

Add Categories to the Category Bank

Last Modified on 10/22/2022 10:11 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 'Code' field. 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 indicate if a checkbox should be used instead of a 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.

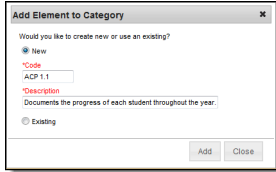
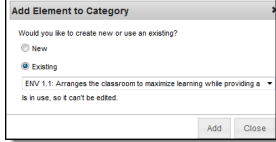
2. Enter a unique **Code** to identify the Category.
3. Select the **Evaluation Period** to which you want to associate the Category.
4. Enter a detailed **Description** of the Category.
5. Mark the **Observation Only** checkbox if the Category does not require a **Rating Scale** and will only be used 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:
 - o **Category**
 - o **Element**
 - o **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 New and enter a Code and Description .	
Select Existing and choose an element from the dropdown list.	

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

The screenshot shows a window titled "Elements" with a close button (X) in the top right. The main content area displays the following information:

- ACP 1.1: Documents the progress of each student throughout the year.** (with a "Hide Details" link below it)
- *Code**: A text input field containing "ACP 1.1"
- *Description**: A text input field containing "Documents the progress of each student throughout the year."

At the bottom of the window, there are two buttons: "Add Sub-Element" and "Add Element".

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*)

The screenshot shows a window titled "Rating Scale Definitions" with four distinct sections, each with a title and a description:

- 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.

Each section has a small up/down arrow icon on the right side of the description box.

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 New and enter a Code and Description.</p>	<p>The dialog box "Add Sub-Element to ACP 1.1" asks "Would you like to create new or use an existing?". The "New" radio button is selected. Below, the "Code" field contains "ACP 1.1.2" and the "Description" field contains "Provides evidence that achievement goals have been met." The "Existing" radio button is unselected. "Add" and "Close" buttons are at the bottom right.</p>
<p>Select Existing and choose a sub-element from the dropdown list.</p>	<p>The dialog box "Add Sub-Element to ACP 1.1" asks "Would you like to create new or use an existing?". The "Existing" radio button is selected. Below, a dropdown menu shows "ENV 1.2.2: Enforces classroom rooms consistently and fairly." with the note "It is in use, so it can't be edited." The "Add" and "Close" buttons are at the bottom right.</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 form titled "Rating Scale Definitions" with four sections, each representing a rating level. Each section includes a label, a description, and a text input field with up and down arrows.

Rating Level	Description
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.