

# Add Categories to the Category Bank

Last Modified on 03/11/2024 8:45 am CDT

**PATH:** *Staff Evaluations > Staff Evaluations Setup > Category Bank*

**PATH:** *Human Resources > Administration > Staff Evaluations Setup > Category Bank (HR-enabled)*

The Category Bank contains the areas of responsibility for which employees are being evaluated. Categories can include Elements and Sub-Elements which allow you to divide a Category into specific features that can be rated.

You can also add Categories by [copying existing Categories](#) or add them while [creating Evaluation Templates](#).

Complete the following steps to add a new Category.

The images used in the following procedure are examples only and may not reflect the Categories, Elements, Sub-Elements or Rating Scales used by your District.

1. Click the **New** button.

## Result

The New Category editor displays.

The screenshot shows the 'Category Bank' interface with the 'New Category' editor open. The 'New' button is highlighted with a red box and an arrow pointing to the 'New Category' form. The form includes the following fields and options:

- Code:** A text input field for a unique identifier.
- Evaluation Period:** A dropdown menu to select the associated evaluation period.
- Description:** A large text area for a detailed description of the category.
- Observation Only:** A checkbox to indicate if the category is used only for observations.
- Use Checkbox (Overrides rating scale):** A checkbox to override the rating scale.
- Rating Scale:** A dropdown menu to select the rating scale.
- Rate at the following levels:** Checkboxes for 'Category', 'Element', and 'Sub-Element'.
- Elements:** A section with an 'Add Element' button.

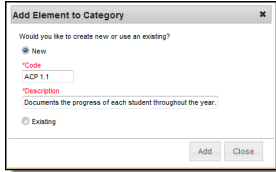
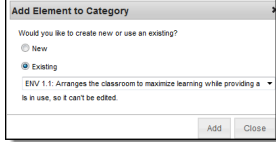
2. Enter a unique **Code** to identify the Category.
3. Select the **Evaluation Period** to which you want to associate the Category.
4. Enter a detailed **Description** of the Category.
5. Mark the **Observation Only** checkbox if the Category does not require a **Rating Scale** and will only be used for an Observation. (*optional*)

If you mark this checkbox, the **Rating Scale** and **Rate at the following levels** fields also become optional.

6. Select the **Rating Scale** that will be used to measure employee's performance in this Category.
7. Mark the **Use Checkbox (Overrides rating scale)** checkbox if you want to use a checkbox called "Meets Requirements" instead of selecting a rating on the Category. *(optional)*
8. Identify the level(s) at which employee's will be rated by selecting any of the following checkboxes:
  - **Category**
  - **Element**
  - **Sub-element**
9. Complete the following steps to add Elements.

The Category must include at least one Element.

1. Click the **Add Element** button.  
**Result**  
 The **Add Element to Category** window displays.
2. Complete one of the following options.

Option	Example (Click to Enlarge)
Select <b>New</b> and enter a <b>Code</b> and <b>Description</b> .	
Select <b>Existing</b> and choose an element from the dropdown list.	

3. Click the **Add** button.  
**Result**  
 The new element displays in the Elements group.

4. Enter Rating Scale Definitions for the Element if you are rating at the Element level and you are NOT using the *Use Checkbox* option (see step 8). (*optional*)

5. Repeat steps a-d if necessary.

10. Complete the following steps to add Sub-Element(s). (*optional*)

1. Click the **Add Sub-Element** button.

**Result**

The Add Sub-Element window displays.

2. Complete one of the following options.

Option	Example (Click to Enlarge)
<p>Select <b>New</b> and enter a <b>Code</b> and <b>Description</b>.</p>	
<p>Select <b>Existing</b> and choose a sub-element from the dropdown list.</p>	

- Click the **Add** button.

**Result**

The new sub-element displays beneath the element.

- Enter Rating Scale Definitions for the Sub-Element if you are rating at the Sub-Element level (see step 8) and you are NOT using the *Use Checkbox* option. (*optional*)

The screenshot shows a window titled "Rating Scale Definitions". It contains four sections, each with a label, a text input field, and a vertical scrollbar:

- VP: Very Poor**: The employee performs at a level that fails to meet district standards.
- P: Poor**: The employee performs at a level that partially meets district standards.
- G: Good**: The employee performs at a level that meets district standards.
- VG: Very Good**: The employee performs at a level that exceeds district standards.

- Repeat steps a-d if necessary.

- Click the **Save** button.

**Result**

The Category displays in the Categories group.