

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.

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*)

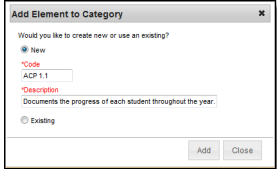
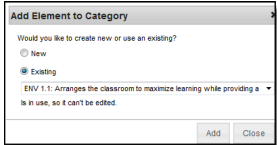
If you mark this checkbox, the **Rating Scale** and **Rate at the following levels** fields also

become optional.

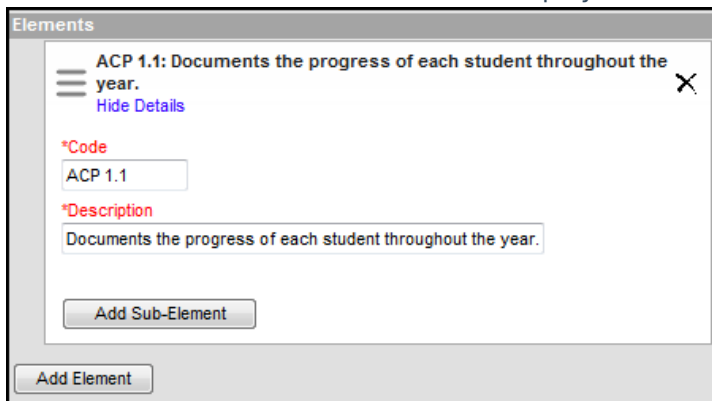
6. Select the [Rating Scale](#) that will be used to measure employee's performance in this Category.
7. Mark the **Use Checkbox (Overrides rating scale)** checkbox if you want to use a checkbox called "Meets Requirements" instead of selecting a rating on the Category. *(optional)*
8. Identify the level(s) at which employee's will be rated by selecting any of the following checkboxes:
 - o **Category**
 - o **Element**
 - o **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 .	
Select Existing and choose an element from the dropdown list.	

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



- 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*)

Rating Scale Definitions

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.

- 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 .	
Select Existing and choose a sub-element from the dropdown list.	

- 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*)

Rating Scale Definitions	
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.	▲ ▼

- v. Repeat steps a-d if necessary.
11. Click the **Save** button. The Category displays in the Categories group.
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