

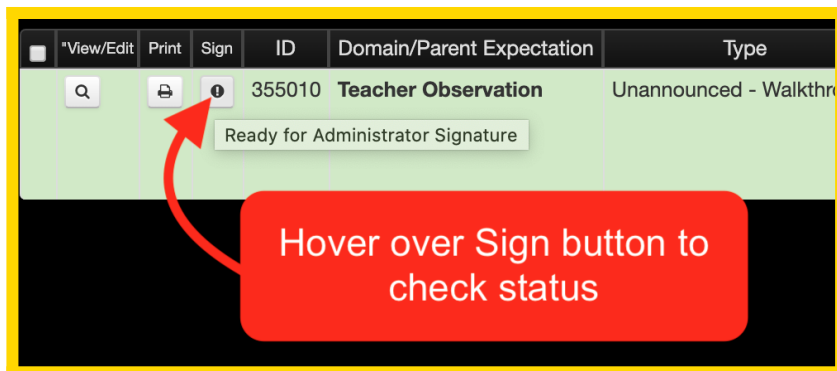
# Signing an Observation Electronically

When electronic signatures are enabled in eDoctrina, the most common workflow is to have the observer and observee both sign the observation in a pre-determined order. Some district will have the observer sign first, while other the observee will sign first. In more advanced signature workflows, there may be some other signatures that are required such as a second observer or even a final approval by some district administrator. Regardless of configuration, this document will explain how both the observer and observee can electronically sign any observation.

## For Observees

The first thing to understand about signing an observation is that a signature cannot be applied unless the observation is set to a *Complete* state. If the observation is not in *Completed* status, then it is likely that the observation is still being worked on by the observer. If this seems incorrect, then please reach out to the observer to inquire about the status.

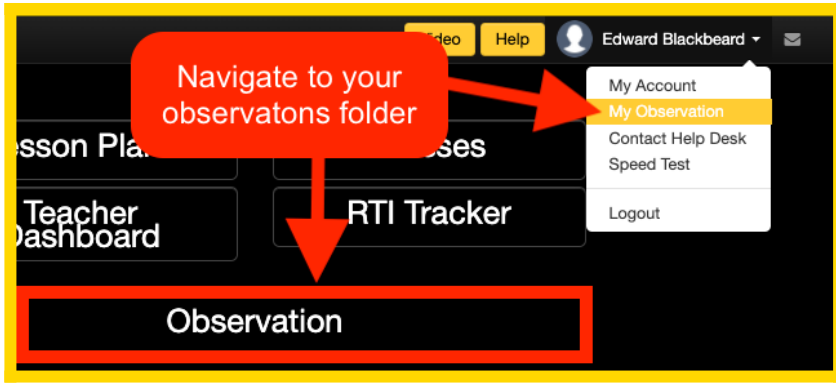
The second thing to understand is that a signature cannot be applied in certain workflows if the observer has yet to sign the observation. If this is the case, it is possible to hover over the signature button to check the status.



The third thing to understand is that after an observation is signed by either the observer or the observee, the rating and entered supporting information will be locked for further updates. This is designed to protect the integrity of the entered information. If it is found that something is inaccurate or incorrect, then the option to "Return to Administrator" exists so this can be addressed on a case-by-case basis.

### **Step 1: Navigate to My Observation**

Depending on the district homepage, there may be an option to select the *Observations* button, but if this does not exist the option to select *My Observation* will always exist in the pull-down menu when the logged-in user's name is selected in the top-right of the screen.



Once selected, this will take you to the screen where your observations will be listed or displayed in a side-by-side manner (these are the different "modes" and the default is determined in district configuration).

### List View

The list view will show all observations that are completed and provide a button to provide an electronic signature.



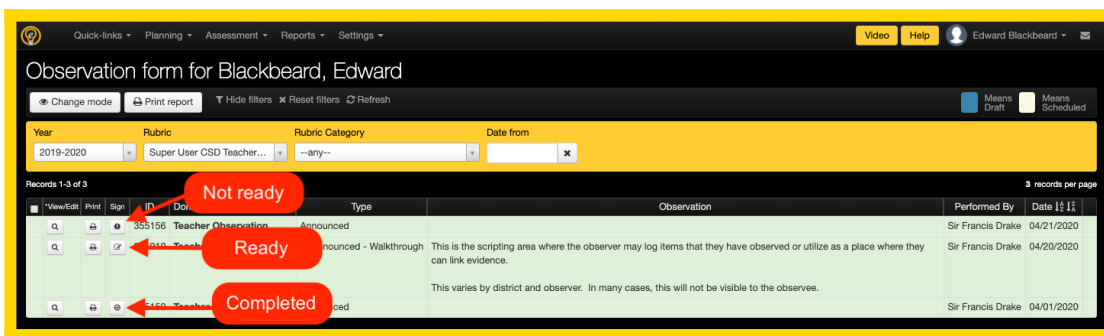
==> If the button looks like this, then all required electronic signatures have been completed.



==> If the button looks like this, then this observation is ready for your signature.

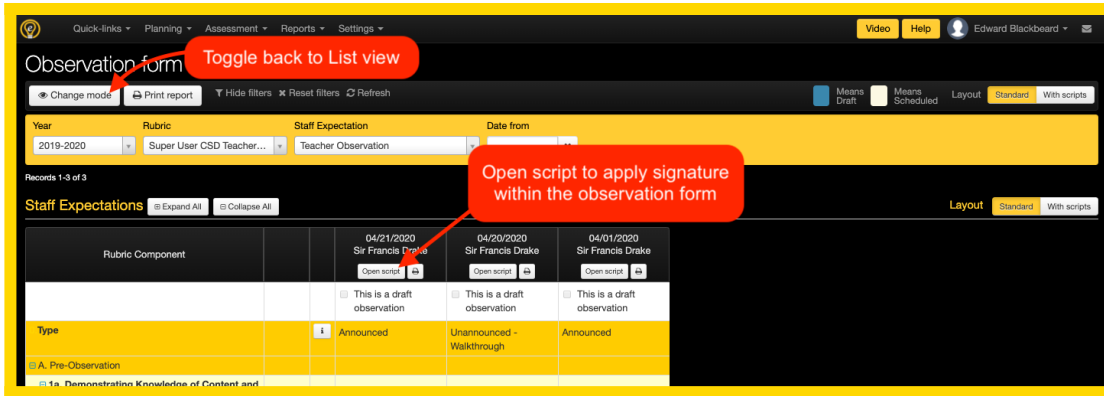


==> If the button looks like this, the ability to electronically sign does not exist because the observation either does not require a signature or it is not your turn to provide your electronic signature.



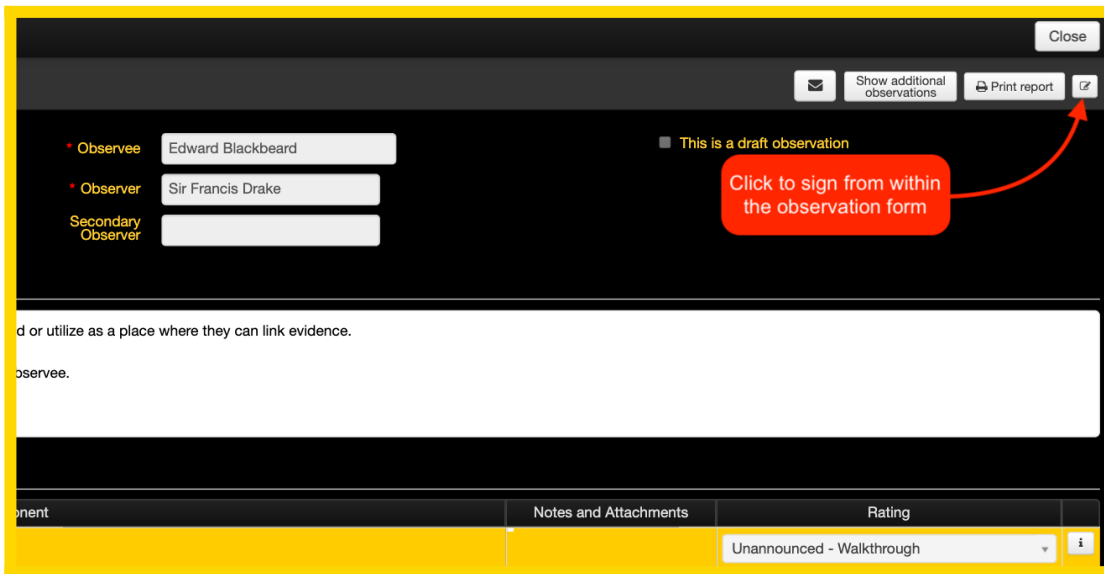
### Column View

The column view will show all observations that are completed. The option to sign an observation electronically from this view does not exist, but it is possible to *Open Script* and then apply your electronic signature from within the observation form itself.




## Within the Observation Form

If the observation is in *Complete* status, it will be possible to open up the observation form from both the "List View" and the "Column View". If viewing the actual observation form, the option to sign the observation will exist in the top-right corner.



## Step 2: Provide your Electronic Signature

If the observation is ready for your signature, simply click the  button. The following pop-up window will appear.


1. **Name:** When applying an electronic signature, it is important to provide the name that should be linked. This does not need to match anything in eDoctrina, so make sure that this name is correct as desired. There are some occasions where a username will need to be applied instead of a name, but this is only if it is allowed to sign an observation while logged in as another user (usually the observer).
2. **Password:** The password field is required to be entered with the individual's eDoctrina password. Passwords in eDoctrina are case sensitive, so be sure that the capslock is not enabled.
3. **Comment:** The comment field is available, but not required, for a note to be applied to the electronic signature. This comment will be linked to the signature only and is best used when returning the observation as this is a great opportunity to provide the reason why you are sending the observation back to the observer for changes.
4. **View Observation:** This pop-up window offers a comprehensive view of how the printed observation will look when printed. If necessary to view existing signatures, go to the last page

Signed Name	User ID/Name	Position	Date/Time	IP Address
SFD	2762213 Sir Francis Drake	District admin	04/21/20 12:23 PM	73.27.227.136
Comment: Great work!				

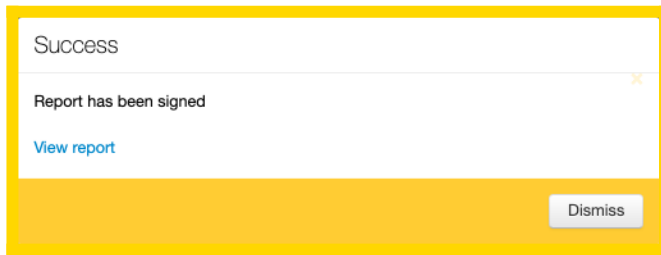
where all applicable signatures will be listed.

*NOTE: The image above shows with handwritten signature, but this may not be available for your district.*

## 5. Buttons

 ==> The approve button should be clicked if all required fields have been

populated (name and password). Once this button is clicked, a result pop-up should be provided stating the "Report has been signed" with the option to view the signed report.



*NOTE: Once the signature is applied, you can also view it on the last page of the signed report.*



==> The option to return an observation exists for the cases where there is an identified mistake or if there is a dispute about one or many of the selected ratings and supporting evidence. In most cases, when the observation is returned an email will be sent to the observer to notify them. It is a best practice to enter a comment on why this observation is being returned to avoid any miscommunication.



==> The cancel button will simply close the electronic signature pop-up window.

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## For Observers

The electronic signature process is very similar for observers as it is for observees, but observers have the option to sign from the OBSerVE Dashboard.

Although the observer can sign an observation electronically from all the same places as the observee can, the best place for an observer to sign and monitor electronic signatures is from the *Observations* layout view of the OBSerVE Dashboard because it is possible to filter for all of the different signature statuses to better monitor all observations that require them. here is where you can filter for all observations that either are "Ready for Administrator Signature", "Returned to Administrator", or "Ready for Observee Signature". It is highly recommended to leverage these filters to ensure that all observations are signed within a respectable timeframe.

Quick-links Planning Assessment Reports Settings Video Help Sir Francis Drake

# OBSerVE Dashboard

Saved filters Refresh Hide more filters... Reset filters

Export to Excel Sign Selected Assignments Observations Calendar Final Rating

Observations Layout view

Select staff

Search ID, UID, SSIN or Name Q x School Select Schools Observer Select Observers User Type Select User types Staff scope Active only Observation scope On leave

Department Code Department Code Q x

Observation Scope Filter

Select rubric

Year Rubric Rubric Assignment Rubric Category Observation Type Rating Start

2019-2020 Super User CSD Teach... Select Rubric Assignm... Teacher Observation --any--

Reports

Individual Teacher Staff Summary Staff Expectations Observer Comparison Pivot Table

Observations

Records 1-2 of 2

R required S scheduled C complete D draft I inactive

ID	UID	Staff	Account	Expectation	Type	Script	Observer	Date
327872	SWS1	Awilda Denmark	2019-2020 School Wide Student Gulf Gate Middle School 2019-2020 School Wide Student Turtle Beach Elementary	Teacher Observation	Unannounced - Walkthrough		Sir Francis Drake	04/02/2020
355156	teach2B	Edward Blackbeard	2019-2020 Teacher Siesta Key High School 2019-2020 Teacher Gulf Gate Middle School	Teacher Observation	Announced		Sir Francis Drake	04/21/2020