

## 2020 – 2021 School Year – Guide for District Managers of Frontline Education’s Employee Evaluation Management (EEM) Application

*This guide is broken into different sections based upon common tasks that District Managers of the Frontline Evaluation application find themselves completing throughout the year. Each section will start off with a checklist to help ensure that all items for a specific task are completed. With each item in the checklist – you will find a link to a quick video that shows you how to complete each task within the application.*

## Section 1: Back to School Checklist

- ☐ Review your account to ensure that you (still) have the correct access to manage your site in Frontline Education.
- ☐ Review and update District Profile Page.
- ☐ Review and update Building Profile Pages.
- ☐ Review and update Department/Grades/Group Profile Pages – if applicable.
- ☐ Review Rollover Results to check for any Errors and change the evaluation plans of users in the 2020-21 school year cycle.

***a. Review your account to ensure that you (still) have the correct access to manage your site in Frontline Education.***

- As the district manager you should have access to:
  - i. Evaluations: Report Writer, Evaluation Rights, & User Management
  - ii. Configuration Tools: Buildings List, Departments List, District Profile, Grades List, and News & Info List.
  - iii. Administration: Add/Edit User Info and Manage User History.
- You can check by navigating to the following Menu Items and ensure that you see Menu Items similar to the ones in the screen shots below.
- Evaluations Menu:

Professional Growth

\*New Mexico Template Site

NAVIGATION

Insights

My Info

Learning Plan

Activity Catalogs

Activities

Administration

Configuration Tools

Reports

Evaluations

Resource Library

ADMINISTRATION

REPORT TOOLS

Scheduled Reports

COMPONENTS

CNFG

User Management

Report Tools

2016\_EPRch200

2016\_EPRch201

2016\_GCPch200

2016\_GCPch201

2016\_GCPch202

2016\_WFch200

2016\_WFch201

2016\_WFch202

2016\_WFch203

2016\_WFch204

2016\_WFch205

2016\_WFch206

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2016\_WFch209

2016\_WFch210

2016\_WFch211

2016\_WFch212

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2016\_WFch997

2016\_WFch998

2016\_WFch999

2016\_WFch1000

2016\_WFch1001

2016\_WFch1002

2016\_WFch1003

2016\_WFch1004

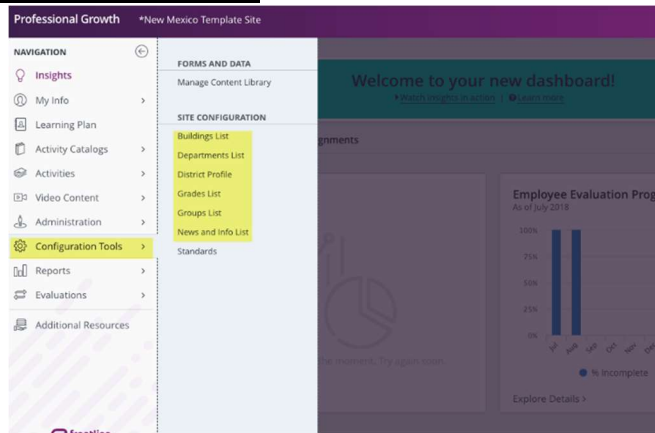
2016\_WFch1005

2016\_WFch1006

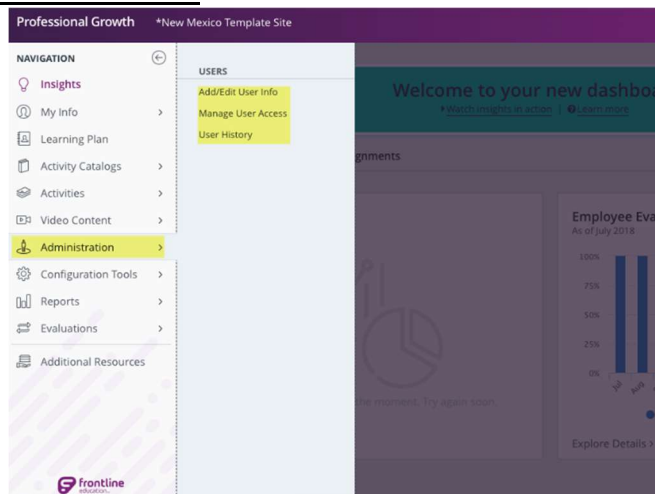
2016\_WFch1007

2016\_WFch1008

## ○ Configuration Tools Menu:



## ○ Administration Menu:



## ○ Process View - Manage Component Instances:

Name	Evaluation Type	Evaluation Period	Progress	Status
2018, NMPrincipal	NM School Leaders - Common - Se...	08/01/2018-05/30/2019	0 of 1	In Progress
2018, NMTeacher	NMTech: Option 2 - 2 Observation ...	08/01/2018-05/30/2019	0 of 6	In Progress
2018, NMTeacher2	NMTech: Option 2 - 2 Observation ...	08/01/2018-05/30/2019	0 of 6	In Progress
2018, NMTeacher3	NMTech: Option 2 - 2 Observation ...	08/01/2018-05/30/2019	0 of 6	In Progress

Component Name	Progress	Status
Professional Development Plan	0 of 4	Incomplete
Professional Responsibilities Domain 1	0 of 2	Incomplete
Professional Responsibilities Domain 4	0 of 2	Incomplete
Observation # 1: Observation: Domains 2 and 3	0 of 3	Incomplete
Observation #5: Observation: Domains 1 and 5	0 of 5	Incomplete

- If your account does not see all of these features as seen in the screen shot – please contact Robyn Cook at Region IX.

## b. Review and update District Profile Page.

- Navigate to Configuration Tools > District Profile

Professional Growth *New Mexico Template Site	
<b>NAVIGATION</b>	<b>FORMS AND DATA</b>
Insights	Manage Content Library
My Info	
Learning Plan	<b>SITE CONFIGURATION</b>
Activity Catalogs	Buildings List
Activities	Departments List
Video Content	<b>District Profile</b>
Administration	Grades List
<b>Configuration Tools</b>	Groups List
Reports	News and Info List
Evaluations	Standards
Additional Resources	

## New Mexico – Frontline Education Employee Evaluation Management (EEM) Solution Guide for District Managers

- PLEASE NOTE that I (Gene May) went in and changed all District Names to match the state list of Districts/Charters - please do not change.
- Ensure that the contacts listed indicated those persons that should have District Manager Access in your district. \*Sometimes it is only one person that is listed and that is fine. Keep in mind that the persons listed are the only person(s) that our support team will accept requests from for account changes to be made including evaluation rights.

Professional Growth \*New Mexico Template Site NMDistrict Manager

State: CA

Zip:

Phone #:

Website URL:

Contact Information

Executive/Administrator Contact: District Manager, Gene

Primary Support Contact: District Manager, Gene

Technical Contact: District Manager, Gene

MLP Oasys Contact: Click the button below to select users

MLP Elevate Contact: Click the button below to select users

Strong Hiring Protocol Contact: Click the button below to select users

Billing Contact Info (for renewals) Include: Contact Name NMPED

### c. Review Rollover Results to check for any Errors.

- Navigate to User Management – Evaluations > User Management

Professional Growth \*New Mexico Template Site

NAVIGATION

Insights

My Info

Learning Plan

Activity Catalogs

Activities

Video Content

Administration

Configuration Tools

Reports

Evaluations

Additional Resources

ADMINISTRATION

Admin View

Process View

Detail View (Detailed evaluati...

REPORT TOOLS

Rubric Explorer

Growth Explorer

System Reports

Composite Score Explorer

Report Writer

Scheduled Reports

CONFIG

User Management

- **Things to review:**
  - Look for any teacher that does not have current cycle dates for the 2019-20 school year. You can do this by sorting the column for end date and look for outliers with something other than 2020.
  - If a teacher does not have this – email Gene May for support with the name of a teacher that doesn't have these plan dates for investigation.
  - **DO NOT** just change the dates because an incorrect date probably indicates that this teacher's previous year evaluation plan has not been rolled over.

## New Mexico – Frontline Education Employee Evaluation Management (EEM) Solution Guide for District Managers

EEM User Management					
Set Evaluation Types		Set Cycle Dates			
User	Eval Type	Start Date	End Date	Building(s)	
2018, NMPrincipal	NM School Leaders - Common - Secondary	08/01/2018	06/30/2019		
2018, 2NMPrincipal	NM School Leaders - Common - Elementary	08/01/2018	06/30/2019		
2018, NMTeacher	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementa	
2018, NMTeacher2	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementa	
2018, NMTeacher3	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementa	
2018, NMTeacher4	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementa	
2018, NMTeacher5	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementa	
Account, Gene's Master	Unassigned	08/01/2018	06/30/2019		
Admin, MLP	Unassigned	08/01/2018	06/30/2019		
District Manager, Gene	Unassigned	08/01/2018	06/30/2019		

- Finally – for all teachers that are currently on a 2019-20 school year cycle date plan – you will need to do a Mass Change of the Evaluation Plan Type to the Interim Plan provided by the state.
  - Start by scrolling to the bottom of the EEM User Management Page and changing the Per Page Number to a number high enough to be sure to include all of your users on one page!
  - Then sort the Start Date Column.
  - Then put a check mark beside the teacher's name who is in a 2019-20 School Year Plan – be sure to go all the way to the bottom of the page selecting users to include them all.
  - Then navigate to the top of the page and click on the icon button that says Set Evaluation Types. Choose the plan titled: 2019.20 NM Observation Plan from the list. Click Submit.
    - All teachers will be assigned the same plan for this interim school year while the NM PED task force is making the more formalized changes for the 2020-21 school year.

Professional Growth \*New Mexico Template Site - NM

an

logs

ion

on Tools

Tools

Sys Admin

EEM User Management

Set Evaluation Types Set Cycle Dates

User	Eval Type	Start Date	End Date	Building(s)
2018, 1SuprNM	Unassigned	Not Set	Not Set	
2018, 2SuprNM	Unassigned	Not Set	Not Set	
District Manager, NM	Unassigned	Not Set	Not Set	
2018, NMPrincipal20	Unassigned	Not Set	Not Set	
District Manager, Gene	Unassigned	08/01/2018	06/30/2019	
Edles, Donna	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementary
Greene, Carla	NMTeach			Calico Elementary
Manser, Tammy	NMTeach			Heritage Middle School
Q43Y52, New Mexico	NMTeach			NM Training High School
Q43Y53, New Mexico	NMTeach			NM Training High School
Olmsod, Donna	Unassigned			
Seashells, Sally	NMTeach			
2018, EPrinc1NM	Elemental			
2018, EPrinc2NM	Elemental			
2018, GPrinc1NM	No Report			
2018, GPrinc2NM	No RC &			
2018, GPrinc3NM	No Report			
2018, GPrinc4NM	No RC &			
2018, NMPrincipal	Elemental			
2018, NMTeacher14	NMTeach			NMTeach High School
2018, NMTeacher2	NMTeach			Calico Elementary
2018, NMTeacher5	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementary
2018, SPrinc1NM	High School Standard - NM School Leaders	08/01/2018	06/30/2019	
2018, SPrinc2NM	High School Standard - NM School Leaders	08/01/2018	06/30/2019	
Account, Gene's Master	Unassigned	08/01/2018	06/30/2019	
Admin, MLP	Unassigned	08/01/2018	06/30/2019	
Dean Smith, Deta	NMTeach: Option 2 - 2 Observation Cycle	08/01/2019	06/30/2020	
2018, NMTeacher	NMTeach: Option 2 - 2 Observation Cycle	08/01/2019	06/30/2020	Calico Elementary
2018, NMTeacher11	2019.20 NM Observation Plan	08/01/2019	06/30/2020	Calico Elementary
2018, NMTEACHER12	2019.20 NM Observation Plan	08/01/2019	06/30/2020	Calico Elementary
2018, NMTeacher13	2019.20 NM Observation Plan	08/01/2019	06/30/2020	Heritage Middle School

Set Evaluation Types

This tool will change the evaluation type of every selected user upon submission. The only exceptions will be those selected users who have currently active forms. This tool will not create a new evaluation cycle, only update the identified cycle for the selected user(s).

Select Evaluation Type: 2019

The Following Users Will Be Assigned 2019.20 NM Observation Plan

User	Eval Type	Start Date	End Date	Building(s)
2018, NMTeacher14	NMTeach			NMTeach High School
2018, NMTeacher2	NMTeach			Calico Elementary
2018, NMTeacher5	NMTeach: Option 2 - 2 Observation Cycle	08/01/2018	06/30/2019	Calico Elementary
2018, SPrinc1NM	High School Standard - NM School Leaders	08/01/2018	06/30/2019	
2018, SPrinc2NM	High School Standard - NM School Leaders	08/01/2018	06/30/2019	
Account, Gene's Master	Unassigned	08/01/2018	06/30/2019	
Admin, MLP	Unassigned	08/01/2018	06/30/2019	
Dean Smith, Deta	NMTeach: Option 2 - 2 Observation Cycle	08/01/2019	06/30/2020	
2018, NMTeacher	NMTeach: Option 2 - 2 Observation Cycle	08/01/2019	06/30/2020	Calico Elementary
2018, NMTeacher11	2019.20 NM Observation Plan	08/01/2019	06/30/2020	Calico Elementary
2018, NMTEACHER12	2019.20 NM Observation Plan	08/01/2019	06/30/2020	Calico Elementary
2018, NMTeacher13	2019.20 NM Observation Plan	08/01/2019	06/30/2020	Heritage Middle School

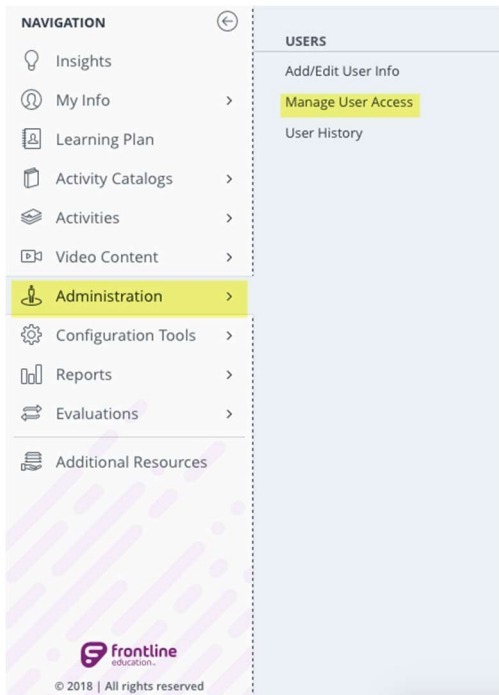
Export

## Section 2: Adding/Editing/Deactivating Users Checklist

- ☐ Remove access/deactivate users that no longer work for your district.
  - ☐ Add new users that have joined your district.
  - ☐ Edit any users that have changed positions, buildings, or names.
  - ☐ Assign Evaluation Plans to New Users or update plans of Users that have changed roles.
  - ☐ Update the evaluation rights for each of your observers/administrators.
  - ☐ Submit support ticket to update your admin rights for all your building admin so that they have the correct access to view historical data and access Ad/hoc Forms.
- 

### **a) Deactivating Users that no longer work for your school.**

- a) Before removing any users mid-year – make sure that all data entered that should be recorded is submitted and saved.
- b) The easiest way to remove a user from your site – and to remove complete access to your organization is to use the Manage User Access Page.
- c) Navigate to: Administration > Manage User Access



- On the Manage User Access Page – here are few things to note:
  - Several filter options will appear at the top of the page. Use these as necessary to locate the user(s) in question or enter the user’s name within the search bar.
    - All Users: Every user in your system
      - **Access Granted:** All users with access to log in
      - **Invitation Sent:** Users granted access and invited to update to a single Frontline Account or to link an existing Frontline account.
      - **No Access:** Users without access who were either newly added or had access revoked (This would include your inactive employees from the past!)
    - The system also includes a series of columns that provide additional user-related details.
      - **User:** Indicates the user’s recorded name.
      - **Account Status:** Identifies current access provided within the system.

### Manage User Access [Learn More](#)

Auto-Invite: Off Options

**Filter Users**

Account Status

All

Application Status

All

72 users

Bulk Change Users (72)
⚙️

Name	Account Status	Professional Growth	Actions
<input type="checkbox"/> (Brown) Smith, Tammy	✖ No Account	● Not Granted	<div>▼</div>
<input type="checkbox"/> 2018, 2NMPrincipal	✔ Has Account	● Granted	<div>▼</div>
<input type="checkbox"/> 2018, NMPrincipal	✔ Has Account	● Granted	<div>▼</div>
<input type="checkbox"/> 2018, NMTeacher	✔ Has Account	● Granted	<div>▼</div>
<input type="checkbox"/> 2018, NMTeacher10	✔ Has Account	● Granted	<div>▼</div>

**\*Note: If you district uses other Frontline Solutions – you might see other solutions listed here as well. Be sure to NOT remove access for other applications if the user just needs to have access removed for Professional Growth (Employee Evaluation) only. In this case, do NOT revoke access to your organization! Just remove access to Professional Growth!**

- Select the user that you would like to “Deactivate” by placing a check box by his/her name. (You may select multiple users if needed.)
- Then click on Bulk Change Users at the top of your list.
- Revoke the access to your organization first.
- Then, remove application access by clicking on “Remove application(s)...”
  - Note you can remove access to one application and leave the user access to another (if your district uses multiple Frontline Solutions).



Professional Growth \*New Mexico Template Site

NAVIGATION

- Insights
- My Info
- Learning Plan
- Activity Catalogs
- Activities
- Video Content
- Administration
- Configuration Tools
- Reports
- Evaluations
- Additional Resources

### Manage User Access [Learn More](#)

Auto-Invite: Off Options

Filter Users

Account Status: All Application Status: All

Find User 2 users selected Clear all selected

Bulk Change Users (2)

Remove Application Access first - then Revoke Access to the Organization.

Name	Account Status	Professional Growth
(Brown) Smith, Tammy	No Account	Not Granted
2018, 2NMPPrincipal	Has Account	Granted
2018, NMPrincipal	Has Account	Granted
2018, NMTeacher	Has Account	Granted
2018, NMTeacher10	Has Account	Granted
2018, NMTeacher2	Has Account	Granted

Grant application(s)...  
Remove application(s)...  
Send account invitation...  
Revoke access to this organization...  
*Includes pending invitations*  
Compare & Merge 2 Users...  
*Comparison preview provided*

### b) Add new users that have joined your district.

- Before adding a new user – search Manage User Access for the teacher first to ensure that there is not an account already created for this person.
- To add a new user to your district (make sure they don't already have an inactive account that can be re-activated!) – Navigate to Administration > Add/Edit User Info.

Professional Growth \*New Mexico Template Site

NAVIGATION

- Insights
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USERS

- Add/Edit User Info
- Manage User Access
- User History

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- Click on Add New User.

## New Mexico – Frontline Education Employee Evaluation Management (EEM) Solution Guide for District Managers

- Enter the user information into the fields. The minimal amount of information that must be added for a user is as follows:
  - First Name, Last Name, Email Address and Certificate ID.
    - Certificate ID = NM State Educator License Number.
    - NO one should be entered into the system without their license number.
    - Do NOT put in fake numbers for a real person.
    - Once a user has submitted a COMPLETED application for a license to the NMPED, the PED will issue a license number within 24 hours.
    - IF you are creating a Demo/Training Account – please use XXXXXX as the Certificate ID.
  - **For teachers only:** You will need to place the teacher in at least one building where he or she works and will be evaluated. Do NOT select a building for your administrators on their User Profile.
  - If you are using Grades/Groups/Departments as a means of disaggregating your data – then you will need to assign each user to the appropriate Grade/Group/Department.

User Information- Frontline Content Platform	
<b>User Info</b>	
Last Login Date	
First Name	<input style="width: 90%;" type="text"/>
Last Name	<input style="width: 90%;" type="text"/>
Email Address	<input style="width: 90%;" type="text"/>
<b>User Configuration</b>	
Active Employee	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Administrator Rights</b>	
District Administrator	<input type="radio"/> Yes <input checked="" type="radio"/> No
Program To Administer	<input type="checkbox"/> Content Catalog FCP
Admin Role	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">--- Click To Select ---</div>
<b>Certificate/Licensure Information</b>	
Certificate ID	<input style="width: 90%;" type="text"/>
Do not enter SSNs here	
Birth Date	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">31</div>
Certificate Holder?	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Personnel Information</b>	

Professional Growth \*New Mexico Template Site

Building(s)

Building(s)

- ☐ Calico Elementary
- ☐ Coral Elementary School
- ☐ Heritage Middle School
- ☐ Junior High - NM Sample District
- ☐ NM Training High School
- ☐ NMTech High School
- ☐ Sherwood Forrest Middle School

Department(s)

Department(s)

- ☐ Counseling
- ☐ Early Childhood
- ☐ English Language Arts
- ☐ Fine Arts
- ☐ Home Economics
- ☐ Math Department
- ☐ Science Department
- ☐ Social Studies
- ☐ Technology and Science

Grade(s)

Grade(s)

- ☐ 1st Grade
- ☐ 8th Grade
- ☐ K-8 PE
- ☐ Kindergarten
- ☐ Middle School

- **If the new user you are adding is an administrator** – then you will need to complete all of the above information plus the Administrator Rights Section of the User Profile.
  - Check YES for District Administrator
  - We will review building profile pages soon!
- **The FINAL step in Adding a New User** is sending the invitation to the user to create their Frontline ID. (YOU ONLY HAVE TO DO THIS IF YOU HAVE NOT CHECKED TO HAVE INVITATIONS AUTOMATICALLY SENT ON THE MANAGE USER ACCESS PAGE!)
  - Navigate to Administration > Manage User Access
  - Once on the Manage User Access page – use the filters and filter by Access Granted and NO Account.
  - This will show you a list of any users that have an Evaluation Account but do NOT have a Frontline ID yet.
  - Put a check by each user you to invite.
  - Click on the Bulk Change Users Dropdown Menu.
  - Choose Send account invitation...
  - Then confirm.
  - Users will need to check their email and create the Frontline ID. (Emails come from no-reply@frontlineed.com)

## Manage User Access [Learn More](#)

Auto-Invite: Off Options

**Filter Users**

Account Status: 1 of 4 Selected No Account...

Application Status: 1 of 2 Selected Granted - Professional Gro...

Find User 2 users selected [Clear all selected](#)

Name	Account Status	Professional Growth
<input checked="" type="checkbox"/> 10NMTEACHER, NMTEACHER	<span>No Account</span>	<span>Granted</span> Required: Send Invitation
<input type="checkbox"/> Admin, MLP	<span>No Account</span>	<span>Granted</span> Required: Send Invitation
<input checked="" type="checkbox"/> Dawn, Delta	<span>No Account</span>	<span>Granted</span> Required: Send Invitation

< 1 >

**Bulk Change Users (2)**

- Grant application(s)...
- Remove application(s)...
- Send account invitation...**
- Revoke access to this organization...  
*Includes pending invitations*
- Compare & Merge 2 Users...  
*Comparison preview provided*

### c. Edit any users that have changed positions, buildings, or names.

- For any user that has switched buildings or has other important changes that occur – you will need to open their User Profile and make those changes.
  - Navigate to: Administration > Add/Edit Users
  - Click View Active Users
  - Choose User that needs to be edited by clicking on the User's Name.
  - In the User Profile – make any updates as needed.

### d. Review and update Building Profile Pages.

- Navigate to the Building Profile Page: Configuration Tools > Building Lists.

**NAVIGATION**

- Insights
- My Info
- Learning Plan
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- Activities
- Video Content
- Administration
- Configuration Tools**
- Reports
- Evaluations
- Additional Resources

**FORMS AND DATA**

- Manage Content Library

**SITE CONFIGURATION**

- Buildings List**
- Departments List
- District Profile
- Grades List
- Groups List
- News and Info List
- Standards

## New Mexico – Frontline Education Employee Evaluation Management (EEM) Solution Guide for District Managers

- Ensure that all buildings/campuses in your district/charter are visible.
- If you need to add a new building/campus – click the Add button at the top of this page. Please make sure building codes in the profile of each building is correct.
- Review to ensure that the correct building evaluators are listed under each building. If not – see directions below for correcting.

**Configuration Summary**

Buildings: **ADD**

**Calico Elementary**  
Code = 098345

- \*BUILDING: Principal : 2018, NMPrincipal
- \*BUILDING: Asst. Principal : NOT SPECIFIED!
- \*BUILDING: Sub Scheduler : NOT SPECIFIED!
- \*BUILDING: Prof Dev Rep : NOT SPECIFIED!
- \*BUILDING: Asst. Supt. : NOT SPECIFIED!
- Observer 1 : 2018, 2NMPrincipal
- Observer 2 : NOT SPECIFIED
- Observer 3 : NOT SPECIFIED
- Observer 4 : NOT SPECIFIED

**Coral Elementary School**  
Code = 123456

- \*BUILDING: Principal : OASYSADMIN1, New Mexico **Inactive**
- \*BUILDING: Asst. Principal : NOT SPECIFIED!
- \*BUILDING: Sub Scheduler : NOT SPECIFIED!
- \*BUILDING: Prof Dev Rep : NOT SPECIFIED!
- \*BUILDING: Asst. Supt. : NOT SPECIFIED!
- Observer 1 : New Admin, User
- Observer 2 : NOT SPECIFIED
- Observer 3 : NOT SPECIFIED
- Observer 4 : NOT SPECIFIED

**Heritage Middle School**

Callouts:

- If you need to add a building not listed click here!
- Ensure your Building Codes are Correct!
- Review to ensure that the correct building evaluators are listed in the Building Profile.

- If you have a building that is not active any longer – click on the name of the building and scroll down to the bottom, where you can click “No” beside the “Active?” question.
- **Assigning Building Level Evaluators** - Under each building profile page in Config Summary, make sure that each person that is to be evaluating/observing teachers in that building are listed on the profile page in either the Approver list OR the Oasys Observer list. *(If your district is using Frontline Professional Learning Management System –PLM – please do not add observers to the Approver List unless they are indeed Approvers for that system)* **They should not be on both lists!** – Once an observer is listed on this list – then they have the right to evaluate/observe any teacher in that building. The administrator’s account does not need to be assigned to the building in the user profile in order to evaluate in that building. The user profile should only denote where the administrator’s primary location for work is identified. \*\*\*\* You may have to come back to this step again later as you add new administrators or as administrators change buildings and/or leave throughout the year. \*\*\* Making changes here will create the need for you to ask for evaluation rights to be removed (if you remove an evaluator) or added (if you add a new evaluator to a building). \* See later directions for requesting your evaluation rights to be updated.

## New Mexico – Frontline Education Employee Evaluation Management (EEM) Solution Guide for District Managers

1st Building Level Approver (Principal)

Principal ☒ 2018, NMPrincipal [Change Selection](#)

2nd Building-Level Approver

Asst. Principal ☐ Click the button below to select users [Select User](#)

3rd Building-Level Approver

Sub Scheduler ☐ Click the button below to select users [Select User](#)

4th - Building Level Approver

Prof Dev Rep ☐ Click the button below to select users [Select User](#)

5th Building Level Approver

Asst. Supt. ☐ Click the button below to select users [Select User](#)

Oasys Observers

The users above will automatically be listed as Oasys observers. In many cases, Oasys observers are also MyLearningPlan approvers. In those cases, please use the above approval layers. For observer-only roles, consider adding names to the list below.

Oasys Observer #1 ☒ 2018, 2NMPrincipal [Change Selection](#)

Oasys Observer #2 ☐ Click the button below to select users [Select User](#)

Oasys Observer #3 ☐ Click the button below to select users [Select User](#)

### e. Review and update Department/Grades/Group Profile Pages – if applicable.

- Navigate to Each Section as needed: Configuration Tools > Departments or Grades or Groups
- If your district wishes to disaggregate data by Departments/Grades/Group – then these will need to be set up and configured. This also means that you will have to assign teachers to appropriate Department/Grade/Group in their User Profile.

Professional Growth \*New Mexico Template Site

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- Additional Resources

FORMS AND DATA

- Manage Content Library

SITE CONFIGURATION

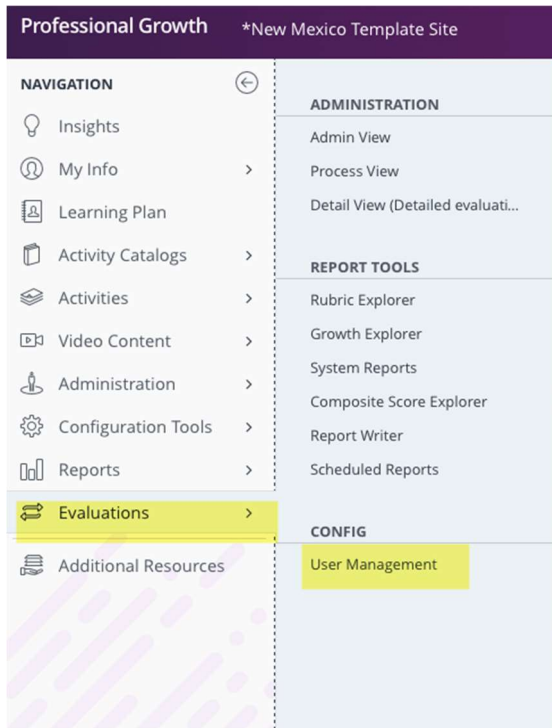
- Buildings List
- Departments List**
- District Profile
- Grades List**
- Groups List**
- News and Info List
- Standards

### f. Assign Evaluation Plans to New Users or update plans of Users that have changed roles.

- After you have created a new user – you will need to assign an evaluation plan type to that user if he/she is to be evaluated. You will also go here to make changes to existing plan assignments – However, **DO NOT** change an evaluation plan that has already been started and contains data! **IF YOU DO – YOU WILL LOSE THAT DATA!**
- **For the 2020-21 School Year – be sure to assign the Elevate NM evaluation plan type.**

## New Mexico – Frontline Education Employee Evaluation Management (EEM) Solution Guide for District Managers

- Navigate to Evaluations > User Management



- This page shows you all the users in your district. It also shows you all the evaluation plans currently assigned and all of those that do NOT have a plan assigned.
- You can assign a plan to an individual user by clicking on the PENCIL ICON to the far right of the user's line of information.
- You will then choose the correct plan to assign and set the evaluation cycle dates.
  - Tips:
    - The cycle dates – remain the same – regardless of when a teacher is hired and entered into the system. The cycle dates represent the school year. For example: a school year is 08/01/2019 – 06/30/2020 for our purposes in Frontline.

### G. Reviewing and Updating Evaluation Rights.

- Updating and understanding evaluation rights: It is often easier to download a list to review. OR... you can delete all and reassign after clean-up – whichever is easiest for you.
- If staff members have moved buildings, changed positions, or left the district, we recommend you review existing Evaluation Rights to ensure administrators have the proper access to teachers in EEM. And to protect confidential information!

Please refer to the Evaluation Rights Cheat Sheet at the end of this document.



**f. Submit support ticket to update your admin rights for all your building admin so that they have the correct access to view historical data and access Ad/hoc Forms.**

- Accounts that are set-up as district administrators include principals, assistant principals, directors, superintendents etc.
- Because there are different levels of administrators our Frontline Employee Evaluation Management solution allows you to configure each role different.
- You will need to submit a support ticket to our support team ([pgsupport@frontlineed.com](mailto:pgsupport@frontlineed.com)) if you would like to add new administrator or change existing rights of an administrator.
- Below are the rights you should suggested for each role:

Administrator Type	Admin Rights that should be Assigned
Principal/Assistant Principal	View Historical Data, Ad-Hoc Elements
Director	View Historical Data, Ad-Hoc Elements, System Reports, Report Writer
Superintendent	View Historical Data, Ad-Hoc Elements, System Reports, Report Writer
District Manager of Frontline Employee Evaluation Management System	View Historical Data, Ad-Hoc Elements, System Reports, Report Writer, User Management

**Description of these rights:**

**View Historical Data** – with evaluation rights to specific teachers – this allows a user to view data from previous evaluation cycles that may be in the system.

**Ad-Hoc Elements** – with evaluation rights to specific teachers – this right allows a user to view any Ad-Hoc Elements (walk-throughs) that may have been added to their account.

**System Reports** – Allows a user to access and view any System Wide Reports that have been created. \*\*Contains data for the entire district and all teachers.

**Report Writer** – Allows a user to access the Frontline Report Writer tool to create custom reports with District-wide data. \*\*Contains access to data for the entire district and all teachers.

**User Management** – Allows a user to have access to add/edit user account information.

**\*\*Only District Managers of the Frontline Employee Evaluation Solution should have this right assigned.**

## Section 3: Throughout the Year Processes:

- ☐ Adding New Users – *review steps above.*
- ☐ Removing Access to users that leave – *review steps above.*
- ☐ Managing Component Instances.
- ☐ Changing/Removing Evaluation Rights for Principals that changes building assignments or leaves the district.



### c) Managing Component Instances

- From time to time, throughout the year you might need to add or remove a component from an assigned Evaluation Plan. You might need to do this if the user is hired after the first round of observations is completed. You might need to do this should you decide that another observation is necessary for a teacher.
- From the process view – you can manage the instances for each component of a user's evaluation plan.
- To add an instance (example: Create another Observation) – Click the cog wheel icon beside the Component you would like to duplicate. Change the instance from 1 to 2.
- To remove an instance (example: remove Observation #1) – Click the cog wheel icon beside the Component you would like to remove. Change the instance from 1 to 0.
- You can always access removed components by clicking on the Manage Zero Instance button and change the 0 back to 1!

The screenshot shows the 'Manage Instances' dialog box open over the 'Professional Development Plan' component. The dialog has a field for 'Instances' with the value '2' entered. Below the field are 'Submit' and 'Cancel' buttons. The background interface shows a table of components with their progress and status.

Name	Evaluation Type	Evaluation Period	Progress	Status
2018, NMTeacher	NMTech: Option 2 - 2 Observation Cycle	08/01/2018-06/30/2019	0 of 5	In Progress
2018, NMTeacher2	NMTech: Option 2 - 2 Observation Cycle	08/01/2018-06/30/2019	0 of 6	In Progress
2018, NMTeacher3	NMTech: Option 2 - 2 Observation Cycle	08/01/2018-06/30/2019	0 of 7	In Progress

Component Name	Progress	Status
Professional Development Plan	0 of 4	Incomplete
Professional Responsibilities Domain 1	0 of 2	Incomplete
Professional Responsibilities Domain 4	0 of 2	Incomplete
Observation # 1: Observation: Domains 2 and 3	0 of 3	Incomplete
Observation # 1: Observation: Domains 2 and 3 #2	0 of 3	Incomplete
Observation #2: Observation: Domains 2 and 3	0 of 3	Incomplete
End of the Year Reflection	0 of 2	Incomplete

The screenshot shows the 'Manage Components' dialog box open over the 'Observation # 1: Observation: Domains 2 and 3' component. The dialog has a table with 'Component' and 'Instances' columns. The 'Instances' column shows the value '0'. Below the table are 'Submit' and 'Cancel' buttons. The background interface shows the same table of components as the previous screenshot.

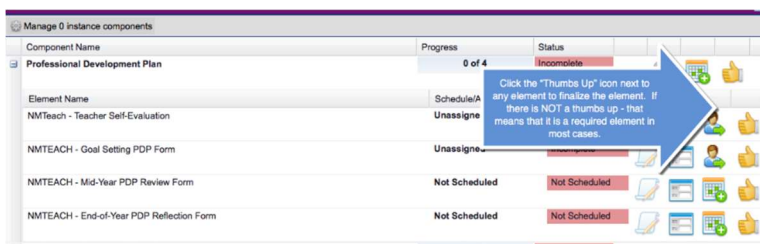
Component	Instances
Observation # 1: Observa...	0

- d) Changing/Removing Evaluation Rights for Evaluators that changes building assignments or leaves the district.
- Do **NOT** forget to send in a support request to have evaluation rights removed for any Evaluator that changes buildings or is demoted!

## Section 4: End of the Year Check-List Prepping for Rollover



- ❑ Review any outstanding components or elements for completion (Detail View) prior to the end of the year and remind observers to please completed (required items) and finalize all elements.
- ❑ If there are some required elements that cannot be completed due to a variety of reasons, you as the district manager will need to zero out those components in preparation for the annual rollover.
- ❑ Deactivate any users that left prior to the end of the school year. **Review steps above.**
- ❑ Ensure that all your users with an assigned evaluation plan are showing the status: “Awaiting Finalization”

- a. Monitor for compliance. As the district manager the easiest way to monitor for compliance is to use the detail view. This will show you all evaluation component and elements for all users. Please refer to the Frontline Help section for details on how to use the Detail View. Type “Detail View” in the search box.
- b. Finalize any Components/Elements that were not REQUIRED and therefore not completed for teachers at the district’s discretion.
- To finalize a component or element that has been submitted – the evaluator or district manager needs to click the thumbs up.
  - Items that are REQUIRED cannot be finalized until scores have been submitted.



- c. Zero out any REQUIRED Components/Elements that were not completed for sound reasons at the district’s discretion.
- To get all your plans to show the status of “Awaiting Finalization” it may be necessary to Zero out Component Instances of Required Components/Elements. Only do this in the case of a Teacher being hired late in the year and missing deadlines for activities to be complete earlier in the year. There are a few other instances that apply as well.
  - To Zero out instances – **please refer to Section 3c above.**
- c. Ensure that all your users with an assigned evaluation plan are showing the status: “Awaiting Finalization”

## New Mexico – Frontline Education Employee Evaluation Management (EEM) Solution Guide for District Managers

ation Period	Progress	Status	
1/2017-06/30/2018	6 of 6	Awaiting Finalization	
1/2017-06/30/2018	6 of 6	Awaiting Finalization	
1/2017-06/30/2018	5 of 5	Awaiting Finalization	

## **Understanding and updating Evaluation Rights within Frontline Education's Employee Evaluation Management System**

The most important thing to remember is this: *Anyone that has evaluation rights to a user has access to that user's data.*

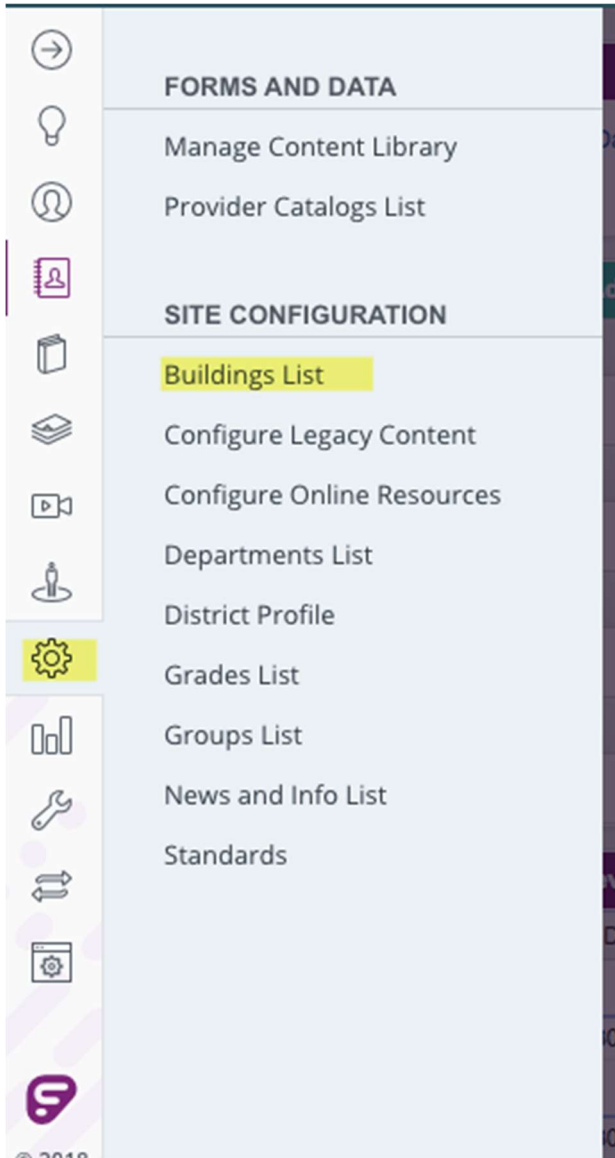
**This is the reason that evaluation rights must be handled carefully.**

***Another note – once you add evaluation rights, those rights remain until you remove them!***

First things first – You will have to assign rights to all users to yourself if you want to see teachers in your process view and/or your detail view. I strongly suggest this.

**Before you begin to refresh evaluation rights – make sure you double check the following:**

1. Go to Configuration – Building List.
2. Make sure that anyone who will be completing observations for teachers in each building are listed on the Building Profile Page. (This will make your job much easier!)
3. Do NOT include those that should have access to all teachers. You can give them access in a much easier way.



### Calico Elementary

Code = 098345

\*BUILDING: Principal : 2018, NMPrincipal  
\*BUILDING: Asst. Principal : 2018, NMPrincipal  
\*BUILDING: Sub Scheduler : NOT SPECIFIED!  
\*BUILDING: Prof Dev Rep : NOT SPECIFIED!  
\*BUILDING: Asst. Supt. : NOT SPECIFIED!  
Observer 1 : 2018, 2NMPrincipal  
Observer 2 : NOT SPECIFIED  
Observer 3 : NOT SPECIFIED  
Observer 4 : NOT SPECIFIED

### Coral Elementary School

Code = 123456

\*BUILDING: Principal : 2018, 2NMPrincipal  
\*BUILDING: Asst. Principal : 2018, GCPrinc4NM  
\*BUILDING: Sub Scheduler : NOT SPECIFIED!  
\*BUILDING: Prof Dev Rep : NOT SPECIFIED!  
\*BUILDING: Asst. Supt. : NOT SPECIFIED!  
Observer 1 : NOT SPECIFIED  
Observer 2 : NOT SPECIFIED  
Observer 3 : NOT SPECIFIED  
Observer 4 : NOT SPECIFIED

[Text Wrapping Break]

Once you have confirmed the observers in your buildings – it is time to **review your current** evaluation rights and add new ones.

\*Some folks will just delete all rights at the beginning of the year and then add new rights. Doing this is a bit less work in the long run to ensure that all users that have switched buildings, etc. show up in the correct building. If you don't do this – then you will need to be sure to remove those rights one by one.

Go to: Evaluations>Evaluation Rights

Evaluation Rights

Component Rights

Admin: All Admins

User: All Users

+ Add Evaluation Rights

<input type="checkbox"/>	Administrator	User	Evaluation Type	Rights		
<input type="checkbox"/>	District Manager, Gene	2018, 2NMPPrincipal	Secondary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, NM	2018, 2NMPPrincipal	Secondary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, Gene	2018, EPrinc1NM	Elementary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	2018, 1SuptNM	2018, EPrinc1NM	Elementary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, Gene	2018, EPrinc2NM	Elementary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	2018, 2SuptNM	2018, EPrinc2NM	Elementary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, Gene	2018, GCPrinc1NM	No Report Card - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	2018, 1SuptNM	2018, GCPrinc1NM	No Report Card - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, Gene	2018, GCPrinc2NM	No RC & No Survey Data - NM School Lead...	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	2018, 1SuptNM	2018, GCPrinc2NM	No RC & No Survey Data - NM School Lead...	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, Gene	2018, GCPrinc3NM	No Report Card - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	2018, 2SuptNM	2018, GCPrinc3NM	No Report Card - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, Gene	2018, GCPrinc4NM	No RC & No Survey Data - NM School Lead...	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	2018, 2SuptNM	2018, GCPrinc4NM	No RC & No Survey Data - NM School Lead...	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	Dawn, Delta	2018, NMPrincipal	Elementary Standard - NM School Leaders	View,View Ad-Hoc Elements		
<input type="checkbox"/>	District Manager, Gene	2018, NMPrincipal	Elementary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		
<input type="checkbox"/>	District Manager, NM	2018, NMPrincipal	Elementary Standard - NM School Leaders	View,Comment,Schedule,Submit,Componen...		

Page 1 of 1

Delete Selected Copy Selected Move Selected

Displaying rights 1 - 71 of 71

This list shows you all of the users in your district and which administrators have been assigned rights to those users.

To become familiar with all the information on this page – Click on the filter for Admin – and choose and administrator from the drop-down list.

The list will now show you all the users that this administrator has rights to access. (Meaning that these users will show on that administrator's process view!)

Clear the administrator filter. Now click on the filter for User and choose a user from the list.

The list will now show you a specific user and all the administrators that have access to that user. (Meaning that this user shows on those administrator's process view!)

The column for Rights in the list above shows the specific rights that have been assigned for a that administrator for that user.

### The choices are as follows:

View – allows a user to view any information for a submitted form within the evaluation plan.

Comment – allows a user to comment on any form that has not yet been finalized.

Schedule – allows a user to schedule a form to be completed.

Submit – allows a user to enter data into a form and submit the form making it complete.

Component Instances – allows a user to zero out instances of elements within an Evaluation Plan or Add instances of elements to the evaluation plan.

View Ad-Hoc Elements – allows a user to view ad-hoc elements (walk-throughs) for the user(s).

### Suggestions for assigning Rights by role – etc.



**District Manager:** with Super Admin rights – you do NOT need to be assigned evaluation rights because you automatically have access to all users.

**Superintendent who does NOT observe teachers:** View, View Ad-Hoc Elements

**Superintendent who does observe teachers:** View, Comment, Schedule, Submit, Component Instances, View Ad-Hoc Elements

**Building Administrators:** View, Comment, Schedule, Submit, View Ad-Hoc Elements

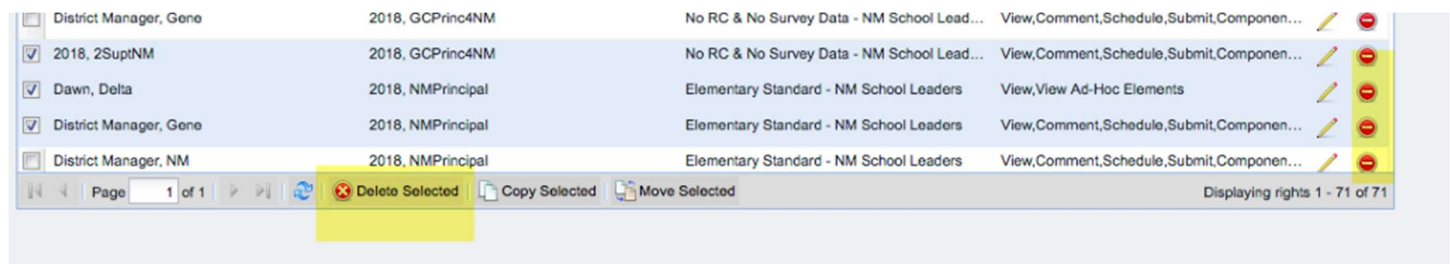
Removing Assigned Rights:

To remove evaluation rights individually –

You can filter by a specific teacher/administrator and put a check mark in the box to the left of the rights you want to remove – then scroll down to the bottom of the page and click on Delete Selected.

OR

Click on the Red Minus sign to delete one row of rights at a time.



### To Remove rights in mass –

You can use your filters to narrow the number of rights down to a manageable number.

**Filter by administrator** – If you have an administrator that has left the district or has switched buildings – you will want to start by filtering by that administrator’s name. Then Check the box at the top of the list to select all. Once you have selected all – then scroll to the bottom and click on Delete Selected.

(NOTE: if there are more than one pages – you might need to repeat this several times)

**Filter by teacher** – If you have a teacher that has left the district or has switched to a new building – you will want to start by filtering by the teacher’s name. Then Check the box at the top of the list to select all. Once you have selected all – then scroll to the bottom and click on Delete Selected.

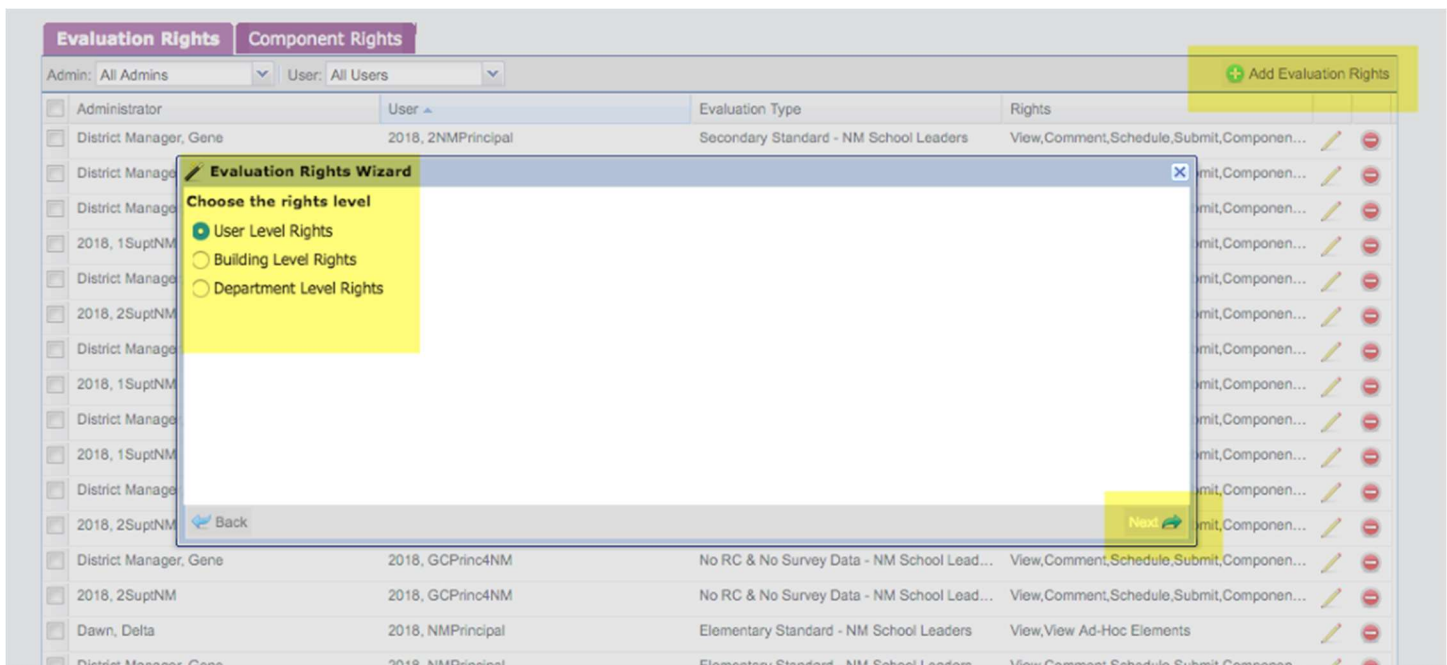
(NOTE: if there are more than one pages – you might need to repeat this several times)



## **ADDING Evaluation Rights:**

Adding evaluation rights can be done in one of two ways:

1. Adding rights by User:
  - a. Click the green Plus Sign button in the top right of your Evaluation Rights Menu.
  - b. This will open the Evaluation Rights Wizard tool.
  - c. You will choose the first selection – Add Rights by User.
  - d. Click on the Next Button
  - e. On the next screen – choose the administrator from the list you are wanting to assign evaluation rights by placing a check in the box to the left of his/her name.
  - f. Click the Next Button. (You can select more than one if they are all being assigned to the same teacher(s))
  - g. On the next screen – choose the teacher(s) for which this administrator should have evaluation rights.
  - h. Click the Next Button.
  - i. On the next screen – select the appropriate rights from the list.
  - j. Click the Submit Button.



2. Adding Rights by Building – this is the most efficient way to assign evaluation rights for building administrators.
  - a. Click the green Plus Sign button in the top right of your Evaluation Rights Menu.
  - b. This will open the Evaluation Rights Wizard tool.
  - c. You will choose the 2<sup>nd</sup> selection – Building Level Rights
  - d. Click on the Next Button
  - e. On the next screen – choose the Buildings from the list you are wanting to assign evaluation rights by placing a check in the box to the Building's Name. (You can select more than one)

- f. Click the Next Button.
- g. On the next screen – select the appropriate rights from the list.
- h. Click the Submit Button.

**\*\* Adding rights by buildings works based on the Observers being correctly set-up in the Building Profile Pages – AND teacher being assigned to the correct building on their User Profile Pages.**

**\*\* If you are using a School Leaders evaluation Plan, observers should not have a building assignment in their User Profile Page if you are updating by building rights.**