

Add Categories to the Category Bank

Last Modified on 10/21/2024 8:21 am CDT

Staff Evaluations will no longer be available after June 30th, 2025. For more information, visit the Human Resources and Staff Evaluation Deprecation FAQ.

Tool Search: Category Bank

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. The New Category editor displays.

Category Bank ☆		Staff Evaluations > Setup > Category Bank
Over the second sec	rt to CSV	
Filter On Evaluation Pariod 24-25 06/24/2024 - 06/24/2025 Categories Code Description D1:PP Planning and Preparation 24-25	New Category "Code "Evaluation Period "Description "Description "Description	▼
	Observation Only Use Checkbox (Overrides rating scale) Rate at the following levels: Category Element Sub-Element	
	Elements Add Element	

- 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.

- i. Click the Add Element button. The Add Element to Category window displays.
- ii. Complete one of the following options.

Option	Example (Click to Enlarge)
Select New and enter a Code and Description .	Add Element to Category X Would you lie to create new or use an existing? If lies Wow Add Open Documents the progress of each student throughout the year. © Exacting
Select Existing and choose an element from the dropdown list.	Add Element to Category > Would you like to create new or use an existing? > O new > B Loaming > EV 14. Arranges the classroom to maximize learning while providing a • > b in use, so it can't be edited. Add

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

Eler	nents
	$\equiv \frac{_{\text{ACP 1.1: Documents the progress of each student throughout the}}{_{\substack{\text{year.} \\ \text{Hide Details}}}} \times$
	*Code
	ACP 1.1
	*Description
	Documents the progress of each student throughout the year.
	Add Sub-Element
4	Add Element

iv. 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)
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VP: Very Poor	
The employee performs at a level that fails to meet district standards.	1
	-
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.	-
	-
/G: Very Good	
The employee performs at a level that exceeds district standards.	

- v. Repeat steps a-d if necessary.
- 10. Complete the following steps to add Sub-Element(s). (optional)
 - i. Click the **Add Sub-Element** button. The Add Sub-Element window displays.
 - ii. Complete one of the following options.

Option	Example (Click to Enlarge)
Select New and enter a Code and Description .	Add Sub-Element to ACP 1.1 X Would you like to craite new or use an existing? Item or use an existing? Image: Second Sec
Select Existing and choose a sub-element from the dropdown list.	Add Sub-Element to ACP 1.1 X World you be to create new or use an existing? There Bening Enving E

- iii. Click the **Add** button. The new sub-element displays beneath the element.
- iv. 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 employee performs at a level that meets district standards.	VP: Very Poor	
The employee performs at a level that partially meets district standards. G: Good The employee performs at a level that meets district standards.	The employee performs at a level that fails to meet district standards.	
The employee performs at a level that partially meets district standards. G: Good The employee performs at a level that meets district standards.		
G: Good	P: Poor	
The employee performs at a level that meets district standards.	The employee performs at a level that partially meets district standard	s.
The employee performs at a level that meets district standards.		
	G: Good	
VG: Very Good	The employee performs at a level that meets district standards.	
VG: Very Good		
	VG: Very Good	

v. Repeat steps a-d if necessary.

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11. Click the **Save** button. The Category displays in the Categories group.