



GOAL SETTING

ADMINISTRATOR TASK

Log in and review Teacher Goal Plan.
Review goals, action steps, and all required fields.
Send one goal back for revision with comments.

ADMINISTRATOR TASK

Log in and approve resubmitted goal.
Approve Goal Plan.

MANCHESTER TENURE LEVEL FORM (EVALUATOR)

ADMINISTRATOR TASK

Log in as the Evaluator and fill out the Manchester Tenure Level form. Save and finalize

MANCHESTER OBSERVATION FORM

ADMINISTRATOR TASK

Log in as an administrator and fill out the Manchester Observation Form (Evaluator) using notes and evidence fields.

Try the note taker feature and align notes/evidence to domains and indicators. Save and Finalize.

MID-YEAR SIGNOFF FORM: (EVALUATOR)

ADMINISTRATOR TASK

Log in as an administrator and fill out the Mid-Year Signoff Form (Evaluator).
Save and Finalize button.

SUMMATIVE SCORING & RATINGS: (EVALUATOR)

ADMINISTRATOR TASK

Log in as an administrator and score all teacher goals.
Once scoring is done set the Goal Plan to Completed.

ADMINISTRATOR TASK

Log in as an administrator and complete the Summative Observation Form.

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click **EzHR**
4. From the left menu, click on **Goal Setting/Goal Setting Management/Manage Goal Plans**
5. In **Goal Plans Requiring Approval** click on the name of the plan you want to approve
6. To review/approve the goals click the blue **View Link**
7. Once you have made a decision on the goals click, the **Approve Goal, Revise Goal, or Reset Goal Status** button.
 - a. Approve Goal- Means the goal has been approved
 - b. Revise Goal- Means the teacher needs to change their goal.
 - c. Reset Goal Status- Changes the status of the goal from Approved or Revise back to In-Progress.
8. To view/approve the remaining goals, select a goal from the Switch Goal drop down menu
9. Once all of the goals have been approved scroll to the bottom of the page and click the **Back to Goal Plan** button
10. If all the goals in the plan have been approved, click the **Approve Goal Plan** button at the top of the page.
11. If the teacher is missing goals from their goal plan click the **Deny Goal Plan** button. This will allow the teacher to add more goals to the plan.

ADMINISTRATOR TASK
Log in and approve resubmitted goal.
Approve Goal Plan.

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click **EzHR**
4. From the left menu click on **Goal Setting/Goal Setting Management/Manage Goal Plans**
5. In Goal Plans Requiring Approval click on the **Name** of the plan
6. To approve the goal(s) click on the blue **View** link
7. Click the **Approve Goal** button.
8. At the bottom of the page or in the top right corner of the screen click **Back to Goal Plan**
9. To approve the goal plan click the **Approval Goal Plan** button.



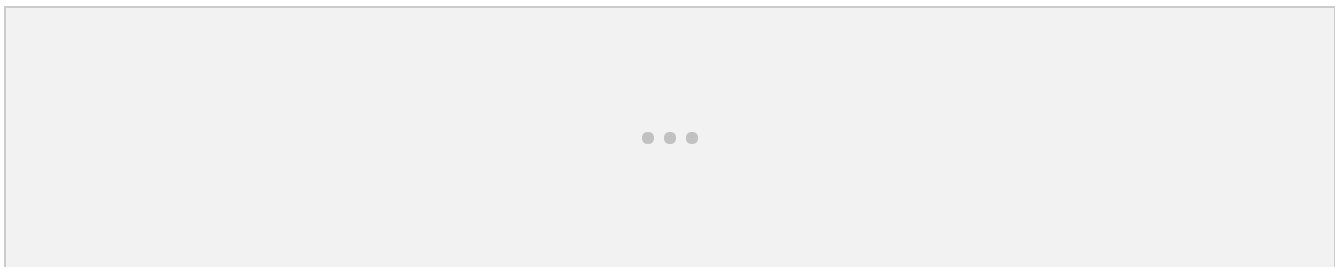
1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login**
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/Evaluator/Observer Dashboard**
*(**NOTE** You can also manage your forms for individuals by going to List Employees, List Employees' Details, or List Employees' Progress.)*
6. Click on the yellow Note Pad icon to record observation notes/evidence
7. Type your notes/evidence in the text box
*(**NOTE** If you know right away which component(s) you want to align your notes/evidence to follow the below steps.)*
 1. Select whether it's notes or evidence
*(**NOTE** Type is defaulted to Evidence. If the comments are Notes, select the Notes radio button.)*
 2. Highlight the text
 3. In the align to box select the box to the left of the component(s)
 4. Click the Save Highlighted Entry button.)
8. Click the **Save Entry** button. Do this for each note/evidence you have
9. If your notes/evidence are ready to be aligned to the observation select the component(s) from the Select Component to assign to drop down.
*(**NOTE** If you scripted your notes/evidence you will have to copy and paste the notes/evidence back up to the notes/evidence box.)*

Then:

 1. Select whether it's notes or evidence
*(**NOTE** Type is defaulted to evidence. If the comments are notes select the notes radio button.),*
 2. Highlight the text
 3. In the align to box select the box(es) to the left of the component(s),
 4. Click the Save Highlighted Entry button.)
10. Click the **Assign Notes/Evidence to Component** button
11. At the top of the page click on the blue **Go to Form (Make sure you save first!)** link
12. In the rubric you will see an E for evidence or a N for notes next to the components for which you have aligned notes/evidence
13. Click **Expand All**
14. Click on the Notes or Evidence boxes to see the notes or evidence.
15. If your district is going to rate after each observation select the ratings that applies to the evidence in the observation. If you aren't rating after each observation skip to step 16.
16. Click the **Save & Finalize** button



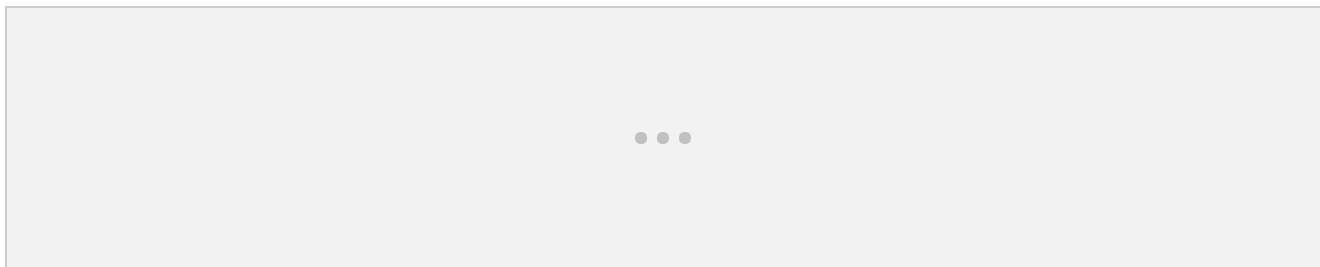
1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/Evaluator/Observer Dashboard** (**NOTE** You can also manage your forms for individuals by going to List Employees, List Employees' Details, or List Employees' Progress.)
6. Under Action Required click on the blue **Fill Out Form** link
7. Fill out the form
8. Click the **Save & Finalize** button



to

<https://www.protraxx.com>

2. Type in your username/password
3. Click on the **EzHR**
4. From the left menu click on **Goal Setting/Goal Setting Management/Manage Goal Plans**
5. In Goal Plans Requiring Goal Scoring click on the goal plan **Name**
6. Click **View** for the goal you would like to score
7. Select the score for the goal
8. Click the **Score Goal** button
9. Select the next goal using the **Switch Goal** drop down
10. Score the remaining goals
11. Click **Back to Goal Plan** at the bottom or in the top right hand corner of the page.
12. Click the **Set Goal Plan to Completed** button



Go to

<https://www.protraxx.com>

2. Type in your username/password

3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/Evaluator/Observer Dashboard** (****NOTE**** *You can also manage your forms for individuals by going to List Employees, List Employees' Details, or List Employees' Progress.*)
6. Under Action Required click on the blue **Fill Out Form** link
7. Fill out the form
8. Click the **Save & Finalize** button



OTHER

RESET GOAL PLAN STATUS

This function would be used when you need to add a new goal to the plan or you completed the plan before scoring the goals.

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Goal Setting/Goal Setting Management/Search Goal Plans**
6. In the Search Goal Plans screen enter search criteria for the plan you want to reset
7. Click the **Filter** button
8. Select the box to the left of the Plan Type
9. From the **Change Plan Status** drop down select a the new status
10. Click the **Update Plan Status** button

ADD SUPPLEMENTAL FORMS

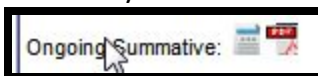
This function is used when you have completed a specific form type.

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/Add Supplemental Forms**
6. Select a process from the **Select Process** drop down
7. Select a person from the **Select Person** drop down
8. From the **Select Form** drop down select the form(s) you would like to add to the process/person
9. Click the **Add Form(s) to Process** button


HOW TO VIEW THE COLLECTION OF ON-GOING SUMMATIVE DATA

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/List Employees**
6. Click on the name of the person whose data you want to view

7. Click the **Ongoing Summative** icon




HOW TO CHANGE THE EVALUATOR FOR A FORM

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/List Employees**
6. Click on the name of the person for whom you want to change the evaluator
7. Click the edit **Evaluator/Observer** icon 
8. From the evaluator/observer list select the new evaluator/observer
9. Click the **Update Information** button

RESET A FORM STATUS

This function is used when a form has been submitted and edits need to be made.

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/List Employees**
6. Click on the name of the person for whom you want to rest a form
7. For the form you want to reset click the **Reset Form Back to Draft** icon 

SKIP FORM

This function is used when you aren't going to complete the form in the process.

1. Go to <https://www.protraxx.com>
2. Type in your username/password
3. Click the **Login** button
4. Click **EzHR**
5. From the left menu click on **Online Process/Online Process Management/List Employees**
6. Under action click the **Skip Form** icon 