

The Educational Support Professional Evaluation System

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I. Overview

The Educational Support Professional Evaluation System has been moved from JPLS to Skyward. Evaluators and employees will use Skyward EmployeeAccess. Employees will no longer be required to do a self- evaluation. The classified evaluation process requires the completion of four tasks. As each task is completed, the evaluator and employee will receive an email. The evaluation process is not complete until all tasks are finished and the employee and evaluator receive a confirmation email.



- Task 1 – Evaluator starts the Evaluation Assessment Form.
- Task 2 – Evaluator meets with the employee and completes the Evaluation Assessment Form.
- Task 3 – Employee completes the Employee Signature/Acknowledgment Form.
- Task 4 – Evaluator completes the Evaluator Signature/Acknowledgment Form.

Each task has four steps.

- Step 1 – Review or complete a form.
- Step 2 – Review or add notes. Notes are included in emails.
- Step 3 – Review or add attachments.
- Step 4 – Choose the next task.

Note: The first task has an additional step where the employee being evaluated is selected.

Employees can view all of their evaluations in Skyward Employee Access. Schools and departments can run a "Classified Evaluation Report" containing a list of employees with their most recent evaluation and their current year evaluation status. For questions, contact the Information Systems Help Desk at 801-567-8737.

II. Task 1 – Evaluator starts the Evaluation Assessment Form

The evaluator will log in to Skyward Employee Access at <https://skyfin.jordan.k12.ut.us>

The screenshot shows the login page for the Skyward Finance System. The page has a light blue background with the Jordan School District logo at the top. In the center, there is a white box containing the Skyward logo and the text "Jordan School District Finance System". Below this, there are two input fields: "Login ID:" and "Password:". A "Sign In" button is located to the right of the password field. At the bottom of the white box, the date "05.17.06.00.10" is displayed. Below the white box, there is a "Login Area:" dropdown menu set to "All Areas". At the very bottom of the page, there is a copyright notice "© 2017 Skyward, Inc. All rights reserved." and the text "Windows 10 / Firefox 55".

To view the "Task Processes" section, click the "Task Manager" link in the "Jump to Other Dashboards" section. To start Task 1, click the "Educational Support Professional Evaluation" link in the "Task Processes" section.

The screenshot shows the Skyward Employee Access dashboard. The top navigation bar includes links for "Home", "Employee Information", "Time Off", "True Time", "FastTrack Open Positions", and "FastTrack Screener". The main content area is divided into three sections: "Jump to Other Dashboards", "Task Processes", and "Jump to Other Systems". In the "Jump to Other Dashboards" section, the "Task Manager" link is circled in black. In the "Task Processes" section, the "Classified Evaluation" link is circled in black. A red arrow points from the "Classified Evaluation" link to a text box that says "Now labeled Educational Support Professional Evaluation". The "Jump to Other Systems" section includes links for "Employee Access", "Financial Management", "Human Resources", and "Product Setup". The bottom of the page shows the copyright notice "© 2017 Skyward, Inc. All rights reserved." and the text "Finance System" and "Windows 10 / Firefox 55".

On step 1, enter the first five characters of the employee's last name in the "Employee" field and select the employee from the list. To move to the next step, click the "Next" button.

The screenshot shows a web browser window titled "TM Process: Classified Evaluation - 05.17.06.00.10 - Mozilla Firefox". The address bar shows the URL: <https://skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/qwkfwsgntabs000.w?isPopup=true>. The page title is "TM Process: Classified Evaluation".

The main content area includes a description of the evaluation process: "The Classified Evaluation Process includes four tasks. Task 1 - Evaluator starts the evaluation assessment form. Task 2 - Evaluator meets with the employee and completes the remaining portion of the evaluation assessment form. Task 3 - Employee completes the employee acknowledgement/signature form. Task 4 - Evaluator completes the evaluator acknowledgement/signature form. The evaluation is not complete until all tasks are finished and the employee and evaluator receive a confirmation email."

1. Select Employee

READ FIRST: Step 1 (Select Employee) - select the employee to be evaluated. Step 2 (General) - click the "Open" button, complete the top portion of the Classified Evaluation form, and click the "Save" button. Step 3 (Notes) - add any notes that you want included in the meeting request email. Step 4 (Attachments) - add any attachments for exceptional or unacceptable performance. Step 5 (Choose Next Task) - click the "Evaluation Meeting" button and schedule a meeting with the employee. An email will be sent requesting an evaluation meeting. At the meeting, complete the "Evaluation Meeting" task.

The "Employee" field contains the text "smol". A dropdown menu is open, showing the following information for the selected employee:

- SMOLIMIC000 [SMOLIK, MICHELLE R]
- Employee Type: Classified Contracted
- Building: INFORMATION SYSTEMS
- Check Location: INFORMATION SYSTEMS

The right sidebar contains the "Evaluator Assessment" section with a list of steps:

1. Select Employee
2. General
3. Notes
4. Attachments
5. Choose Next Task

Below the list, it says "Step 1 of 5". A "Next" button is circled. Below that is a "Process History" section with two buttons: "Save and Finish Later" and "Reassign Task".

On step 2, open the Educational Support Professional Evaluation Form by clicking the "Open" button.

The screenshot shows the same web browser window, now on Step 2: General. The "Employee" field now displays "SMOLIMIC000 [SMOLIK, MICHELLE R]".

2. General

READ FIRST: Step 1 (Select Employee) - select the employee to be evaluated. Step 2 (General) - click the "Open" button, complete the top portion of the Classified Evaluation form, and click the "Save" button. Step 3 (Notes) - add any notes that you want included in the meeting request email. Step 4 (Attachments) - add any attachments for exceptional or unacceptable performance. Step 5 (Choose Next Task) - click the "Evaluation Meeting" button and schedule a meeting with the employee. An email will be sent requesting an evaluation meeting. At the meeting, complete the "Evaluation Meeting" task.

The "Custom Forms" section contains a table with the following data:

Custom Profile	Evaluation Classified	Classified Evaluation	Open

The "Open" button in the table is circled.

The right sidebar is the same as in Step 1, but the "Next" button is now "Next" (Step 2 of 5).

On the Educational Support Professional Evaluation Form, complete the “Performance Areas”, “Documentation” and “Recommended Status” sections. When finished, click the “Save” button.

Classified Evaluation - 05.17.06.00.10 - Mozilla Firefox

https://skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/qqudfedit050.w?isPopup=true

Classified Evaluation

Name: **SMOLIK, MICHELLE R.** Employee Type: **Classified Cont** Building Code: **080**

Performance Areas

Performance Area	Rating
Attendance and Punctuality - Reports to work and meetings regularly and punctually	3 Satisfactory
Communication Skills - Communicates clearly in oral and written forms and effectively listens to others	3 Satisfactory
Human Relations - Works effectively and respectfully with supervisor, coworkers, students, patrons and customers	3 Satisfactory
Judgment - Shows good judgment and makes responsible decisions	3 Satisfactory
Leadership Skills - Motivates, supports and inspires others	3 Satisfactory
Planning and Organization - Effectively identifies, organizes and completes work on schedule	3 Satisfactory
Policies and Procedures - Demonstrates awareness of and compliance with District policies and procedures	3 Satisfactory
Professionalism - Responds to work situations in a positive, respectful and productive manner	3 Satisfactory
Quality of Work - Completes work products and activities in a useful, accurate and precise manner	3 Satisfactory
Quantity of Work - Completes all assigned duties which are expected of similar employees in the same position	3 Satisfactory
Safety and Security - Completes all assigned duties safely and follows all District security procedures	3 Satisfactory
Technical Skills - Applies sound technical approaches to areas of responsibility with an overall technical competence	3 Satisfactory
Supervision - Completes performance evaluations on time and provides effective support and training	0 N/A

Documentation

Documentation is required for Exceptional and Unacceptable performance. Describe below or include attachment. Attachments can be added after saving the form.

Michelle does great work.

Recommended Status

I **Michael Heaps** will meet with the employee and recommend that the status of this employee be **Regular Contract**

Professional Development

The Professional Development Plan is completed together as part of the Evaluator and Employee Meeting. A plan is required for Unacceptable performance.

Goals

Plan

To move to step 3, click the “Next” button.

TM Process: Classified Evaluation - 05.17.06.00.10 - Mozilla Firefox

https://skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/qwkfwsgntabs000.w

TM Process: Classified Evaluation

Employee: **SMOLIMIC000** **SMOLIK, MICHELLE R**

The Classified Evaluation Process includes four tasks. Task 1 - Evaluator starts the evaluation assessment form. Task 2 - Evaluator meets with the employee and completes the remaining portion of the evaluation assessment form. Task 3 - Employee completes the employee acknowledgement/signature form. Task 4 - Evaluator completes the evaluator acknowledgement/signature form. The evaluation is not complete until all tasks are finished and the employee and evaluator receive a confirmation email.

2. General

READ FIRST: Step 1 (Select Employee) - select the employee to be evaluated. Step 2 (General) - click the “Open” button, complete the top portion of the Classified Evaluation form, and click the “Save” button. Step 3 (Notes) - add any notes that you want included in the meeting request email. Step 4 (Attachments) - add any attachments for exceptional or unacceptable performance. Step 5 (Choose Next Task) - click the “Evaluation Meeting” button and schedule a meeting with the employee. An email will be sent requesting an evaluation meeting. At the meeting, complete the “Evaluation Meeting” task.

Custom Forms

Custom Profile	Evaluation Classified	Classified Evaluation	Open

Evaluator Assessment

- Select Employee
- General
- Notes
- Attachments
- Choose Next Task

Step 2 of 5

Next

Process History

Save and Finish Later

Reassign Task

On step 3, add notes by clicking the “Add” button. Enter notes in the “Your Notes” box and click the “Save” button. The notes will appear in the emails that are sent to the evaluator and employee at the end of each task. To move to step 4, click the “Next” button.

TM Process: Classified Evaluation - 05.17.06.00.10 - Mozilla Firefox

https://skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/qwkfwsgntabs000.w

TM Process: Classified Evaluation

Employee: SMOLIMIC000 SMOLIK, MICHELLE R

The Classified Evaluation Process includes four tasks. Task 1 - Evaluator starts the evaluation assessment form. Task 2 - Evaluator meets with the employee and completes the remaining portion of the evaluation assessment form. Task 3 - Employee completes the employee acknowledgement/signature form. Task 4 - Evaluator completes the evaluator acknowledgement/signature form. The evaluation is not complete until all tasks are finished and the employee and evaluator receive a confirmation email.

3. Notes

Task - 05.17.06.00.10 - Mozilla Firefox

https://skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/qwkfwsgntabs000.w?isPopup=true

Task

Information

Process Description: Classified Evaluation

Task Summary: Evaluator Assessment

Task Instructions: READ FIRST: Step 1 (Select Employee) - select the employee to be evaluated. Step 2 (General) - click the "Open" button, complete the top portion of the Classified Evaluation form, and click the "Save" button. Step 3 (Notes) - add any notes that you want included in the meeting request

Notes

* Your Notes: Can we meet on Friday at 1:00pm to complete your Classified Evaluation?

Previous Notes:

Asterisk (*) denotes a required field

Evaluator Assessment

1. Select Employee
2. General
3. Notes
4. Attachments
5. Choose Next Task

Step 3 of 5

Previous Next

Process History

Save and Finish Later

Reassign Task

On step 4, add attachments by clicking the “Add” button. Click the “Browse” button and select the file. Enter a description in the “Description” box and click the “Save” button. To move to step 5, click the “Next” button.

TM Process: Classified Evaluation - 05.17.06.00.10 - Mozilla Firefox

https://skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/qwkfwsgntabs000.w

TM Process: Classified Evaluation

Employee: SMOLIMIC000 SMOLIK, MICHELLE R

The Classified Evaluation Process includes four tasks. Task 1 - Evaluator starts the evaluation assessment form. Task 2 - Evaluator meets with the employee and completes the remaining portion of the evaluation assessment form. Task 3 - Employee completes the employee acknowledgement/signature form. Task 4 - Evaluator completes the evaluator acknowledgement/signature form. The evaluation is not complete until all tasks are finished and the employee and evaluator receive a confirmation email.

4. Attachments

Description	Step	Inputted File	Date Modified

Attachments

Attachments

* File Name: Browse... Documentation.pdf

* Description: Documentation of Exceptional Performance

Asterisk (*) denotes a required field

Evaluator Assessment

1. Select Employee
2. General
3. Notes
4. Attachments
5. Choose Next Task

Step 4 of 5

Previous Next

Process History

Save and Finish Later

Reassign Task

On step 5, click the "Evaluation Meeting" button. This completes Task 1. An email will be sent to the employee and evaluator requesting a meeting.

TM Process: Classified Evaluation - 05.17.06.00.10 - Mozilla Firefox

https://skyfin.jordan.k12.ut.us/scripts/wsis.dll/WService=wsFin/qwkfwagntabs000.w

TM Process: Classified Evaluation

Employee:

The Classified Evaluation Process includes four tasks. Task 1 - Evaluator starts the evaluation assessment form. Task 2 - Evaluator meets with the employee and completes the remaining portion of the evaluation assessment form. Task 3 - Employee completes the employee acknowledgement/signature form. Task 4 - Evaluator completes the evaluator acknowledgement/signature form. The evaluation is not complete until all tasks are finished and the employee and evaluator receive a confirmation email.

5. Choose Next Task

Select the Next Task

Select the button below to create the Next Task:

Evaluation Meeting (HEAPS, MICHAEL S)

Evaluator Assessment

1. Select Employee
2. General
3. Notes
4. Attachments
5. Choose Next Task

Step 5 of 5

[Previous](#)

[Process History](#)

[Save and Finish Later](#)

[Reassign Task](#)

Sample Email



noreply@jordandistrict.org

michael.heaps@jordandistrict.org

Classified Evaluation - Request for Meeting MICHELLE R SMOLIK

MICHAEL S HEAPS has started the Classified Evaluation process for MICHELLE R SMOLIK. A meeting is requested to review the Classified Evaluation Assessment form.

Notes: >>> Can we meet on Friday at 1:00pm to complete your Classified Evaluation?

Evaluation Status:

Task 1 (COMPLETE) Evaluator Assessment - Evaluator starts the evaluation assessment form.

Task 2 (IN-PROGRESS) Evaluation Meeting - Evaluator meets with the employee and completes the evaluation assessment form.

Task 3 (INCOMPLETE) Employee Acknowledgement - Employee completes the employee acknowledgement/signature form.

Task 4 (INCOMPLETE) Evaluator Acknowledgement - Evaluator completes the evaluator acknowledgement/signature form.

The evaluation process is not complete until all tasks are finished and the employee and evaluator receive a confirmation email.

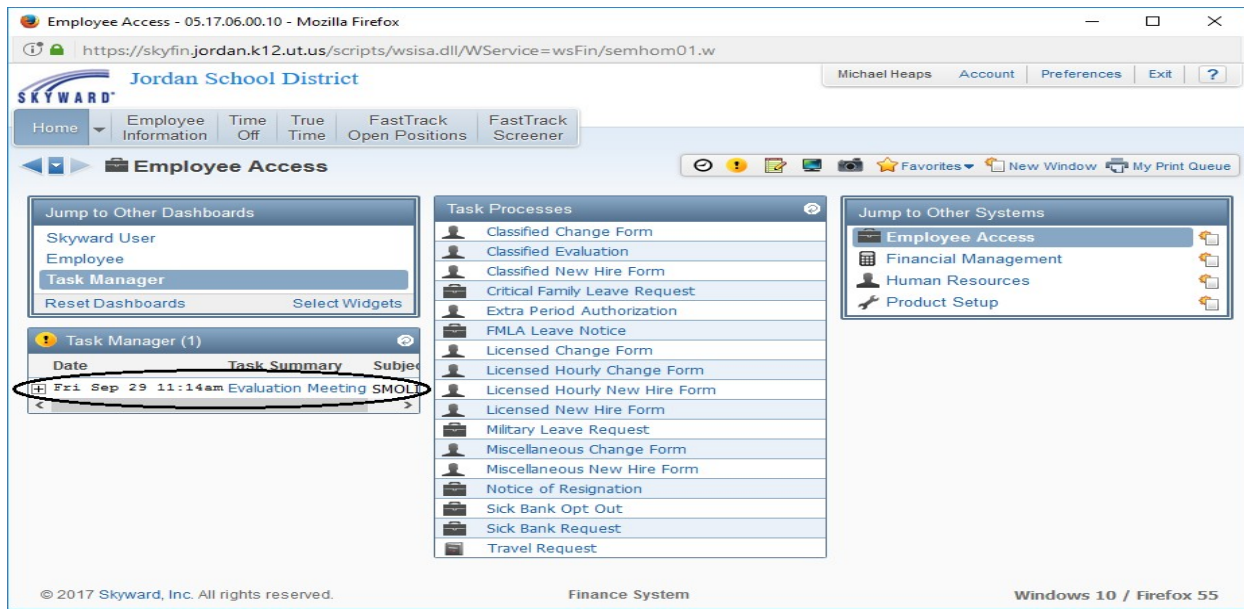
Evaluator Instructions:

1. At the evaluation meeting, login to the Skyward Finance System.
2. Click the "Task Manager" link found in the "Jump to Other Dashboards" section.
3. Click the "Evaluation Meeting" link found in the "Task Manager" section.
4. Follow the online instructions.

III. Task 2 – Evaluator meets with the employee and completes Evaluation Assessment Form

While meeting with the employee, the evaluator will log in to Skyward Employee Access at <https://skyfin.jordan.k12.ut.us>

To start Task 2, click the “Evaluation Meeting” link in the “Task Manager” section.



On step 1, open the Educational Support Professional Evaluation Form by clicking the “Open” button.

On the Educational Support Professional Evaluation Form, complete the “Professional Development” section. When finished, click the “Save” or “Save and Print” button.

Professional Development
The Professional Development Plan is completed together as part of the Evaluator and Employee Meeting. A plan is required for Unacceptable performance.
Goals
Learn more.
Plan
Watch tutorials.

To move to step 2, click the “Next” button.

To move to step 3, click the “Next” button.

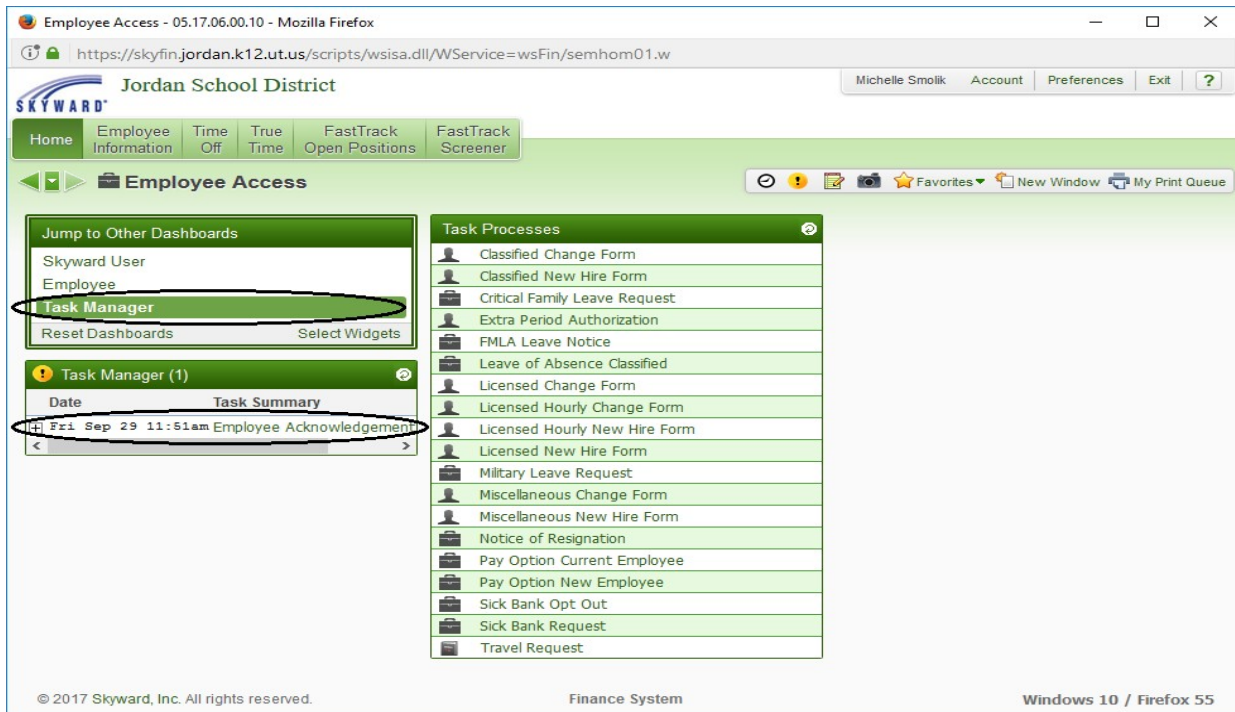
On step 3, view attachments by clicking the attachment description. To move to step 4, click the “Next” button.

On step 4, click the “Employee Acknowledgement” button. This completes Task 2.

IV. Task 3 – Employee completes the Employee Signature/Acknowledgement Form

While meeting with the employee, the employee will log in to Skyward Employee Access at <https://skyfin.jordan.k12.ut.us>

To view the “Task Manager” section, click the “Task Manager” link in the “Jump to Other Dashboards” section. To start Task 3, click the “Employee Acknowledgement” link in the “Task Manager” section.



On step 1, open the Educational Support Professional Evaluation Employee Acknowledgement Form by clicking the “Open” button. Employee enters today’s date and their name. When finished, click the “Save” button.

A screenshot of the "Classified Evaluation Employee Acknowledgement" form. The browser window title is "Classified Evaluation Employee Acknowledgement - WH\EP\TB\CU - 27198 - 05.17.06.00.10 - Mozilla Firefox". The URL is "https://skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/qqudfedit050.w?isPopup=true". The form header shows "Name: SMOLIK, MICHELLE R.", "Employee Type: Classified Cont", and "Building Code: 080". On the right, the "Save" button is circled. Below the header, the "Employee Acknowledgement" section contains a statement: "I acknowledge my evaluation has been discussed with me. My acknowledgement does not necessarily indicate my agreement." There are input fields for "Date" (10/01/2017) and "Name" (Michelle Smolik).

To move to step 2, click the “Next” button.

To move to step 3, click the “Next” button.

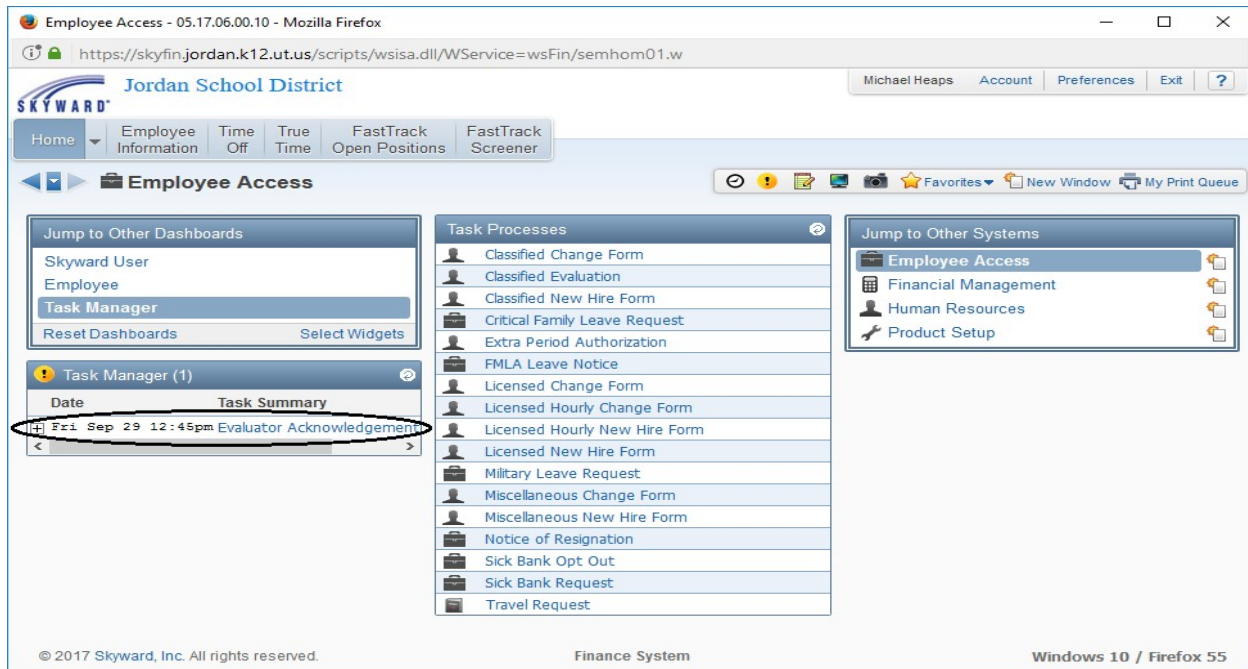
To move to step 4, click the “Next” button.

On step 4, click the “Evaluator Acknowledgement” button. This completes Task 3.

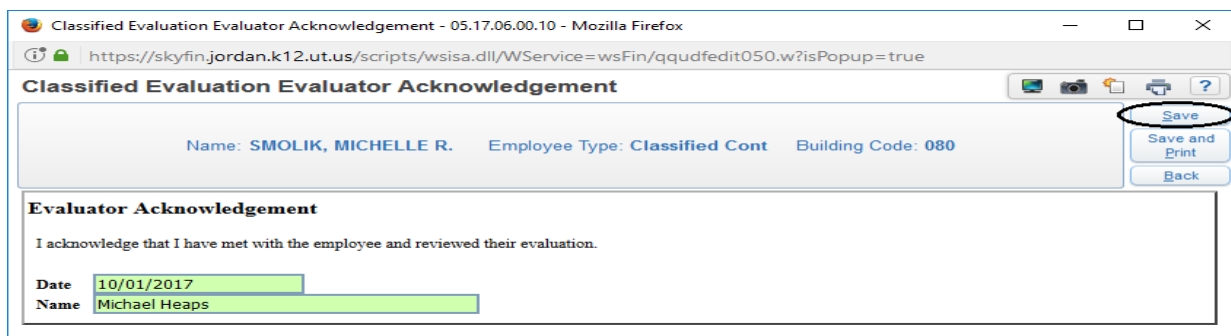
V. Task 4 – Evaluator completes the Evaluator Signature/Acknowledgement Form

While meeting with the employee, the evaluator will log in to Skyward Employee Access at <https://skyfin.jordan.k12.ut.us>

To start Task 4, click the “Evaluator Acknowledgement” link in the “Task Manager” section.



On step 1, open the Educational Support Professional Evaluation Evaluator Acknowledgement Form by clicking the “Open” button. Evaluator enters today’s date and their name. When finished, click the “Save” button.

The screenshot shows the 'Classified Evaluation Evaluator Acknowledgement' form. The header includes the title and a 'Save' button circled in red. Below the header, the evaluator's information is displayed: Name: SMOLIK, MICHELLE R., Employee Type: Classified Cont, and Building Code: 080. The main section is titled 'Evaluator Acknowledgement' and contains a statement: 'I acknowledge that I have met with the employee and reviewed their evaluation.' Below this statement, there are input fields for 'Date' (10/01/2017) and 'Name' (Michael Heaps). The form also includes 'Save and Print' and 'Back' buttons.

To move to step 2, click the “Next” button.

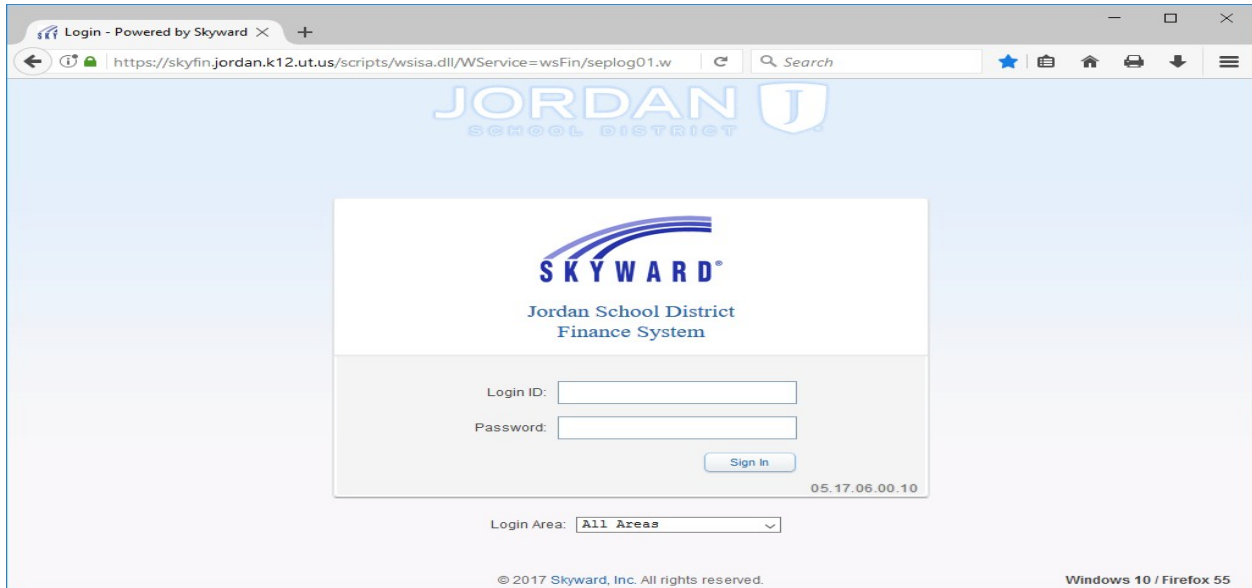
To move to step 3, click the “Next” button.

To move to step 4, click the “Next” button.

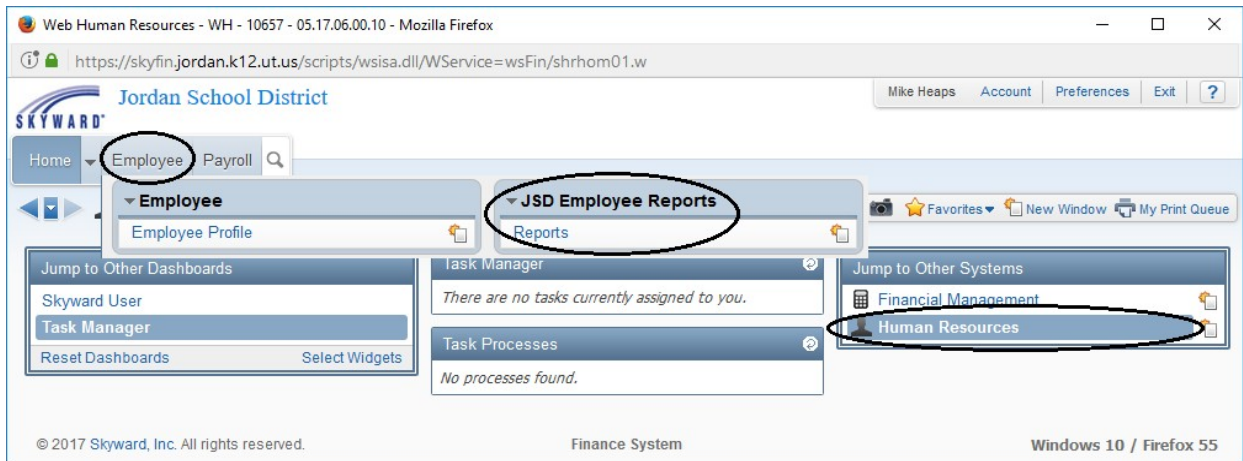
On step 4, click the “Finish Evaluation” button. This completes Task 4. A confirmation email will be sent to the employee and evaluator. Employees can view all of their completed evaluations in Skyward Employee Access under “Employee Information”, “Personal Information” and “Custom Forms”.

VI. Classified Evaluation Report

Schools and departments can run a “Educational Support Professional Evaluation Report” containing a list of employees with their most recent evaluation and their current year evaluation status. The head secretary or administrator will log in to Skyward Employee Access at <https://skyfin.jordan.k12.ut.us>



In the “Human Resources” system, click the “Reports” link in the “JSD Employee Reports” section and select the “Educational Support Professional Evaluations Report”.



The report contains a list of employees with their most recent evaluation and their current year evaluation status.

4jsdclaseval01.r 01-4				Jordan School District				09/29/17		Page:2	
05.17.06.00.06 *TrnDB*				Classified Evaluations Status						1:24 PM	
Employee Name	Loc	Hire Date	Term Date	Eval Date	Evaluator	Recommended Status	Last Evaluation Employee Signature	Date Signed	Evaluator Signature	Date Signed	Current Year Status
080 08/14/09				05/18/17	M	Regular Contract		05/18/17	M	05/18/17	**Incomplete**
080 09/24/12				05/23/17	M	Regular Contract		05/23/17	M	05/23/17	**Incomplete**
080 12/01/16				05/19/17	M	Provisional		05/19/17	M	05/19/17	**Incomplete**
080 07/28/14				05/22/17	M	Regular Contract		05/22/17	M	05/22/17	**Incomplete**