



Direct Report Quick Start Guide

Unified Talent Perform

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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' application interface. At the top, there is a blue header with the 'Unified Talent Perform' logo on the left and user information 'Welcome, Jane Teacher' and a 'Sign Out' link on the right. A notification icon with the number '2' is also present. Below the header, a navigation menu is open, showing options: 'My Folder' (A), 'Signatures' (B), 'Tasks' (C), 'History' (D), 'Attachments' (E), 'Profile', and 'Evidence' (F). The main content area displays a table with columns for 'Process', 'Scheduled', and 'Due'. A single row is visible with the following data: '1', a document icon, '"Teacher Plan for Growth Form ("In-House" Plan)', and '2019-2020 Teacher Evaluation'. A 'Go To Form' button (G) is located to the right of the row. At the bottom, a message 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 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'. A dashed box highlights the 'Attached Workflow' section, which shows 'DR Signature SV Signature' and 'Current Status Draft'. Below this, 'Workflow Steps' are listed: '1 Signature by Direct Report' and '2 Signature by Supervisor/Evaluator', both with 'Forthcoming' status. A callout 'C' points to the workflow section. At the bottom, there are buttons for 'AutoSave Enabled', 'Back', 'Save Progress', and 'Save & Submit' (with an info icon). A callout 'D' points to the 'Save & Submit' button.

- 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' (with a 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	View and Sign
Teacher: Section A: Standard 1: Missouri Teaching Standards	J. Teacher	Teacher: non-tenured	Signature by Jane Teacher	View and Sign

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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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**.