



WESTFIELD

Public School District

Achieving Excellence Together

Employee Guide to TalentEd Records and Perform



March 24, 2020

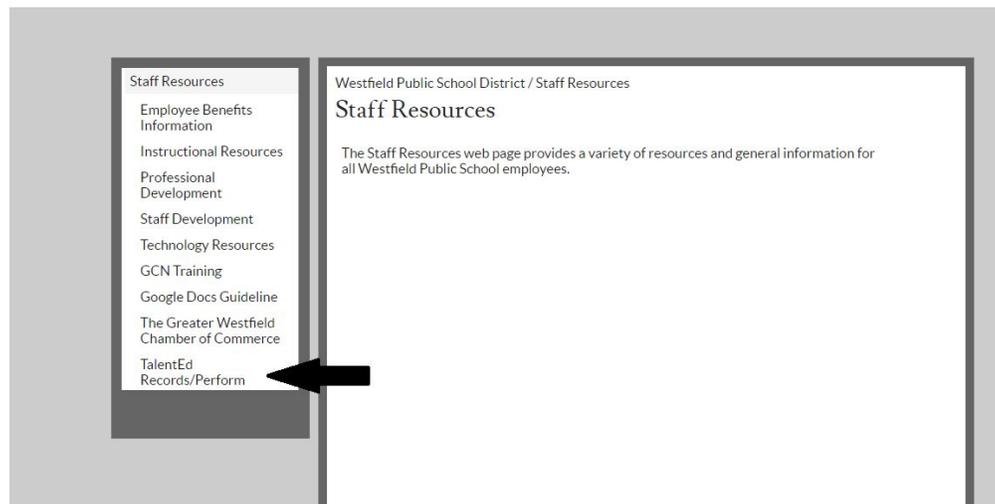
TALENTED RECORDS

To begin using RECORDS, you may receive an email from TalentEd that you have been assigned a task. Your username will be supplied for you in the email and there is also a link to login embedded in the email. Otherwise, you can follow these steps to access the program.

Click the link provided below to access the login homepage.

[TalentEd Records/Perform](#)

Please note, you may also find this link on the WPS district website under “Staff Resources”



Once you have accessed the link, you should see this login screen:

WESTFIELD PUBLIC SCHOOLS
WESTFIELD
Public School District
Achieving Excellence Together

Four Products. One Login.
Introducing an easier way to access all of your TalentEd products.

Username
Password
Sign In

Remember username on this computer

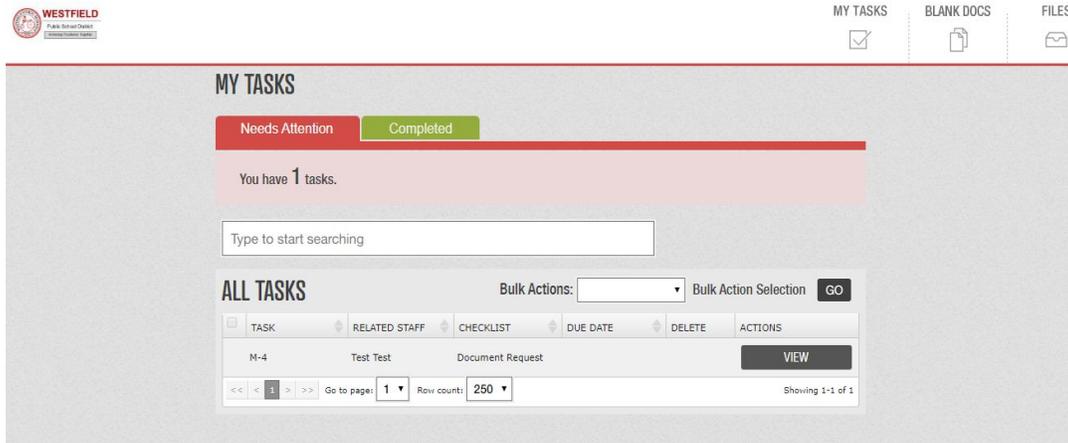
Logging in for the first time?
Forgot your password?

Discover
Recruit & Hire
Perform
Records

If logging in for the first time, click on “Logging in for the first time?”. You will be asked to enter your email address and will be sent a message to set your password. Follow those directions to set your password.

If you are NOT logging in for the first time but have forgotten your username, check the email you received from TalentEd. You can also reach out to either Nicole Landry (n.landry@schoolsofwestfield.org) or Becca Sullivan (rebecca.sullivan@schoolsofwestfield.org) in Human Resources for assistance.

MY TASKS



When you first log into Records, you will be taken to the **My Tasks** page. This is where you can view and complete any outstanding tasks you have been assigned. The **My Tasks** screen is where you can view all tasks you have been assigned through Records. You'll notice there are two tabs on this screen.

The **Needs Attention** tab will indicate which tasks still require action on your part. To take action, click **View** to open the form. You may be asked to fill out a new form or Sign or Approve a form that has been submitted to you.

Some tasks are not associated with a form at all. These tasks will include a **Mark as Done** button next to them. When you have completed the appropriate tasks simply click Mark as Done to remove it from your Needs Attention list.

This page also includes a **Completed** tab for your reference. Keep in mind that tasks may not show up on your Completed tab immediately if they require a review or signature by other staff in your organization.

Use the search field to quickly locate a task in your task list.

BLANK DOCS



Certain Documents are available to be completed at any time. These are referred to as **Blank Docs** or **Blank Forms**. These Documents typically include Change Management forms (for example, you wish to change your name, address, phone number, or direct deposit information) while other Blank Docs may refer to Reports and Requests your organization has made available to you.

To complete a Blank Doc, simply open the document you wish to submit, enter the data requested, and Save Final. Your document will automatically route to the appropriate department within your organization for processing.

PERSONNEL FILES



Documents in Records are sorted into **Folders** based on the type of document. The first image shows a sample Folder structure you might see when you click on the Files button. This allows Payroll documents to be grouped together, Personnel documents to be grouped together, so on and so forth. Users will see different Folders based on the access they need.

Once allocated to a folder you can see how each Document is sorted into its unique individual **Sleeve**. The second image shows what a sample Payroll Folder might include.

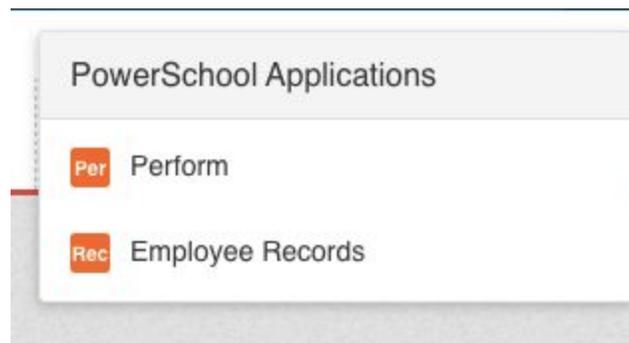
- If a Document has been completed you will see a piece of paper active in the Sleeve, Automatic Deposits Authorization and W-4 in the example above.
- If a Document is currently being worked on you will see **In Process** above the Sleeve as indicated by Employee Information above.
- If a Document has not been started the Sleeve will be blank. It is completely normal to have blank Sleeves in a Folder.

TALENTED PERFORM

TalentEd PERFORM is our online evaluation system. When your supervisor has completed your evaluation, you will receive an email stating that you have an incomplete task. To begin using PERFORM, login to your TalentEd RECORDS using instructions on page 1 & 2 of this form. Once you have successfully signed in, click the box in the upper right hand corner of your screen and click on PERFORM.



This box will allow you to “toggle” back and forth between RECORDS and PERFORM.



For further instruction on navigating PERFORM, click the link to the user guide below. This user guide can always be found on the district website under staff resources.

[Direct Report User Guide](#)

Should you have any additional questions regarding TalentEd, please feel free to contact Human Resources at 413-572-6550.