



Principal Guide Updated Summer 2012

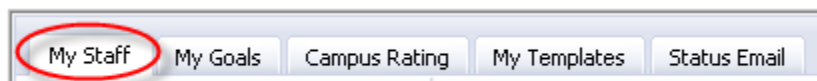
PDAS for Principals

This guide will assist a principal or appraiser with setting up PDAS, completing evaluations, and reporting.

Setting up PDAS

To begin using PDAS, Principals will need to setup their appraisal list, the current campus rating, and choose their walkthrough templates. This is all completed in the PDAS Management interface.

My Staff Tab



From the Evaluations Tab, click on PDAS Management. This enables you to select your teachers and indicate how they should be appraised. When clicking on a staff member's name, you will be able to choose between using PDAS, PDAS Exempt, or an alternate evaluation tool.

PDAS allows walkthroughs, formal observations, and a summative evaluation. Teachers can also complete the Teacher Self Report.

PDAS Exempt will allow custom forms to be used alongside walkthroughs. This option is designed for districts that allow teachers to attain an exempt status. Appraisers can conduct walkthroughs and select from the district's list of custom evaluations, but observations and summatives cannot be completed. You may also be able to set the next year that this teacher will need to be fully appraised.

Alternate Instrument is designed for non-instructional staff such as paraprofessionals, secretaries, librarians, etc. When appraising these staff you will be able to choose from a list of district appraisal forms that have been created in the system.

You will become the formal appraiser for every staff member that you select.

Colors Administration			Export to Excel
Staff Member	Appraiser	Instrument	
Admin, Form	Not Set	Not Set	
Admin, Intervention	Not Set	Not Set	
Aiken-DistrictAdmin, Katherine	Not Set	Not Set	
Editor, Help	Not Set	Not Set	
Inventory, Reading	Not Set	Not Set	
Jackson, Kevin	Not Set	Not Set	
massa, lance	Not Set	Not Set	
Money, Mike	Not Set	Not Set	
nnrincipal, test	Not Set	Not Set	

1. Select a teacher in the list and click their name
2. A pop up indicating their current evaluator and instrument will appear.

Select either **PDAS**, ***PDAS Exempt**, or **Alternate Instrument** to have the teacher assigned to you. In the case of two or more evaluators, the formal appraiser should be the one listed as the Appraiser. Other principals can evaluate this staff member, but will not be listed as the formal appraiser.

Staff Member	Appraiser	Instrument
Abbott, Sharon	Jones, Bobby	Exempt Until 2010-11
Baldwin, Michael	Newman, Victoria	PDAS
Fennmore, Lauren	Newman, Victoria	Alternate
Newman, Victoria	Not Set	Not Set
Phillips, Sarah	Not Set	Not Set
Romalati, Daniel	Jones, Bobby	Alternate
Tapp, Michael		

Jackson, Kevin has no appraiser assigned.

I will evaluate this staff member using...

☐ PDAS
 ☐ Alternate Instrument

☐ PDAS Exempt
 ☐ Not Appraised

* When selecting **PDAS Exempt**, you also have the option to select the next year that teacher will be evaluated:

Abbott, Sharon will be appraised by Bobby Jones using PDAS exempt.

I will evaluate this staff member using...

☐ PDAS
 ☐ Alternate Instrument

☒ PDAS Exempt
 ☐ Not Appraised

Next year to be evaluated:

Not Selected
 2008-09
 2009-10
 2010-11
 2011-12
 2012-13
 2013-14



PLEASE NOTE: Teachers WILL NOT be able to access SchoolObjects:PDAS and complete their Self Report until they have been assigned a formal appraiser.

The My Staff tab also indicates whether a teacher has submitted PDAS sections I, II and III and how many evaluations have been completed.

Instrument	TSR I	TSR II & III	Walkthrough Count	Observations & Evaluations	Summative
Exempt Until 2010-11			3		✓
PDAS	✓	✓	2	1	✓
Alternate				1	
Not Set			1		
Not Set					
Alternate				1	
PDAS	✓		3		
PDAS	✓		2		

Exporting

Export the status report to a spreadsheet format by clicking on the Export to Excel button.



Sorting

To organize viewing of appraises, simply click on any column heading to sort the list of staff members. For example, click on "Instrument" and all staff members will be sorted by what instrument they are appraised.

Staff Member	Appraiser	Instrument
Romalati, Daniel	Jones, Bobby	Alternate
Fennmore, Lauren	Newman, Victoria	Alternate
Tapp, Michael	Not Set	Not Set
Tapp, Tonya	Not Set	Not Set
Baldwin, Michael	Newman, Victoria	PDAS
Abbott, Sharon	Newman, Victoria	PDAS
Newman, Victoria	Jones, Bobby	PDAS
Corder, Janet	Newman, Victoria	Exempt Until 2010-11

Filtering



Use the filter option to select criteria to change the view of staff members. Appraisers can filter the view by:

- Staff met or not met principal goals
- Staff they formally appraise
- Staff with a specific number (or more or less) of certain evaluations
- A date range

Use the Filter button to enter and Reset to begin a new filter.

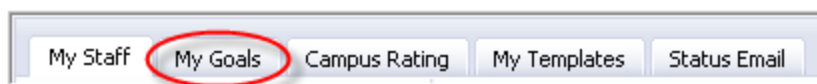
My Staff	My Goals	Campus Rating	My Templates	Status Email			
Yellow Elementary	Export to Excel						
Staff Member	Appraiser	Instrument	TSR I	TSR II & III	Walkthrough Count	Observations & Evaluations	Summative
Abbott, Sharon	Newman, Victoria	PDAS	✓		1		
Baldwin, Michael	Newman, Victoria	PDAS	✓			1	
Corder, Janet	Newman, Victoria	Exempt Until 2010-11				1	
Fennmore, Lauren	Newman, Victoria	Alternate					
Newman, Victoria	Jones, Bobby	PDAS					

☐ Show staff that have not met goals
 ☐ Show staff members having 0 Walkthroughs
 ☐ Show evaluations between Not Set & Not Set

☐ Show only staff I formally appraise



My Goals Tab



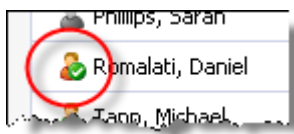
Principals can set the number of desired evaluations to complete per staff member during the school year. First check the box to “Enable Evaluator Goals,” and then enter a value for each type of evaluation. The summative is simply a check box.



Make sure to click Save before moving to another tab.

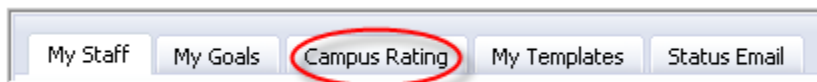


On the My Staff Tab, staff will be marked with a green check icon if the goals have been met.



Results of goals can also be viewed by using the filter in the My Staff tab.

Campus Rating Tab



Principals should enter their campus rating and AYP indicators (if needed).

Make sure to click Save before moving to another tab.



Note: If a campus is new and therefore does not have a campus rating, just skip this screen. You will need to mark all staff members as “first-year on campus” if they did not select that in their profile.

My Templates Tab

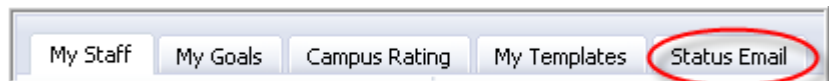


PDAS will enable you to choose from a district-created menu of walkthrough templates. You can choose from your selected templates when creating a new walkthrough evaluation. The templates chosen here will also appear on a mobile device. You must choose at least one template in order to create walkthrough evaluations.


1. Use the drop-down list to view the various walkthrough templates.
2. Once you have selected the template you want to use, check the **Use this template** checkbox.
3. Repeat for each desired template.

A dialog box titled 'Select Walkthrough Templates'. It contains the instruction 'Select walkthrough templates you wish to use in your evaluations:'. Below this is a list box with the following items: 'District Walkthrough', 'District Walkthrough', '5 Minute Walkthrough', 'Default Template', 'Scored Template', 'LoTi 2009', 'H.E.A.T. 2009', 'test', and 'Scaled Walkthrough'. The '5 Minute Walkthrough' item is selected. To the right of the list box is a checkbox labeled 'Use this template' which is checked.

Status Email Tab



As an appraiser, you can choose to have emails sent to you weekly (Sunday evening) or monthly (first of the month) updating you on the status of PDAS on your campus.

1. Check the "**Send a status email to me each...**" box to activate the emails
2. Choose whether or not you prefer emails weekly or monthly by clicking in the drop-down box and choosing 'Week' or 'Month'.
3. Select what information you want included in the email by checking the box next to each item.
4. Click Save. 

Note: The information you want included in the email can be changed at any time.

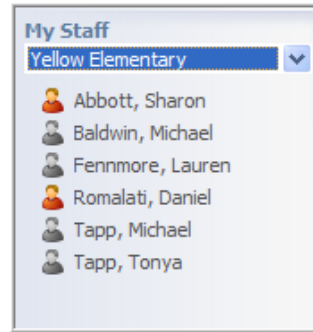
A dialog box titled 'Appraiser Status Emails'. It contains a checkbox labeled 'Send a status email to me each' which is checked. To the right of this checkbox is a drop-down menu currently showing 'Week'. Below this is a section titled 'Include the following in the email' with four checkboxes: 'How many walkthroughs, observations, and summatives I completed.' (checked), 'List of staff members requiring an observation.' (checked), 'List of staff members requiring a summative.' (unchecked), and 'List of staff members with fewer than 2 walkthroughs.' (checked). The number '2' is in a small text box. At the bottom is a checkbox for 'List of staff members with sent evaluations that have not been viewed.' (unchecked).

Evaluations

Once the setup of PDAS has occurred, evaluations can now be completed for staff. This section will cover managing Teacher Self Reports; conducting walkthroughs, observations, and summatives; and additional options for principals.

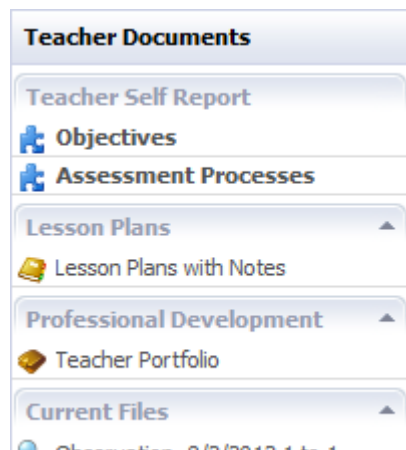
Once staff members have been “selected” to be formally appraised, their names will move over to the far-left pane on the Evaluations Tab. You will notice that staff you formally appraise have a red icon whereas staff you do not have a grey icon.

To create and view any evaluations for a staff member, select their name from this column.



Managing Teacher Self Reports

Once a teacher submits their self report, principals can view each portion of the document by selecting the various sections. Principals cannot edit self report items. You will be able to view the date the teacher submitted in the upper right corner of the self report.

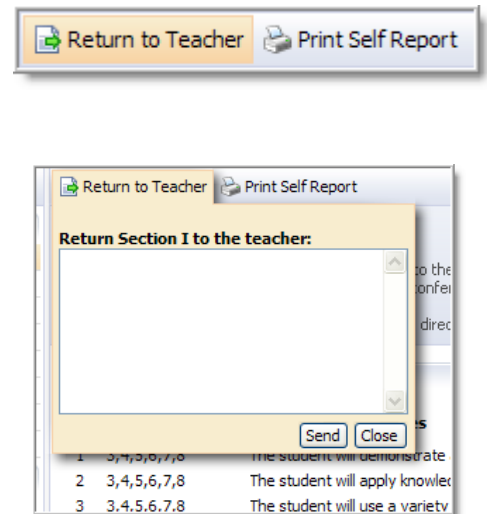


Returning Self Reports to Teachers

This feature is only necessary if certain changes need to be made to the self report. For instance, the teacher may have accidentally submitted the report without completing a certain section. When returning the self report to a teacher, Section I and Sections II & III work independently of each other. So in order to return Section I, you will click **Return to Teacher** from Section I. To return Sections II & III, click on Summative Questions and **Return to Teacher** from Sections II & III. This does not work the same way as evaluations, as it will remove the entry from the Principal's view allowing a teacher to resubmit a section. **This may not always be necessary, as teachers can make changes to the self report AFTER it has been submitted. Teachers can simply make the changes and click Save.**

To return a self report back to a teacher:

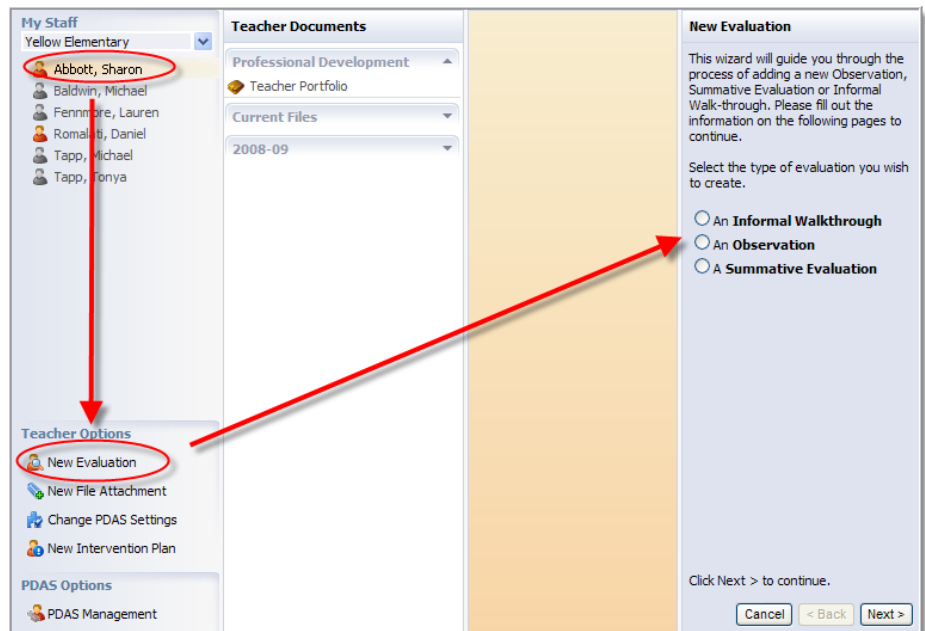
1. Click in either Section I or Sections II & III.
2. Click the **Return to Teacher** button at the top of the self report.
3. Enter a message to be sent to the teacher.
4. Click the **Send** button to have an email containing the comments delivered to the teacher.



Conducting a Walkthrough

“Create a New Evaluation” Wizard

1. Select a teacher in the **My Staff** list.
2. Click the **New Evaluation** button in the **Teacher Options** list. (For PDAS Exempt it will say **New Walkthrough**.)
3. The **New Evaluation** wizard will appear.
4. Select **An Informal Walkthrough**.
5. Continue completing the wizard requesting the following:
 - The walkthrough template to use
 - Information about the class such as class name/class period
 - The date, start time, and end time of the walk-through
6. Click **Next** after each step. You must click “Finish” to finalize the wizard.



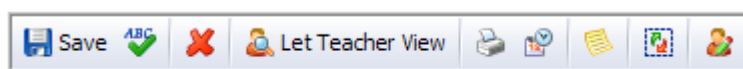
To complete an informal walkthrough evaluation:

1. Select a walkthrough under the selected teacher's **Current Files**. *Note: Each walkthrough in the list will have the title of the walkthrough template you chose.*
2. Complete the form as appropriate. Comment sections have a very long limit and will auto expand as needed.

The screenshot shows the 'Teacher Documents' interface. On the left, there's a sidebar with categories: 'Teacher Self Report' (Reading, Writing, Mathematics, Science, Social Studies, Other Objectives, Assessment Processes), 'Professional Development', and 'Current Files'. Under 'Current Files', two items are listed: 'District Walkthrough, 8/14/2009 9:00 to 9:15' and 'Scaled Walkthrough, 8/17/2009 9:00 to 9:15'. The main area shows the 'District Walkthrough' form. It has a title 'District Walkthrough' and 'By: Bobby Jones' with the date '8/14/2009 9:00 to 9:15'. Below this is a 'Walkthrough' section with 'I. Evidence of:' containing six checkboxes: 'Student engagement in learning', 'Teacher engagement of targeted students', 'Higher level student thinking', 'Self-directed learning', 'Connected/applicable learning', and 'Successful learning'. At the bottom is a 'Comments' section with a text area.

3. **Save** the evaluation when completed.
4. Click the **Let Teacher View** button to enable the teacher to view the evaluation in their PDAS interface. An email will be sent to the teacher indicating that a new evaluation is available to view. The date and time that you made the evaluation available will be stored, and you will also be informed once the teacher has viewed the walkthrough.

Options Toolbar



Prints evaluation to PDF.



Clears the entire walkthrough removing all checks from checkboxes and text from comment sections.



Changes date, time, and class information of evaluation



Adds a comment for the staff member. The staff member will be able to add a comment as well.



Evaluation Comments - script comments or view comments scripted during the evaluation from a handheld or mobile device

Note: comments scripted here will not be viewable to the teacher

Note: The comment(s) will be permanently attached to the walkthrough. The only way to delete a comment is to delete the walkthrough completely.

Conducting a Formal Observation

“Create a New Evaluation” Wizard

1. Select a teacher in the **My Staff** list.
2. Click the **New Evaluation** button in the **Teacher Options** list.
3. The **New Evaluation** wizard will appear.
4. Select **An Observation**.
5. Continue completing the wizard requesting the following:
 - The date, start time, and end time of the observation
6. Click **Next** after each step. You must click **Finish** to finalize the wizard.

My Staff
Yellow Elementary
Abbott, Sharon
Baldwin, Michael
Fennimore, Lauren
Romano, Daniel
Tapp, Michael
Tapp, Tonya

Teacher Documents
Professional Development
Teacher Portfolio
Current Files
2008-09

New Evaluation
This wizard will guide you through the process of adding a new Observation, Summative Evaluation or Informal Walk-through. Please fill out the information on the following pages to continue.
Select the type of evaluation you wish to create.
☐ An Informal Walkthrough
☒ An Observation
☐ A Summative Evaluation
Click Next > to continue.
Cancel < Back Next >

Teacher Options
New Evaluation
New File Attachment
Change PDAS Settings
New Intervention Plan
PDAS Options
PDAS Management

To complete an Observation:

1. Select an evaluation in the **Teacher Documents** list.
2. Select a rating for each objective in the list which automatically updates the teacher's domain score.
3. Navigate through each PDAS domain by using the 1 - 8 navigation buttons. Your selections will auto-save as you move between domains.
4. Add remarks for **Comments**, **Strengths**, and **Areas to Address** for each domain or use predetermined district comments.

Teacher Documents
Teacher Self Report
Reading
Writing
Mathematics
Science
Social Studies
Other Objectives
Assessment Processes
Professional Development
Current Files
District Walkthrough, 8/14/2009 9:00 to 9:15
Scaled Walkthrough, 8/17/2009 8 to 9
Scaled Walkthrough, 8/18/2009 2:00 to 2:10
Observation, 8/31/2009 10:00 to 10:45

Domain 1
Active, Successful Student Participation in the Learning Process
Not Scored
Total: 0
By: Bobby Jones
8/31/2009 10:00 to 10:45

	Exceeds Proficient (x 5)	Below Unsatisfactory (x 3)	Unsatisfactory (x 1)	Unsatisfactory (x 0)
1. Engaged in learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Successful in learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Critical thinking/ problem solving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Self-directed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Connects learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Subtotals:	0	0	0	0

Comments

5. **Save** the evaluation when completed.
6. Click the **Let Teacher View** button to enable the teacher to view the evaluation in their PDAS interface. An email will be sent to the teacher indicating that a new evaluation is available to view. The date and time that you made the evaluation available will be stored, and you will also be informed once the teacher has viewed the evaluation.



Prints evaluation to PDF in the long/official form.



Clears the domain items for the currently selected domain.



Short Form: Prints evaluation to PDF in a condensed form.



Adds a comment for the staff member. The staff member will be able to add a comment as well.
Note: The comment(s) will be permanently attached to the evaluation. The only way to delete a comment is to delete the evaluation completely.



Changes date, time, and subject of evaluation.



Evaluation Comments - script comments or view comments scripted during the evaluation from a handheld or mobile device.



Opens the scoring guide for each domain criterion.

Note: comments scripted here will not be viewable to the teacher.

Conducting a Summative Evaluation

"Create a New Evaluation" Wizard

1. Select a teacher in the **My Staff** list.
2. Click the **New Evaluation** button in the **Teacher Options** list.
3. The **New Evaluation** wizard will appear.
4. Select **A Summative Evaluation**
5. Continue completing the wizard requesting the following:
 - The date of the summative
 - Whether to copy an observation, average observations, or start with a blank summative

Note: remember that averaging will average each criterion and round up in favor of the teacher.

7. Click **Next** after each step. You must click "Finish" to finalize the wizard.

The same options appear for a summative as do for formal observations. Domain 8 will include an extra item displaying the campus rating. The print out for a summative will also add the campus rating into the final score for staff who are not flagged as “First Year on Campus.”

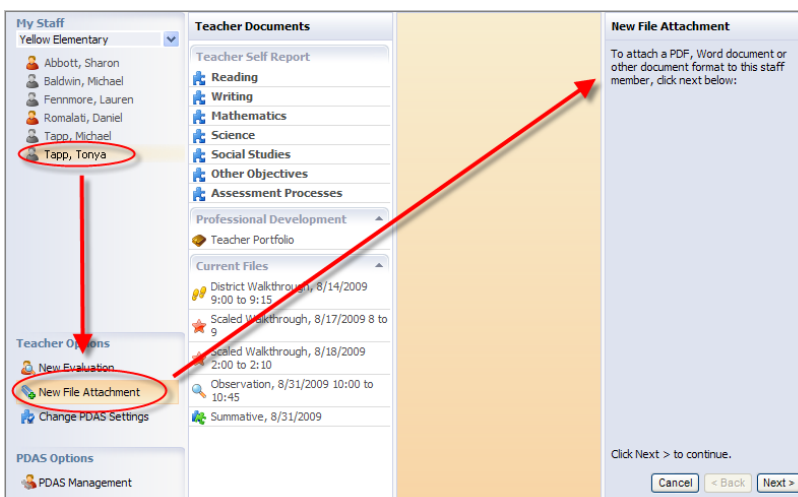


For Summatives only, there is an option to view summarized walkthroughs for the individual teacher.

File Attachments

PDAS enables you to attach a document to a teacher's record for additional documentation and view documents that teachers upload.

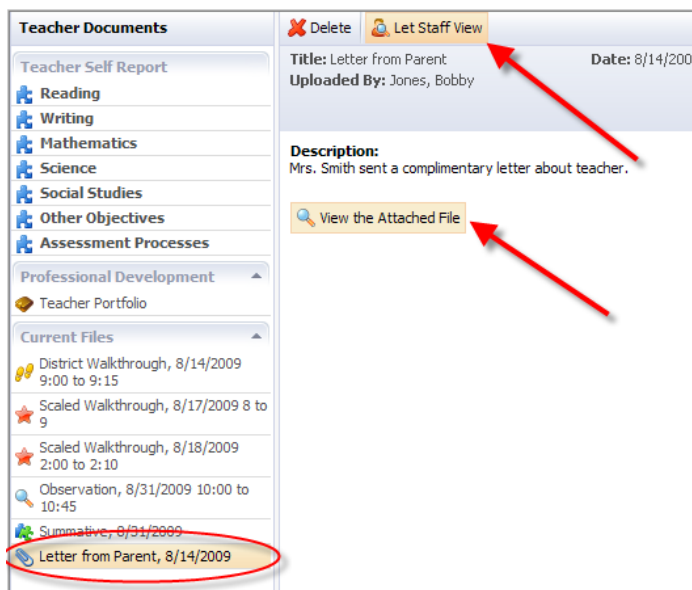
File attachments are not restricted to any particular file type.



To attach a file:

1. Click the **New File Attachment** button in the **Teacher Options** list.
2. The **New File Attachment** wizard will appear:
 - Click **Browse** to locate the file
 - Choose the date associated with the document
 - Enter the title and an optional description

The file will be listed with the appraisals under 'Current Files'.



Let Staff View – displays document in teacher view of PDAS and emails staff member



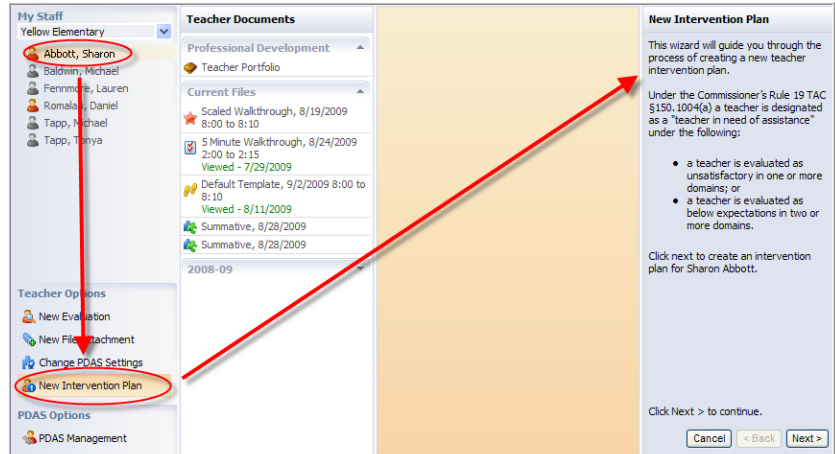
Removes file from staff member's documents

Creating an Intervention Plan

Principals can create an intervention plan for a teacher designated as a "teacher in need of assistance." Check <http://www.tea.state.tx.us/eddev/PDAS/> for intervention plan requirements. If a teacher meets the recommended criteria as indicated by the commissioner's rules, an indicator will appear on observations and summatives.

To create an intervention plan:

1. Select a teacher from the My Staff list.
2. Click the **New Intervention Plan** button under Teacher Options.
3. The Add Intervention Plan wizard will appear requesting the start and end dates for the Intervention plan.



Complete sections 1 – 5 at the start date of the Intervention Plan.



Don't forget to **Save**.

A screenshot of the 'Intervention Plan for Teacher In Need of Assistance' form. The form has a title bar with buttons for 'Save', 'Delete', 'Archive', 'View Report', 'Start Date', and 'End Date'. Below the title bar, the form is divided into five sections, each with a text area for input: 1. Domain(s) in which the teacher is in need of assistance. 2. Professional-improvement activities and dates for completion. 3. Evidence that will be used to determine that professional-improvement activities have been completed. 4. Directives for changes in teacher behavior and time lines. 5. Evidence that will be used to determine if teacher behavior has changed.

View Report – Opens document in pdf format. This document can be printed and signatures added.

Note: There is no button for allowing a teacher to view the intervention plan in their SchoolObjects interface due to the sensitive nature of this document.



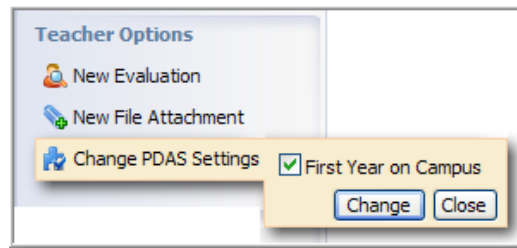
Archive - When the plan is completed, **Archive** the plan to prevent any future changes.

Technical Note: Accidental archiving will require an appraisal administrator to use the document removal tool.

Additional Options

Change PDAS Settings – allows principal to change the first year on campus status for a teacher.

Use the check box to select if the current year is the first for a staff member. Click **“Change”** to save.



Walkthrough Analysis

The Walkthrough Analysis report will give you a summary of which items are most commonly observed based on a particular walkthrough template. The report interface will require you to select one specific template. It cannot compare data across different walkthrough templates.

Choose a walkthrough template from the **Document** option.

To filter the report:



Use **Campus** to select a single campus or group of campuses. Note: If you do not choose anything to filter, you will get all campuses available.



Use **Staff** to narrow the report down to one particular staff member. You can search for that staff member using their email address or last name. You can also limit the report to staff groups.



The **District Groups** option will allow you to narrow the report down to one or more district wide user groups.



Use **Appraisal Dates** to limit the report to a specific date range. If no dates are set, the report will stay within the current school year.



Lastly, you can narrow the report down to specific **questions**. Every option you select from Questions must be flagged in order for the walkthrough to be included in the report.

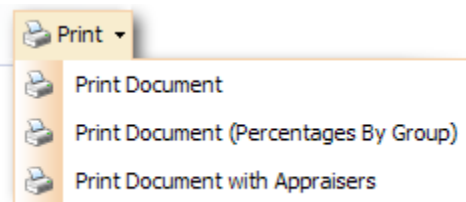


Click **Print** in the upper right to view the three print options.

Print Document will generate a cumulative report regardless of appraiser. For instance, across all walkthroughs that were included, the first item may have been checked 10 times.

Print Document (Percentages by Group) will generate pie charts representing the percentages by group.

Print Document with Appraisers will break down the total by appraiser.



Observation & Summative Analysis

The Observation & Summative Analysis report will show a total for each domain item denoting how many staff members were scored a particular way for all eight domains. This report will be a district or campus wide cumulative report unless filtered down.

The screenshot shows a web application titled "Observation & Summative Analysis". Below the title is a link "Select filter criteria below." and a "Print" button with a dropdown arrow. The main area is divided into two columns. The left column, titled "Filter Items", contains a list of filter categories: "PDAS Evaluation Type", "Campus", "Staff", "District Groups", "Appraisal Dates", and "Domains". The right column, titled "Select the types of evaluations to analyze", contains three radio button options: "PDAS Summatives" (selected), "PDAS Observations", and "Both Observations & Summatives".



Use **Campus** to limit the report down to one or more campuses.



Use **Appraisal Dates** to limit the report to a specific date range.



Use **Staff** to filter based on staff positions, grade level, etc.



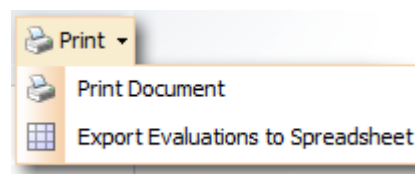
Use **Domains** to limit the report to staff that scored a certain way on a certain domain. The logic statement will allow you to filter based on domain score for one or all domains.



Use **District Groups** to view one or more specific district wide groups.



Click **Print** to generate the report.



Evaluation Status

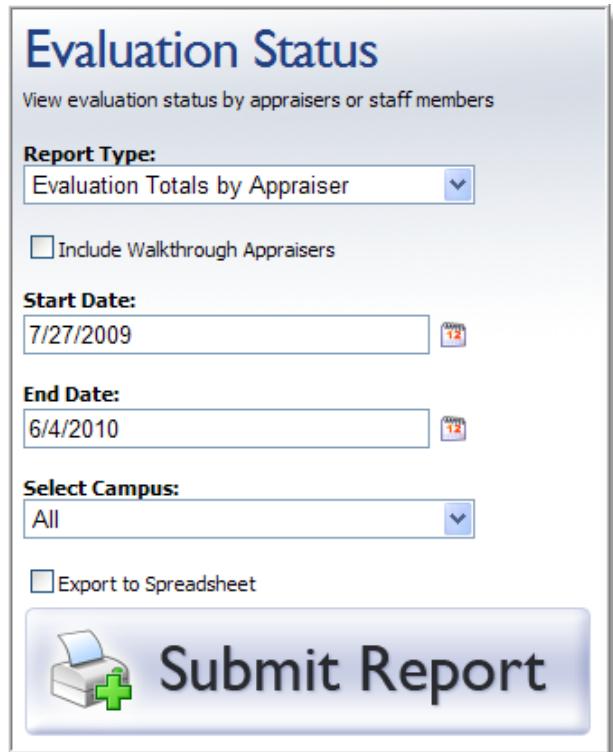
Evaluation Status Reports give administrators a variety of options to choose from in order to see the status of appraisals on their campus or in their district.

Choose a report type, start and end dates, and campus (if appropriate).

All reports can be exported to Excel Spreadsheets.

Report Types

- **Evaluation Totals by Appraiser** – This report will show what evaluations a particular appraiser has completed.
- **Evaluation Log by Appraiser** – This report will show a detailed log of each appraisal including the type, date created, date sent to staff, and date viewed by staff member.
- **Evaluation Totals by Week** – This report will show all evaluations created for staff members regardless of who the appraiser was with totals each week.
- **Evaluation Totals by Month** - This report will show all evaluations created for staff members regardless of who the appraiser was with totals each month.
- **Staff Evaluation Totals by Appraiser** – This report will show a total number of evaluations that have been completed for each staff member, sorted by appraiser. This report includes custom evaluations as well as PDAS documents.
- **Appraiser Totals by Staff Member** – This report actually shows the data flipped from the Staff Member's perspective. This will show you which appraiser created each evaluation by staff member.



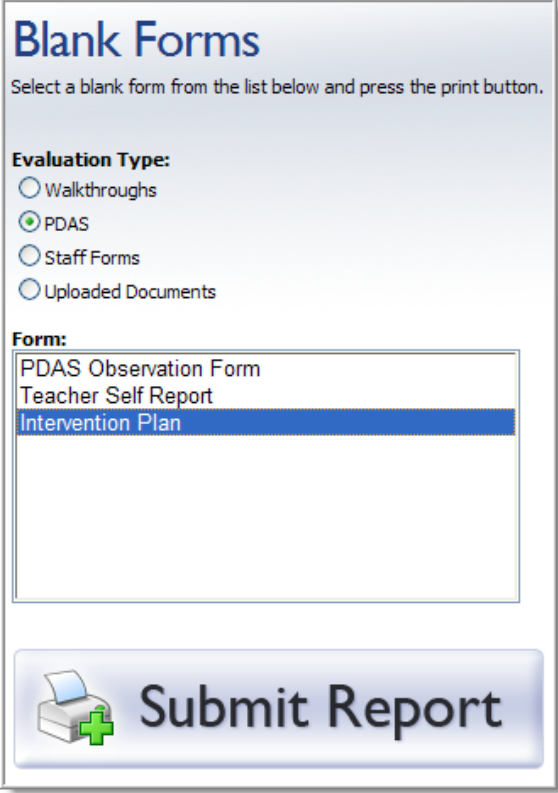
The screenshot shows a web interface titled "Evaluation Status" with the subtitle "View evaluation status by appraisers or staff members". It contains several input fields and checkboxes. The "Report Type:" dropdown is set to "Evaluation Totals by Appraiser". There is an unchecked checkbox for "Include Walkthrough Appraisers". The "Start Date:" field is set to "7/27/2009" and the "End Date:" field is set to "6/4/2010", both with calendar icons. The "Select Campus:" dropdown is set to "All". There is an unchecked checkbox for "Export to Spreadsheet". At the bottom, there is a large blue button with a printer icon and a green plus sign, labeled "Submit Report".

Blank Forms

The Blank Forms option is not really a report, but it will allow you to print any walkthrough template, PDAS form, or custom evaluation form that is currently in the system.

To print a blank form:

1. Choose the evaluation type.
2. Select the form.
3. Click Submit Report.



The screenshot shows a web interface titled "Blank Forms". Below the title is a instruction: "Select a blank form from the list below and press the print button." There are two sections: "Evaluation Type:" with four radio button options: "Walkthroughs", "PDAS" (which is selected), "Staff Forms", and "Uploaded Documents". Below this is a "Form:" section with a list box containing three items: "PDAS Observation Form", "Teacher Self Report", and "Intervention Plan". The "Intervention Plan" item is highlighted with a blue background. At the bottom of the interface is a large button with a printer icon and a green plus sign, labeled "Submit Report".