

# Derventio Education Training

## New Academic Year Guide

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This guidance covers the updates required for transferring from the old review cycle to the new review cycle.

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## 1 The New Academic Year and the new appraisal review cycle

The first half-term of the new academic year, up until November, is traditionally a busy time in schools and colleges as staff are completing the appraisal cycle for the last academic year and starting their new appraisal cycle.

The leadership team and the Administrator of the iP system, have a number of decisions to make regarding setting up iP including how to organise the opening and closing of review periods and which default dates to display in the system etc. Often many schools and colleges choose that the previous year's reviews are not closed until the end of September or October so external exam results can be taken into account in the overall judgement of the appraisal cycle.

This document will take you through the steps, in order, involved in successfully closing a review cycle and starting a new one,

- Changing the New Academic Year

- Closing all reviews

- Ensure your staff records are up to date

- Ensure your objectives, Monitoring Forms and standards are up to date.

- Starting new reviews

Bitesized videos are also available in the Help area on your iP system.

## 2 Changing the New Academic Year

Before any new reviews are started for the new Academic Year we recommend you update your default Academic Year to the new year. Your default Academic Year determines the default date range for the screens in the iP system.

Practical task	
1.	Login as a <b>Site Administrator</b> of iP
2.	From the left-hand contents menu select <b>Settings</b>
3.	From the <b>School</b> box select <b>Go</b>

The screen opens on the Details tab which has the general information about your establishment. The view will be similar to the below image:



School Settings

Settings » School Settings

- Settings >
- Academic Years >
- Departments >
- Key Stage >
- Priorities >
- Registration >
- SSO >
- Styles >
- Modules >
- Support File Upload >

Settings
Save Settings

**Name**

**Academic Year**

**Address**

**Postcode**

**Login Area**

**Home Page Tab**

**Default Graph Type**

**Roll**

Notice the Academic Year drop down under the establishment name. We shall update this to next academic year.

Practical task
1. Click the <b>Academic Years</b> tab

The screen shows the Academic Years in your system allowing you to add, edit and remove records.



### School Settings

Settings » School Settings

- Settings
- Academic Years**
- Departments
- Key Stage
- Priorities
- Registration
- SSO
- Styles
- Modules
- Support File Upload

#### Academic Years

Export

TITLE	+	⊗
<input type="text" value="Title"/>		
September 2017 - August 2018	✎	⊗
September 2018 - August 2019	✎	⊗
September 2020 - August 2021	✎	⊗
September 2021 - August 2022	✎	⊗

Practical task

1. **Click +** , this will show a popup to add a new Academic Year

The popup screen requires a title and a start and end date for your new academic year:

## Add Academic Year

**Details**

**Title** September 2022 - August 2023

**Start** 01/09/2022 

**End** 31/08/2023 

**Add** **Close**

### Practical task

1. Enter details for the new academic year and click the **Add** button

**NOTE** - Please ensure the dates follow on from the last review end date, *leaving no gaps* e.g.:-

Last review - 01/09/2021 - 31/08/2022

New Review - 01/09/2022 - 31/08/2023

The new academic year should be now present in the list. You now need to return to the Settings Tab and select it from the dropdown.

Practical task	
1.	Select the <b>Settings Tab</b>
2.	Select the down arrow in the <b>Academic Year</b> drop down
3.	Select your new academic year from the dropdown list
4.	<b>Save Settings</b>

With this updated, we will check over the default Review Period Information in the “Start Review / New Review Settings”..

Practical task	
1.	Select the <b>Settings</b> option on the left hand menu
2.	Select the <b>Performance Management</b> option followed by <b>General</b>
3.	Scroll down the <b>Settings</b> tab to find the <b>Start Review / New Review Settings</b> section

This section displays like this:

### Start Review / New Review Settings

- Automatically add Standards when starting a review period?
- Automatically add Staff Objectives when starting a review period?
- Automatically add Monitoring when starting a review period?
- Add default review title
- Default Review Period Start and End Dates to Academic Year
- Add default review dates
  - 
  - 
  - Start Date                      End Date
- Use a dropdown list of set review titles when starting new reviews?
- Allow staff members to start / set their own review periods?

From the display you are able, if you choose, to set a default review title and review dates which will appear at the start of the staff members review. This is highly recommended as this will ensure a more consistent approach, avoiding unfortunate errors if line managers are starting reviews individually; and avoids repetition.

Practical task	
1.	Tick <b>Add Default Review Title</b> and enter text e.g. 'Appraisal 2022 - 2023' <b>**Recommended**</b>
2.	Tick <b>Default Review Period Start and End Dates to Academic Year or...</b>
3.	Tick <b>Add default review dates</b> and select the appropriate date range in the fields below

New reviews can either be started individually with a line manager during a meeting when the Objectives and Standards are discussed and then agreed, or they can be started in bulk by an Administrator so staff can login without waiting for the initial review meeting (see below).

Another important set of settings in the 'Start Review / New Review Settings' section are the three checkboxes for automatically adding appropriate standards, staff objectives and Monitoring Forms into new reviews.

Start Review / New Review Settings

Automatically add Standards when starting a review period?

Automatically add Staff Objectives when starting a review period?

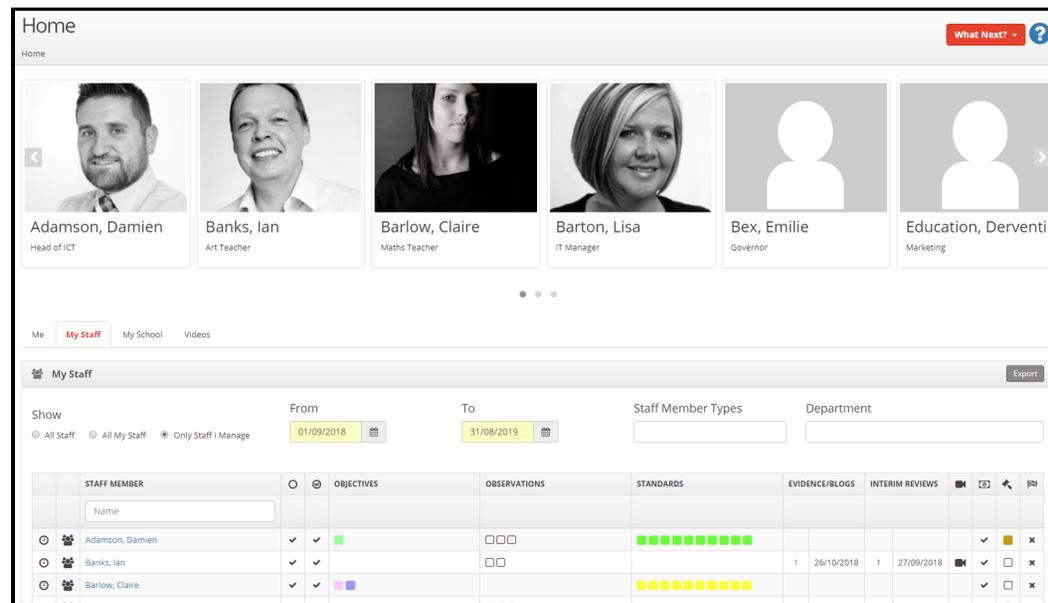
Automatically add Monitoring when starting a review period?

These **settings are defaulted to 'on'** for new systems, as most customers are keen for appropriate targets and other items to be automatically 'pulled' into new reviews. The Staff Member Type category is used to match staff to appropriate standards, staff objectives and Monitoring Forms. This matching is covered in the forthcoming sections.

The start and end dates of the academic year should now display as the defaults for date ranges on those pages of iP which have date filtering e.g.

**Practical task**

1. Select **Home** from the left-hand contents menu
2. Select the **My Staff** tab
3. Check the 'From' and 'To' dates in yellow are for the academic year you set up earlier



### 3 Adding and removing staff *before* starting new reviews

Before starting any new reviews the Administrator should ensure any staff who have left since last year are removed from the active list and any new staff are present on the active list.

Firstly note there are four statuses staff can be in:

- Active - staff who can login and access their performance management information
- Inactive - staff who are away on a temporary basis such as on secondment or maternity leave
- Removed (but not permanently) - staff who have left but whose details can be referenced by restoring them to active
- Permanently removed - staff whose data has been completely removed for GDPR reasons and can no longer be recovered

## 3.1 Making Staff Inactive

We shall first look at how to make an active staff member inactive.

### Practical task

1. Select **Users and Groups** from the left-hand contents menu
2. Select **Staff Members**
3. A full list of active staff members should display
4. If necessary, use the Staff Type filter, the Staff Member Type filter or search for a specific member of staff to quickly navigate to the correct staff members
5. Select the edit pencil icon next to a staff member
6. Scroll down to the **Active** checkbox and remove the tick
7. From under the **What Next?** Button select **Save**
8. Back on the Staff Members screen, now select the **Inactive** status radio button
9. The staff member you have just edited will now be in the inactive list



Your screen should resemble this one:

## Staff Members

Users And Groups ▾ Staff Members

What Next? ▾
?

**Filters** -

Search  Search

Staff Type  Status  Active  Inactive  All Staff Member Type

**Staff Members** Export -

			NAME	JOB TITLE	REPORTS TO	RIGHTS		
			Bex, Emilie	Governor	Stuart, Jim	Governor		
			Cacace, Flavia	Physical Education Teacher	Essien, Yaya	Teaching Staff & Admin Staff		
			Gerrard, Steven	Janitor	Winterberry, Angela	Teaching Staff & Admin Staff		
			Gregg, Jane	Maths Teacher	Not Set	Support		

Showing  Entries Showing 1 to 4 of 4

To make any staff active again you click the pencil to edit them and tick the Active checkbox and save.



## 3.2 Removing Staff

To remove a staff member, you select the bin symbol.

Practical task	
1.	Select <b>Users and Groups</b> from the left-hand contents menu
2.	Select <b>Staff Members</b>
3.	A full list of active staff members should display
4.	Select the remove (bin) icon next to a staff member

A remove screen pop-up should appear:

Remove Staff Member

Please enter the reason for removal

Permanently Remove User

Remove Close

Enter a reason for removal. As mentioned above there is a checkbox to permanently remove. We strongly suggest you only tick this box for GDPR reasons, as once a staff member is permanently removed, their details can never be recovered.

### 3.3 Restoring Staff

Staff who have been removed (but not permanently removed) can be restored to the active list from the Restore page.

Practical task	
1.	Select <b>Users and Groups</b> from the left-hand contents menu
2.	Select <b>Staff Members</b>
3.	A full list of active staff members should display
4.	From the <b>Top right</b> select the <b>Restore Users</b> button
5.	Find the staff member to be restored and then Select the restore icon

Restore Staff Members ?

Users And Groups » Users » Restore Staff Members

**Users**

NAME	REASON FOR REMOVAL	DATE REMOVED	
Bex, Emilie	Left	07/11/2018	🔄
Black, Joe	Left	07/11/2018	🔄
Bloggs, Joe	Left	07/11/2018	🔄
Bob, Fish	left	12/04/2016	🔄
Bordes, Charles	Left	07/11/2018	🔄
Brown, Debbie	left	07/11/2018	🔄
Brown, Jane	left	07/11/2018	🔄
Jefferson, Ned	left	12/04/2016	🔄
K. broad	left	12/04/2016	🔄
Lawday, Andrew	Retired	23/11/2018	🔄
Menzies, Mischa	left	12/04/2016	🔄
Smith-Bex, Claire	left	12/04/2016	🔄
White-Bex, Bob	left	12/04/2016	🔄

## 3.4 Manually Adding Staff

We will now consider adding new staff. If your school or college iP system is connected to an MIS system or is connected to your Active Directory system, you should not need to manually add staff. New staff should be pulled in either when a data sync with the MIS is performed or their account is automatically created on login if Active Directory is used (see further details re: MIS Sync below). If your iP system is fully standalone, then you need to manually add new staff on the Staff Members page.

Practical task	
1.	From the left-hand contents menu, click the <b>Users and Groups</b> button
2.	Click the <b>Go</b> button in the <b>Staff Members</b> area
3.	From the <b>What Next?</b> button select <b>Add</b>

The top of the Add Staff Member screen which appears should look similar to this:

## Add Staff Member

[Users And Groups](#) » [Staff Members](#) »

**What Next?** ?

### Staff Members

**Details** | Groups | Departments | Sensitivity | Key Stage | Staff Member Type | Notifications

<b>Login Name</b>	<input type="text"/>
<b>Surname</b>	<input type="text"/>
<b>First Name</b>	<input type="text"/>
<b>Initials</b>	<input type="text"/>
<b>e-Mail</b>	<input type="text"/>
<b>Password</b>	<input type="password"/>
<b>Gender</b>	<input type="text" value="Not Set"/>
<b>Age Group</b>	<input type="text" value="Not Set"/>
<b>Job Title</b>	<input type="text"/>
<b>Pay Scale</b>	<input type="text" value="Not Set"/> 
<b>TLR</b>	<input type="text" value="Not Set"/> 
<b>Reports To</b>	<input type="text" value="Nobody"/>
<b>User Rights</b>	<input type="text" value="-- None --"/>
<b>Send e-Mails</b>	<input type="text" value="Send"/>
<b>Language</b>	<input type="text" value="English"/>

Notice:

- On the Details tab, mandatory fields are shown in yellow. These are obligatory. The other strongly recommended fields are Job Title, Reports to, User Rights and the check boxes at the bottom. However, these recommended areas can be completed at a later date.
- There are seven tabs for you to enter staff details but the data need not be all entered straight away, if at all if your organisation chooses not to
- Many establishments use the staff member's organisation email address as the login name as this is both easy to remember and is unique to the person
- The password you enter can be weak as when the staff member first logs in they are prompted to change it anyway
- The staff initials need to be unique so you may have to use more than two characters

Practical task	
1.	Enter data in the six mandatory fields
2.	From the <b>What Next?</b> Dropdown select <b>Save</b>
3.	You are returned to the staff member page where your new member of staff should be listed
4.	Search for your new member of staff



Notice your new staff member may lack a job title, does not report to anybody and is not set to a User Rights Group if the information is not yet at hand.

Updating staff details at any time is usually done from the Staff Members page, but some updates can be done more quickly from the Staff Management page. (see section on staff management)

**Practical task**

1. From the left-hand contents menu, click the **Users and Groups** button
2. Click the **Go** button in the **Staff Members** area

By default you should see a full list of active staff, similar to this:

	NAME	JOB TITLE	REPORTS TO	RIGHTS
	Alger, Aaron	Head of English	Miles-Hayler, Claire	Leadership Team
	Al-Idrisi, Muhammad	Geography Department Head	French, Justin	Leadership Team
	Anderson, Barry	Head of ICT	Miles-Hayler, Claire	Leadership Team
	Augustine, Page	Religious Education Teacher	Best, Findlay	Teaching Staff & Admin Staff
	Banks, Joe	Deputy Head	Miles-Hayler, Claire	Leadership Team
	Banks, George	Art Teacher	Not Set	Middle Leaders
	Banneker, Evelyn	Mathematics Teacher	Menzies, Mischa	Teaching Staff & Admin Staff
	Barbossa, Franklin	Art Department Head	Farriday, Callum	Leadership Team
	Barlow, Claire	Maths Teacher	Hodson, Charlotte	Teaching Staff & Admin Staff
	Barradell, Joseph	IT Manager	Miles-Hayler, Claire	Administrator
	Belfon, Onika	Music Department Head	French, Justin	Middle Leaders



Notice:

- The first column has an icon to indicate the relationship of the staff member to you
- The second column has a clock icon from which you can access the staff member's diary
- Clicking on the staff member's name brings up their Staff Summary page
- It is normal that all staff members have a job title, report to a line manager and have a standard user rights group set
- To the right of the Rights column are the standard pencil icon to edit and the bin icon to remove

Practical task	
1.	Select the <b>pencil icon</b> next to the new staff member you added a few minutes ago
2.	Add realistic data to the fields on the <b>Details tab</b> which are Not Set by either selecting from the dropdown list, typing in free text or ticking checkboxes.
3.	Choose the <b>User Rights</b> for an ordinary teacher, set the staff member to report to you, set the Login Area to Home Page, do not tick the CPD Coordinator or Cover Supervisor checkboxes but tick the Classroom Observer checkbox
4.	<b>Add a photo</b> if you have one to hand
5.	From the <b>What Next?</b> button select <b>Save</b>

You are returned to the Staff Members list and you should see any changes to job title, line manager and rights group which you have just made.

We shall now look at the fields on the rest of the tabs of Edit Staff Member.

Practical task	
1.	Select the <b>pencil</b> next for the staff member you are working on
2.	The information you entered previously should be displayed
3.	Work your way across the <b>other seven tabs</b> adding realistic data
4.	<b>Save</b> your data from the <b>What Next?</b> button options

Be aware that:

- The data on the Groups tab relates only to SEF rights
- You may tick several checkboxes on each of the various tabs
- The Staff Member Type selection is important as it controls which Performance Management Objectives, Standards and Monitoring Forms are automatically added to the staff member's new review

### 3.5 Adding new staff with a Management Information System (MIS) sync

If your organisation has purchased and is using the Management Information System (MIS) synchronisation functionality, then the adjustments for deleting old staff and adding new must be first processed in the MIS. Once inputted here, the additional steps must be taken in iP:-

Practical task	
1.	Delete old staff and add new staff on your <b>MIS</b>
2.	In iP select <b>Users and Groups</b> and <b>Staff Management</b>
3.	Select <b>What Next</b> and <b>Sync</b> . The data will be drawn in from your MIS
4.	Select <b>Users and Groups</b> and <b>Staff Members</b>
5.	Select the <b>pencil</b> by the side of the new Staff Member and edit fields as necessary
6.	Select <b>What Next</b> and <b>Save</b>

For more information on adding staff members, see the **iP Help > Support Centre** files when logged into the system.

## 4 Setting up data *before* the new reviews are opened

Before starting any new reviews for the new academic year, the Administrator should check a number of things:

- 4.1 All staff have the correct Staff Member Type (Tutor Type) allocations
- 4.2 Any Standard Objectives are correctly set up
- 4.3 Standards are correctly set up
- 4.4 Any Standard Monitoring Forms are correctly set up.

### 4.1 Ensuring Staff are set to Staff Member Types

Staff Member Types are used to link Performance Management Objectives, Standards and Observation Forms to members of staff given their job role within the organisation.

Practical task
<ol style="list-style-type: none"><li>1. Select <b>Settings</b> from the left-hand contents menu</li><li>2. Select <b>User</b></li><li>3. Select <b>Staff Member Types</b></li></ol>

Notice:

- The padlock icon indicates which Staff Member Types are in use and therefore cannot be deleted
- The count on the right-hand side to indicate how many staff of that type there are allocated to that Staff Member Type
- Clicking on the Staff Member Type allows you to edit the description

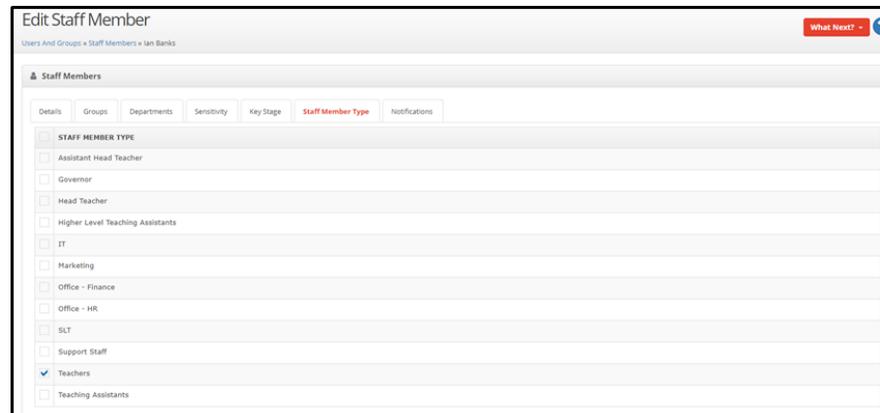
Practical task (if necessary)	
1.	Select + from top right of the table
2.	Enter a description for a new Staff Member Type
3.	Select <b>Add</b> to add it to the existing list

It is important that all staff are set against one or more Staff Member Types and that Standard Objectives, Standards and Standard Monitoring Forms are also set to the appropriate Staff Member Types. When new reviews are started Standard Objectives, Standards and Standard Monitoring Forms which match the Staff Member Type of the user will be automatically pulled into the review if the appropriate setting is turned on.

We shall now see how to set a Staff Member Type against a member of staff.

### Practical task

1. Select the **Users and Groups** item from the left-hand contents menu
2. Select **Staff Members**
3. Click the pencil icon to edit the selected staff member
4. Select the **Staff Member Type** tab
5. Tick one or more of the Staff Member Types listed (a staff member can be allocated more than one Staff Member Type depending on the data assigned to them)
6. From the **What Next?** button dropdown select **Save**



The screenshot shows the 'Edit Staff Member' interface. At the top, there is a breadcrumb trail: 'Users And Groups > Staff Members > Ian Banks'. A 'What Next?' button with a question mark icon is in the top right corner. Below the breadcrumb, there is a section titled 'Staff Members' with a dropdown arrow. Underneath, there are several tabs: 'Details', 'Groups', 'Departments', 'Sensitivity', 'Key Stage', 'Staff Member Type' (which is highlighted in red), and 'Notifications'. The 'Staff Member Type' tab is active, showing a list of roles with checkboxes. The roles are: Assistant Head Teacher, Governor, Head Teacher, Higher Level Teaching Assistants, IT, Marketing, Office - Finance, Office - HR, SLT, Support Staff, Teachers (which has a blue checkmark), and Teaching Assistants.

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## 4.2 Making bulk changes using the staff management page

The staff management page allows you to make bulk changes by ‘dragging and dropping’ User rights, departments, staff member types and settings, for example observer and CPD co-ordinator. Using this function saves you individually entering a staff member’s details and amending.

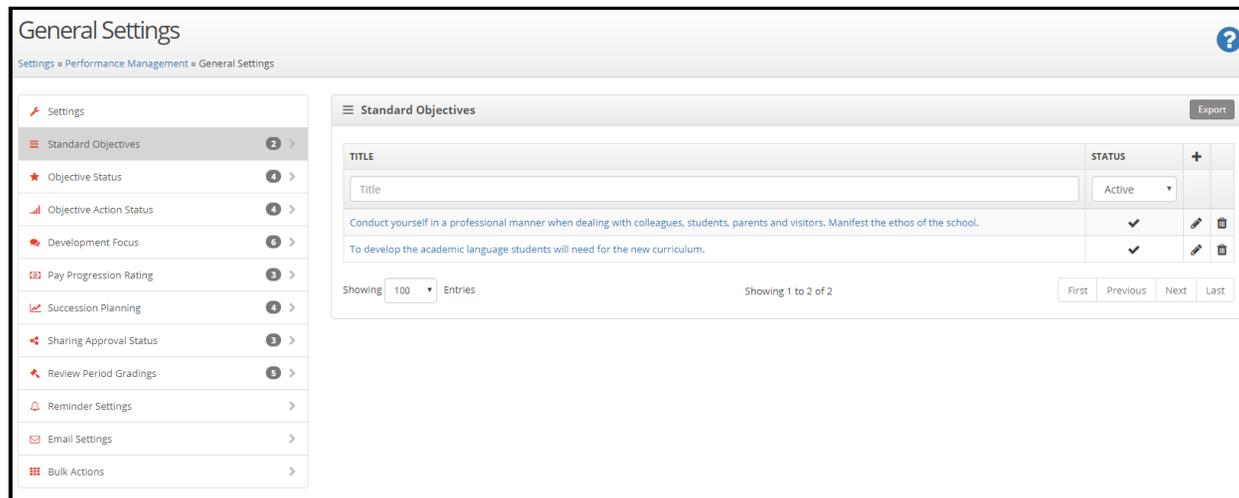
The screenshot displays the 'Staff Management' interface. At the top, it shows 'Users And Groups » Staff Management' and a help icon. Below this is a 'Filters' section with a dropdown menu for 'Staff Member Type' and a text input for 'Value' containing 'Leadership'. There are also search and options buttons. A search bar is located below the filters. The main area contains eight staff member cards, each with a profile picture, name, and role. The right-hand sidebar includes sections for 'User Rights', 'Departments', 'Staff Member Types' (with buttons for Business Manager, Headteacher, Head of subject, Leadership, Main Scale Teacher, Support, Teaching Assistant, and UPS Teacher), and 'Settings'.

## 4.3 Adding, Editing and Removing Standard Objectives

Usually the line manager will discuss and agree personalised targets (Staff Performance Objectives) at the start of a new review period. However it is also possible to pre-populate new reviews with Standard Objectives that have been set for the whole organisation/department/group of staff. The advantage of this is it provides guidance for the line manager and provides a consistent approach. These standard objectives need to be set in the Staff Performance Settings area of the iP system.

Practical task	
1.	Select the <b>Settings</b> item from the left-hand contents menu
2.	Select <b>Performance Management</b>
3.	Select <b>General</b>
4.	Select the <b>Standard Objectives</b> tab

Your screen should resemble this one:



Now we will look at how to edit an existing Standard Objective in readiness for the new review period (this will not affect existing Standard Objectives in existing reviews)

Practical task	
1.	If Standard Objectives exist from a previous review and you wish to use similar for this year, select the pencil icon to edit
2.	Note you can edit the text of the Objective, Performance Criteria, the list of suggested Evidence, small step Actions and select/de-select Staff Member Types
3.	Click <b>Save</b> to save any updates you have made

Now we shall look at how to **add** new Standard Objectives for the new review period:

Practical task
1. Click the + icon to add an additional standard objective and enter appropriate details
2. The new standard objective will appear in the list

Now we shall look at how to **delete** unwanted Standard Objectives:

Practical task
1. Click the bin icon to remove the standard objective you have just added

## 4.4 Adding, Editing and Removing Standards

A central aspect of performance management involves staff aiming to achieve a set of Standards which are appropriate to their present or aspiring job role. Adding and assigning Standards is similar to adding and assigning Standard Objectives and Standard Monitoring Forms.

Firstly we will look at **importing** sets of pre-set Standards (publicly available and produced by various national bodies):

Practical task	
1.	Select the <b>Settings</b> item from the left-hand contents menu
2.	Select <b>Performance Management</b>
3.	Select <b>Standards/Competancies</b>
4.	Select the <b>Standards</b>
5.	Select <b>Import Standards</b>
6.	From the Available Standards Imports list select a category like Support Staff then click <b>Next</b>
7.	Set an appropriate End Date for your Standards - usually the same date as end of the Review cycle e.g. 31 August
8.	Tick an appropriate Staff Member Type from the list or add one if there is no appropriate one
9.	Click <b>Next</b> to move to the final screen
10.	Check the summary information and click <b>Import</b> if the information is correct
11.	Check your imported Standards are displayed on the Standards Settings page. When the new reviews are opened, these Standards will automatically be allocated to the Staff Member Type selected.

## Import Standards

<b>STANDARDS SELECTED</b>
Support Staff
<b>STAFF MEMBER TYPE SELECTED</b>
Support Staff
<b>END DATE</b>
31/08

Previous
Import
Cancel

Before we look at adding bespoke Standards, you may wish to add your own **new Standard Type**, e.g. ‘Acacia Avenue School Standards’, rather than add your bespoke Standards to an existing list e.g. Teacher Standards. You may wish to create a bespoke list to ensure it can be applied to *all* staff members.

Practical task	
1.	From the Standards Settings page select Standard Type
2.	Click on the + icon and create a title
3.	Click on Add to save

Now we will look at **adding bespoke Standards**:

Practical task	
1.	From the Standards Settings page select <b>+ icon</b>
2.	Complete the <b>Title, Description and Due Date</b> (usually the end review date)
3.	Select the <b>Standard Type drop down</b> to add to an existing Standard list or find the one you have just created
4.	Tick an appropriate <b>Staff Member Type</b> from the list or add one if there is no appropriate one
5.	Click <b>Add</b> to save

In a similar way to Standard Objectives and Standard Monitoring Forms, Standards are usually set up in a way to be automatically pulled into new reviews for staff with matching Staff Member Types to the Standards. Note the Staff Member Type settings for Standards and for Staff can have multiple ticks. For Example, Senior Leaders may be ticked to receive both Teaching Standards and Leadership Standards.

We shall now look at the Standards, previously imported and currently in your Settings area, and we shall then look how to edit them, remove them and add new ones.

Practical task	
1.	From the left-hand contents menu select <b>Settings</b>
2.	From the <b>Performance Management</b> section select <b>Standards</b> in the dropdown list from the <b>Go</b> button
3.	Select the <b>Standards</b> tab from the list of three tabs on the left-hand side

The page will display the active Standards in the system. We shall examine the Teaching Standards as an example, so filter to just these by selecting 'Teaching Standards' in the Type dropdown.

**Standards Settings**

Settings » Performance Management Settings » Standards Settings

Standards 121

Rating 4

Type 20

**Standards** Import Standards Export

TITLE	TYPE	DUE DATE	STATUS		
<input type="text" value="Title"/>	All	DD/MM	Active		
1. Create outward-facing schools which work with other schools and organisations - in a climate of mutual challenge - to champion best practice and secure excellent achievements for all pupils.	Excellent headteachers: the self-improving school system	31 August	✓		
1. Demand ambitious standards for all pupils, overcoming disadvantage and advancing equality, instilling a strong sense of accountability in staff for the impact of their work on pupils' outcomes.	Excellent headteachers: pupils and staff	31 August	✓		
1. Ensure that the school's systems, organisation and processes are well considered, efficient and fit for purpose, upholding the principles of transparency, integrity and probity.	Excellent headteachers: systems and process	31 August	✓		
1. Hold and articulate clear values and moral purpose, focused on providing a worldclass education for the pupils they serve.	Excellent headteachers: qualities and knowledge	31 August	✓		
2. Demonstrate optimistic personal behaviour, positive relationships and attitudes towards their pupils and staff, and towards parents, governors and members of the local community.	Excellent headteachers: qualities and knowledge	31 August	✓		
1. Set high expectations which inspire, motivate and challenge pupils	Teaching Standards	31 August	✓		
2. Develop effective relationships with fellow professionals and colleagues in other public services to improve academic and social outcomes for all pupils.	Excellent headteachers: the self-improving school system	31 August	✓		
2. Promote good progress and outcomes by pupils	Teaching Standards	31 August	✓		
2. Provide a safe, calm and well-ordered environment for all pupils and staff, focused on safeguarding pupils and developing their exemplary behaviour in school and in the wider society.	Excellent headteachers: systems and process	31 August	✓		
2. Secure excellent teaching through an analytical understanding of how pupils learn and of the core features of successful classroom practice and curriculum design, leading to rich curriculum opportunities and pupils' well-being.	Excellent headteachers: pupils and staff	31 August	✓		
3. Challenge educational orthodoxies in the best interests of achieving excellence, harnessing the findings of well evidenced research to frame self-	Excellent headteachers: the self-improving school system	31 August	✓		

- Select the **Settings** item from the left-hand contents menu

- Select **Performance Management**
- Select **General**
- Select the **Standard Objectives** tab the Standards are hyperlinked so clicking on the title opens the Standard for editing

First, we will look at **editing** existing Standards:

Practical task	
1.	Select the title of one of the Standards to open the 'Edit Standard' screen.
2.	Note the <b>Details</b> tab contains the data displayed on the main page but additionally an optional description
3.	Select the <b>Staff Member Type</b> tab and adjust the categories if necessary
4.	Click the <b>Save</b> button to save your update

### Edit Standard

Details
Staff Member Types

<input type="checkbox"/> STAFF MEMBER TYPE
<input type="checkbox"/> Governor
<input type="checkbox"/> Assistant Head Teacher
<input type="checkbox"/> Head Teacher
<input type="checkbox"/> Higher Level Teaching Assistants
<input type="checkbox"/> IT
<input type="checkbox"/> Marketing
<input type="checkbox"/> Office - Finance
<input type="checkbox"/> Office - HR
<input type="checkbox"/> SLT
<input type="checkbox"/> Support Staff
<input checked="" type="checkbox"/> Teachers
<input checked="" type="checkbox"/> Teaching Assistants

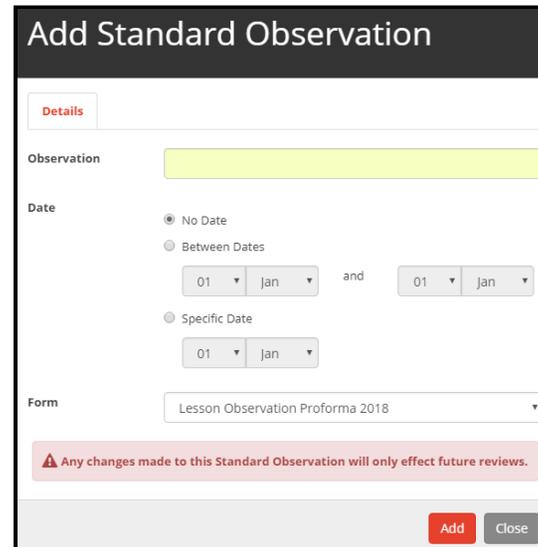
Save
Close

## 4.5 Adding, Editing and Removing Standard Monitoring Forms

We have seen how Standard Objectives and Standards can be set up to automatically pull into new reviews for appropriate staff. In a similar way we can set up Standard Monitoring Forms to automatically pull into new reviews. This is useful if your organisation has a schedule of quality assurance Monitoring Forms, staff survey forms, staff well-being forms, 360 feedback forms or indeed any other type of Monitoring Forms/survey/questionnaire.

First we will look at **editing** existing Standard Observation and Monitoring Forms form (if appropriate):

Practical task	
1.	From the left-hand contents menu select <b>Settings</b>
2.	From the <b>Performance Management</b> section select <b>Monitoring</b> in the dropdown list from the <b>Go</b> button
3.	Select <b>Standard Monitoring</b> from the menu on the left-hand side
4.	Select the <b>edit pencil</b> to check any existing Standard Monitoring Forms are set up as you require
5.	<b>Update or remove</b> any Standard Monitoring Forms which need editing or removing for the new review cycle



**Add Standard Observation**

**Details**

Observation

Date

No Date

Between Dates

01 Jan and 01 Jan

Specific Date

01 Jan

Form Lesson Observation Proforma 2018

**Any changes made to this Standard Observation will only effect future reviews.**

Add Close

Next we will look at **adding** new Standard Observation and Monitoring Forms forms for the new review:

Practical task	
6.	From the left-hand contents menu select <b>Settings</b>
7.	From the <b>Performance Management</b> section select <b>Monitoring</b> in the dropdown list from the <b>Go</b> button
8.	Select <b>Standard Monitoring</b> from the menu on the left-hand side
9.	Click the <b>+</b> icon to add a new Standard Observation

Notice you can set the Standard Observation to be added without a date or to be performed within a date range or performed on a specific date. For example, if your establishment requires teaching staff to be observed three times a year, once each term, the from and to dates can be set to the term dates. The Standard Observation needs to be based on one of the active Observation Forms in your system, and these should be listed in the text box dropdown list.

Practical task	
1.	Enter a title such as 'Autumn Term Observation'
2.	Set to run between two dates, such as the start and end dates of the Autumn Term
3.	Select an appropriate observation form from the dropdown list
4.	Click the <b>Add</b> button to add the Standard Observation

The use of standard Monitoring Forms will require greater management of the system as staff will need to understand that the time scales for Monitoring Forms involved and forms appearing needing completion. In a similar way to Standard Objectives and

Standards, if you now start a review for a staff member with the same Staff Member Type as that of the Observation Form, the Standard Observation should display in the new review.

## 5. Closing down current review (with no move over/copy over of last year's incomplete Objectives and Areas for Development)

There are several ways of closing a review down at the end of a cycle and subsequently opening a new review. Choose the method or mixture of methods to suit your organisation. Whichever method is chosen, many organisations choose to open the new reviews in the same meeting, choosing a method as outlined in section 7 below.

5.1 Close each review down manually at a Line Manager in a 1:1 meeting(face to face or via Video Conferencing). The new Reviews may also, if you choose, be opened in this meeting.

5.2 Close each review down manually by the Line Manager not in a 1:1 meeting, independently in the absence of the Reviewee.

5.3 Closing multiple reviews with a bulk action (conducted by the iP Site Administrator) in the absence of Line Manager and Reviewee.

## 5.1 Close each review down manually at a Line Manager 1:1

The usual way to close down reviews at the end of an appraisal cycle is for the line manager to meet the reviewee in person or via Video Conferencing, to discuss their performance and update their targets and other information. The two staff members of staff discuss the summary on the close review screen and enter their passwords to end the review. ( Passwords requirements can be changed in the settings)

Practical task	
1.	Select <b>Home</b> from the left-hand contents menu
2.	Select the <b>My Staff</b> tab
3.	Check the <b>'From' and 'To' dates</b> in yellow are for the Review Period/ Academic Year you are closing e.g. 01/09/2022 -31/08/2023
4.	Select the name of the staff member you wish to close

You should see a screen like this one:-

**Work Area - Steve Farm** What Next? ?

Staff Summary ▾ Work Area

Review Period: PM 20/21 (01/09/2020 - 31/08/2021)

Filter:

- Activity Feed (6)
- Evidence (3)
- Collaborators (2)
- Objectives (4)
- Observations (11)
- Parent View (0)
- Staff Survey (0)
- Staff Well-Being (1)
- Student Voice (0)
- 360 Observations (1)
- Standards (9)
- Areas for Development (11)
- CPD Activities/Courses (4)

**Steve Farm** added a post **Outstanding Practitioners** for 3.1 Improve the number of outstanding practitioners

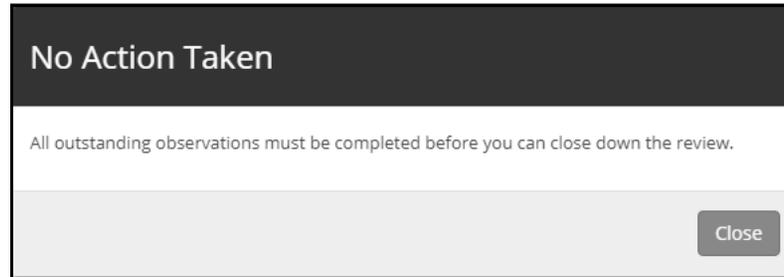
“ Hi Damien,  
Please can we have a chat about this sometime? I have some good ideas that I would like to speak to you about.  
Thanks,  
Steve

Steve Farm, Tim Smith 28 weeks ago

**Steve Farm** uploaded evidence **Outstanding Practitioner Guardian article** for 3.1 Improve the number of outstanding practitioners

“ <http://www.theguardian.com/teacher-network/teacher-blog/2012/nov/19/new-ofsted-framework-how-to-be-outstanding>

Before the close review procedure, several areas must be checked to ensure they have been completed, otherwise the following popup will appear to block the closure.



**Note:-** depending on user rights, the line manager may have the authority to remove any of the items which prevent the review from closing if necessary. For example, if a non-mandatory observation had been planned but not performed, they can select the bin icon next to the item to remove it. If the Line Manager does not have the rights to remove items, the iP Site Administrator will have.

Practical task	
<ol style="list-style-type: none"> <li>1. From <b>My Staff</b> select the staff member and go to their <b>Work Area</b></li> <li>2. Select the <b>Objectives</b> tab and ensure all objectives and associated <b>Actions</b> have a final status. Alternatively, Objectives can be reviewed in the Close Review popup (see below).</li> <li>3. Select the <b>Monitoring Forms</b> tab and remove any Forms which have not been completed. Note: the Monitoring Forms you have just removed are listed, so they can always be restored at a later date if necessary - What Next? button to <b>Restore Monitoring Forms</b>.</li> <li>4. Select the <b>Standards</b> tab and ensure all standards have been rated by the Reviewer and none say 'not rated' (it is not necessary for all of the Standards to be rated by the Reviewee)</li> <li>5. Select the <b>Areas for Development</b> tab and ensure all items have a final status and none saying 'not started'. Alternatively, Areas for Development can be reviewed in the Close Review popup. Select <b>CPD Activities/Courses</b> and set each to Attended or Not Attended</li> <li>6. Select <b>Close Review</b> from the What Next? button to get a screen similar to the one below</li> </ol>	

The Close Review popup window will open and look similar to this. Some of these tabs may have been turned off for your school in the initial set up or have not been used:

## Close Review

Objectives

Pay Progression

Succession Planning

Areas for Development

Appraiser Comments

Appraisee Comments

Final Review

Staff Agreement

	OBJECTIVE	STATUS
⊞	To ensure that teachers are matching tasks to the needs of the most able and evaluation systems are in place to increase the % of pupils achieving 5+ A*/A grades	In Progress ▾
⊞	3.1 Improve the number of outstanding practitioners	Partially Met ▾
⊞	To adapt teaching to respond to the strengths and needs of all pupils by providing opportunities for differentiation.	In Progress ▾
⊞	1.1 Reduce number of areas where achievement is not yet at least good	In Progress ▾

Close Review

Close

Ensure each tab is moved in status and comments made (if applicable), before the Line Manager and Appraisee enter their passwords in turn to agree. ( Pay Progression can be turned on/off in settings)

# Close Review

Objectives

Pay Progression

Succession Planning

Areas for Development

Appraiser Comments

Appraisee Comments

Final Review

**Staff Agreement**

Both the line manager and the staff member must be present to enter their passwords. Enter your passwords below to proceed.

Hughes, Marie

Farm, Steve

Close Review

Close

Practical task

1. Select the **Objectives** tab and change the status of each objective. Click on the + sign next to each objective to make comments.
2. Select a status and enter text on the **Pay Progression** tab
3. If there is a **Succession Planning** tab select an option in both the Reviewer and Reviewee columns
4. Select the **Areas for Development** tab and changed the status
5. Select the **Appraiser Comments** for the Line Manager to make further comments if necessary
6. Select the **Appraisee Comments** for the appraisee to make further comments if necessary
7. Check the text on the **Final Review** tab. This text is copied from the Details tab from the Interim Reviews (if completed)
8. If there is a **Review Period Grading** text box select a grading from the dropdown list
9. Select the **Staff Agreement** tab for the Line Manager and the Reviewee to enter their passwords in turn
10. Click the **Close Review** button
11. Observe you are still on the Work Area page but the review has the word 'Closed' in its title now

Depending on their user rights, the line manager probably will have the ability to reopen a closed review. Both the line manager and staff member will be required to enter their passwords, if required, to reopen a review.

Practical task

1. From the Work Area page of your member of staff for the recently closed review, select the **What Next?** button
2. In the dropdown list select **Re-open Review**
3. Enter the two passwords and click **Re-open**

A review may be reopened if extra evidence relating to the review becomes available.



## 5.2 Close each review down manually by the Line Manager independently in the absence of the Reviewee

In this instance, the Line Manager would follow all steps above in the section 'Close each review down manually at a Line Manager 1:1'. However, to enable a Line Manager to close without the Reviewee present, the Password Override setting would need to be applied.

### Practical task

1. From the left-hand contents menu select **Settings**
2. Select **General Settings** and **Details**
3. Click on the **Global Settings Tab**
4. Scroll down to **Staff Agreement** and ensure the 'Show staff agreement prompt when closing review periods' is unchecked
5. **What Next**, Save

## 5.3 Closing multiple reviews with a bulk action

The Administrator has the option of closing reviews automatically in the absence of Line Managers or Appraisees via the Bulk Actions functionality. This may be necessary if particular staff are not available to close the reviews manually, or if reviews need to be closed down for groups of staff. This will not allow the opportunity to add comments.

Practical task
<ol style="list-style-type: none"> <li>1. From the left-hand contents menu select <b>Settings</b></li> <li>2. From the <b>Performance Management</b> section select <b>General</b> in the dropdown list from the <b>Go</b> button</li> <li>3. Select the <b>Bulk Actions</b> tab from the list of ten tabs on the left-hand side</li> <li>4. Click the <b>Start</b> button within the <b>Close Reviews</b> area</li> <li>5. Set the dates to match the start and end dates for reviews you wish to close</li> </ol>

Practical task
<ol style="list-style-type: none"> <li>1. Select the <b>Next</b> button</li> </ol>

The next screen shows you a list of reviews to close with ticks defaulted to each one. You can check the list and remove ticks for any reviews that should not be closed.

## Bulk Close Reviews

The following reviews will be closed. Deselect a review if you do not want it to be closed.

<input checked="" type="checkbox"/>	STAFF MEMBER	TITLE	START DATE	END DATE
<input checked="" type="checkbox"/>	Farriday, Callum	Training Session Review 2017-18	01/09/2017	31/08/2018
<input checked="" type="checkbox"/>	Riley, Carol	Training Session Review 2017-18	01/09/2017	31/08/2018
<input checked="" type="checkbox"/>	Al-Idrisi, Muhammad	Training Session Review 2017-18	01/09/2017	31/08/2018
<input checked="" type="checkbox"/>	Banneker, Evelyn	Training Session Review 2017-18	01/09/2017	31/08/2018
<input checked="" type="checkbox"/>	White, Bobby	Training Session Review 2017-18	01/09/2017	31/08/2018

Back

Close Reviews

Close

### Practical task

1. **De-select** the Staff you **DO NOT WISH** to close
2. Select the **Close Reviews** button

If you return to your full list of staff the flag icon on the extreme right of the screen should show ticks against staff members for completed reviews.



Me **My Staff** My School My Trust

**My Staff** Export

Show  All Staff  All My Staff  Only Staff I Manage

From  To

Staff Member Types  Department

STAFF MEMBER	OBJECTIVES	OBSERVATIONS	STANDARDS	EVIDENCE/BLOGS	INTERIM REVIEWS				
<input type="text" value="Name"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>							
<input checked="" type="radio"/> Afdon, Louise	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		1 15/01/2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> Allcot, Jessica	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	2 04/12/2019 1 21/02/2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Practical task**

1. Select **Home** from the left-hand contents menu
2. Select the **My Staff** tab
3. Select the **All Staff** radio button
4. Check the last occurrence of one of the staff whose review was closed - the right-hand column will show a tick to indicate a closed review.
5. Select the staff member name to double-check the review is now closed

There are a couple of ways of opening reviews. Choose the most appropriate for your organisation.

## 6. Opening and Closing Reviews (with move over/copy over of last year's incomplete Objectives and Areas for Development)

There are several ways to handle opening and closing reviews. Please select the option to suit your organisation. This method is necessary if last year's review is still listed on the 'My Staff' page. This is the preference when some performance management meetings consist of closing one review and opening another review in the same meeting. First we will work on the existing review Work Area. The Line Manager and staff member will discuss their Performance Management and the Line Manager will update the ratings and status for several areas. A new Review will then be opened, and then the old one closed. When choosing to move or copy the Objectives and Areas for Development from the current and closing review to the new and opening, the process must follow this order.

Practical task	
1.	Click on the <b>staff member's name</b> - this will open the work area for the existing review
2.	Select the <b>Work Area button</b>

Your screen should look like this:-



### Staff Summary

Staff Summary



**Foreman, Susan**  
Teaching Assistant  
✉ Susan.Foreman@secondary.co.uk

Parker, Jon

Review Period: PM 20/21 (01/09/2020 - 31/08/2021) Work Area

Objectives
Evidence
Collaborators
Monitoring
360 Monitoring
Standards
Areas for Development
CPD Activities/Courses

**Objectives**

DATE			OBJECTIVE
31/08/2021			To rapidly raise achievement with identified students by focussing on individual needs
31/08/2021			To support and collaboratively plan with the class teacher to ensure all teaching is appropriately differentiated.
31/08/2021			To support teaching staff in reinforcing key literacy messages consistently and to ensure identified students make progress in literacy.

### Practical task

1. Ensure the **existing Review Period date** is selected from the drop down at the top of the page
2. Select the **Objectives** tab and ensure all objectives and associated **Actions** have a final status. Alternatively, Objectives can be reviewed in the Close Review popup (see below).
3. Select the **Monitoring Forms** tab and remove any Forms which have not been completed. Note: the Monitoring Forms you have just removed are listed, so they can always be restored at a later date if necessary - What Next? button to **Restore Monitoring Forms**.
4. Select the **Standards** tab and ensure all standards have been rated by the Reviewer and none say 'not rated' (it is not necessary for all of the Standards to be rated by the Reviewee)

5. Select the **Areas for Development** tab and ensure all items have a final status. Alternatively, Areas for Development can be reviewed in the Close Review popup.
6. Select **CPD Activities/Courses** and set each to Attended or Not Attended

We will NOT be closing the review at this point. When choosing to move or copy the Objectives and Areas for Development from the current and closing review to the new and opening, the process must follow this order.

#### Practical task

1. Click on **What Next** and select **Staff Summary**
2. Click on **What Next** and **Start Review** (This is your new review)
3. Ensure that the default **Review Period title** is correct. Alternatively, type in a title e.g. 'Appraisal 2021 - 2022'
4. Click **'yes'** to start a new review in the pop up window

You will see a window like the one below:

## Start New Review

You are attempting to start a review period. Did you know that this person already has an active review period? Where possible, you should close these review periods before commencing with a new review period.

Would you like to continue?

Yes

No

You will then see the following screen giving the Line Manager the option of copying or moving Objectives and/or Areas for Development from the old review to the new review.



## There are incomplete items in a previous review

Would you like to pull through all incomplete items into this review?

Copy Areas for Development   Move Areas for Development 

Now follow the section below on ‘Adding and editing Objectives, Standards, Areas for Development etc. (to an open review before it is agreed having opened it in any of the options)’.

Finally, the current review needs to be closed. As noted earlier, the review has been appraised including changing the status of the Objectives, Standards and Areas for Development etc.

Practical task	
1.	Select Home on the left hand menu
2.	Click on the <b>name</b> of the staff member
3.	Select the review to be closed from the <b>drop down menu</b>
4.	Click on <b>What Next</b> and <b>Close Review</b>
5.	Make <b>final comments</b> and amendments to the status of the appraisal areas
6.	Type in the Line Manager and the Staff Member's <b>password to Agree</b>

## 7. Opening New Reviews

As with most other aspects of iP, there are choices to be made how your organisation's new Reviews can be opened:

7.1 Opening new Reviews manually at a Line Manager 1:1

7.2 Open Reviews manually by the Line Manager independently in the absence of the Reviewee

7.3 Adding and editing Objectives, Standards, Areas for Development etc. to an open review *before* it is agreed

7.4 Opening multiple reviews with a bulk action

## 7.1 Opening reviews manually at a Line Manager 1:1 (Opening reviews for the very first time)

During a 1:1, Line managers can manually start reviews for their staff either by clicking the **'Start'** button next to the staff member's name on their 'My Staff' page or by selecting **'Start Review'** from under the **'What Next?'** button from the Staff Summary page of their staff member. Now see below; Adding and editing Objectives, Standards, Areas for Development etc. to an open review *before* it is agreed.

## 7.2 Open Reviews manually by the Line Manager independently in the absence of the Reviewee

In this instance, the Line Manager would follow all steps in above to open the review manually. However, to enable a Line Manager to open without the Reviewee present, the Password Override setting would need to be applied.

Practical task	
7.	From the left-hand contents menu select <b>Settings</b>
8.	Select <b>General Settings</b> and <b>Details</b>
9.	Click on the <b>Global Settings Tab</b>
10.	Scroll down to <b>Staff Agreement</b> and ensure the 'Show staff agreement prompt when closing review periods' is unchecked
11.	<b>What Next</b> , Save

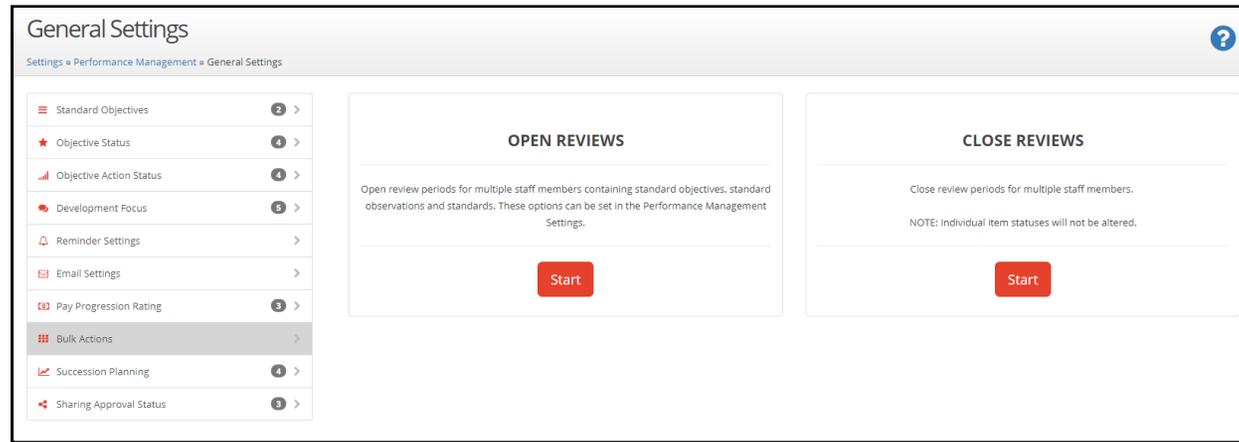
## 7.3 Opening reviews with a bulk action

A user with Administrator rights may be called upon to open reviews for multiple staff members. We see how this is done in this section. We recommend bulk opening with a small ‘test’ group prior to bulk opening multiple staff.

Practical task	
1.	From the left-hand contents menu select <b>Settings</b>
2.	From the <b>Performance Management</b> section select <b>General</b> in the dropdown list from the <b>Go</b> button
3.	Select the <b>Bulk Actions</b> tab from the list of ten tabs on the left-hand side



Your screen should display like this:



Open a bulk review by following the prompts in the Bulk Open Reviews wizard.



## Bulk Open Reviews

Review Title

Enter review start and end dates below

Start Date

End Date

### Practical task

1. From the Bulk Actions screen click the **Start** button inside the **Open Reviews** area
2. Enter a Review Title and leave the default dates for the current academic year
3. Click **Next** to move to the next page of the wizard

Notice you have an option screen concerning what is automatically added to the new reviews.



## Bulk Open Reviews

What would you like to include in the reviews?

Standard Objectives  ⓘ

Standard Observations  ⓘ

Standards  ⓘ

---

What would you like to do with open objectives?

Copy Objectives  ⓘ      Move Objectives  ⓘ

---

What would you like to do with open areas for development?

Copy Areas for Development  ⓘ      Move Areas for Development  ⓘ

**Back** **Next** Close

With these three checkboxes ticked, appropriate standard objectives, standard Monitoring Forms and standards will automatically be included in new reviews in addition to individual staff members' open Objectives and Areas for Development.

Practical task

1. Tick all checkboxes and select the **Next** button

The next screen that comes up is for the user to select the correct staff members for the bulk opening of their reviews.

## Bulk Open Reviews

Include staff with an open review period in the selected date range?

Who would you like the reviews opening for?

Department     
  Staff Type     
  Staff Member Type  
 User Right     
  TLR     
  Pay Scale

Please select an option ▼

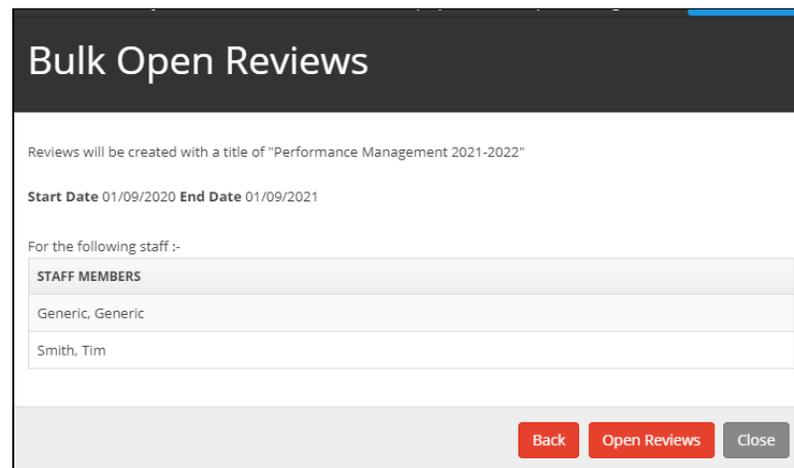
STAFF MEMBERS <span style="float: right;">▲</span>		SELECTED STAFF <span style="float: right;">▲</span>
<input type="checkbox"/> Afdon, Louise	>>	No records found.
<input type="checkbox"/> Anderson, Harry	>	
<input type="checkbox"/> Cooper, Wayne	<	
<input type="checkbox"/> Finn, Anne	<<	
<input type="checkbox"/> Ford, Tom		
<input type="checkbox"/> Generic, Generic		
<input type="checkbox"/> Harrison, Peter		
<input type="checkbox"/>		

Back
Next
Close

Notice there are six ways to filter the staff list down to a particular category of staff. Leave as is to select all staff or several staff or use a radio button filter e.g.:-

Practical task
<ol style="list-style-type: none"> <li>1. Select <b>Department</b> then click in the text area where it says <b>Please select an option</b></li> <li>2. A <b>dropdown list</b> of departments (subjects) is displayed</li> <li>3. Select a department with several staff in it</li> <li>4. Tick the checkbox next to <b>Staff Members</b> to select all the staff in that department</li> <li>5. Click the <b>double arrows</b> to move all selected staff from the left-hand side of the screen to the right-hand side</li> </ol>

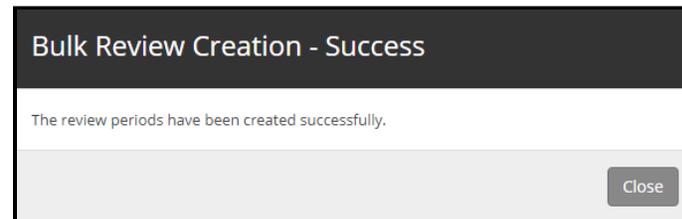
Your screen should look like this:-





Practical task	
1.	Select the <b>Next</b> button
2.	The final screen confirms the title, dates and selected staff for the bulk open of reviews
3.	Check the information is as you requested then click the <b>Open Reviews</b> button

A confirmation message is displayed:



You can check one of the newly created reviews via the staff list.

Practical task	
1.	Select <b>Home</b> from the left-hand contents menu
2.	Select the <b>My Staff</b> tab
3.	Select the <b>All Staff</b> radio button
4.	Each staff member is listed at least once and more than once if they have more than one review covered by the date range
5.	The review names are not displayed but the reviews you have just opened are likely to correspond to the last occurrence of the staff member's name



6. Select the last occurrence of one of the staff you just opened a review for

## 8 Adding and editing Objectives, Standards, Areas for Development etc. to an open review before it is agreed.

More information can be added to the new review before navigating to What Next and Agree. Notice the screen for starting a review may have a text box for the line manager to enter the title of the review, or a default title may be entered. The Start and End dates will have default values (these are pre populated from the global settings) There are four tabs - Objectives, Monitoring Forms, Standards, Areas for Development with the Objectives tab selected. There may be one or more objectives displayed including those that may have just been copied or moved from the previous review and any Standard Objectives set by the Administrator of the system for the particular staff member type. It is intended that all of these areas are discussed, created and edited (if necessary) and then agreed.

Practical task	
1.	Enter a <b>title</b> for the review
2.	Select the first Objective title and edit the text (if necessary) and select <b>Save</b>

## Edit Objective

**Details** Evidence Actions

Type  Priority  SDP Objective  Personal

Objective 

Aim to have full knowledge of the 'A' Level syllabus ready for being assigned an 'A' Level class next year.

Performance Criteria 

Confident knowledge of the whole syllabus shown by model answers to past papers.

Status

Linked Blogs/Evidence

Date Due  

**Save** **Close**

To add, edit or remove areas, click on the +, pencil or bin icon in each tab:

Objectives			
OBJECTIVE	PRIORITY/SDP OBJECTIVE	DATE DUE	
<input type="checkbox"/>  To ensure that teachers are matching tasks to the needs of the most able and evaluation systems are in place to increase the % of pupil progress		31/08/2022	
<input type="checkbox"/>  To improve classroom strategies ensuring that tasks are matched to the needs of the most able so that progress is in line with expectations and beyond.		31/08/2022	
<input type="checkbox"/>  To work in partnership with the gifted and talented co-ordinator to demonstrate effective practice in matching tasks to the needs of the most able pupils. Document and share effective teaching strategies for achieving enhanced achievement for the most able.		31/08/2022	

Notice that at present under the **What Next?** button there are two options - **Agree Targets** and **Cancel Review**. If Cancel Review is chosen any edits will be lost and the line manager will need to start another review from scratch. Selecting Agree Targets will require both the line manager and the reviewee to enter passwords to formally set the review as open (some organisations turn the setting for passwords off). If the line manager wishes to save their input but not agree targets, they need to click away from the current page. This effectively suspends the review which can be resumed at a later time. If this is the case:

Practical task	
1.	Select the <b>Home</b> option from the left-hand contents list
2.	Select <b>My Staff</b> tab from the Home page main screen

Notice the button next to the staff member’s name has changed from **Start** to **Resume**.

Home What Next? ?

Me My Staff My School

**My Staff** Export

Show All My Staff Only Staff I Manage From 01/09/2017 To 31/08/2018 Staff Member Types  Department

	STAFF MEMBER		OBJECTIVES	OBSERVATIONS	STANDARDS	EVIDENCE/BLOGS	INTERIM REVIEWS		
	<input type="text" value="Name"/>								
<input type="radio"/>	Ashbee, Laura	✓	✓	■	□ □ □ □ □	■ ■ ■ ■ ■			✗ <input type="checkbox"/> ✗
<input type="radio"/>	Croft, Louise	✓	✓	■	□ □ □ □ □	■ ■ ■ ■ ■	1	28/03/2018	✗ <input type="checkbox"/> ✗
<input type="radio"/>	Deighton, Sheila	✓	✓	■	□		1	28/03/2018	✗ <input type="checkbox"/> ✗
<input type="radio"/>	Johnson, Marie	✗	✗	Start					✗ <input type="checkbox"/> ✗
<input type="radio"/>	Kingston, Danielle	✓	✓	■	■				✗ <input type="checkbox"/> ✗
<input type="radio"/>	Talliman, Philomena	✓	✗	Resume					✗ <input type="checkbox"/> ✗
<input type="radio"/>	Whiteley, Liam	✓	✗	Resume					✗ <input type="checkbox"/> ✗

Showing 10 Entries Showing 1 to 7 of 7 First Previous Next Last

**Practical task**

1. Click the **Resume** button next to the staff name you used previously

The Start Review screen should appear with the edits which were typed earlier. Notice:

Further items can be added to the review and then the line manager and reviewee can agree the targets. Once targets are agreed the review is set and the work area page for the review is accessible to both the line manager and the reviewee.

On the **'My Staff'** page, the line manager sees the reviewee's name with two ticks to the right of the name, and coloured blocks in the Objectives, Monitoring Forms and Standards columns as appropriate.

The staff member's work area will open with the newly created review. If it is not the review you just created, check the other reviews in the dropdown list and find your new review. The standard objectives, standard Monitoring Forms and standards appropriate for the staff member type should display.

## Work Area - Muhammad Al-Idrisi

What Next? ?

### Review Period

Training Session Review 2017-18 (01/09/2017 - 31/08/2018)

- \* Activity Feed 0 >
- 📄 Evidence 0 >
- 🎯 Objectives 2 >
- 👁️ Observations 2 >
- 👍 Standards 9 >
- 🔧 Areas for Development 0 >
- 📖 CPD Activities/Courses 0 >
- 📅 Interim Reviews 0 >



Export

DATE		OBJECTIVE	DATE COMPLETED	STATUS		
31/08/2018	🗃️ 👤 🔄	To develop the academic language students will need for the new curriculum.		In Progress	✎️	🗑️
31/08/2018	🗃️ 👤 🔄	To develop the pedagogy to ensure that students develop memory skills, independent learning, and successful examination strategies.		In Progress	✎️	🗑️

## FAQs

### Why can I see two reviews open for the same staff members?

It is possible for staff to have two open reviews at this time - the one for the previous academic year which is in the process of being completed and the one for the new academic year which has just started. If this is the case the staff name will appear twice on the 'My Staff' page. Some administrators prefer to complete the old reviews before starting the new ones. This is a decision for each school or college to make at this time of the academic year.

See if your current 'My Staff' page has staff names appearing more than once at present.

Practical task	
1.	Select <b>Home</b> from the left-hand contents menu then select the <b>My Staff</b> tab
2.	Select the <b>All Staff</b> radio button to see all the active staff in your school or college

The screen should be similar to the one on the next page.

## Home

What Next? ▾
?

Home

Me | My Staff | My School | Videos

👤 **My Staff** Export

Show
From
To
Staff Member Types
Department

All Staff
  All My Staff
  Only Staff I Manage
 01/09/2018
📅
31/08/2019
📅

	STAFF MEMBER	<input type="radio"/>	<input checked="" type="radio"/>	OBJECTIVES	OBSERVATIONS	STANDARDS	EVIDENCE/BLOGS	INTERIM REVIEWS	📺	📷	🔍	🚫
	Name <input style="width: 100%;" type="text"/>											
🕒	👤 Adamson, Damien	✓	✓	🟢	□□	🟢🟢🟢🟢🟢🟢🟢🟢	1 19/11/2018			✓	🟡	✕
🕒	👤 Banks, Ian	✓	✓		□□		1 26/10/2018	1 27/09/2018	📺	✓	□	✕
🕒	👤 Banks, Ian	✓	✕	Resume						✕	□	✕
🕒	👤 Barlow, Claire	✓	✓	🟡🟡		🟡🟡🟡🟡🟡🟡				✓	□	✕
🕒	👤 Barton, Lisa	✓	✓		□□🟡					✕	□	✕
🕒	👤 Barton, Lisa	✓	✓	🟢						✕	□	✕
🕒	👤 Education, Derventio	✓	✓		□					✕	□	✕
🕒	👤 Farriday, Nina	✓	✓	🟢	□□	🟢🟢🟢🟢🟢🟢	2 27/09/2018			✕	□	✕
🕒	👤 Farriday, Nina	✓	✓	🟡	□					✕	□	✕
🕒	👤 French, James	✓	✓	🟡		🟢🟢🟢🟢🟢🟢				✓	🟡	✕
🕒	👤 Holiday, Jennifer	✓	✓	🟡	□□					✕	□	✕
🕒	👤 Holiday, Jennifer	✓	✓		□□□					✕	□	✕
🕒	👤 Linthwaite, Jasper	✕	✕	Start						✕	□	✕



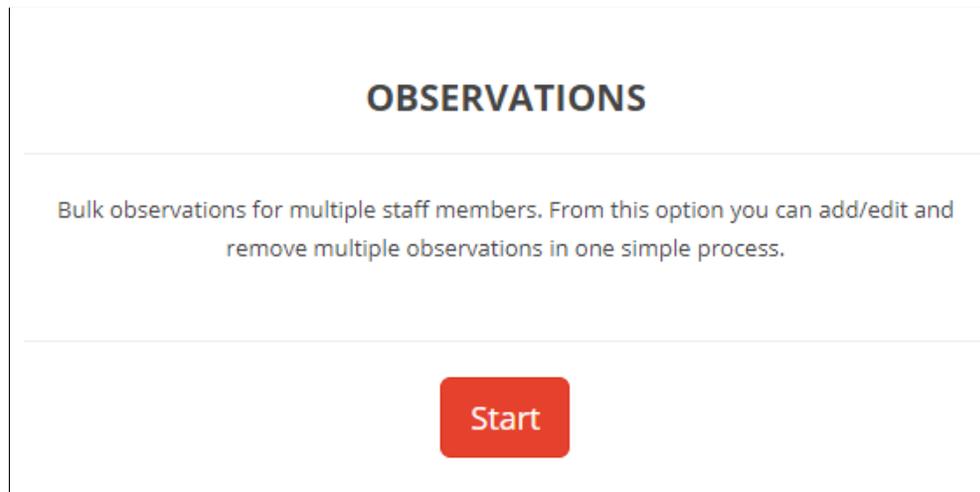
## How can I apply Standard Monitoring Forms after reviews have started?

It is possible to add Standard Monitoring Forms to groups of staff after the review has started by adding bulk Monitoring Forms. From this option you can add/edit and remove multiple Monitoring Forms in one simple process.

### Practical task

1. Select **Settings** from the left-hand contents menu then select the **Performance Management** and **Monitoring Forms**
2. Select **Bulk Actions**

You should see a screen similar to this:



- |                |  |
|----------------|--|
| Practical task |  |
| 3.             | Click on <b>Start</b> and a new window will open                                     |
| 4.             | Select the appropriate radio button to <b>add, update or remove</b> Monitoring Forms |
| 5.             | Select the <b>correct form</b> from the dropdown menu                                |
| 6.             | Select the correct review period date range and click on <b>Next</b>                 |

A window similar to the one below will open:-

**Observations**

Who would you like to change the observations for?

Department     
  Staff Type     
  Staff Member Type  
 User Right     
  TLR     
  Pay Scale

Please select an option

<input type="checkbox"/>	STAFF MEMBERS	SSPERIODSS
<input type="checkbox"/>	Allcot, Jessica	PM 20/21
<input type="checkbox"/>	Alson, Sarah	PM 20/21
<input type="checkbox"/>	Bailey, Lisa	PM 20/21
<input type="checkbox"/>	Boose, Ben	PM 20/21
<input type="checkbox"/>	Clarke, Nathan	PM 20/21
<input type="checkbox"/>	Craven, Mark	PM 20/21
<input type="checkbox"/>	Farm, Steve	PM 20/21
<input type="checkbox"/>	Fletcher, Keith	PM 20/21

>> > < <<

<input type="checkbox"/>	SELECTED STAFF	SSPERIODSS
No records found.		

Back Next Close

Leave the list as it to view and select from all staff or use the radio button to filter to a particular group of staff e.g. :-



- Practical task
1. Click on **Department**
  2. Click on the **dropdown** arrow to select Maths. Only the Maths Department list will be returned
  3. Click on the **double arrow** to select all staff in the filtered list, or tick specific staff before clicking on the double arrow
  4. Click on **Next**

A window similar to the one below will open:

The screenshot shows a form titled "Observations" with the following fields and options:

- Focus:** A yellow highlighted text input field.
- Date:** Radio button options for "No Date", "Between Dates", and "Specific Date".
  - Between Dates:** Two date pickers showing "25/06/2021" and "25/06/2021" with calendar icons, separated by "and".
  - Specific Date:** One date picker showing "25/06/2021" with a calendar icon.
- Purpose:** A dropdown menu currently set to "Not Set".

At the bottom right, there are three buttons: "Back" (red), "Next" (red), and "Close" (grey).

Practical task	
1.	Enter the required focus, dates and purpose
2.	Click on <b>Next</b>
3.	A confirmation window will open for you to review
4.	Click on <b>Run</b> to apply the form

## How can I apply Standard Objectives after reviews have started?

Applying Standard Objectives after the reviews have started is a very similar process to the one above. It is possible to bulk add Standard Objectives to groups of staff after the review has started:

Practical task	
1.	Select <b>Settings</b> from the left-hand contents menu then select the <b>Performance Management</b> and <b>General</b>
2.	Select Standard Objectives
3.	Click on <b>pencil</b> to edit an existing Standard Objective or click on the <b>+</b> to add a new one
4.	Now select <b>Bulk Actions</b> in the General Settings Menu and the <b>Start</b> button on <b>Import Standard Objectives</b>

A window similar to the one below will open:

## Import Standard Objectives

<input type="checkbox"/> STANDARD OBJECTIVES	STAFF MEMBER TYPES
<input type="checkbox"/> To ensure that teachers are matching tasks to the needs of the most able and evaluation systems are in place to increase the % of pupil progress	Main Scale Teacher, Headteacher, Business Manager
<input type="checkbox"/> To refine and develop strategies across school to support teachers in matching tasks to the needs of the most able to increase the % of pupils achieve	Head of subject, Headteacher, Business Manager
<input type="checkbox"/> To work in partnership with the gifted and talented co-ordinator to demonstrate effective practice in matching tasks to the needs of the most able pupils. Document and share effective teaching strategies for achieving enhanced achievement for the most able.	Main Scale Teacher, Headteacher, Business Manager
<input type="checkbox"/> To improve classroom strategies ensuring that tasks are matched to the needs of the most able so that progress is in line with expectations and beyond.	Main Scale Teacher, Headteacher, Business Manager
<input type="checkbox"/> To rapidly raise achievement with identified students by focussing on individual needs	Teaching Assistant
<input type="checkbox"/> To support and collaboratively plan with the class teacher to ensure all teaching is appropriately differentiated.	Teaching Assistant
<input type="checkbox"/> To support teaching staff in reinforcing key literacy messages consistently and to ensure identified students make progress in literacy.	Teaching Assistant

Next
Close

- | Practical task |   |
|----------------|---|
| 1.             | Select the <b>Standard Objectives</b> you wish to apply |
| 2.             | Click on <b>Next</b>                                    |



The next window enables you to double check the list of staff before importing the objectives:

## Import Standard Objectives

<b>BEN BOOSE</b>	<b>PM 20/21</b>
To ensure that teachers are matching tasks to the needs of the most able and evaluation systems are in place to increase the % of pupil progress	
<b>JENNIFER LESS</b>	<b>PM 20/21</b>
To ensure that teachers are matching tasks to the needs of the most able and evaluation systems are in place to increase the % of pupil progress	
<b>JOSHUA MAY</b>	<b>PM 20/21</b>
To ensure that teachers are matching tasks to the needs of the most able and evaluation systems are in place to increase the % of pupil progress	
<b>LISA RALPH</b>	<b>PM 20/21</b>

**Back** **Import Objectives** **Close**

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