

Email Notifications for Observations

It is not always required to be logged into eDoctrina to stay up-to-date with all that is going on in regards to observations in the system. For many actions in eDoctrina, there can be an email notification that can be configured to be sent out to one person or another. In this document, we will explore the different options for email notifications and their utility.

Where are email notifications configured?

Mostly all of the email notifications regarding observations can be configured in the OBServe Settings within the district settings.

Edit district (#3891)

OBServe Settings

- * OBServe Report: within group summary type: Avg
- * OBServe Report: across group summary type: Avg
- * Observation report calculation type: Based on average scores
- Observation UI: Scripting
- ☒ Edit OBServe Discussion
If checked, the Author of the discussion row can edit message after saving
- ☒ Observation Comment Draft Option Enabled
If checked, when users enter comments on OBServe, they will have 2 options: "Send Message" (Current button) or "Save Draft"
- ☒ Script Visible by Default
- ☐ Ignore unobserved expectations
- ☐ Auto Assign Rubric
- ☐ Auto Assign Observer
- ☒ Allow final rating selection
- ☐ Confirm final rating selection
- ☒ Include SSIN on Reports

Notifications

- ☒ Auto Save Observation
- ☐ Non-Draft by default
- ☒ Use access rights instead of "Is Observer" for observation rights
- ☒ Electronic Signature by non-logged in user
- ☒ Handwritten Signature
- ☒ Show secondary observer combo
- ☐ Observer Signs First
- ☒ Show Overall Evaluation Summary in Observe Dashboard
- ☒ Allow finalize within observation editor
- ☒ Ratings
- ☒ Final Ratings
- ☒ Discussion Board
- ☒ Electronic Signatures - Ready for Administrator Signature
- ☒ Electronic Signatures - Ready for Observer Signature
- ☒ Electronic Signatures - Additional Signatures Not Complete
- ☒ Electronic Signatures - Returned to Administrator
- ☒ Include PDF in notification
- ☒ Enable Weekly Notifications

Notify of electronically signed reports

Notify of electronically signed reports + Link

Name
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What are the automated email notification options?

- **Ratings:** The ratings email notification is the primary notification that should be enabled as this is the notification that is sent out when an observation has been updated to a status of *Complete* (uncheck the "This is a draft observation" checkbox). This email notification is also designed to protect the integrity of observations as further emails notifications will be sent out for updates that have been made to a complete observation as it is only appropriate to notify all parties about changes to observations that were thought to be completed.
- **Final Ratings:** The final ratings email notification is designed to be sent out when a "Final" score has been applied to any staff member. The definition of what is considered to be *Final* varies within each district, so it is important to understand the rubric configuration so it is understood if and when this email notification should be sent out.
- **Discussion Board:** The discussion board email notification will be sent out to all individuals who have a vested interest in the target observation when a "non-draft" comment has been posted. This means that the observer and observee will always get a notification for posted comments, but also any other administrator who has contributed to the discussion thread.

- **Electronic Signatures - Ready for Administrator Signature:** When a complete observation arrives at a status where the observer is required to apply their electronic signature, this email notification will be sent out (if enabled).
 - **Electronic Signatures - Ready for Observee Signature:** When a complete observation arrives at a status where the observee is required to apply their electronic signature, this email notification will be sent out (if enabled).
 - **Electronic Signatures - Additional Signatures Not Complete:** When a complete observation arrives at a status where the all required signatures have been applied and the user who is required to sign all observations (configured within their user profile) is required to apply their electronic signature, this email notification will be sent out (if enabled). Additional Signatures can be one individual within the district or many.
 - **Electronic Signatures - Returned to Administrator:** The option to *Return* an observation usually exists for the purposes of letting any of the involved entities to return the observation for edits. This can be necessary if there is an identified mistake or some other dispute. Once the observation is returned, the observer will receive this email (if enabled).
 - **Include PDF in notification:** If this setting is enabled, each one of the automated email messages will include a link to the printed PDF of the observation. To security purposes, the user trying to access the link must log into eDoctrina to view the PDF.
 - **Enable Weekly Notifications:** The weekly notification email is designed to keep observers informed about the status of all observations that have in the system. If enabled, this email will be sent out to all observers that have active observations within the system and will list the status of each of these observations.
 - **Notify of electronically signed reports:** Once any observation has completed the entire electronic signature workflow, an email can be sent to the indicated user here. Not only will the indicated user receive this email, but also the observer that is linked to the observation. This is a great tool to monitor completion.
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Are email notifications sent out upon scheduling an observation?

This depends. Much of what happens in regards to email notifications is dependent on the rubric configuration and which observation type is selected upon scheduling. It is possible for a rubric to be configured to send an email message *Always*, *Never*, or provide the scheduling individual with the option. If the option exists, each observer will see an checkbox for *Send Email to observee* in the bottom left corner (which will not be selected by default so the observer must select this with intent).

NOTE: If the selected type will ALWAYS or NEVER send an email notification, then this checkbox will be hidden, which means it is important to know which type has been configured accordingly.

What are the manual email notification options?

Although the automated message should encompass much of what is necessary to keep all parties informed about the workflow of any observation, there are some occasions where an email needs to be sent outside of the scope of what is already automatic. To accommodate for this need, there is the internal messaging system that exists within each observation.

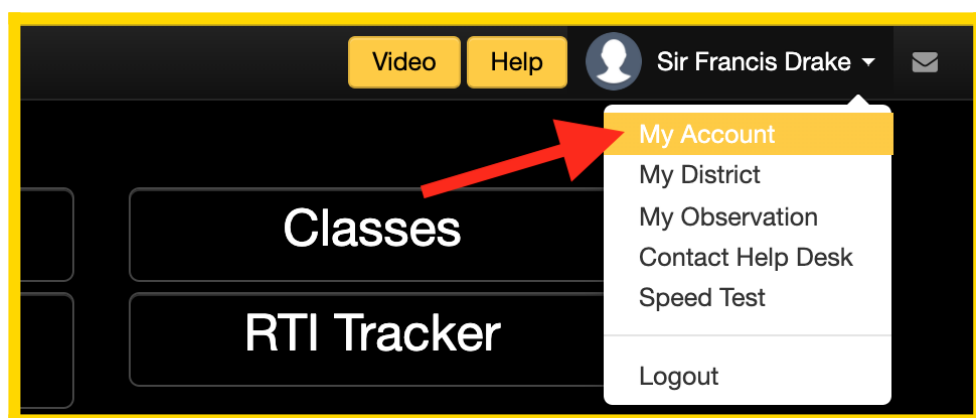
All that is necessary is access to the observation and there will be the option to click the  button in the option located in the top-right of the observation. Conveniently, the TO: message with

be populated with the staff members name if the observer clicks this button OR the observer's name will be populated here if the staff member selects this option. If the person clicking the option is neither the observer nor the staff member, both of these individuals will be populated. If this needs to be changed, the users to receive the message can be updated by adding or removing them, but please note that only users who are marked as observers can be selected here.

The email body is also pre-populated with a generic statement and a hyperlink leading directly to the observation within eDoctrina (for easy access). This message can be modified before sending by adding or removing whatever is necessary. There is even a way to include some attachments along with the sent email notification. Please note that this message will only be an internal eDoctrina message if the option **Send copy per mail** is not enabled, but the default should be enabled for this option.

Is it possible for me to opt out of these email notifications?

Yes, any email notification that is generated through eDoctrina has the option to unsubscribe from it. This can be done from within the user editor or within each users' *My Account* settings.



Once on the **My Account** page, find the *Notifications* section and uncheck or check any email notification that is desired to be unsubscribed from or subscribed to. In the below image, there are red arrows indicating any email notification message related to observations.

Notifications use this section if you want to unsubscribe from emails

- ☒ Additional observation signatures are not complete ←
- ☒ Behavior added to Student
- ☒ Discussion added to Lesson
- ☒ Discussion added to observation ←
- ☒ Discussion added to SLO
- ☒ Discussion added to Student Goal
- ☒ Discussion added to Unit
- ☒ eDoctrina Import Classes
- ☒ eDoctrina Import Courses
- ☒ eDoctrina Import Progress
- ☒ eDoctrina Import Schedules
- ☒ eDoctrina Import Staffs
- ☒ eDoctrina Import Students
- ☒ eScholar Import Courses
- ☒ eScholar Import Schedules
- ☒ eScholar Import Staffs
- ☒ eScholar Import Students
- ☒ eSchool Data API Import
- ☒ Import Answers, Notify Admins
- ☒ Import Answers, Notify Teacher
- ☒ Import Attendances
- ☒ Internal message e-mails
- ☒ Lessons: Workflow state changes
- ☒ Observation ready for administrator signature ←
- ☒ Observation ready for observee signature →
- ☒ Observation returned to administrator →
- ☒ Observation Scheduled (for Observee) →
- ☒ Observation Scheduled (for Observer) →
- ☒ Observation Script Modification →
- ☒ OBSerVE Weekly Status Email →
- ☒ TE Report Signed
- ☒ PD30 Progress Monitoring
- ☒ Power School API Import
- ☒ ric One API Import
- ☒ School Tool API Import
- ☒ School Tool APIImportStaff
- ☒ SLO Report Signed
- ☒ SLO Status Change, Notify Evaluator
- ☒ SLO Status Change, Notify Observer
- ☒ SLO Status Change, Notify Teacher
- ☒ Student completed online assessment
- ☒ Teacher Expectation Report Signed →
- ☒ TIP Status Change, Notify Creator
- ☒ TIP Status Change, Notify Participant
- ☒ TIP Status Change, Notify Teacher
- ☒ Units: Workflow state changes
- ☒ Vendor Link API Import