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.
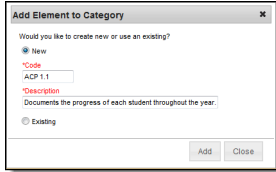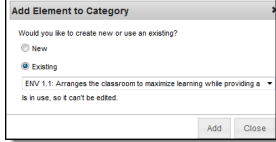   **Result**
   The New Category editor displays.

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 **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.

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)
Select **New** and enter a **Code** and **Description**.	
Select **Existing** and choose a sub-element from the dropdown list.	

3. Click the **Add** button.
   Result
   The new sub-element displays beneath the element.

4. 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.

5. Repeat steps a-d if necessary.

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