Select "Forms" next to the section of the evaluation/informal observation in which you wish to complete forms created & assigned to this section in the rubric
c. Fill out the "Basic Details" (pre observation section of formal evaluation only) as desired; all other evaluation/informal observation will only show assigned form(s)
d. Select the form(s) tab(s) and complete or review as needed
e. Select "Email Options" or "Print" to produce electronic or hard copy of form; or Sort to for ascending/descending display based on time stamp
f. Select the "Script" button next to desired evaluation section and begin entering evidence in the "Actions & Statements by Teacher" box (hit enter to record and time stamp each piece of evidence)
g. You can edit the evidence by selecting the "Edit" button without changing the time stamp
h. Select the "name of rubric's 2nd level" button on the right to pair each statement of evidence with one or more rubric components
i. Select the "Print Options" or "Email Options" buttons to print or email the evidence scripted

5. Summative Evaluations

a. Select "View" next to Professional Practice Summary to view evidence for all included evaluations and assign ratings to each rubric level 2 item
b. Enter text into the comments box(es) near the bottom of each tab for each rubric level 1 item
c. Select "View" next to Summative Forms to complete any form(s) attached to the summative during rubric setup
d. Select "View" next to View Results & Set Ratings
e. Here, depending on the settings defined in the rubric, you can view Professional Practice Averages and/or Professional Practice Ratings Counts, manually set Professional Practice Rating and enter Notes/Comments
f. If using student growth you can input assessment scores, calculate the growth factor, corresponding rating, set overall student growth level and enter Notes/Comments
g. The overall Summative Rating will be calculated (using student growth if turned on)
h. Manually adjust the Summative Rating and enter Notes/Comments as desired

6. Manage Artifacts

a. If you have documents you would like to attach to an evaluation select the “Manage Artifacts” button in the upper right of the particular evaluation to which you wish to attach the artifact
b. Select “Choose File” to choose the file from your computer
c. Select the component you want to pair the artifact with
d. Select Add Artifact
e. Artifacts the teacher has submitted will also appear and this is where you would pair those artifacts with the rubric
f. If an artifact has been paired with the rubric the alphanumeric part of the rubric it has been assigned will appear next to the file thumbnail (e.g. 4a etc.)

Note: you may upload word, excel, ppt, pdf, txt and photo files

7. Teacher Access – Overview

Part I – Grant Form Access

a. Select Rubrics tab
b. Select Rubric
c. Select Forms tab within rubric
d. Select Manage Forms button
e. Select form group and form
f. Move Teacher Access slider to Yes to allow them to view and complete form if evaluator sends them teacher access email

Part II – Grant Summary, Evidence, Rating Access and Notify

g. Select Evaluation tab

h. Select existing or Add a New Evaluation, Informal, or Summative
i. Select the Teacher Access button for the particular evaluation
j. Select Observation Summary, View Evidence or Teacher Self Rating to determine what teacher may view/complete
k. Click email access to teacher button to notify teacher of access

Note - prevent further editing of form(s) by selecting Section Complete after clicking on the date circle for a particular evaluation section

Part III – Teacher Dashboard

l. Teacher clicks link in email they receive to go to Teacher Dashboard
m. From Teacher Dashboard teacher may (depending on permissions granted by evaluator)
    i. Select Answer Questions
        1. Complete questions
        2. Select Save
    ii. Select View Summary/Self Rating
        1. Input Evidence
        2. Select a Rating
        3. Select Save
    iii. Select Upload Document
        1. Select File from computer
        2. Enter notes
        3. Submit

8. Observation Summary

a. Select “View” next to Observation Summary
b. Select the tab for the Domain whose evidence you want to view
c. Here you can rate the components of each domain (assigning ratings are optional and may be turned off in rubric options for individual evaluations)
d. Enter notes in the Comments section(s) at the bottom of each tab
e. The Signatures tab allows remarks from both the administrator and teacher to be entered
f. Signatures of both the administrator and teacher can be entered electronically either on a tablet or computer (a teacher’s signature will lock the observation summary)
g. The summary may be printed or emailed using the buttons near the top (turn print background images on for optimal printing)

9. Settings

a. Login Settings tab allows you to change your name, email and password

b. Subscription tab gives you info on your subscription and allows you to add additional licenses by clicking on the "Manage Subscription" button (administrator account Only)

c. Preferences tab allows you to set the max number of teachers and evaluations to be displayed on your list in the teachers and evaluations tab (useful if large district with many teachers and evaluations) as well as to turn on an alternative evidence pairing display option

d. Calendar Feed tab allows you to set your timezone and setup a calendar sync which allows your EvaluWise appointments to be pulled into your personal calendar

   i. Send to My Email Calendar button will open your default calendar software on your computer.

   ii. Email Calendar Link To Me will send an email to you with links to setup various calendar subscriptions

Note the calendar feed is a one way feed from EvaluWise to your calendar only

e. Organization section on the right allows **administrator account only** to "Add Schools", "Content Areas", and approve "Users" - status of users who have been added or are requesting to be added are displayed on the Users tab **(here is where new users are approved and assigned Schools permissions)**