Evaluat'd

Petaluma City Schools – User Guide

A. Sign-in Info

Website: petaluma.evaluatd.com
User: your District AD login
Password: your district password

B. List of Evaluation Forms

Certificated Performance Observation Form
Certificated Evaluation Form
Classified Evaluation Form

C. Important Icons

Start new evaluation

Start additional evaluation of the same type for the same employee

Folder containing existing evaluations

Edit or Update an evaluation

Evaluator needs to give access

Re-draw signature

Evaluation is e-signed and complete.

Error Occurred. Needs Correction.

D. 3-Step Evaluation Process

1. **START**: Evaluator starts an evaluation document and the Evaluatee will be notified.
2. **UPDATE**: Evaluator updates the evaluation document and when ready chooses to notify Evaluatee of the changes and give access to the document. If required, Evaluatee will update the form and the Evaluator will be notified.
3. **E-SIGN**: Evaluator and Evaluatee meet in-person, discuss about the evaluation document and input their passwords to e-sign. Once the passwords are verified, Evaluation will be e-signed and a PDF rendition with signatutes is emailed to the Evaluator, Evaluatee and HR Department.

E. Things to Remember

1. Capturing your signature is a one-time process. The same signature will be used for all your e-signs with your district password. You can update your signature anytime, if you choose to.
2. Every evaluation document is private, by default. Evaluator must give access to the evaluatee.
3. All evaluations must be started by the Evaluator.
4. To e-sign an evaluation, both the evaluator and the evaluatee must be in front of the same computer.
5. Always remember to click on UPDATE to save your evaluation document.
6. Evaluation cannot be modified after it is e-signed. If you want to make changes after it is e-signed, contact your HR department to request a reset. All data already input into the evaluation will stay intact after reset.
7. Always look for the success message after every action: start, update or e-sign. If you get an error message, fix those errors before trying again.
8. Always click on sign-out before leaving the application, especially if you are using a public computer.

F. Update Signature
(Evaluator and Evaluatee)

1. Sign-in into *Evaluat'd*
2. In your *dashboard*, click on Signature
3. Click on Update Signature
4. Use your mouse or any touch screen device; draw your signature inside the dotted rectangle. (Click on the *double-arrows* on the lower right corner, to reset and draw again, until you are satisfied.)
5. Click on *Submit.*
6. Your signature will be saved. Click on *Review Signature.*
7. If you are satisfied with the signature displayed on screen, click on the *Return To Dashboard.*
8. If you are not satisfied with the signature, click on *Update Signature Again* and repeat steps from #4 above.

G. Start a new Evaluation(Evaluator)

1. Sign-in into *Evaluat'd*
2. In your *dashboard*, click on *Evaluations*
3. For the Evaluatee that you would like to start a new evaluation, click on the *play icon* for the correct form number. (OTRC, PRFL etc.)

logicloft

4. On the confirmation page, click on *Yes, Start Evaluation.* (Your Evaluatee will receive an email notification about this.)
5. Click on *Update Evaluation*, if you would like to input information into the evaluation form. Click on *Return To Evaluations*, if you would to input the information later.

H. Update Evaluation(Evaluator)

1. Follow steps #1 and #2 in Section G.
2. For the Evaluatee that you would like to update evaluation, click on the *folder icon* for that employee.
3. In the list of current evaluations for this Evaluatee, click on the *pencil icon* for the Evaluation form you want to update.
4. Make needed changes to the evaluation and click on *Update Evaluation*.
   (If you get an error message, fix those errors and try again.)
5. If you get a success message, click on *Return To Dashboard*. (Click on *Update Evaluation Again*, if you want to update the evaluation again or click on *View All Evaluations* to go back to the list of all evaluations page.)

I. Access Evaluation (Evaluatee)

1. Follow steps #1 and #2 in Section G.
2. In the list of evaluations, click on the *pencil icon* to open it. If you see a *lock icon,* your evaluator needs to give access.
3. If you have any inputs in the evaluation, input them and click on "update evaluation". If you update the evaluation, your evaluator will be notified.

J. Give Access to Evaluatee(Evaluator)

4. Follow all the steps from #1 through #3 in Section H.
5. Scroll down to the bottom of the evaluation form and select *Give Access & Notify Employee* for the *Employee Access input*.
6. Click on *Update Evaluation*. (Evaluatee will receive an email notification about this)

K. E-sign Evaluation (Evaluator and Evaluatee)

1. Follow all the steps from #1 through #3 in Section H.
2. Scroll down to the bottom of the evaluation form and select *Yes; I'm done with Changes for this Evaluation* for the *Process with E-sign* input.
3. Click on *Update Evaluation*. (Evaluatee will receive an email notification about this)
4. Click on *Proceed to E-sign*
5. After the Evaluator and Evaluatee input their Pins, Click on *E-sign*. (A PDF rendition with signatures will be emailed to Evaluator, Evaluatee and HR Department)
6. Click on *View [Evaluatee Name] Evaluations* to view the list of evaluations for this Evaluatee.
7. Click on the *check-mark icon* to view the PDF rendition of the evaluation.

L. Need Help / Questions?

1. If you have any missing employees in your evaluations dashboard, or notice any discrepancies in the information about you or your employee, contact *HR* department.
2. If you need to **delete** or **reset** any evaluations, contact *HR* department.
3. For technical support, email **support@logicloft.com** or call **(510) 323-4770**

logicloft