



# Direct Report Quick Start Guide

Unified Talent Perform

**Updated: July 15, 2019**

This edition applies to Release 19.6.0.0 of the Unified Talent Perform software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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## Direct Report

### My Folder

The screenshot shows the 'Perform' interface for a user named Jane Teacher. The top navigation bar includes the 'Perform' logo, a notification bell with a '2' badge, an HR icon, and a 'Sign Out' link. The left sidebar contains 'My Folder' (A) and 'Signatures' (B). A dropdown menu from 'My Folder' lists 'Tasks' (C), 'History' (D), 'Attachments' (E), 'Profile', and 'Evidence' (F). The main content area shows a task list with columns for 'Process', 'Scheduled', and 'Due'. A task is listed with a document icon, the title '"Teacher Plan for Growth Form ("In-House" Plan)', and the description '2019-2020 Teacher Evaluation'. A 'Go To Form' button (G) is located at the end of the task row. A footer note states: 'Completed forms and tasks can be found in the History tab'.

- A. **My Folder:** View your tasks and evidence here.
- B. **Signatures:** Electronically review, sign, or approve forms.
- C. **Tasks:** Review the tasks assigned to you that need to be completed.
- D. **History:** Review your completed tasks and forms.
- E. **Attachments:** View documents shared by supervisors.
- F. **Evidence:** Access the list of artifacts that you have attached to your forms, as well as notes shared with you by supervisors.
- G. **Go To Form:** Click to open and complete the form.

## Forms

The screenshot shows a form submission interface. At the top, there are three attachment upload fields labeled 'Attachment #1', 'Attachment #2', and 'Attachment #3', each with a 'Browse...' button and a 'Delete' link. A callout 'A' points to a slide-out menu icon. Below the attachments is a message: 'If the attachment will not upload properly, [click here](#) to try the alternate version.' with a callout 'B'. The main section is titled 'Attached Workflow' and shows 'DR Signature SV Signature' with a 'Current Status' of 'Draft'. A callout 'C' points to this section. Under 'Workflow Steps', there are two steps: '1 Signature by Direct Report' and '2 Signature by Supervisor/Evaluator', both with 'Forthcoming' status. A callout 'D' points to the 'Save & Submit' button. At the bottom, there is an 'AutoSave Enabled' indicator and three buttons: 'Back', 'Save Progress', and 'Save & Submit'.

- A. **Rubric/Form Review Tool:** Access a slide-out tool to view any rubric associated with this process, as well as any completed forms in the process.
- B. **Attachments:** Add up to three separate attachments.
- C. **Workflow:** View the signature, approval, or review steps that must be completed once the form is submitted.
- D. **Save & Submit:** Save the form, lock it from further edits, and begin the workflow defined for the form.

## Signatures and Approvals

The screenshot shows the 'Approvals' section with the heading 'Documents Awaiting Your Signature'. On the left, there is a sidebar with 'My Folder' and 'Signatures' (callout 'A'). The main area contains a table with the following data:

Document	Direct Report	Process	Action Required	
Classroom Observation Summary Sheet	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	<a href="#">View and Sign</a>
Teacher: Section A: Standard 1: Missouri Teaching Standards	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	<a href="#">View and Sign</a>

A callout 'B' points to the 'View and Sign' buttons in the table.

- A. **Signatures:** Review and electronically sign or approve forms.
- B. **View and Sign:** This button name changes depending on whether you are signing, approving, or reviewing a form. Click to view the completed form, then scroll to the bottom to complete the assigned step.

## Evidence

### Add an Artifact

Evidence

<input type="checkbox"/>	Date Added	Process	Associated With	Task	Added By	Type	Title	Content
<input type="checkbox"/>	7/12/2019	2019-2020 Te...		Formal Obser...	System Admin...	File	Sample Artif...	Perform Quick Start Guide.dor
<input type="checkbox"/>	6/5/2019	2019-2020 Te...		Formal Obser...	Test Princip...	File	Example	Lesson Plan.docx

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25  per page

0 Selected | [Select All](#) | [Clear](#)

Bulk Action

**Add Artifact**

Title required

File Upload

Valid extensions : csv,tif,tiff,doc,docx,ppt,pptx,xls,xlsx,pdf,txt,rtf,jpg,gif,png, MP4,WMV,MOV,AVI,FLV,WAV,MP3. Max size 2GB.

URL

Associate the artifact with one or more rubric items.

1. Click **Add Artifact**.
2. Enter the **Title**.
3. Select **File Upload** or **URL**.
4. If enabled by HR, associate the artifact with rubric items. Note that the rubric selected for the process is the rubric to which artifacts can be associated.
5. Click **Save Artifact**.