Kansas State Department of Education

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Kansas Educator Evaluation Protocol (KEEP) v 3.0.0

Annual Update Requirements

Prepared by: *Richard Matteson*

Published: *4/8/2014*

Version 1.0

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Review History

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Date** |
| Kayeri Akweks | Business Analyst | 4/3/2014 |
| Bill Bagshaw | Business Analyst | 4/3/2014 |
| Rhett Dubiel | Developer | 4/3/2014 |
| Javier Zarazua | Project Manager | 4/3/2014 |
| RA/QA Staff | Peer Review | 4/3/2014 |
| Andrea Hall | RA/QA Supervisor | 4/7/2014 |

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Date** | **Reason For Changes** | **Version** |
| Richard Matteson | 3/25/2014 | Initial Draft | 1.0 pending |
| Richard Matteson | 4/3/2014 | Updated based on requirements meetings | 1.0 pending |
| Richard Matteson | 4/7/2014 | Updated based on review feedback | 1.0 pending |
| Richard Matteson | 4/8/2014 | Updated based on Approval | 1.0 |

Related Documents

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Date** | **Document Title** | **Comments** |
| **Richard Matteson** | **Created on:** *3/24/2014* | **Executive Summary** | **Approved on:** *3/25/2014* |
| **Rhett Dubiel** | **Pending** | **Technical Design** | **Will be saved here:** [**P:\Keep\3.0.0\Requirements\Technical Design**](file:///P:\Keep\3.0.0\Requirements\Technical%20Design) |
| **Javier Zarazua** | **Created on:** *3/5/2014* | **Roles\_and\_Responsibilities\_KEEP 3.0\_1.1** | **Saved here:**  [**P:\Keep\3.0.0\Project Mgmt Documents\Roles and Responsibilities**](file:///P:\Keep\3.0.0\Project%20Mgmt%20Documents\Roles%20and%20Responsibilities) |
|  |  |  |  |

# Introduction

## Purpose

The Annual Update Requirements (AUR) document describes the business needs to be met by the Kansas Educator Evaluation Protocol (KEEP) application in the version 3.0.0 annual updates. It is intended to be used as a communication tool between the project team members to ensure that all involved parties agree to the purpose and specific requirements of the software.

This document may be updated on an ongoing basis throughout the project as needed until the application updates are deployed to ensure traceability from the requirements gathering process through the Technical Design updates, development, and testing. Updates to the AUR will be documented in the Revision History.

## Statement of Work

The Statement of Work lists the needs that will be addressed in the version 3.0.0 annual updates to the KEEP application. Many of the needs will be addressed by changes to multiple screens or distinct functional changes. Each section under 2.1 Functionality will note which need is addressed by Index number.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Index** | **Category** | **Page/Section of Application** | **Requirement Description** | **Purpose** |
| 1 | Notifications  FP # 7533 | All data entry screens | Display a message on a successful save | Ease of Use |
| 2 | Error Text  FP # 8070 | All data entry screens | Update the error message wording for clarity | Ease of Use |
| 3 | Artifacts | Evaluation > Informal Observation  Evaluation > Artifacts | Allow users to add, update, and delete Artifacts at any point during data entry | Ease of Use |
| 4 | Artifacts | Evaluation > Informal Observation  Evaluation > Artifacts | Allows both upper case and lower case letters in file extensions | Ease of Use |
| 5 | Artifacts  FP # 7957 | Evaluation > Informal Observation  Evaluation > Artifacts | Adjust the file size limit, if needed | Ease of Use  *(Not needed)* |
| 6 | Static Text | Multiple | Additional static text will be added to screens to inform users of workflow | Ease of Use |
| 7 | Workflow | Evaluation | Allow users to have one Evaluation at a district available for each of their roles | User Request |
| 8 | Workflow | All Evaluation screens | Limit Evaluations to a single cycle workflow | Ease of Use |
| 9 | Static Text | Evaluation > Assessment Rubric | Additional static text will be displayed for users | Ease of Use |
| 10 | Workflow | Evaluation > Assessment Rubric | Save the last Assessment Rubric on the Evaluatee sign off of the Mid-Cycle Conference instead of the Evaluator sign off | Ease of Use |
| 11 | Text | Evaluation > Assessment Rubric | Update the names of the three Rubrics for clarity | Ease of Use |
| 12 | Workflow | Evaluation > Goals | Allow Goals data entry from when the Self-Assessment is saved through the Evaluatee signoff of the Mid-Cycle Conference | Ease of Use |
| 13 | Workflow  FP # 7823  FP # 7849 | Evaluation > Goals | Update Layout for ease of use and clarity | Ease of Use |
| 14 | Workflow | Evaluation > Informal Observations | Add the ability to enter Observation Data on the Informal Observations screen under displayed data (in addition to the one on the left hand menu) | Ease of Use |
| 15 | Data Entry | Evaluation > Summary Rating | Add Student Growth Measure data entry | Required data collection for reporting purposes |
| 16 | Data Entry  FP # 7557 | Evaluation > Summary Rating | Add Final Rating data entry | Required data collection for reporting purposes |
| 17 | Workflow  FP # 7557 | Evaluation > Summary Rating | Add the ability to skip the Summary Rating data entry while still counting the Evaluation as being complete | Required data collection for reporting purposes *(canceled during AUR discussions)* |
| 18 | Data Access  FP # 7209 | New role with access to Evaluatee Archive | Add the ability for an Evaluatee to view their Evaluations using a login that is not associated with a specific Organization | Data Access |
| 19 | Data Access  FP # 7462 | Human Resources (new) | Add a role for Human Resources to access Completed Evaluations | Data Access |
| 20 | Work Queue Access | KSDE Staff (new) | Add a new screen that lists data entry progress and completion for a KSDE role to assist users with troubleshooting data entry and tracking completion | KSDE Helpdesk ease of use and reporting application usage |
| 21 | Work Queue  FP # 7530  FP # 7933  FP # 7532 | Evaluator | Add columns to the table for selecting individuals to convert the screen into a work queue | Ease of Use |
| 22 | Work Queue  FP # 7532  FP # 7933  FP # 7532 | Observer | Add columns to the table for selecting individuals to convert the screen into a work queue | Ease of Use |
| 23 | Work Queue  FP # 7530  FP # 7933  FP # 7532 | Superintendent | Add columns to the table for selecting individuals to convert the screen into a work queue | Ease of Use |
| 24 | Help Desk | Evaluator  KSDE Staff | Allow the KEEP Helpdesk staff and Evaluators to delete or reset data entry for data entry issues | Ease of Use |
| 25 | Pagination  FP # 7820 | Evaluator | Fix pagination issues, possibly by removing the pagination on this screen | Ease of Use |
| 26 | Defect  FP # 8205 | Evaluator Archive | Resolve an issue where some Archived Evaluations are not displayed properly | Ease of Use |

## Project Documentation

Requirements documents for the KEEP application for release 3.0.0 are stored on the project drive in the requirements folder for release 3.0.0:

[P:\Keep\3.0.0\Requirements\Business Needs & Functional Overview](file:///P:\Keep\3.0.0\Requirements\Business%20Needs%20&%20Functional%20Overview)

In addition to the AUR, several documents are saved in a folder located in the requirements folder titled [Text Changes to Screens](file:///P:\Keep\3.0.0\Requirements\Business%20Needs%20&%20Functional%20Overview\Text%20Changes%20to%20Screens) that show entire screens within the application for reference as needed for the locations of new static text.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Date** | **Document Title** | **Comments** |
| Artifacts changes to displayed text | 3/24/2014 | Artifacts screen static text changes 2014 |  |
| Assessment Rubric changes to displayed text | 3/7/2014 | Assessment Rubric screen static text changes 2014 |  |
| Goal screen changes to displayed text | 3/12/2014 | GOALS screen static text changes 2014 |  |
| Observer screen changes to displayed text | 3/7/2014 | Observer screen static text changes 2014 |  |

# Functional Overview

## Functionality

The Functionality changes will address the needs listed in the Statement or Work and are intended to improve the clarity of the application functionality and workflow for users to address specific issues, and to collect Student Growth and Summative Rating scores that are required by the ESEA Waiver.

As the Evaluation Assignment functionality resides in the Educator Data Collection System (EDCS) application, two of the changes will need to be made in that application.

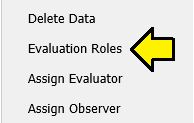
### Allow Multiple Evaluations at the Same District

Although it was decided in previous pilot releases of KEEP to restrict individuals to one active Evaluation of any type per district at a time, districts have provided feedback that individuals who fill multiple roles have the need to enter data for more than one Evaluation at a time. For example, a principal who is also a teacher would need to complete their Teacher Evaluation and their Building Leader Evaluation, and the limitation was very inconvenient.

This issue will be addressed through changes to the following screens that are located in the Educator Data Collection System (EDCS) application.

#### Evaluation Roles

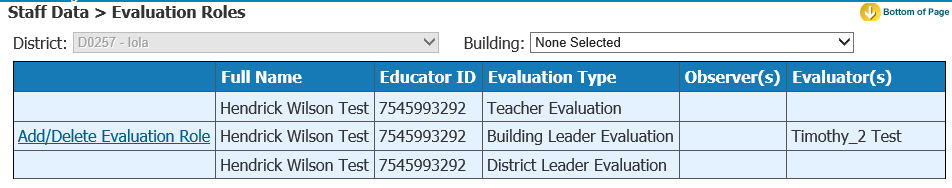
*This change will address need # 7.*



This application will be changed to allow users to assign an individual for each role that they are eligible, still based on their Assignments in EDCS:

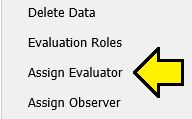
* Teacher
* Building Leader
* District Leader

The following example shows that the current Evaluator Assignment process only lists a single link after an Evaluator has been assigned. This will be changed to allow the assignment of different Evaluators and Observers for each Evaluation Type for which the individual is eligible based on their EDCS Assignments.

**

#### EDCS – Assign Evaluator

*This change will address need # 7.*

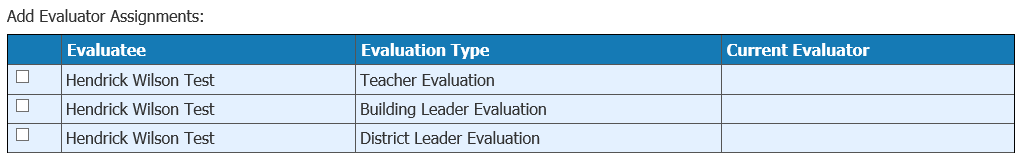


This application will be changed to allow users to assign an individual for each role that they are eligible, still based on their Assignments in EDCS:

* Teacher
* Building Leader
* District Leader

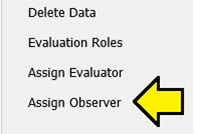
Currently, when the individual is assigned to be evaluated by an individual they are removed from the bottom table and displayed on the top. The change will be to remove only the Evaluation Type for which the Evaluator is assigned for that individual so that they may select one or more Evaluation Types.

The following example shows that the current Evaluator Assignment process initially displays all of the options, but then removes all of the Evaluatee options after an Evaluator has been assigned to one role. This will be changed to allow the user to select more than one Evaluation Type for which the individual is eligible based on their EDCS Assignments at a time for the same individual.

**

#### EDCS – Assign Observer

*This change will address need # 7.*

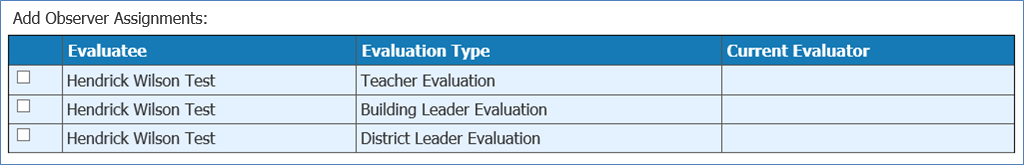
**

This application will be changed to allow users to assign an individual for each role that they are eligible, still based on their Assignments in EDCS:

* Teacher
* Building Leader
* District Leader

Currently, when the individual is assigned to be evaluated by an individual they are removed from the bottom table and displayed on the top. The change will be to remove only the Evaluation Type for which the Evaluator is assigned for that individual so that they may select one or more Evaluation Types.

The following example shows that the current Observer Assignment process initially displays all of the options, but then removes all of the Evaluatee options after an Observer has been assigned to one role. This will be changed to allow the user to select more than one Evaluation Type for which the individual is eligible based on their EDCS Assignments at a time for the same individual.



### Work Queue

*This change will address need # 20.*

Thisnew feature would list the completion steps in the following order on the Evaluator, Observer, and Superintendent Search screens for Evaluations that have not had the Summary Rating signed off completely.

#### Steps in the Process

The following labels for steps will be used to represent the amount of data entry completed so far in the Evaluation.

1. Self-Assessment
2. Beginning of Cycle Conference
3. Mid-Cycle Conference
4. End of Cycle Conference
5. IPP/SGM
6. Summative Rating
7. Archived

Individuals who have been assigned an Evaluator, but have not yet saved any Evaluation data, will be displayed as Self-Assessment based on their Evaluation assignments.

#### Display number of Archived Evaluations

*This change will address need # 20.*

A column will be displayed that shows the current number of Archived Evaluations for the individual that has the same Evaluation Type, District, and School Year values. This column will inform that the Evaluatee has Archived Evaluations already completed for the same School Year, since Evaluatees will continue to be displayed as they may have to complete a second Evaluation in the same School Year if they meet specific criteria not tracked in KEEP.

In the example below:

* Timothy has not completed the Self-Assessment for his first Teacher Evaluation at USD 257 in the 2015 School Year.
* The last step in the process completed for Hendrick’s first Building Leader Evaluation was him signing off on the Beginning of Cycle Conference.
* Christina has completed one District Leader Evaluation at the district for the 2015 School Year and is working on her second. This would have been the second cycle in previous versions of KEEP.
* Timothy has completed his Building Leader Evaluation, and has not started a second one of that Evaluation Type.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Current Step** | **Next Step** | **Last Saved** | **Archived** |
| Timothy Test | 1234567890 | Teacher | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 0 |
| Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Mid-Cycle Conference | Evaluator | 3/16/2014 | 0 |
| Christina Test | 4962513966 | District Leader | D0257 - Iola | 2015 | End of Cycle Conference | Evaluator | 11/2/2013 | 1 |
| Timothy Test | 1234567890 | Building Leader | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 1 |

#### Displaying an indicator of step in the queue

*This change will address need # 20.*

The workflow will be based on completion of specific data entry completed, as shown in the table below. When a step has been completed, but the next step has not been completed, then the Current Step and who completes the Next Step will be displayed on the Search screens.

|  | Step in the process after action taken | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| Action taken | Self-Assessment | Beginning of Cycle Conference | Mid-Cycle Conference | End of Cycle Conference | IPP/SGM | Summative Rating |
| Assign Evaluator in EDCS | Evaluatee |  |  |  |  |  |
| Evaluatee saves Assessment Rubric without checking the "I have completed my Self-Assessment: checkbox | Evaluatee |  |  |  |  |  |
| Evaluatee Saves "I have completed my Self-Assessment" checkbox |  | **Evaluator** |  |  |  |  |
| Evaluator signs off on Beginning of Cycle Conference |  | Evaluatee |  |  |  |  |
| Evaluatee signs off on Beginning of Cycle Conference |  |  | **Evaluator** |  |  |  |
| Evaluator signs off on Mid-Cycle Conference |  |  | Evaluatee |  |  |  |
| Evaluatee signs off on Mid-Cycle Conference |  |  |  | **Evaluator** |  |  |
| Evaluator signs off on End of Cycle Conference |  |  |  | Evaluatee |  |  |
| Evaluatee signs off on End of Cycle Conference |  |  |  |  | **Evaluator** |  |
| Evaluator completes data entry on the Instructional Practices AND Student Growth Measures screens |  |  |  |  |  | **Evaluator** |
| Evaluator completes Summative Rating Score |  |  |  |  |  | Evaluatee |
| Evaluatee signs off on first checkbox of Summative Rating |  |  |  |  |  | **Evaluator** |
| Evaluator signs off on second checkbox for Summative Rating | Evaluation is complete and available in the Archive | | | | | |

### Print Archived Evaluation

*This change will address needs # 8, # 11, # 13, # 15, and # 16.*

Due to the changes in data collection and the order in which some data is collected, the Printed form for the Evaluations that includes all data and is available on the various Archive Search screens will need to be updated to match the new data entry.

The changes should apply to only 2015 and newer Evaluations, older Evaluations should still be printed following the existing template.

### New role – “Evaluatee Read Only”

Individuals who have access to KEEP within a school district are able to access any of their KEEP Evaluations at any district, but not all individuals will stay employed at a district that participates in KEEP. As individuals should have access to their Evaluations and Artifacts at any point in time, a new way to access the data will be added so that individuals can access their data at any time if needed.

#### New role in Common Authentication

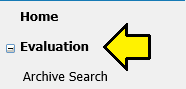
*This change will address need # 18.*

A new role will be added named “Evaluatee Read Only” in Common Authentication under the non-KSDE Statewide selection for Organizations. This role will require the user to enter their SSN and Educator ID following the same process as the current registration.

This role will not have the ability to access active Evaluations at districts, and needs access only to the Home and Archive Search screens.

#### Evaluation screen message

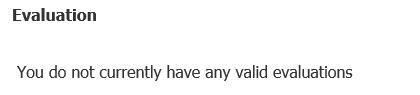
*This change will address need # 18.*

**

If the left hand Navigation Menu selection for Evaluation cannot be hidden for this role while still displaying Archive Search, this role should have a custom default message displayed on the Evaluation screen and no access to any active Evaluations:

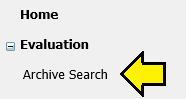
“Evaluation data entry is not available for this login. Please use the Archive Search to view your previously completed Evaluations.”

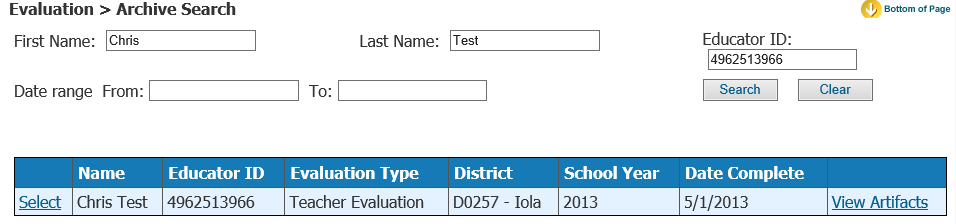
This will be displayed instead of the default message that is displayed when an individual is registered for an Organization and no Organizations have submitted Evaluation assignments for the individual:

**

#### Evaluatee Archive Search screen

*This change will address need # 18.*

**



The user will have access to only the Archive Search screen which will list their archived Evaluations in the same manner as if they were registered with a specific district.

### New role – “Human Resources”

Human Resources staff members at districts have the need to review Evaluation progress and completion, but have not previously had the ability to access the data in KEEP directly. A new role that allows the Human Resources staff that access will be added.

#### New role in Common Authentication

*This change will address need # 19.*

A new role will be added to Common Authentication for a District level role that will be used by Human Resources Staff at the district to access completed Evaluations.

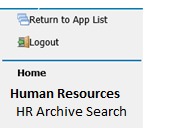
As Human Resources Staff are not required to have a teaching license or be reported in EDCS, this login will not require an SSN or Educator ID to register.

This role will require approval by the Superintendent for access.

#### Left Hand Navigation Menu update

*This change will address need # 19.*

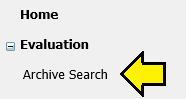
When the Human Resources Staff role is used to access KEEP, they will have access to the Home screen and one additional screen to be added titled HR Archive Search. The following is a mockup of how this would likely be displayed:

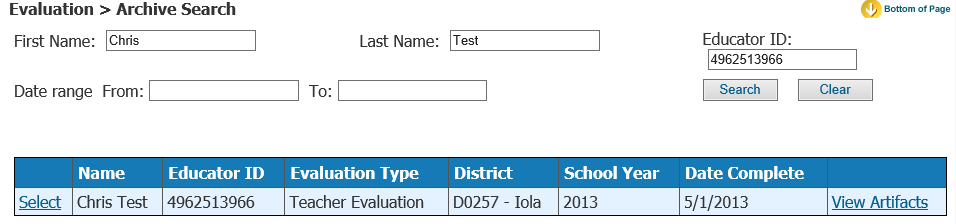


The screen functionality for the two screens is located in Sections 2.1.12 and 2.1.13.

### Evaluation Archive Search

This screen will be updated to display data and provide functionality that supports the work queue as described in Section 2.1.2.

**



#### Export Search Results

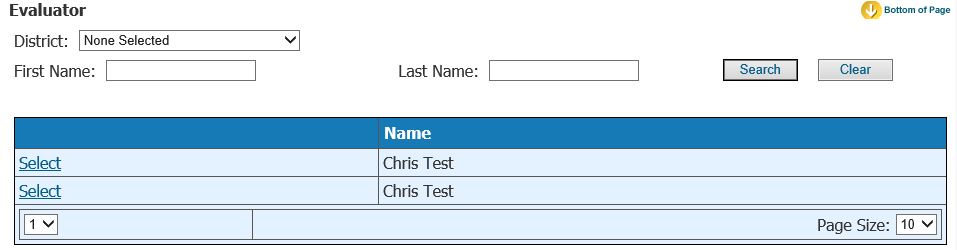
*Although not explicitly stated in the Executive Summary, this change will address the same Work Queue changes for other Archive Search screens for needs # 21, # 22, # 23, and # 24.*

The ability to export the data displayed in the table to an Excel file will be added.

### Evaluator Search

This screen will be updated to display data and provide functionality that supports the work queue as described in Section 2.1.2.





#### Additional columns for Search Results

*This change will address need # 21.*

Additional columns will be displayed to provide a workflow for users.

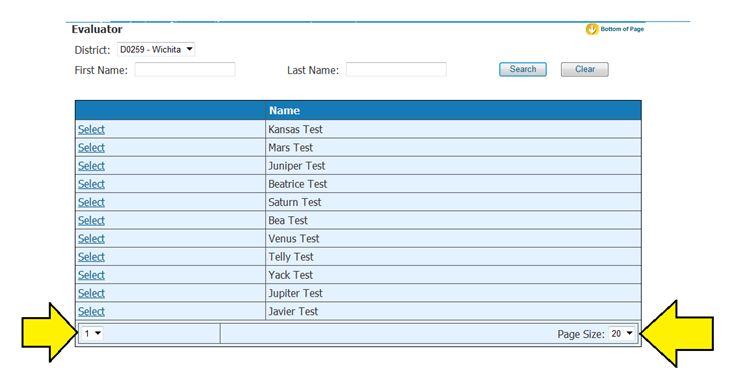
|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Current Step** | **Next Step** | **Last Saved** | **Archived** |
| Select | Timothy Test | 1234567890 | Teacher | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 0 |
| Select | Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Mid-Cycle Conference | Evaluator | 3/16/2014 | 0 |
| Select | Christina Test | 4962513966 | District Leader | D0257 - Iola | 2015 | End of Cycle Conference | Evaluator | 11/2/2013 | 1 |
| Select | Timothy Test | 1234567890 | Building Leader | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 1 |

#### Fix pagination issues

*This change will address need # 25.*

The pagination issues will be addressed.

The issue with the screen is the two pagination dropdowns are not set to update the table when the options are selected, but when the Search button is clicked:



If the left dropdown is changed, sometimes it refreshes the list, but most of the time it doesn't. If there are rows for more than one page ( |<, <, >, and >| ) then the arrows do refresh the table when clicked.

The Page Size dropdown doesn't refresh the table, so when the user changes to a higher or lower Page Size, it isn't displayed until they click something on the screen that does refresh the table, such as the Search button or the arrows. The screen will be updated so that changing the Page Size dropdown will refresh the table.

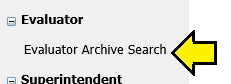
#### Export Search Results

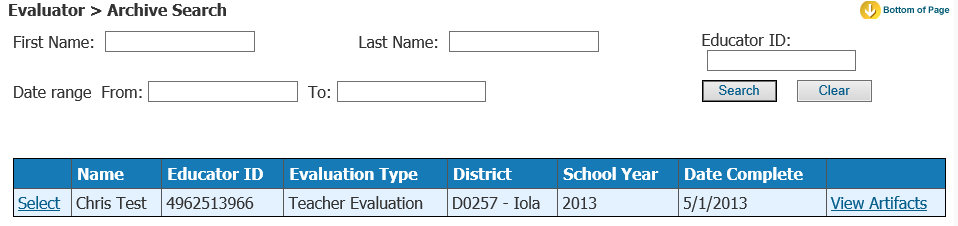
*This change will address need # 21.*

The ability to export the data displayed in the table to an Excel file will be added.

### Evaluator Archive Search

This screen will be updated to display data and provide functionality that supports the work queue as described in Section 2.1.2.





#### Fix display issue

*This change will address need # 26.*

An issue was reported where not all Evaluations were being displayed correctly on this screen. This will be fixed to correctly display all Evaluations for which the Evaluator should have access.

The reported issue text from the Footprints ticket:

|  |
| --- |
| What appears is the issue here is that the 2013 archive exits which is why we are getting results in the archive search.  Due to the current design it is only storing/pulling the current year (2014) and that is what is displaying in the grid.  So it appears the archive is for 2014 when it in fact is not.  The 2014 evaluation is what is not yet completed.  Once it has been completed it should be available in the archive.    Adding this piece to be included in the requirements for the next KEEP release.  There will need to be changes made to the snapshot tables and possibly some of the live ones to account for the issue we're having here.  The problem is the table that has the IDs used to identify the educator is not captured in the 'snapshot'.  So when the educator comes in for the next program year it updates their values and therefore when tying back to this table we get the most current values as opposed to the values that existed at the time of the snapshot.  This will require changes made to the snapshot tables, snapshot process, and the queries used to generate the archive report.  Changes to 'live' tables may be required as well.  Further investigation will be required to determine that. |

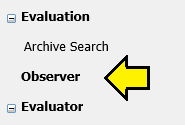
#### Export Search Results

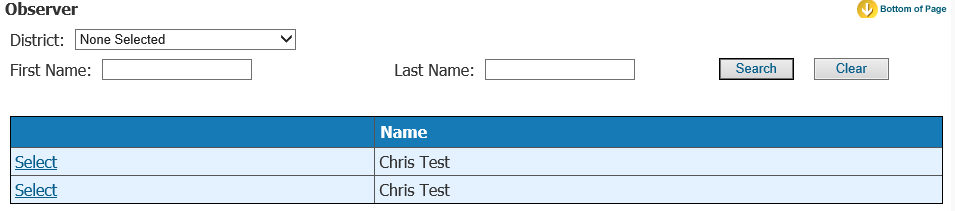
*This change will address need # 21.*

The ability to export the data displayed in the table to an Excel file will be added.

### Observer Search

This screen will be updated to display data and provide functionality that supports the work queue as described in Section 2.1.2.

**



#### Evaluator Name Search Options

*This change will address Need # 22.*

This screen will keep the existing Search options and have the following additional Search Options added:

* Evaluator First Name
* Evaluator Last Name

#### Additional columns for Search Results

*This change will address Need # 22.*

Additional columns will be displayed to provide a workflow for users.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Current Step** | **Next Step** | **Last Saved** | **Archived** |
| Select | Timothy Test | 1234567890 | Teacher | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 0 |
| Select | Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Mid-Cycle Conference | Evaluator | 3/16/2014 | 0 |
| Select | Christina Test | 4962513966 | District Leader | D0257 - Iola | 2015 | End of Cycle Conference | Evaluator | 11/2/2013 | 1 |
| Select | Timothy Test | 1234567890 | Building Leader | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 1 |

#### Export Search Results

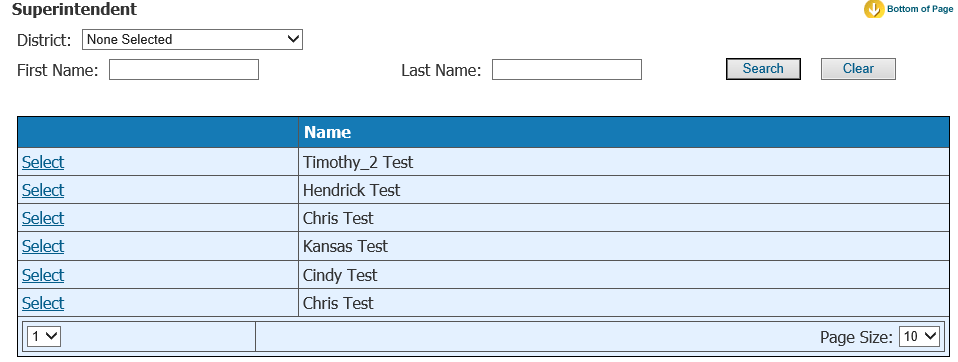
*This change will address Need # 22.*

The ability to export the data displayed in the table to an Excel file will be added.

### Superintendent Search

This screen will be updated to display data and provide functionality that supports the work queue as described in Section 2.1.2.

**



#### Evaluator Name Search Options

*This change will address need # 23.*

This screen will keep the existing Search options and have the following additional Search Options added:

* Evaluator First Name
* Evaluator Last Name

#### Additional columns for Search Results

*This change will address need # 23.*

Additional columns will be displayed to provide a workflow for users.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Current Step** | **Next Step** | **Last Saved** | **Archived** |
| Select | Timothy Test | 1234567890 | Teacher | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 0 |
| Select | Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Mid-Cycle Conference | Evaluator | 3/16/2014 | 0 |
| Select | Christina Test | 4962513966 | District Leader | D0257 - Iola | 2015 | End of Cycle Conference | Evaluator | 11/2/2013 | 1 |
| Select | Timothy Test | 1234567890 | Building Leader | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 1 |

#### Export Search Results

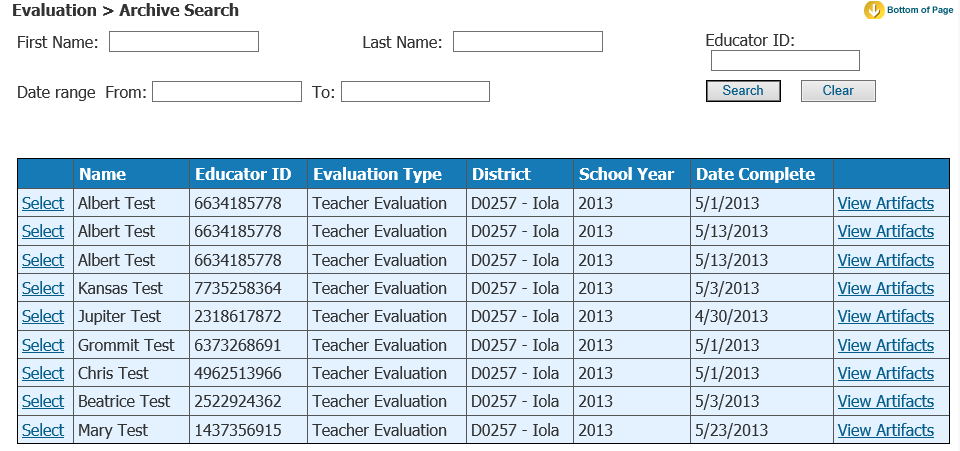
*This change will address need # 23.*

The ability to export the data displayed in the table to an Excel file will be added.

### Superintendent Archive Search

This screen will be updated to display data and provide functionality that supports the work queue as described in Section 2.1.2.

**



#### Evaluator Name Search Options

*This change will address need # 23.*

This screen will keep the existing Search options and have the following additional Search Options added:

* Evaluator First Name
* Evaluator Last Name

#### Additional columns for Search Results

*This change will address need # 23.*

Additional columns will be displayed to provide a workflow for users.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Evaluator** | **Date Complete** |  |
| Select | Timothy\_2 Test | 1234567890 | Teacher Evaluation | D0257 - Iola | 2015 | Kim Test | 3/5/2014 | View Artifacts |
| Select | Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Kim Test | 3/16/2014 | View Artifacts |
| Select | Chris Test | 4962513966 | District Leader | D0257 - Iola | 2015 | Kim Test | 11/2/2013 | View Artifacts |
| Select | Kansas Test | 5823697410 | Teacher Evaluation | D0257 - Iola | 2015 | Ted Test | 9/13/2013 | View Artifacts |
| Select | Cindy Test | 7481592630 | Teacher Evaluation | D0257 - Iola | 2015 | Ted Test | 11/5/2013 | View Artifacts |

#### Export Search Results

*This change will address need # 23.*

The ability to export the data displayed in the table to an Excel file will be added.

### Human Resources Search (new screen)

A new screen titled Human Resources Archive Search will be added that is accessible to the Human Resources staff that displays the same layout and information as the updated Superintendent Archive Search. This screen will display data and provide functionality that supports the work queue as described in Section 2.1.2.

#### Human Resources (Search)

*This change will address need # 19.*

The HR Archive Search screen will have the same functionality as the Superintendent Search screen except without the ability to view an Evaluation, and will be available on the Left Hand Navigation Menu for only the Human Resources role.



Although Human Resources staff are responsible for ensuring that the process is completed, they are not a part of the review process itself. Human Resources staff may coordinate access to Evaluations that are In Progress with the Superintendent if that need should arise.

#### Search Options

*This change will address need # 19.*

Search options will include:

* Evaluatee First Name
* Evaluatee Last Name
* Evaluatee Educator ID
* Evaluator First Name
* Evaluator Last Name
* Date Range From
* Date Range To

#### Search Results

The results of the search will display the following columns, it will not have links to view the Evaluations that are not yet Archived:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Current Step** | **Next Step** | **Last Saved** | **Archived** |
| Timothy Test | 1234567890 | Teacher | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 0 |
| Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Mid-Cycle Conference | Evaluator | 3/16/2014 | 0 |
| Christina Test | 4962513966 | District Leader | D0257 - Iola | 2015 | End of Cycle Conference | Evaluator | 11/2/2013 | 1 |
| Timothy Test | 1234567890 | Building Leader | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 1 |

#### Export Search Results

*This change will address need # 19.*

The ability to export the data displayed in the table to an Excel file will be added.

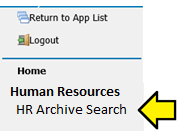
### Human Resources Archive Search (new screen)

A new screen titled Human Resources Archive Search will be added that is accessible to the Human Resources staff that displays the same layout and information as the updated Superintendent Archive Search. This screen will display data and provide functionality that supports the work queue as described in Section 2.1.2.

#### HR Archive Search

*This change will address need # 19.*

The HR Archive Search screen will have the same functionality as the Superintendent Archive Search screen, and will be available on the Left Hand Navigation Menu for only the Human Resources role.



#### Search Options

*This change will address need # 19.*

Search options will include:

* Evaluatee First Name
* Evaluatee Last Name
* Evaluatee Educator ID
* Evaluator First Name
* Evaluator Last Name
* Date Range From
* Date Range To

#### Search Results

*This change will address need # 19.*

The results of the search will display the following columns:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Evaluator** | **Date Complete** |  |
| Select | Timothy\_2 Test | 1234567890 | Teacher Evaluation | D0257 - Iola | 2015 | Kim Test | 3/5/2014 | View Artifacts |
| Select | Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Kim Test | 3/16/2014 | View Artifacts |
| Select | Chris Test | 4962513966 | District Leader | D0257 - Iola | 2015 | Kim Test | 11/2/2013 | View Artifacts |
| Select | Kansas Test | 5823697410 | Teacher Evaluation | D0257 - Iola | 2015 | Ted Test | 9/13/2013 | View Artifacts |
| Select | Cindy Test | 7481592630 | Teacher Evaluation | D0257 - Iola | 2015 | Ted Test | 11/5/2013 | View Artifacts |

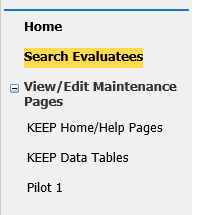
#### Export Search Results

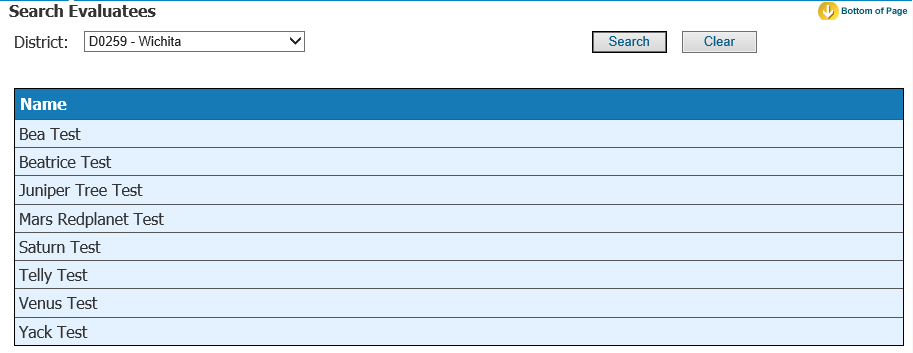
*This change will address need # 19.*

The ability to export the data displayed in the table to an Excel file will be added.

### Search Evaluatees

This screen will be updated to display data and provide functionality that supports the work queue as described in Section 2.1.2.





#### Search Evaluatees screen

*This change will address need # 20.*

The screen currently titled Search Evaluatees will continue to be accessible to only the State Read Only and State Admin roles. The screen will display the completion information similar to the Superintendent screen, but without the ability to select an Evaluation to view.

#### Search Options

*This change will address need # 20.*

This screen will be updated to include the same Search options as the Superintendent screen in addition to the option to select a specific district.

* District
* Evaluatee First Name
* Evaluatee Last Name
* Evaluatee Educator ID
* Evaluator First Name
* Evaluator Last Name
* Date Range From
* Date Range To

#### Search Results

*This change will address need # 20.*

The results of the search will display the following columns, it will not have links to view the Evaluations that are not yet Archived:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Current Step** | **Next Step** | **Last Saved** | **Archived** |
| Timothy Test | 1234567890 | Teacher | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 0 |
| Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Mid-Cycle Conference | Evaluator | 3/16/2014 | 0 |
| Christina Test | 4962513966 | District Leader | D0257 - Iola | 2015 | End of Cycle Conference | Evaluator | 11/2/2013 | 1 |
| Timothy Test | 1234567890 | Building Leader | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 | 1 |

#### Export Search Results

*This change will address need # 20.*

The ability to export the data displayed in the table to an Excel file will be added.

### Evaluatee Archive Search

This screen will display data and provide functionality that supports the work queue as described in Section 2.1.2.

This screen will be available as a submenu for Search Evaluatees following the same format as the Archive Searches for other roles:

**Home**

**Search Evaluatees**

  Evaluatee Archive Search

#### Evaluatee Archive Search

*This change will address need # 20.*

A new screen titled Evaluatee Archive Search will be added that is accessible to the KSDE Admin role that displays a list of Archived Evaluations but without the ability to select an Evaluation to view. This will list both in progress and Archived Evaluations for assisting users with troubleshooting issue and reporting data entry completion.

#### Search Options

*This change will address need # 20.*

This screen will have the same Search options as the Superintendent Archive Search screen plus an option to select a specific district.

* District
* Evaluatee First Name
* Evaluatee Last Name
* Evaluatee Educator ID
* Evaluator First Name
* Evaluator Last Name
* Date Range From
* Date Range To

#### Search Results

*This change will address need # 20.*

The results of the search will display the following columns, it will not have links to view the Evaluations that are Archived:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Evaluator** | **Date Complete** |
| Timothy\_2 Test | 1234567890 | Teacher Evaluation | D0257 - Iola | 2015 | Kim Test | 3/5/2014 |
| Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Kim Test | 3/16/2014 |
| Chris Test | 4962513966 | District Leader | D0257 - Iola | 2015 | Kim Test | 11/2/2013 |
| Kansas Test | 5823697410 | Teacher Evaluation | D0257 - Iola | 2015 | Ted Test | 9/13/2013 |
| Cindy Test | 7481592630 | Teacher Evaluation | D0257 - Iola | 2015 | Ted Test | 11/5/2013 |

#### Export Search Results

*This change will address need # 20.*

The ability to export the data displayed in the table to an Excel file will be added.

### Rollback Evaluation

The ability to reset an Evaluation to one of the steps in the process will be added and will be available for both the KSDE Admin and Evaluator roles.

The title of the new screen will be Rollback Evaluation and will be available to the Evaluator role and the KSDE Admin role through a new link on the Left Hand Navigation Menu.

#### Search options

*The following changes will address need # 24.*

The screen will list the Evaluations that are still in progress. The KSDE Admin role will see all Evaluations. The Evaluator will see the same list that they see on the Evaluator screen.

#### Search Options

* District (KSDE Only)
* Evaluatee First Name
* Evaluatee Last Name
* Evaluatee Educator ID
* Evaluator First Name
* Evaluator Last Name
* Date Range From
* Date Range To

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Evaluatee** | **Educator ID** | **Evaluation Type** | **District** | **School Year** | **Current Step** | **Next Step** | **Last Saved** |
| Select | Timothy\_2 Test | 1234567890 | Teacher Evaluation | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 3/5/2014 |
| Select | Hendrick Test | 9876543210 | Building Leader | D0257 - Iola | 2015 | Mid-Cycle Conference | Evaluator | 3/16/2014 |
| Select | Chris Test | 4962513966 | District Leader | D0257 - Iola | 2015 | End of Cycle Conference | Evaluator | 11/2/2013 |
| Select | Kansas Test | 5823697410 | Teacher Evaluation | D0257 - Iola | 2015 | Beginning of Cycle Conference | Evaluatee | 9/13/2013 |
| Select | Cindy Test | 7481592630 | Teacher Evaluation | D0257 - Iola | 2015 | Self-Assessment | Evaluatee | 11/5/2013 |

#### Export Search Results

*The following changes will address need # 24.*

The ability to export the data displayed in the table to an Excel file will be added.

#### Available selections for Rollback

*The following changes will address need # 24.*

When the user selects an Evaluation that has not yet reached the Archive step, they will be presented with a text box and will be required to enter the reason for rolling back the Evaluation. The user will be presented with the steps in the progress that have been completed so far.

For example, if the Mid-Cycle Conference Evaluator sign off has been completed and the End of Cycle has not, the user will have the ability to roll the Evaluation back to any one of the following:

1. Self-Assessment
2. Beginning of Cycle Conference
3. Mid-Cycle Conference

#### Data Deletion

*The following changes will address need # 24.*

The user can roll the Evaluation back to the following steps and the following data will be cleared if it exists.

| Roll back to | Data Deleted | Data Retained |
| --- | --- | --- |
| Self-Assessment | 1. Beginning of Cycle Assessment 2. Goals 3. Observations 4. Individual Growth Plan 5. Beginning of Cycle Conference 6. Mid-Cycle Conference 7. Final Assessment Rubric 8. End of Cycle Conference 9. Instructional Practices Protocol Summary Rating 10. Summative Rating | 1. Artifacts 2. Self-Assessment (but without the “I have completed my Self-Assessment” checkbox) 3. Student Growth Measures Summary Rating |
| Beginning of Cycle Assessment | 1. Beginning of Cycle Conference 2. Mid-Cycle Conference 3. Final Assessment Rubric 4. End of Cycle Conference 5. Instructional Practices Protocol Summary Rating 6. Summative Rating | 1. Artifacts 2. Self-Assessment 3. Goals 4. Observations 5. Student Growth Measures Summary Rating 6. Individual Growth Plan 7. Beginning of Cycle Assessment (if saved) |
| Mid-Cycle Conference | 1. Mid-Cycle Conference 2. Final Assessment Rubric 3. End of Cycle Conference 4. Instructional Practices Protocol Summary Rating 5. Summative Rating | 1. Artifacts 2. Self-Assessment 3. Goals 4. Observations 5. Student Growth Measures Summary Rating 6. Individual Growth Plan 7. Beginning of Cycle Assessment 8. Beginning of Cycle Conference |
| End of Cycle Conference | 1. End of Cycle Conference 2. Instructional Practices Protocol Summary Rating 3. Summative Rating | 1. Artifacts 2. Self-Assessment 3. Goals 4. Observations 5. Student Growth Measures Summary Rating 6. Individual Growth Plan 7. Beginning of Cycle Assessment 8. Beginning of Cycle Conference 9. Mid-Cycle Conference 10. Final Assessment Rubric |
| IPP/SGM | 1. Summative Rating | 1. Artifacts 2. Self-Assessment 3. Goals 4. Observations 5. Student Growth Measures Summary Rating 6. Individual Growth Plan 7. Beginning of Cycle Assessment 8. Beginning of Cycle Conference 9. Mid-Cycle Conference 10. Final Assessment Rubric 11. End of Cycle Conference 12. Instructional Practices Protocol Summary Rating |

#### Logging

*The following changes will address need # 24.*

In addition to the data deletion, the application will save a history of the rollback that includes the following data:

* Date and Time Rolled Back
* The Step selected
* The login for the user who completed the process
* The First Name for the user who completed the process from the login
* The Last Name for the user who completed the process from the login
* Any data necessary for identifying the specific Evaluation changed

#### Editable text

*This change will address need # 6.*

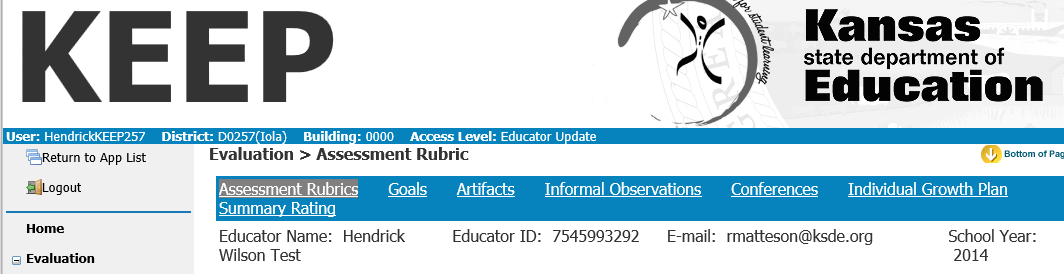
The ability to add text to the screen that can be edited in the same way as the Home screen will be added under the data entry. The ability to edit the text will be added to the **View/Edit Maintenance Pages > KEEP Home/Help Pages** or similar location.

### Common User Interface Elements

#### Header to display School Year for Evaluations

*This change will address need # 6.*

The School Year for which Evaluations are being completed will be displayed in the Header. This date will match the School Year that is displayed once the user has selected an Evaluation.



The year will be displayed in the same way as EDCS:

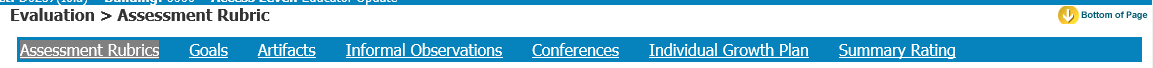


#### Top Navigation Menu update

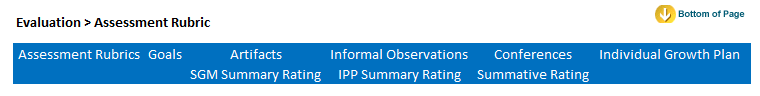
*The following change will address need # 15 and # 17.*

The list of screens that are part of the Evaluation will increase in this release. The screen currently titled Summary Rating will be renamed IPP Summary Rating and the SGM Summary Rating and Summative Ratings will be added.

Current list of Top Navigation Menu selections:



The list will be updated to list the Summary Ratings on a second row:

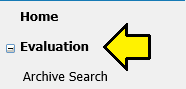


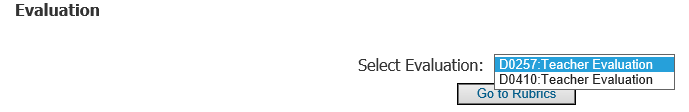
### Home screen

There are no planned changes to the Home screen for this release.

### Evaluation screen

This screen will be updated to accommodate the needs as listed in the subsection below.

**

**

#### The dropdown list will display all of the assigned Evaluations

*The following change will address need # 8.*

The dropdown currently displays Evaluations at any district for which the user has Evaluation assignments submitted to KEEP. The dropdown will display all Evaluation assignments for which the Evaluatee has an assignment.

### Assessment Rubrics screen

#### All Evaluations will be Single Cycle

*This change addresses need # 8.*

The ability to select 1 or 1 Cycle Evaluations will be removed. All Evaluations going forward will be only 1 Cycle.



#### Print entire Evaluation before Archived

*This change will address need # 20 and #24 by allowing users to more easily identify data entry errors.*

In addition to the Print report for the Archived Evaluations, there is a desire to print the report at any step in the process in its entirety knowing that some fields will be blank. For roles other than Evaluatee, this could be made available on the various Search screens, but it could also be available when an Evaluation is selected.

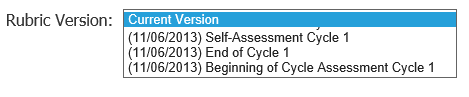
A link will be added to the Assessment Rubric to allow the user to print the complete Evaluation format with the data entered so far included, even though the entire Evaluation is not Archived. Data that is missing will be blank.

A Print button will be added next to the existing Print button at the bottom of the screen, and the label for the existing button will be updated to “Print Rubric”:



#### Updated names for Assessment Rubrics

*This change addresses need # 11.*



Instead of only displaying names after data is saved, the label for the last saved version titled “Current Version” should instead display the current Rubric Version without a date. So if the user had completed their Beginning of Cycle Conference, but had not yet signed off on the Mid-Cycle Assessment, the following would be displayed in the dropdown:

* End of Cycle Conference
* (12/15/2013) Beginning of Cycle Assessment
* (11/06/2013) Self-Assessment

#### End of Cycle Assessment Rubric locked on Evaluatee Mid-Cycle sign off

*This change addresses need # 10.*

The last Assessment Rubric will be locked when the Evaluatee signs off on the Mid-Cycle Conference instead of the Evaluator sign off.

#### Static text will be added to the screen

*This change addresses need # 6 and # 9.*

Static text will be added per the document titled *Assessment Rubric screen static text changes 2014* located on the project drive: [Text Changes to Screens\Assessment Rubric screen static text changes 2014.docx](file:///\\svfs15597.ksde.local\Projects\Keep\3.0.0\Requirements\Business%20Needs%20&%20Functional%20Overview\Text%20Changes%20to%20Screens\Assessment%20Rubric%20screen%20static%20text%20changes%202014.docx)

#### Error messages will be updated for clarity

*This change addresses need # 2.*

Existing errors will be ‘stacked’ under the Save and Print buttons so that users can see the errors more clearly. The error for the Evaluation Cycle will be removed as all Evaluations will be Single Cycle.



* ~~Please select an evaluation cycle~~ (this error will be removed)
* You must select an indicator in each row
* Please select at least one and no more than four goals

#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



### Goals screen

#### The Goal Version dropdown will be removed

*This change addresses need # 8.*



#### Layout update to list each selected Goal once

*This change addresses need # 13.*

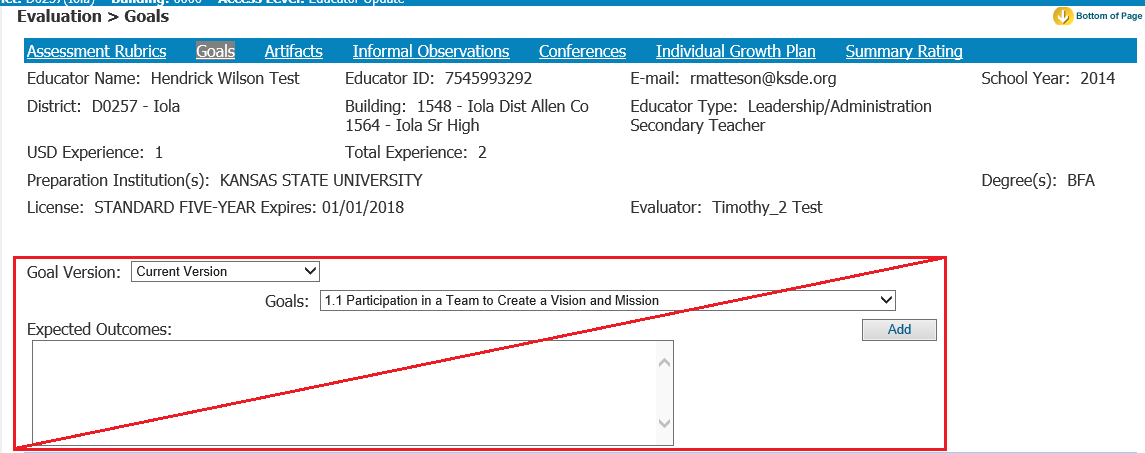
The Goals screen will be changed to display one Expected Outcomes per Goal selected on the Assessment Rubric screen instead of having to select them from the dropdown first.

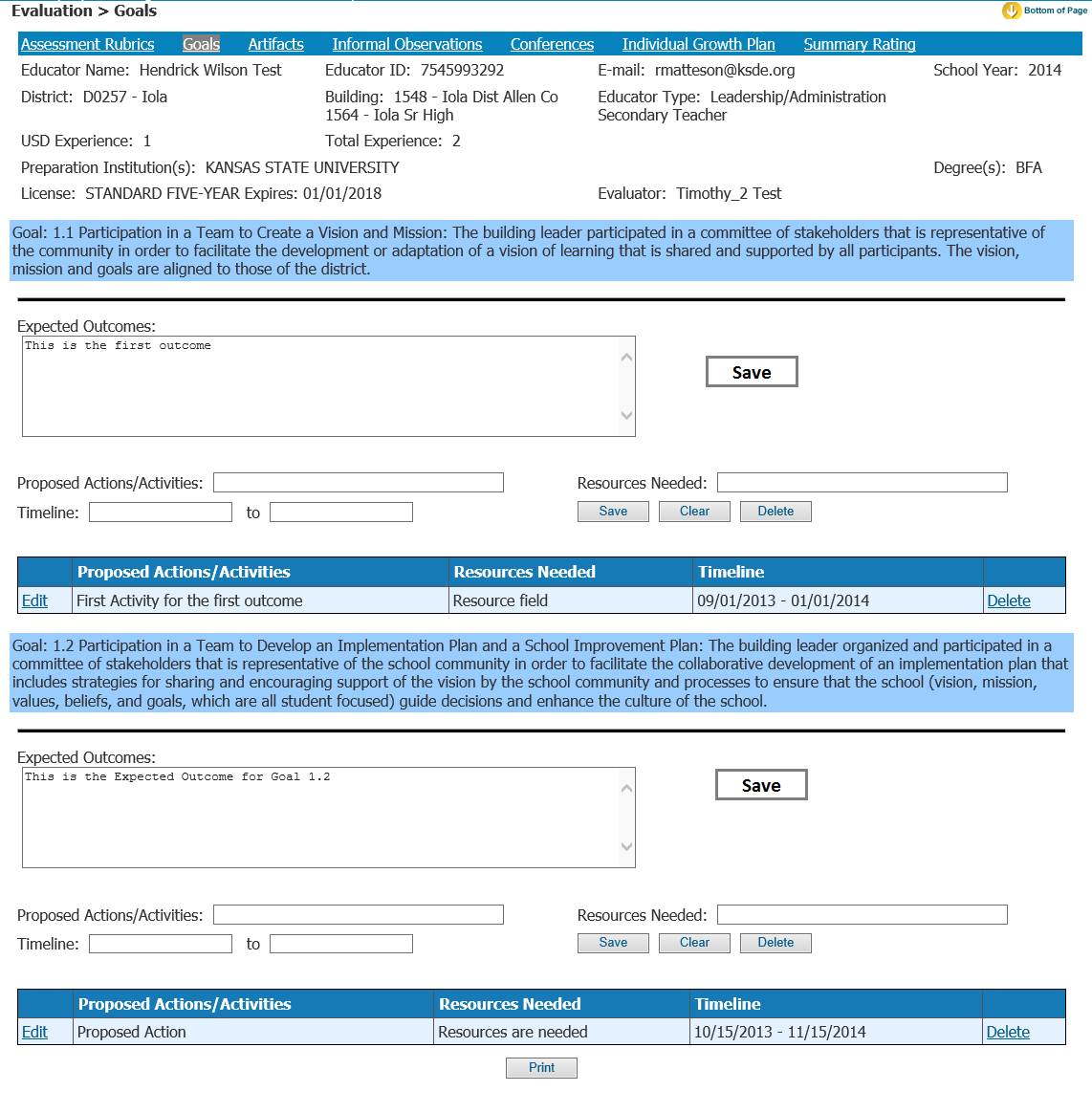
The Goals dropdown will be removed.



The ability to add additional Expected Outcomes for each Goal will be removed, and replaced with one per Goal (up to four total Goals).

Old format:

**

New format (with suggested Save buttons for each Goal):**

This change should not affect the saved data, just the way that it is displayed and saved.

#### Goal data entry extended through the end of Mid-Cycle Conference

*This change addresses need # 12.*

The ability to enter Goals and related data will be available continuously from the time that the Evaluatee completes the Self-Assessment through the Evaluatee sign off of the Mid-Cycle Conference.

#### Static text will be added to the screen

*This change addresses need # 6.*

Static text will be added per the document titled *GOALS screen static text changes 2014* located on the project drive: [Text Changes to Screens\GOALS screen static text changes 2014.pdf](file:///\\svfs15597.ksde.local\Projects\Keep\3.0.0\Requirements\Business%20Needs%20&%20Functional%20Overview\Text%20Changes%20to%20Screens\GOALS%20screen%20static%20text%20changes%202014.pdf)

#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



### Artifacts

#### The Artifacts Version dropdown will be removed

*This change addresses need # 8.*



#### Remove the data entry restriction

*This change addresses need # 3.*

The restriction for data entry based on the End of Cycle conference will be removed so that Artifacts may be uploaded at any point during the process.

#### Static text will be added to the screen

*This change addresses need # 6.*

Static text will be added per the document titled *Artifacts screen static text changes 2014* located on the project drive: [Text Changes to Screens\Artifacts screen static text changes 2014.pdf](file:///\\svfs15597.ksde.local\Projects\Keep\3.0.0\Requirements\Business%20Needs%20&%20Functional%20Overview\Text%20Changes%20to%20Screens\Artifacts%20screen%20static%20text%20changes%202014.pdf)

#### File extensions will not be case sensitive

*This change addresses need # 4.*

The file extensions allowed for upload will allow any case (.PDF, .pdf, .Pdf, .pDf, etc.)



### Observer screen

#### The Observer Version dropdown will be removed

*This change addresses need # 8.*



#### Remove the data entry restriction

*This change addresses need # 3.*

The restriction for data entry based on the End of Cycle conference will be removed so that Artifacts may be uploaded at any point during the process.

#### Static text will be added to the screen

*This change addresses need # 6.*

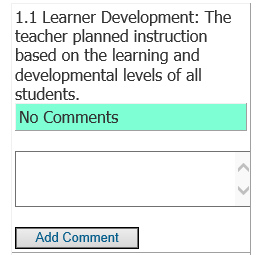
Static text will be added per the document titled *Observer screen static text changes 2014* located on the project drive: [Text Changes to Screens\Observer screen static text changes 2014.docx](file:///\\svfs15597.ksde.local\Projects\Keep\3.0.0\Requirements\Business%20Needs%20&%20Functional%20Overview\Text%20Changes%20to%20Screens\Observer%20screen%20static%20text%20changes%202014.docx)

#### Error messages will be updated for clarity

*This change addresses need # 2.*

No error is currently returned when no text has been entered and the user attempts to save and there are no other Observation type errors on the screen.

An error will be added “Text required to add a Comment” that is displayed near the Add Comment button.



#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Add Comment buttons are clicked and the data is saved. This notification will be displayed near the Add Comment button that was clicked.

### Informal Observations screen

#### The Informal Observations Version dropdown will be removed

*This change addresses need # 8.*



#### Observation data entry

*This change addresses need # 14.*

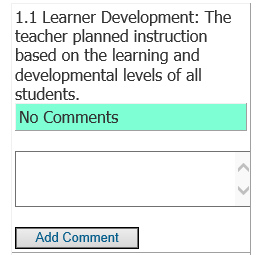
To improve ease of use for Evaluators, the ability to enter Observations within the Evaluation itself will be added so that they do not need to exit the Evaluation to complete data entry through the Observer screen.

The ability for the Evaluator to enter Observations to the screen to match the Observer screen will be added to the Informal Observations Screen.

#### Error message

*This change addresses need # 2.*

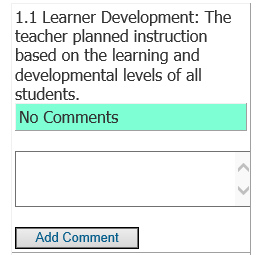
An error will be added “Text required to add a Comment” to match the Observer data entry screen when the user tries to add a comment with no text in the field.



#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



### Conferences

#### The Conferences Version dropdowns will be removed

*This change addresses need # 8.*



#### Static text will be added to the screen

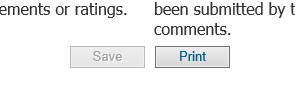
*This change addresses need # 6.*

Static text will be added per the document titled *Observer screen static text changes 2014* located on the project drive: [Text Changes to Screens\Conferences screen static text changes 2014.docx](file:///\\svvfs.ksde.local\Projects\Keep\3.0.0\Requirements\Business%20Needs%20&%20Functional%20Overview\Text%20Changes%20to%20Screens\Conferences%20screen%20static%20text%20changes%202014.docx)

#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



### Individual Growth Plan

#### The Individual Growth Plan Version dropdown will be removed

*This change addresses need # 8.*



#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



### Student Growth Measures Summary Rating (new screen)

A new screen will be added to collect user entered Student Growth Measures that will be used to calculate the Summative Rating. This screen will be locked until the Self-Assessment Rubric is signed off by the Evaluatee, and will be available for editing until the Evaluation is Archived.

#### Editable text

*This change addresses need # 6.*

The ability to add text to the screen that can be edited in the same way as the Home screen will be added between the Evaluatee data displayed at the top of the page and the data entry. The ability to edit the text will be added to the **View/Edit Maintenance Pages > KEEP Home/Help Pages** or similar location.

#### Student Growth Measures

*The following changes will address need # 15.*

The Evaluator will enter at least two, but up to three measures with scores and indicate whether the measure was Met or Not Met. The Measure and Score can be one of a large number of scoring systems, and will not be able to be used for aggregate calculations.

|  |  |  |
| --- | --- | --- |
| Field | Format | Required? |
| Measure 1 | Alphanumeric (30) | Required |
| Score 1 | Alphanumeric (10) | Required |
| Met/Not Met 1 | Bit | Required |
| Measure 2 | Alphanumeric (30) | Required |
| Score 2 | Alphanumeric (10) | Required |
| Met/Not Met 2 | Bit | Required |
| Measure 3 | Alphanumeric (30) | Optional |
| Score 3 | Alphanumeric (10) | Optional |
| Met/Not Met 3 | Bit | Optional |

For the optional measure 3, if any field has data then all three must have data.

The Rating field will display the Rating based on the Met/Not Met radio button selections per the Summary Rating Matrix. The recommended rating is as follows:

|  |  |
| --- | --- |
| Number of Met | Recommended Rating |
| 3 | Highly Effective |
| 2 | Effective |
| 1 | Developing |
| 0 | Ineffective |

If the Evaluator Accepts the Recommended Rating, then that will be the SGM Summary Rating used on the Summative Rating screen.

If the user chooses not to use the Recommended Rating, they will be presented with the options that are one higher or lower on the list to choose from for the Summative Rating screen.

#### Example of SGM Summary Rating data entry:

*The following changes will address need # 15.*

The following example shows that since only a single Student Growth Measure was Met, the recommended score was Developing. When the Evaluator clicked Not Accept, the options that were within one rating of the Recommended Rating were displayed for the user to select. If the Recommended Rating was Ineffective, they would only have the one option of Developing:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |
|  | **Name of Student Growth Measure** |  | **Score** |  | **Met** |  | **Not Met** |  |
|  |  |  |  |  |  |  |  |  |
|  | District’s Measure # 1 |  | 14 |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | Another measure |  | Effective |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | **Recommended Rating** |  |  |  |  |  |  |  |
|  | Developing |  | Accept |  |  |  |  |  |
|  |  |  | Not Accept |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  | **Change Rating to** |  |  |  |  |  |
|  |  |  | Effective |  |  |  |  |  |
|  |  |  | Ineffective |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



#### Print Functionality

*The following changes will address need # 15.*

A report generated when the Print button is clicked will need to be created for this new screen.

### Instructional Practices Protocol Summary Rating (old Summary Rating)

The screen that was titled Summary Rating in previous releases will be changed to Instructional Practices Protocol Summary Rating, or IPP Summary Rating where a shorter title is needed.

#### The Summary Rating Version dropdown will be removed

*This change addresses need # 8.*



#### Editable text

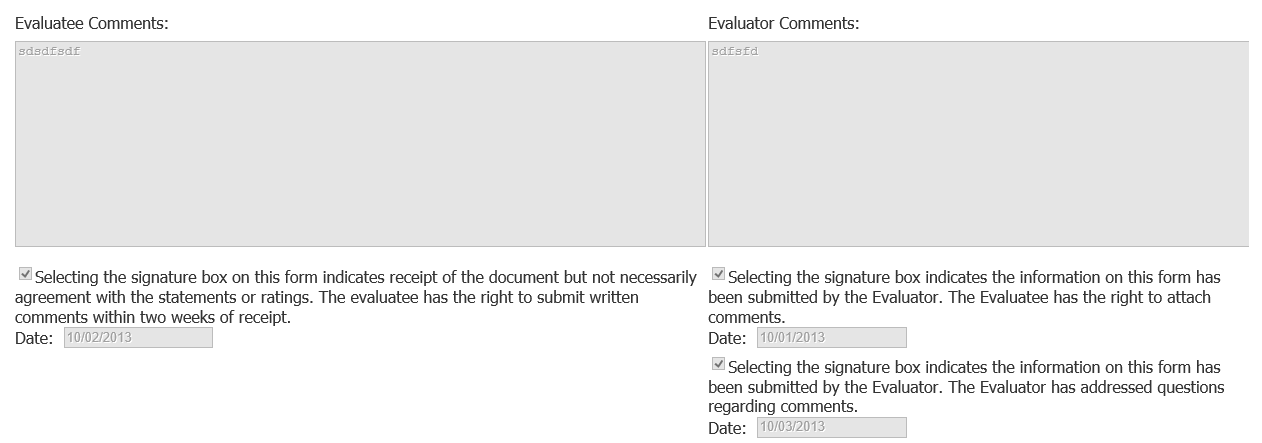
*This change addresses need # 6.*

The ability to add text to the screen that can be edited in the same way as the Home screen will be added between the Evaluatee data displayed at the top of the page and the data entry. The ability to edit the text will be added to the **View/Edit Maintenance Pages > KEEP Home/Help Pages** or similar location.

#### Comments and sign offs will be moved to the Summative Rating screen.

*This change addresses need # 16.*

The following fields will no longer be displayed on the IPP Summary Rating screen, as they will be collected on the Summative Rating screen starting in release 3.0.0.



#### Final Rating

*This change addresses need # 16.*

The Evaluator role will complete the data entry for this functionality. This data entry is required for the Summative Rating screen to allow Data Entry.

When the Evaluator has entered all four Overall Ratings, the Average of the scores of the Overall Ratings will be rounded and presented as the Recommended Score.

The Ratings values are:

* Highly Effective = 4
* Effective = 3
* Developing = 2
* Ineffective = 1

Examples:

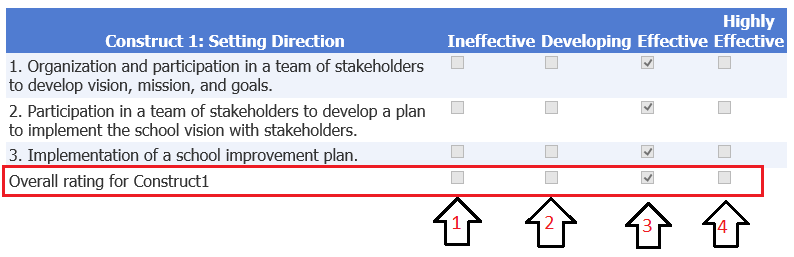
* All four are Developing (2+2+2+2)/4 = 2 : Recommended Score of Developing
* Two Developing and two Effective (2+2+3+4)/4 = 2.75 rounded to 3 : Recommended Score of Effective
* One Highly Effecting and three Effective (4+3+3+3)/4 = 3.25 rounded down to 3 : Recommended Score of Effective

The Overall Ratings from each Construct would be used to display a suggested Final Rating score using the Summary Rating Matrix, with the choice to override the score for an adjacent score.

If the Evaluator Accepts the Recommended Rating, then that will be the IPP Summary Rating used on the Summative Rating screen.

If the Evaluator chooses not to use the Recommended Rating, they will be presented with the other three Ratings.

This is an example of the Overall Ratings that will be used from each Construct:



#### Example of IPP Summary Rating data entry

*This change addresses need # 16.*

The following example shows that since all of the Overall Ratings for the Constructs were Effective, the recommended score from the Summary Rating Matrix is Effective. When the user clicked Not Accept, the other three options were displayed for the Evaluator to select:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  | Overall Rating for Construct 1 |  | Effective |  |  |  |
|  | Overall Rating for Construct 2 |  | Effective |  |  |  |
|  | Overall Rating for Construct 3 |  | Effective |  |  |  |
|  | Overall Rating for Construct 4 |  | Effective |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  | **Recommended Score** |  |  |  |
|  |  |  | Effective |  |  Accept |  |
|  |  |  |  |  |  Not Accept |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  | **Change Rating to** |  |
|  |  |  |  |  | Highly Effective |  |
|  |  |  |  |  | Developing |  |
|  |  |  |  |  | Ineffective |  |
|  |  |  |  |  |  |  |

The selection of whether to use the Rating or not will be saved so that it can be referenced at a later date for how many Evaluations had their Rating recommendation overridden.

#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



#### Print Functionality

*This change addresses need # 16.*

The report generated when the Print button is clicked will need to be updated to include the new data entry fields and not include the data entry that was removed.

### Summative Rating (new screen)

This screen will allow data entry only after the Student Growth Measures Summary Rating and Instructional Practices Protocol Summary Rating screens have had all required data entry completed. This screen includes data entry by the Evaluator or the Evaluatee as described.

#### Editable text

*This change will address need # 6.*

The ability to add text to the screen that can be edited in the same way as the Home screen will be added between the Evaluatee data displayed at the top of the page and the data entry. The ability to edit the text will be added to the **View/Edit Maintenance Pages > KEEP Home/Help Pages** or similar location.

#### Summative Rating

*This change will address need # 16.*

A new screen will be added that combines the Student Growth Measure Summary Rating and IPP Summary Rating to determine a Summative Rating. The Evaluator will complete data entry for the Summative Rating.

The preferred implementation would allow users to view the screen even if the SGM Summary Rating and IPP Summary Rating have not yet been completed, but to not allow data entry until the two Summary Ratings have been completed.

This screen will display a row that lists the Student Growth Rating and the Instructional Practices rating and compares the two to give a Final Rating based on the Summary Rating Matrix.

\_\_\_\_\_\_\_\_\_\_\_ + \_\_\_\_\_\_\_\_\_\_\_\_\_\_ = (one or two Ratings to choose from)

If the Summary Rating Matrix has two Ratings then the user must select between the two ratings.

For example if Effective + Developing, then it would he Effective OR Developing and the user would have to pick between Effective and Developing:



Effective + Developing = 🞊 Effective

⭘ Developing

If both are Developing it would automatically be Developing:



Developing + Developing = 🞊 Developing

If the Ratings don’t generate one or two Ratings, then the Evaluator may select any of the four Ratings. For example, if the SGM Summary Rating is Highly Effective and the IPP Summary Rating is Developing, the Evaluator would pick from any of the four Ratings.

#### Comments and sign offs

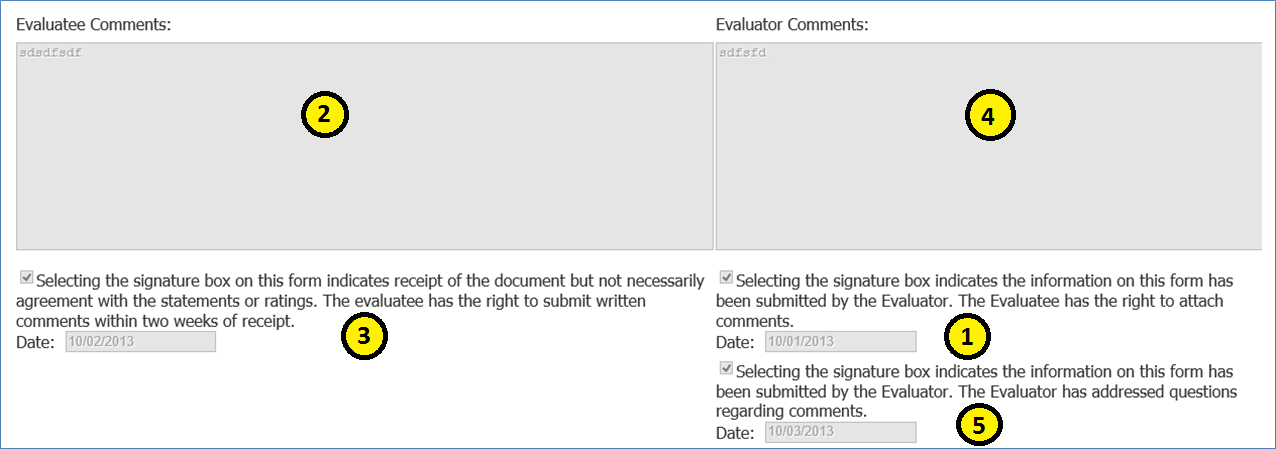
*This change will address need # 16.*

The comments and sign offs will be moved to the Summative Rating screen. The data entry fields and checkboxes will be ‘stacked’ to more clearly indicate the new workflow.

The order of steps for the comments and sign off are as follows.

1. Evaluator first sign off
2. Evaluatee Comments
3. Evaluatee sign off
4. Evaluator Comments
5. Evaluator second sign off

The fields from the Summary Rating screen, with the new order of completion noted by number:



An additional text box will be added for the first Evaluator sign off titled “Final Evaluator Statement” that will be required to complete the first sign off.

#### Example of data entry

|  |  |  |  |
| --- | --- | --- | --- |
| **SGM Summary Rating IPP Summary Rating**  Effective + Developing = 🞊 Effective  ⭘ Developing  Final Evaluator Statement:   |  | | --- | |  |     Evaluatee Comments:   |  | | --- | |  |     Evaluator Comments:   |  | | --- | |  | |

#### Data Entry Errors

*This change addresses need # 16.*

The error messages for requiring data entry in the text fields and valid dates that exist on the Summary Rating screen will be moved to accompany the fields moved to the Summative Rating screen with one change:

* The Final Evaluator Statement box will be required for the first Evaluator sign off.

The screen functionality will not allow the Evaluator to mark the first signoff until a Summative Rating has been selected.

#### Notification of Data Saved

*This change addresses need # 1.*

A message will be displayed to indicate the successful save of data when the Save button is clicked and the data is saved:



#### Print Functionality

*This change will address need # 16.*

A report generated when the Print button is clicked will need to be created for this new screen.

### KEEP Home/Help Pages

*This change addresses need # 6.*

This screen will be updated to include the new text displayed on screen for the following screens.

* Rollback Evaluations
* Student Growth Measures Summary Rating
* Instructional Practices Protocol Summary Rating
* Summative Rating

### KEEP Data Tables

*No changes*

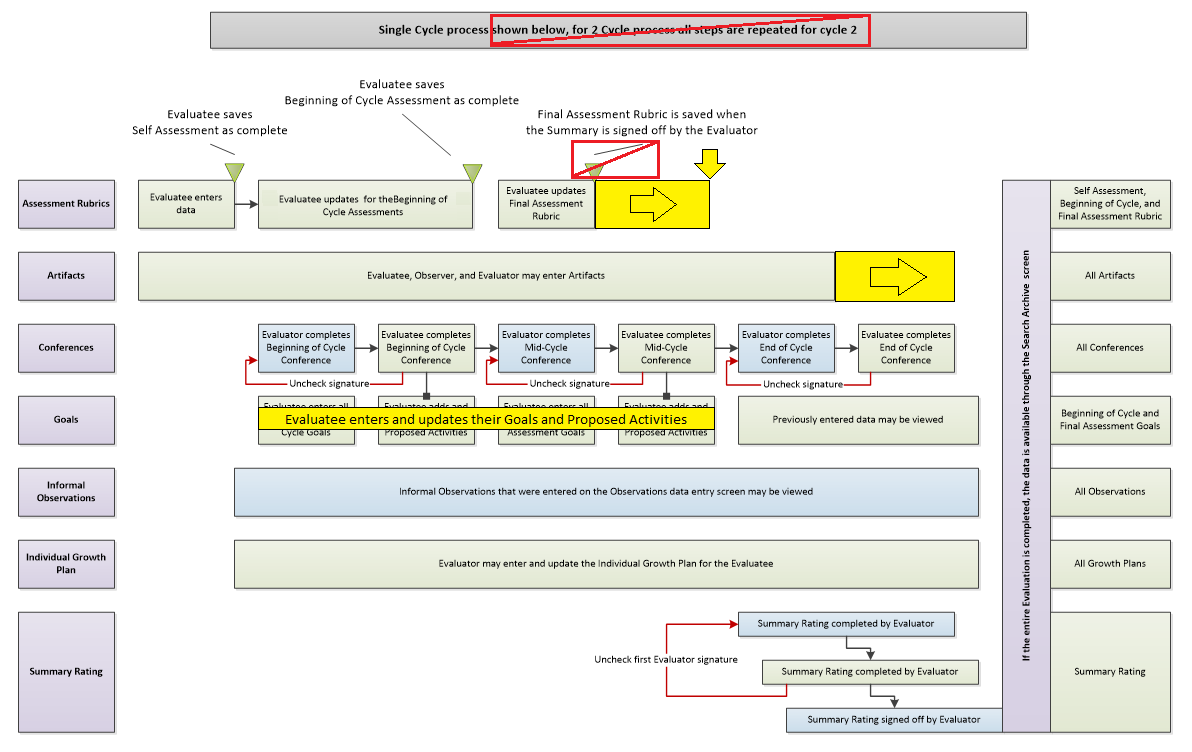
### Pilot 1

*No changes*

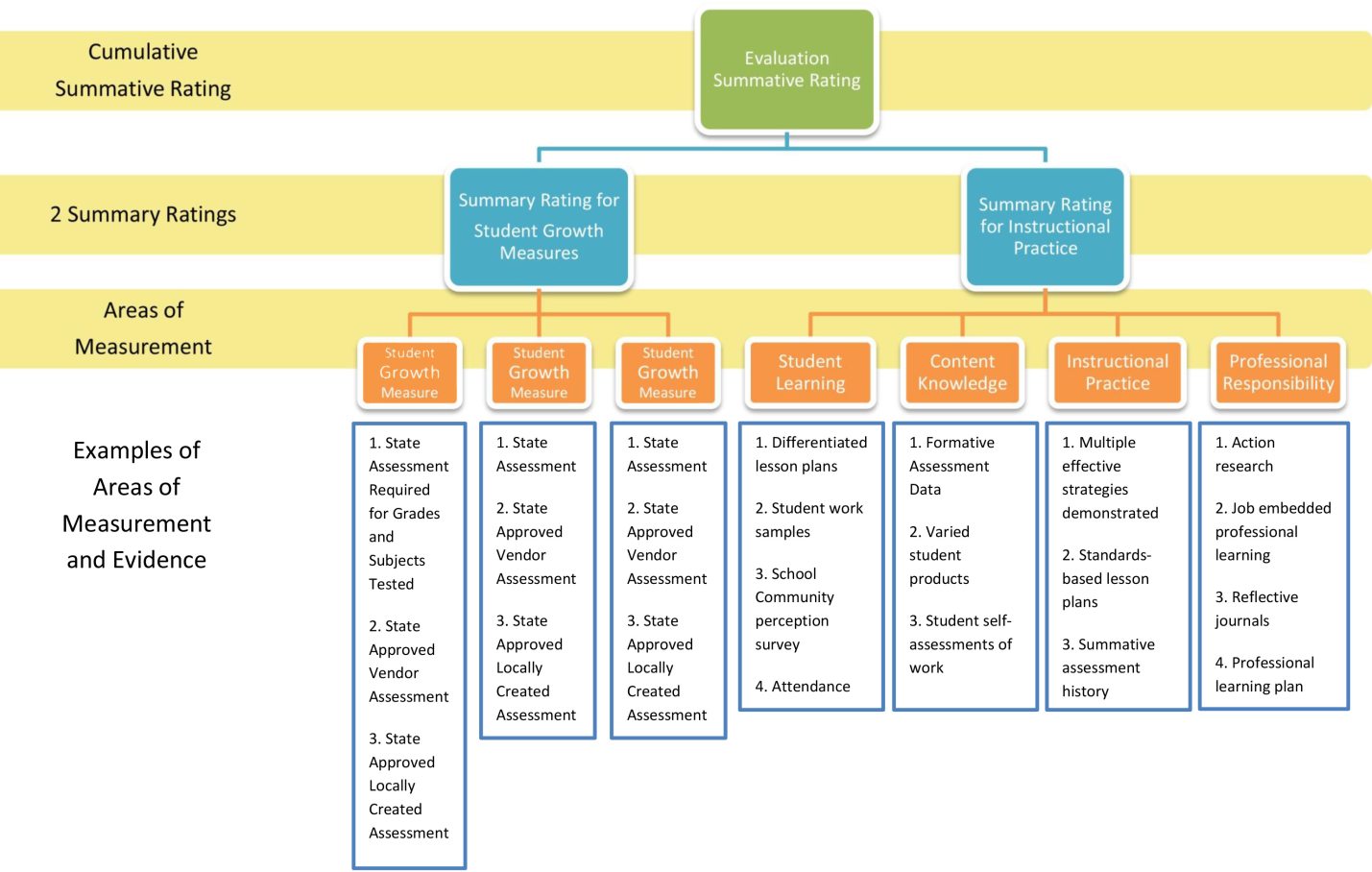
## Workflow

New steps in the process are not included in the graphic:

* Data entry for Artifacts will always be available until the Evaluation is Archived
* The data entry for Student Growth will be available after the Beginning of Cycle Evaluatee sign off until the first Evaluator checkbox on the Summative Rating screen



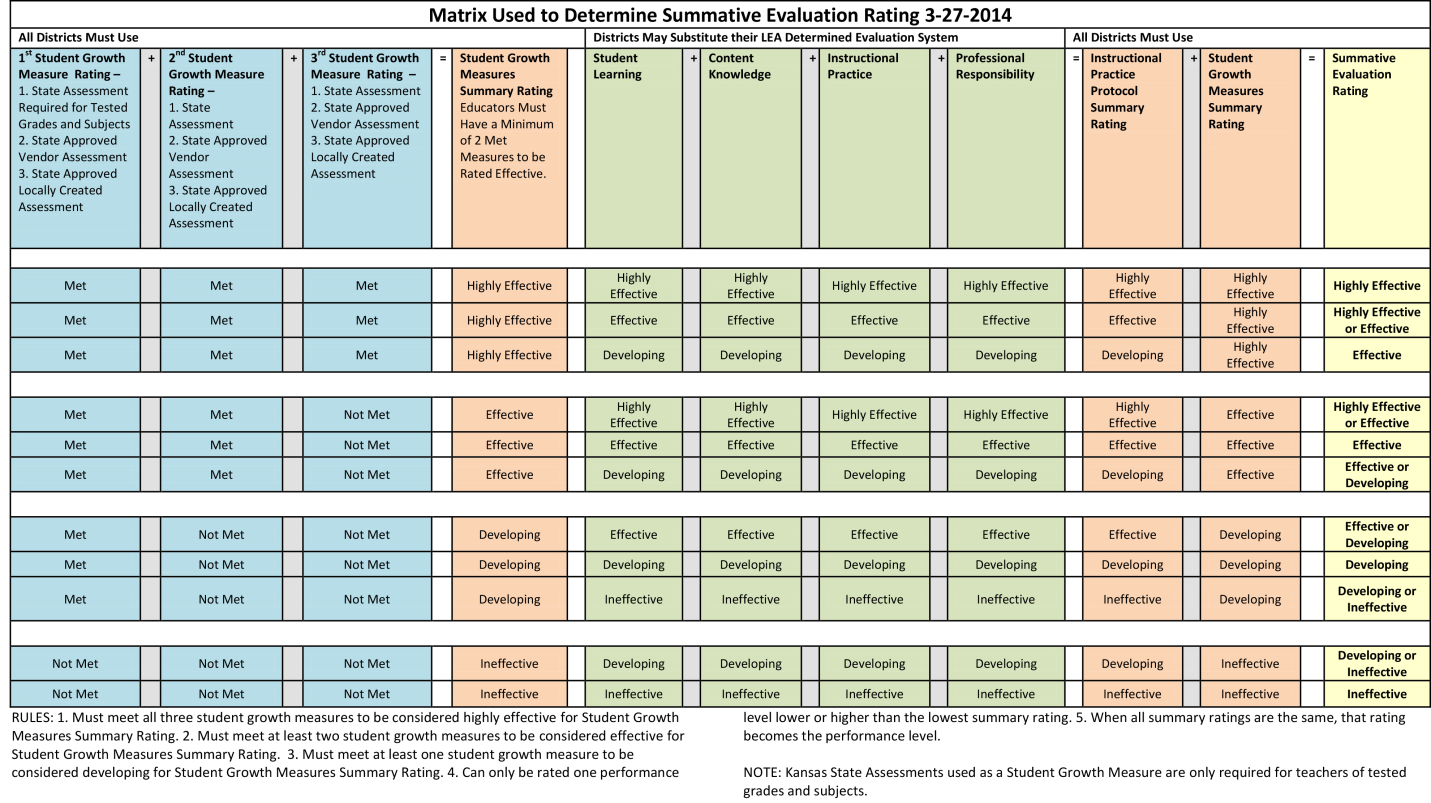
## Summative Rating Reference Material



The KSDE method and final guidelines that include student growth as a significant factor in its teacher and principal evaluation and support systems are as follows:

1. LEAs may select an evaluation system of choice for the instructional practice component--such as the Kansas default model (KEEP), commercial vendor based, or an LEA locally developed evaluation system, provided each district submits the annual Kansas D2 Assurances form stating how they will meet the six guidelines stipulated in the Kansas Flexibility Waiver.
2. All Kansas LEAs will determine an overall Summative Evaluation Rating per evaluated educator regardless of the evaluation system chosen by a district.
3. A Summary Rating for Student Growth Measures will be determined by using three approved student growth measures. One growth measure, as described on the Summary Rating Matrix, must be a Kansas State Assessment for those teachers of tested grades and subjects.
4. A teacher/principal must meet two of three growth measures in order to receive a Summary Rating of Effective.
5. KSDE will define for the state what it means to meet growth on Kansas State Assessments.
6. A Summary Rating for Educator Instructional Practice will be determined by using the vetted rubrics for any evaluation system chosen by a district.
7. A Summary Rating for Student Growth and a Summary Rating for Educator Instructional Practice will equal the overall Summative Evaluation Rating. School districts decide upon substantial weightings that are describable and defensible for Summary Rating #1 and #2 to complete the Summative Evaluation Rating.

## Summary Rating Matrix



## Data Elements and Common Education Data Standards (CEDS) Alignment

*These data elements wouldn’t be reported to CEDS.*

| **Data Element** | **Required/ Optional** | **Definition** | **Data Type** | **Code Set(s)** | **Valid Values** | **Screen/ Section** | **Related to Function(s)** | **CEDS Element Alignment** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Step** |  | The steps in the Evaluation process | Alphanumeric |  | * Self-Assessment * Beginning of Cycle Conference * Mid-Cycle Conference * End of Cycle Conference * Summary Rating |  |  | N/A |
| **Reset Reason** |  | The reason for resetting the Evaluation to a previous step | Alphanumeric |  | Any non-NULL |  |  | N/A |
| **Reset Login** |  | The login used to reset the Evaluation to a previous step |  |  |  |  |  | N/A |
| **Reset Date Time** |  | The date that the Evaluation was reset to a previous step |  |  |  |  |  | N/A |
| **Reset Step** |  | The step to which the Evaluation was reset | ? |  | * Self-Assessment * Beginning of Cycle Conference * Mid-Cycle Conference * End of Cycle Conference   Summary Rating |  |  | N/A |
| **Use Suggested Student Growth Rating** | Required | An indication of whether the suggested Student Growth Measurement will be used on the Summative Rating | bit |  | * True * False | SGM Summary Rating |  |  |
| **Student Growth Measure Title** |  |  | Alphanumeric (30) |  |  | SGM Summary Rating |  |  |
| **Student Growth Measurement** |  |  | Alphanumeric (10) |  |  | SGM Summary Rating |  |  |
| **Student Growth Measure Met/Not Met** |  |  | Bit (?) |  |  | SGM Summary Rating |  |  |
| **Final Rating** | Required | The Final Rating for the Instructional Practices Protocol Summary Rating | ? |  | * Highly Effective * Effective * Developing * Ineffective | IPP Summary Rating |  |  |
| **Final Evaluator Statement** | Required | The final statement entered by the Evaluator for the Summative Rating | Alphanumeric | Any |  | Summative Rating |  |  |