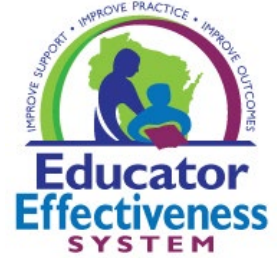


Frontline Education Evaluation Platform ROLLOVER GUIDE for the WI STATE MODEL 2023-2024



Rollover includes the archiving of the current year's data in the Frontline Education Evaluation platform and automatically moving active users to the new evaluation year. It should be completed by one local level platform administrator at the end of every school year.



Recommended Timeline for Rollover Completion: **END OF JUNE (6/30/2024)**

The 2024-25 Setup Specifications form AND rollover must be completed locally in order for [Frontline Education to do the configuration work necessary to prepare your site](#) to use the [newly required 2022 Danielson Framework for Teaching](#) for the evaluation of teachers.

DPI cannot ensure that completion of the setup and local access will occur prior to the start of the school year if submission and rollover are completed in the fall.

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Preparing for the Rollover Process

Prepare - Step 1: Check District Settings and Rollover Rights

Check District Settings

Follow path: Evaluations > CONFIG > District Settings

Check the following:

- Require final evaluation summary: **Unchecked**
- Require rolover rights to finalize evaluations: **checked**
- Evaluation finalization options: **Evaluation finalization do not require approval**

Manage District Settings

Settings

Require final evaluation summary: ←

Require final evaluation report acknowledgement:

Require rolover rights to finalize evaluations: ←

Final evaluation report name: Final Evaluation Summary

Evaluation finalization options: Evaluation finalizations do not require approval ←

Evaluation finalization approver: Select an approver

Allow teachers to upload artifacts:

Require artifact type:

Require artifact category:

Allow artifact statement in artifact:

Require rubric alignment:

Show evidence collection tool:

Disable automatic coding:

Clear evidence after sync:

Use Rights Assignments instead of Forms Assignments in Admin View:

Enable Editing of Form Behind Evidence Collection Tool:

Restrict Evaluation Assignments to Staff in the Same: Off

Enable Automatic Building Evaluation Rights:

Rollover Tool Access

The user performing rollover requires the appropriate access rights to do so.

To check the rights, follow path: Evaluations > CONFIG > Admin Rights

- Check to ensure that the appropriate district/charter admin has rights to the Rollover Tool.
- If needed, a person with Super Admin Rights in your district can select "Add Admin Rights" and complete the Admin Rights Wizard process to assign the Rollover Tool. If you need to add the Rollover Tool to existing users then select the pencil to modify their access. It is greatly recommended to limit the number of people with rollover rights.

Manage Admin Rights

+ Add Admin Rights

Admin	View Historic...	System Reports	Report Writer	Ad-Hoc Elements	Evaluat... Assign...	Rollover Tool	Edit Archive...	Compo... Manager	Evaluat... Rights	Form Designer	Rubric Designer	Super Admin		
Admin, MLP	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

Prepare - Step 2: Check Evaluation Type Settings

Follow path: Evaluations > CONFIG > Evaluation Types

For EACH active evaluation type, review/identify the next evaluation type, default start date, and default duration.

Principal - Supporting Year 2

Evaluation Type Name: Principal - Supporting Year 2

Evaluation Type Code:

Description:

Employee Classification: Administrator

Next Type: Principal - Summary Year

Default Start Date (mm/dd): 07/01

Default Duration (# of months): 11

Active?:

Export Key:

Submit Cancel

Next Evaluation Type

Verify to be sure each evaluation type moves to the next evaluation type in the cycle. The “Next Type” is the next evaluation type in the cycle. Select from the drop down options.

Default Start Date

Recommendation: Set all start dates in each evaluation type to late August to allow time to properly set up your site for the next school year. Setting the start date later ensures educators will not be able access forms until the district is sure they have been set up correctly.

- The district can mass change the start date to an earlier date once the district has completed all setup requirements. Start dates can be adjusted in “Evaluation Assignments”.
- The date you set for the start date needs to be at least one day later of the date you plan to rollover. (Example: If the plan to rollover is 6/30, set the start date to 7/1 or later)
- **NOTE:** If there is not a date in the default start date, the date will default to 1/1 of the current year. If a district completes the rollover after the default date, the district can update the users after in “Evaluation Assignments”. This process is covered in the Setup process prior to the next school year.
- **ALERT:** The start date for the next evaluation cycle also needs to be at least 1 day ahead of the end date of the previous evaluation cycle. If the evaluation periods overlap, the form reports on the End-of-Cycle Summary or Cycle Summary will bring in information from 2 evaluation periods.
 - Example of incorrect date setup: If a school’s evaluation period ended on 6/30/2022 and the new evaluation period begins on 6/1/2022 anything submitted in that 1 month period (6/1/2022-6/30/22) would show in both evaluation cycles.

Default Duration (# of months)

Determines how many months an evaluation cycle will last.

Recommendation: Set this duration to 10 or 11 months allowing a “grace period” for you to finalize, make changes to evaluation type assignments, etc. prior to the new evaluation period starting.

Click Submit.

Prepare - Step 3: Finalizing the Current Cycle

The rollover process cannot occur until ALL forms are finalized. Evaluators are generally responsible for finalizing forms and components. System administrators will need to follow up with evaluators if some forms still require that finalization.

Track Form Status

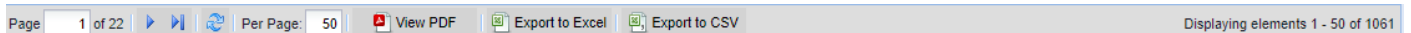
- Utilize reporting tools such as the Process View or Detail View (Evaluations > Administration)
 - These reports will identify form progression and indicate whether you can complete the rollover.
 - Reference the green progress bar and use the provided filters to track the completion of components within a given Evaluation Type.
 - All statuses will need to be completed and marked as "Awaiting Finalization" in the status column before an evaluation can be finalized.
 - (If all users say "Awaiting Finalization" skip to STEP 4.)

Element	Component	User	Admin	Eval Type	Eval Start ...	Eval End ...	Sched...	Status
End-of-Interval ...	Student Learning Objective (SLO)	Smith, Ms	Not Assigned	Teacher - Summary Year	07/01/2016	06/30/2017	N/A	Awaiting Finalization

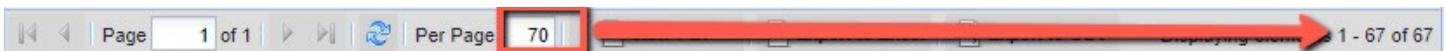
Review Users Still Requiring Forms to be Finalized - Status in Process View "In Progress"

Using Detail View, run a report to see which forms are incomplete. If nothing populates in Detail View right away, you can filter by Buildings using the "Detail View Filters" at the top of the page and "Select All". Click "Apply".

ALERT: Very Important. Ensure you view ALL forms/elements. The bottom right of the page displays the total number of elements. If you cannot view the amount, click on the last page arrow.



Only 50 forms/elements are viewable on one page. Increase the number of forms/elements viewable per page to at least the total number of forms/elements listed on the bottom right-hand corner. For this example, 70 was entered into the per page field so the number of pages of the detail view is now 1 and all forms are accounted for on that one page.



At the top of the columns, find the Status column. Using the down arrow, filter the Status column with the following filters:

- Incomplete
- Not Scheduled
- Proposed
- Scheduled
- In Progress
- Awaiting Acknowledgment
- Awaiting Finalization

If any forms are identified in the report as needing finalization, contact the assigned evaluator. The forms should be submitted and acknowledged by the educator before the evaluator will be able to finalize.

Mass Finalize Forms

ONLY USE THIS SECTION IF you choose to mass finalize incomplete forms in bulk, all at once.

IMPORTANT: The name of the person who completes the mass finalization function will appear at the top of each educator's form in the "Finalized By" field.

Follow the path: Evaluations > ADMINISTRATION > Detail View

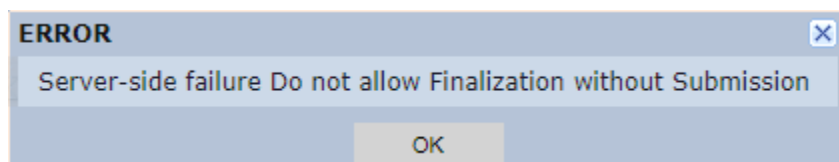
If nothing appears on this page, filter by buildings at the top of the page and "Select All" and click "Apply".

- Filter the "Status" column by selecting every status *EXCEPT FOR* "Complete." This will display all forms that need to be finalized.
- Check the "Select All" checkbox next to the column heading "Element".
- Select the "Action" button that will appear above the column headings.
- Select the option to "Finalize Selected Elements" to finalize all forms.

WARNING

The End-of-Cycle Summary (legacy forms) / Cycle Summary (growth-focused forms) typically has to be submitted and acknowledged prior to finalization and, therefore, the system may not allow it to be mass finalized. It is not recommended to finalize that form without the review and acknowledgement of the educator. You may wish to consult with your local legal counsel.

If you receive this error message, submit a [Help Ticket](#) to the DPI Help Center for Support of Frontline.



Completion of Rollover

Once the forms/components are finalized for an evaluation, the rollover can be performed individually or in bulk.

Rolling Over Individuals

Follow path: Evaluations > ADMINISTRATION > **Process View**

- Select the educator in “Awaiting Rollover” status. A section will populate below, showing their completed components.

Evaluation Administration - Process View

Status: Any Status | Type: Teacher - S | Building: Any Building | Last Name: demo

Name	Evaluation Type	Evaluation Period	Progress	Status
Demo, Gretchen-Flynn	Teacher - Supporting Year 1	08/01/2022-06/30/2023	1 of 1	Awaiting Rollover

Page 1 of 1 | Displaying users 1 - 1 of 1

Demo, Gretchen-Flynn (Teacher - Supporting Year 1) | Building: None

Manage 0 instance components

Component Name	Progress	Status
Teacher Mini-Observation	2 of 2	Complete

Rollover Options

- Click the “Rollover Options” button. A pop-up box will appear. From here, you will review the details for the new evaluation cycle.
 - **Choose an action:**
 - **Finalize and Rollover option: (RECOMMENDED)**

With this action, select the next evaluation type from the dropdown and determine your evaluation start and end date. Each cycle should have a gap between when the rollover occurs and when the new cycle begins. (This gap allows you to make changes to evaluation types and perform additional system functions during that period.)
 - **Finalize Only: (NOT RECOMMENDED)**

With this action, the next evaluation type and evaluation start and end date are greyed out (not applicable for this function). The action will archive the user's existing evaluation data, **unassign the evaluation type, and will not assign new cycle dates (which removes the user from Process View).**

Possible Use of “Finalize Only”: This may be an option for users you know will not return next year (i.e., leaving district, retiring, etc.). This action also allows EEM admins to complete evaluations of users who will not need an evaluation the following year.

The screenshot shows a dialog box titled "Evaluation Finalization". It contains the following fields and options:

- Current Type: Teacher - Summary Year
- Choose an action: Finalize and Rollover, Finalize Only
- Next Type: Teacher - Supporting Year 1 (dropdown menu)
- Next Evaluation Start Date: 08/15/2022 (calendar icon)
- Next Evaluation End Date: 06/15/2023 (calendar icon)
- Notify User:
- Submit button

- Once finished, click “Submit” to complete the rollover for that individual evaluation.

Rolling Over in Bulk Using the ROLLOVER TOOL

Follow path: Evaluations > ADMINISTRATION > **Rollover Tool**

The Rollover Tool allows you to perform your rollover in bulk (multiple users at once).

REMEMBER: Review each eval type and make any necessary adjustments prior to attempting the finalization.) **Users who are not ready for rollover (i.e., forms are not in “complete” status) will not show up in the list of users to rollover and will be missed.**

STARTING TIPS:

1. In the PROCESS VIEW, check and make note of your total number of users in the bottom right-hand corner.
2. In the ROLLOVER TOOL, use the “Export to Excel” option to reference a longer list. You can note any changes in the spreadsheet and use it as a guide to make adjustments before completing the rollover.

The screenshot shows the "Evaluation Rollover Tool" interface. It features a table with columns for Name, Evaluation Type, and Start Date. A red box highlights the checkbox in the first column. Below the table, there are two buttons: "View PDF" and "Export to Excel", with the latter also highlighted by a red box.

<input checked="" type="checkbox"/>	Name ▲	Evaluatio...	Start Date	E
<input checked="" type="checkbox"/>	Demo, Gr...	Teacher - ...	08/01/2022	0

Check the Number of Users

In the Rollover Tool, scroll to the bottom of the page to compare the total number of users to that of the users indicated in the Process View.

Next Start...	Next End ...	Building(s)	Progress	Status
07/01/2023	07/01/2024		1 of 1	Awaiting Fin:
				Total users: 278

If the total number of users in Process View is different than the total number of users on the Rollover Tool, some users have been missed and this will affect your rollover. If this is the case, refer back to [Prepare - Step 3: Finalizing the Current Cycle](#) to ensure all educators' forms are Complete and in Awaiting Finalization status.

Check System Accuracy

Check the next evaluation type, the start date, and the end date for each user. If an error is identified, click on the box containing the error and correct it. (This also can be done during the beginning-of-year setup process.)

Evaluation Rollover Tool							
Finalize and Rollover Selected Users							
<input checked="" type="checkbox"/>	Name	Evaluation Type	Start Date	End Date	Next Type	Next Start Date	Next End Date
<input checked="" type="checkbox"/>	Demo, Gretche...	Teacher - Supp...	08/01/2022	06/30/2023	Teacher - Supp...	07/01/2023	07/01/2024

Rollover All Users

Once all users are correct:

- Select the checkbox next to the Name field. This will select ALL the users in the Rollover Tool. Or select specific users.
- Select "Finalize and Rollover Selected Users".

Evaluation Rollover Tool							
Finalize and Rollover Selected Users							
<input checked="" type="checkbox"/>	Name	Evaluation Type	Start Date	End Date	Next Type	Next Start Date	Next End Date
<input checked="" type="checkbox"/>	Gretche...	Teacher - Supp...	08/01/2022	06/30/2023	Teacher - Supp...	07/01/2023	07/01/2024

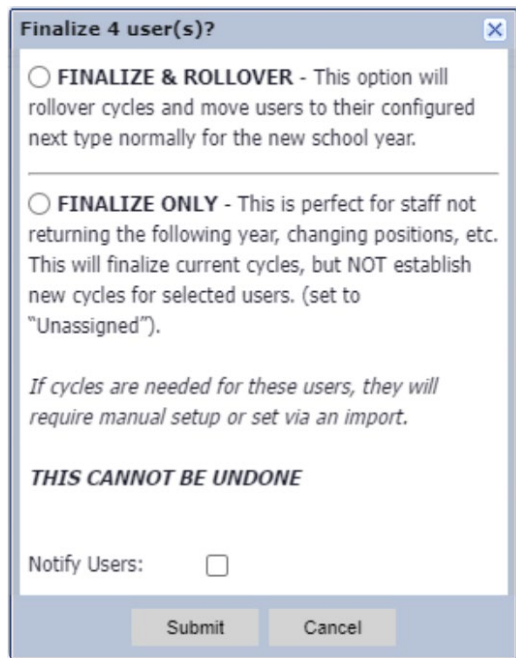
- **Select one of the options.**

In the pop-up you will see 2 options:

RECOMMENDED CHOICE: “Finalize & Rollover”

NOT RECOMMENDED: “Finalize Only”.

This option may be useful for select, individual users. It is an option for users you know will not return next year (i.e., leaving district, retiring, etc.). The action also allows EEM admins to complete evaluations of users who will not need an evaluation the following year.



- Click the “Submit” button.
- The eligible users will now be rolled over to the next evaluation period.

Possible Error Message

Transaction count after EXECUTE indicates a mismatching number of BEGIN and COMMIT statements. Previous count = 1, current count = 0.
Transaction count after EXECUTE indicates a mismatching number of BEGIN and COMMIT statements. Previous count = 1, current count = 0.

The user causing the error message will be the first educator that is listed in the Rollover Tool:

1. Find that educator in the Evaluation Assignments list (Evaluations > CONFIG > Evaluation Assignments) and double click on that educator’s row.
2. Change the end date of their current cycle to one day earlier. Example: If the date is 6/30/23, change it to 6/29/23.
3. Try rolling over that educator’s cycle again.
4. If the error still occurs, contact the [DPI Help Center](#) for support.

Check Current Evaluation Status After Rollover

Follow path: Evaluations > ADMINISTRATION > **Process View**

- Check that **ALL** educators' statuses indicate "Not Started".
- Check the Evaluation Cycle Dates to ensure all the educators have rolled over properly:
 - Find the "Evaluation Period" column.
 - Select the down arrow.
 - Sort by ascending.

If an educator was not rolled over they will appear at the top of the list and their cycle will most likely be from last year.

NOTE: Did the rollover cycle dates jump two years ahead (i.e., now reads 2024 - 2025 instead of 2023 - 2024)?

Reason: The start date setting for evaluation types was set to "7/01" and rollover was performed **after** July 1st. So the system jumped ahead a year.

Solution: Mass update the evaluation cycles for all.

1. Follow path: Evaluations > CONFIG > Evaluation Assignments
2. Increase the users per page at the bottom to include the total number of users in your district.
3. Select the box to the left of "User".
4. "Set Cycle Dates" and choose the correct Start and End Dates for the Cycle.
5. Click on Submit to save the dates.

NOTE: It is recommended to push the start date ahead to a date that you know you will have your setup complete and all the necessary new forms in place. This may need to be strategically planned.

Feel free to reach out to the [Help Center](#) to the DPI Help Center with any questions!