



Effective Practices for Processes, Workflows and Tasks

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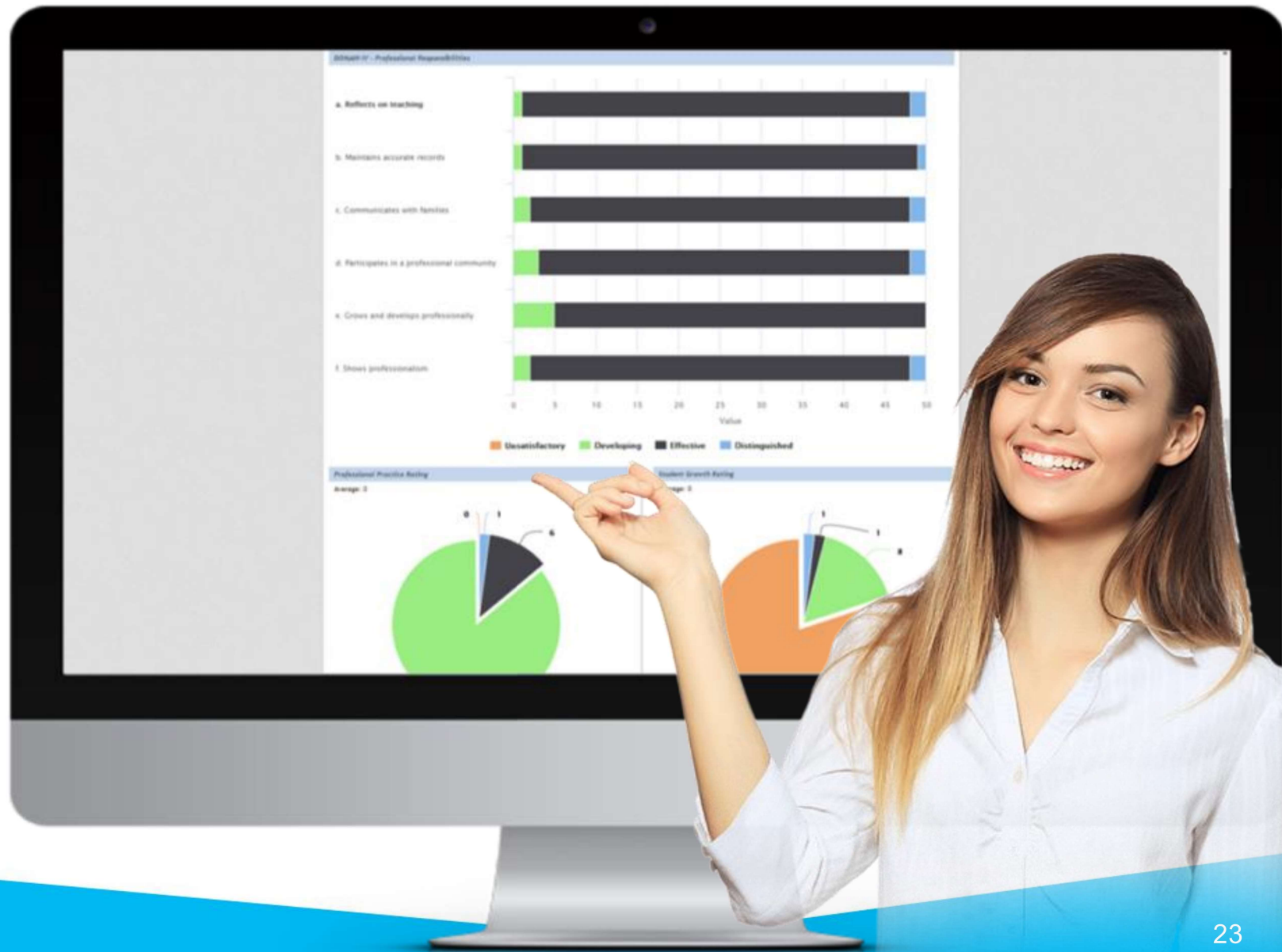


Agenda

- 1 Evaluation 5-Step Process
- 2 Building Effective Processes
- 3 Constructing Customized Workflow
- 4 Providing Data Transfers from Form to Form
- 5 Setting Up Automations

Begin with
the end in
mind!

Dr.
Stephen
Covey



Evaluation Five Step Process

Step 1*

- **Description**
 - Name, Job Type, Category

Step 2*

- **Tasks**
 - Forms, Workflows, Calendar Meetings
 - Building the Process

Step 3

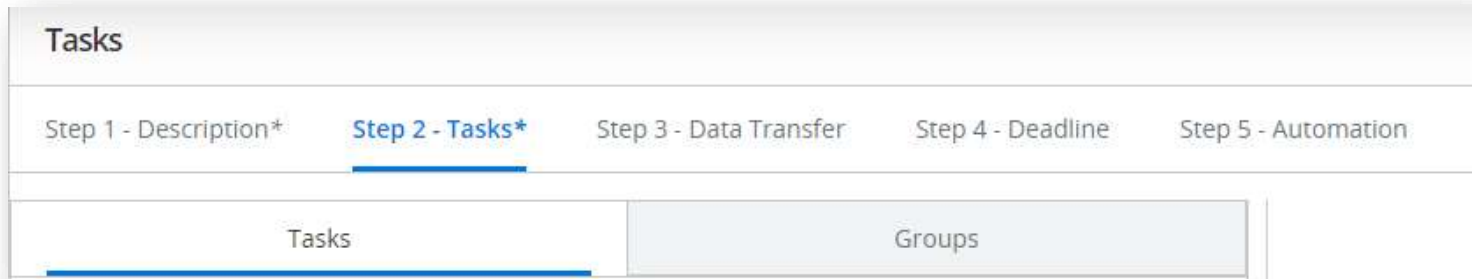
- **Data Transfer**
 - Moving data fields across forms

Step 4

- **Deadline**
 - When the process ends

Step 5

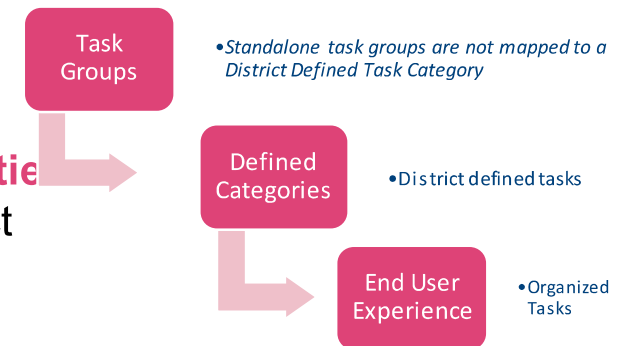
- **Automation**
 - Group of users can be mass assigned to a process based on defined criteria



Building Effective Processes



1. Start with identifying your **job profiles**
2. Decide what will be the **tasks** for the job profiles
3. Identify the **supervisor's role and responsibilities**
4. Create **workflows** and structures for your district
5. Formulate a decisive **timeline** aligned with instructional expectations
6. Product a **defined list of tasks** for performance improvement plans
7. Review, assess and synthesize desire **outcomes** throughout the year of the processes



Constructing Customized Workflows

Step Type required

▼

Approver required

▼

Disclaimer

Approval
Signature
Review

What is the meaning of each step?

Supervisor, unless Assigned Evaluator
Supervisor
Assigned Evaluator
Direct Report
Specific User
Member of a Group
Role
Either Supervisor or Assigned Evaluator

Who approves the steps?

Constructing Customized Workflows

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Disclaimer

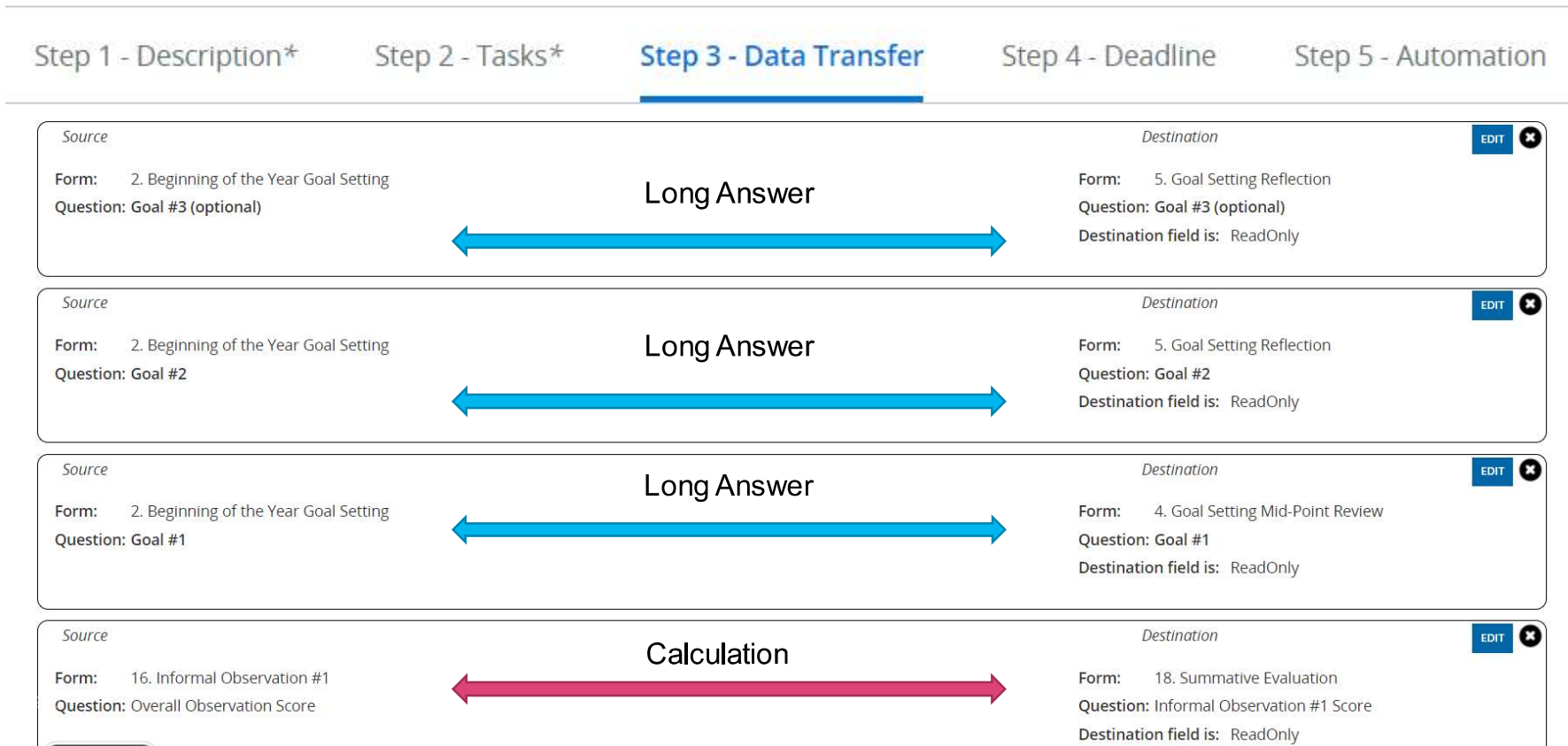
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Providing Data Transfers from Form to Form



Setting Up Automations

Step 1 - Description*

Step 2 - Tasks*

Step 3 - Data Transfer

Step 4 - Deadline

Step 5 - Automation

Note: Automations generate lists of staff that meet the following criteria and belong to the job types selected on "Step 1 – Description" of the process builder. Upon automation completion, navigate to [HR Tools Dashboard](#) to review the list and utilize the Bulk Action drop-down to assign the staff list to the selected process.

1 Last Completed Eval Name EQUAL Teacher - Probationary Evaluat X Remove



Make sure you are in process you want the users to move into the following year.

+ Add Criteria

All criteria are true. Any criteria are true.



Clear

Adding the criteria is the most part. Plan who and select the criteria that meets the condition.

When to Run Automation

Off /



Select when do you want the automation to occur for this employee group and process.



Save – This will save your work on the criteria selected for the employee group.
Save & Preview – This will allow you to view the employee group in the Dashboard.

Save Save & Preview



Let's Demonstrate!
Unified Perform





Questions/Opportunities

For more information please contact:

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