OPMS: Initiating and Completing the Formal Observation
For Supervisors of Classroom Teachers

Note: Steps 1-3 outline how to access OPMS from a City Schools computer and using the City Schools network.

**Step 1:**
Click **ERP Production** to access the OPMS portal.

**Step 2:**
Type your username and password into the text boxes. Click the **Login** button.

**Step 3:**
Click on **Manager Self Service** and then click **Performance Management**.

**Step 4:**
Click on the green arrow icon next to the task.

**Note:**
In this example, it is the 1st **Formal Observation** task. The systems will update each school year.
Step 5: Appraisals in Progress lists all of the open evaluations in your queue, by employee name.

Click on the yellow pencil icon in order to open the evaluation for that employee.

Note: You can check the status of all open evaluations:
- **Planned** – You have not touched the evaluation.
- **Transferred to employee** – You have completed the form and sent it to the employee.
- **Ongoing with Main Appraiser** – The employee has reviewed the evaluation and sent it back to you.

Note: The systems will update each school year.

You will now see the formal observation form. Scroll down to complete the formal observation.
**Note:**
If you cannot complete the task for the employee at this time, select a reason from evaluation waiver drop down box.

**REMEMBER** that teachers must be formally observed **at least two** times during the school year. Make sure to plan for both observations.

<table>
<thead>
<tr>
<th>Step 6:</th>
<th>To begin completing the observation <strong>click</strong> the yellow pencil next to the 1st Teach indicator.</th>
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| Step 7: | Select your rating from the **drop down box**.  
**Note:** To see the rubric for this Teach indicator, click “Show Instructional Rubric.” |
| --- | --- |

| Step 8: | Type in **comments and evidence statements** in the space provided.  
**Remember** that the Teach indicators require a rating and comment for each indicator. |
### Step 9:
Click on the **Apply and Update Next** button to move onto the next Teach indicator.

**Note:**
You can choose to “Save as Draft” and return later to finish entering ratings.

### Step 10:
Once you have finished entering ratings and comments for all 9 Teach indicators, click **Share with Appraisee** to send the form to the employee’s queue for review and response.

### Step 11:
Add a notification message to the employee and click **Submit** to send to his or her queue.

**Note:**
The confirmation message indicates the form was sent.

- You have successfully initiated the Formal Observation task for your employee.
- This task will not be considered complete (“closed”) until the employee reviews and returns the form to your queue, and you close out the task.

Please visit the Effectiveness webpage on CSI (http://www.baltimorecityschools.org/Page/21586) for additional information.
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**Step 3:**
Click on Manager Self Service and then click Performance Management.

**Step 4:**
Click on the green arrow icon next to the task.

**Note:**
In this example, it is the 1st Formal Observation task. The systems will update each school year.
Step 5: Click on the yellow pencil icon in order to open the Formal Observation task for that employee.

Note: You can review any employee comments.

Step 6: Click the Next button if you want to proceed with finishing this evaluation task.

Step 7: Click on the Continue button.

Step 8: Click on the Finish button.

Step 9: Click on the Yes button.
<table>
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<tr>
<th>Note:</th>
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<tr>
<td>The confirmation message indicates that you have successfully completed Professional Expectations task for this employee.</td>
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✓ You have **successfully completed** the Formal Observations task for your employee.