



EdReflect

Summer Checklist

Make Sure Your Organization's Process Changes Can be Accommodated

We recognize that schools and districts often refine observation and coaching processes over the summer. Refer to the important deadlines below to ensure that any needed updates are reflected when educators return this fall.

By July 1st

- ✓ All 2016-17 activities will be **archived** (though still accessible!) on July 15th unless otherwise requested. To request an *alternative* archive date, click [here](#).

By July 15th*

**Requests received after July 15th may not be processed by the start of the school year, so don't delay!*

- ✓ Please **notify us** of your organization's activity adjustments, such as modifying forms, adding or modifying steps (for example, adding a document upload step), or turning on electronic Signing & Locking.
- ✓ Submit new and/or modified rubrics to support@edreflect.com.

Get EdReflect User Accounts Ready for 2017-18

Use the summer months to make important user account updates in EdReflect.

- ✓ Once your end of year reporting is complete, mark users who will not be returning in the fall as **'inactive'**. This will close their accounts and hide - but not delete - their information.
NOTE: If your organization uses EdReflect's EOY Worksheets, **do not change** end of year evaluator assignments. Once these were set in January or February, you don't need to revisit them until 2018.
- ✓ Create accounts for new hires, update rubric and school site assignments, and modify relationships with our [user management tools](#).
- ✓ Remember to set **read-only** relationships at the beginning of the school year to ensure that co-observers have access to view all necessary activities.
- ✓ Set training dates as soon as possible to ensure time for scheduling and preparation. Leverage our [library](#) of support resources to help facilitate your organization's internal trainings.