**Business Requirements Document**

**Project: eVal Implementation**

**BRD Title: Final Evaluations File Transfers**

**BRD: #4**

**Development required by:**

***Washington State’s eVal Team***

**BACKGROUND**

This Business Requirement Document (BRD) is part of a set of business requirement documents that are part of the Seattle School District’s 2015 implementation of Washington State’s online evaluation tool, eVal. eVal is an online tool developed by the State to support teacher professional growth in alignment with Washington State’s mandates for TPEP (Teacher Principal Evaluation Process). The project goal is to successfully integrate this tool into the District’s TPEP activities, adhering to the District’s obligations of its CBA and to the spirit of the TPEP process which is aimed at fostering professional growth through collaborative, face-to-face discussions between teacher and evaluator.

BRDs related to eVal functionality have been submitted to the State’s eVal development team. BRDs related to back-office activities which require District development have been submitted to DOTs (the District’s development team). Where noted, several of these documents require review and collaboration from both teams.

*For further information, please see Excel file “eVal Seattle - Enhancements and BRD Index” which contains listing of each enhancement that has been approved for development and the related BRD and assigned development team.*

| Version No. | Date | Name | Description of Change |
| --- | --- | --- | --- |
| 1 | 10/31/14 | Donna Schmidt | Baseline; submitted to for review to eVal, DOTs and HR teams |
| 2 | 11/19/14 | Donna Schmidt | Misc. word smithing per stakeholder review (no material changes); updated Review/Approval table to reflect current status |

# High Level Requirement Description

With the implementation of the eVal tool, the District is moving from paper copies of each teacher’s annual evalution report to electronic copies. Whereas in the current state, evaluators deliver a paper evaluation report to HR at the end of each year, in the future state, these reports will be created electronically in the eVal tool and stored as PDF files. These files belong to the District and are part of the teacher’s personnel file. They are subject to retention rules and must be accessible to appropriate parties per Washington State’s Public Records Act. Therefore, the District will be acquiring a secure repository in which to store these files on site (see BRD 13). *The requirements in this document are related to the transfer of these PDF files from the eVal tool to the District, including but not limited to file naming conventions so that the files can be easily absorbed into the District’s repository system, security measures, timing, and other attributes to ensure safe and accurate delivery.*

# Business Objective

The ability to safely and securely transfer in an automated and efficient manner each teacher’s evaluation report from the eVal tool to the appropriate District system.

# Business processes impacted by the change

* Definition/Workflow of “Finalized” Evaluation Reports
  + Currently, eVal does not save a final, static PDF version of the evaluation report. BRD No. 8 contains requirements to create a new workflow within eVal that would create and store a PDF copy representing the final Evaluation report for each teacher
* Distributing the Evaluation Report
  + In the current state, each evaluator is responsible for manually delivering a paper version of the evaluation report to HR. In the future state, the evaluator’s obligation is completed once they have finalized the report within the eVal tool and have ensured that the teacher has received it within the tool.
* Receiving the Evaluation Report
  + In the current state, HR manually receives a paper version of each teacher’s evaluation report. In the future state, a to-be-procured electronic repository within HR will pull the PDF files from the eVal tool.
    - There may be some minimal end-of-year tasks requiring HR to interact with the system in order to pull the files
    - There will always be a few one-off exceptions where evaluations were modified after-the-fact and need to be re-pulled from eVal. In these instances, HR will need to log into eVal and manually pull those particular reports

# Requirement Details

| ID | Requirement | Purpose or expected outcome |
| --- | --- | --- |
| Req 4.1 | District has the ability to trigger a process which pulls finalized evaluation reports (saved as PDF files) from the eVal system to the appropriate school system (most likely, directly into an electronic repository) | With minimal manual effort, HR can trigger the file transfer |
| Req 4.2 | PDF files are named or flagged within eVal in such a manner that they can automatically be recognized by the District’s system for appropriate indexing | Once the file is absorbed into the District’s system, it must be retrieveable by year, teacher name, school name or region |
| Req 4.3 | Audit reports must be available to track the number of files received, any errors, etc. |  |
| Req 4.4 | PDF files are named (or flagged) within eVal in such a manner that the District’s system can recognize the file as an *additional* file for those exception cases where an evaluator submits a report as final, than after the fact must go back, re-open it and modify it, thereby creating a *new* evaluation report that should *replace* the former one. |  |
| Req 4.5 | Further discussions needed on whether each request pulls all evaluations to date, or whether the pull is based on a date range, whether it pulls only new reports since the last pull, etc. |  |
| Req 4.6 | The transfer mechanism must enforce security such that no persons without the right to access these files can interrupt the transmission or gain access to the files or the information on the files |  |

# Out-of-Scope

This BRD is intended to represent any work that needs to be defined and/or developed jointly between the eVal and District development teams. Any work that resides soley within the District, such as acquisition, configuration and maintenance of an electronic repository for storing the files, is contained in BRD 13 and is not part of this BRD’s scope.

# Review and Approval

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| --- | --- | --- | --- | --- |
| Team | Person | Organizational and Project Roles | Role | Date review/approval received |
| Project | Clover Codd | Exec Director Strategic Plan & Partnerships; **Project Sponsor** | Approve project deliverable | 11/5/14 |
| HR | Brent Jones | Asst Superintendent for Human Resources; Project Steering Committee representative for HR; Internal customer for many of the technology updates requested in these documents | Approve project deliverable | 11/19/14 |
| HR | Elaine Williams | Subject matter expert representing Labor Employee Relations Team | Review | 11/14/14 |
| HR | Denise Williams-Saunders | Subject matter expert representing Labor Employee Relations Team | Review | 11/14/14 |
| HR | Sue Means | Subject matter expert representing Labor Employee Relations Team | Review | 11/14/14 |
| DOTs | Nancy Petersen | Director, Enterprise Applications | Informational | 11/6/14 |
| DOTs | James Bradley | Manager, Business Applications | Informational | 11/6/14 |
| DOTs | Mabel Mah | Sr Business Analyst (SAP/HR); project systems analyst representing DOTs for design and development | Review and accept as milestone deliverable | 11/14/14 |
| eVal Dev Team | Anne Chinn | Lead eVal Developer | Review and accept as milestone deliverable | 11/7/14 |
| eVal Dev Team | Dana Anderson | eVal Supervisor/ Project Manager | Review and accept as milestone deliverable | 11/7/14 |