

District Evaluators: Site Visit Caseloads Quick Reference Card

CIITS: Managing Site Visit Caseloads

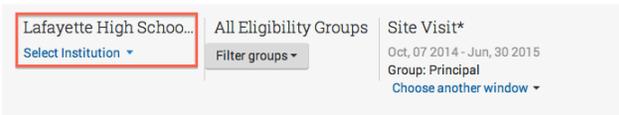
Users permitted with Caseload Manager (included in the Leadership role), can use the Caseload Manager tool to match Principals with their evaluator for Site Visits. Users with the "View Leadership Effectiveness Data" role (typically principals, superintendents, and superintendent designees) can be selected as reviewers/evaluators for Principal Site Visits.

Create an Observation Caseload

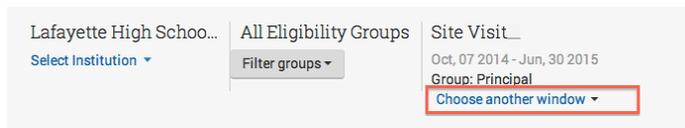
1. Roll your cursor over Educator Development on the navigation bar and click **Caseload Manager**



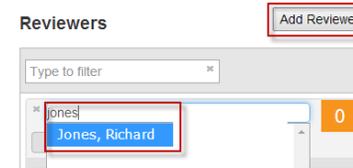
2. The institution will default to your CIITS default institution. Confirm that the correct institution is selected. If you need to change the institution, **Select Institution**



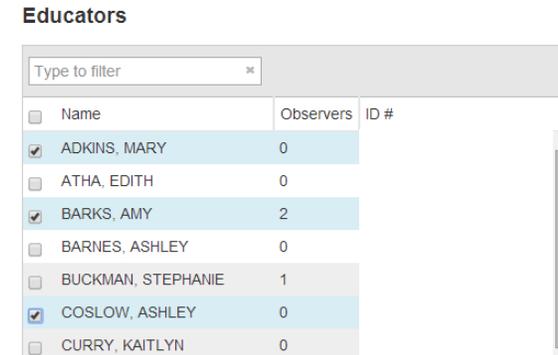
3. Select the window named **Site Visit**. To select a window click **Choose another window**



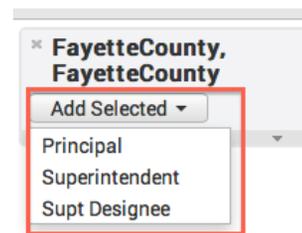
4. Click **Add Reviewer** and type the last name, first name of the Evaluator (the user must have the View Leadership Effectiveness Data role)



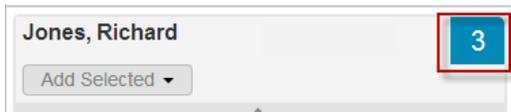
5. Select the principal(s) that you would like to add to this evaluator's caseload.



6. Find the reviewer you are creating the caseload for on the right side of the screen. Click **Add Selected** and choose the Observer Type



Once you have created the caseload, the number next to the Reviewer's name will update to reflect the number of people assigned to the caseload.

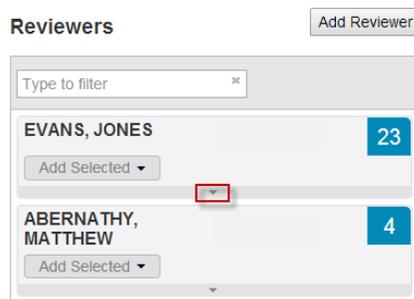


3. Select the names of the principals you wish to add. Next, click **Add Selected** and choose the Observer Type



Editing an Existing Caseload

1. Expand the reviewer screen to display the Observers full caseload



2. Click the **X** next to the name you would like to remove from the caseload

