



1.0 SCOPE

- 1.1 This procedure describes the steps necessary to enter an administrator's performance evaluation using the evaluation rubrics documented in the CIAS Handbook and the ePerformance module in PeopleSoft 9.1.
- 1.2 For the 2011-2012 school year, the evaluation will apply to all ASAR Certificated Administrators, including Principals, Assistant Principals, Athletic Directors, CASE's, Program Directors and Central Office Directors, except for the 3 Principals (only) at the "Growth Schools" (East, Dr. Freddie Thomas and Montessori - School 53).
- 1.3 For the 2011-2012 school year, the employee steps of Goal Setting and Self Evaluation will be skipped as only the final, manager evaluation is required to be in PeopleSoft for this school year.
- 1.4 For the 2012-2013 school year and beyond, the employee steps will be required steps. Generally, the administrator being evaluated should have completed their self evaluation **prior** to the manager writing their evaluation.

2.0 RESPONSIBILITY

- 2.1 Administrators have the responsibility to ensure that all performance evaluation steps for ASAR Certificated personnel under their purview are completed in a timely fashion. Some portions of the process, at the discretion of the Administrator (and per the terms of the respective bargaining unit CBA), may be completed by someone other than the Administrator.

3.0 APPROVAL AUTHORITY

- 3.1 No approval process has been specified or designed into the ePerformance system.

4.0 DEFINITIONS

- 4.1 **ASAR:** Association of Supervisors and Administrators of Rochester.
- 4.2 **ASAR Certificated:** Instructional certificated personnel in the administrative and supervisory salary schedule who manage a school, program or are responsible for a specific educational program or an area of expertise.
- 4.3 **Document Type:** identifies certain groups of employees, for example, ASAR Certificated, RTA, RAP, BENTE, to name a few.
- 4.4 **Template:** identifies the evaluation form that is used to evaluate each employee's annual performance, for example, ASAR Certificated.
- 4.5 **Empl Class:** An employee's classification in the PeopleSoft system. For an administrator, this might be tenured or non-tenured.
- 4.6 **Job Title:** the job title should be an accurate description of the type of work that an employee is currently performing. The job title is associated with the specific Job Code for the employee's current position.
- 4.7 **Plan/Grade:** Aligns the employee's job title to the appropriate bargaining unit and salary bracket.



4.8 **Tenure Status:** An employee’s employment status (e.g., 1st/2nd/3rd Year Eval, Acting, Tenured-Incentive Eligible, Tenured-Incentive NonEligible, etc.).

5.0 PROCEDURE

5.1 Navigate to your performance documents as previously described in the *ePerformance Navigation Basics* work procedure. (Navigation: **Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents** – as shown in the bread crumbs). Note: the Current Performance Documents page will show all employees in your department. The snapshot below only shows a subset of this manager’s evaluation documents.

ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Current Performance Documents

Listed below are the current performance documents for which you are the Manager.

Employee▲	Document Type	Begin Date	End Date	Job Title	Status
Amanda Assistant-Principal	ASAR Certificated	09/01/2011	06/30/2012	ASSISTANT PRINCIPAL	In Progress
Terry Teacher	RTA	09/01/2011	06/30/2012	Tchr-Elem 4-6	Acknowledged

5.2 Click on the [ASAR Certificated](#) link next to the administrator whose evaluation you want to complete. For purposes of this example, we’re going to use the only administrator in the list, Amanda Assistant-Principal.

This example assumes that you have completed the goal setting step for the selected employee. If not, refer to the ePerformance Job Aid, *Bypassing the Goal Setting Step*, and complete the goal setting for this employee. Once that has been completed, your screen should look similar to the screen shown at the top of the following page.



ORACLE®
 Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Current Performance Documents

Document Details

Amanda Assistant-Principal, ASSISTANT PRINCIPAL
 ASAR Certificated: 09/01/2011 - 06/30/2012

Performance Document Details				
Employee:	Amanda Assistant-Principal	Job Title:	ASSISTANT PRINCIPAL	
Document Type:	ASAR Certificated	Period:	09/01/2011 - 06/30/2012	
Template:	ASAR Certificated Current CIAS	Document ID:	402	
Manager:	Deborah Department-Manager	Status:	In Progress	

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	06/30/2012	View	
Review Self Evaluation	○ Not Started	06/30/2012		
Complete Manager Evaluation	○ Not Started	06/30/2012		Start

[Return to Select Documents](#)



5.3 ***Before proceeding, it is important to confirm that the correct template and evaluation period are listed for this employee. If either are incorrect, you should contact your HCI Zone Director prior to proceeding with the evaluation.***

5.4 Select the [Start](#) link in the *Next Action* column for the *Complete Manager Evaluation* step.

ORACLE®
 Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Performance Document - ASAR Certificated

Manager Evaluation

Amanda Assistant-Principal, ASSISTANT PRINCIPAL
 ASAR Certificated: 09/01/2011 - 06/30/2012

Author: Deborah Department-Manager **Role:** Manager
Status: In Progress **Due Date:** 06/30/2012
Approval: Not Required

Employee Data			
Empl ID:	9913003		
Department:	11202	#12 - James P B Duffy - ES	
Location:	112	School 12	
Plan/Grade:	ASA	3	RCSD Empl Class

[Rating History](#)



- 5.5 Carefully review and verify that the Employee ID, Department, Location and Plan/Grade are correct. Click on the [RCSD Empl Class](#) link.

ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

RCSD Employee Class

Evaluatee: Amanda Assistant-Principal

Empl ID: 9913003

Employee Classification: Tenured Administrator TP

Return

- 5.6 Verify that the employee classification is correct.
- 5.7 Click on the **Return** button to return to the *Manager Evaluation* page.
- 5.8 From the *Manager Evaluation Page*, click on the [Rating History](#) link to view prior year performance documents for this employee. Since we are just beginning to utilize the PeopleSoft ePerformance system, there will be no rating history for any District employees at this time.

Rating History [Close]

Rating History

Evaluatee: Amanda Assistant-Principal Empl ID: 9913003

Document Type: ASAR Certificated End Date: 06/30/2012

Overall Rating

This Employee doesn't have any overall rating history.

Return

- 5.9 Click on the **Return** button to return to the *Manager Evaluation* page.
- 5.10 From the *Manager Evaluation* page, scroll down to the *Employee Tenure Status* section.



ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Section - Employee Tenure Status

Identify the employee's probationary or tenure status by selecting one of the following options.
This information is not rated.

Employee Tenure Status Summary

Acting
 Other
 Tenured, Incentive Eligible
 Tenured, Incentive NonEligible
 Tenured, Pay for Performance
 1st Yr. Eval
 2nd Yr. Eval
 3rd Yr. Eval

Rating:

5.11 If known, click the button next to the appropriate status. If you need an expanded description of the Employee Tenure Status values, click the icon. See the following page for the full descriptions. You will also be able to make your selection from the following screen.

ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Section - Employee Tenure Status

Proficiencies	
Rating	Description
<input type="radio"/> 1st Yr. Eval	Newly employed administrator or promotion of current administrator to new tenure area.
<input type="radio"/> 2nd Yr. Eval	For administrators serving the second year of probationary period.
<input type="radio"/> 3rd Yr. Eval	For administrators serving final year of probationary period, unless extension is approved by BOE.
<input checked="" type="radio"/> Tenured, Incentive Eligible	A Unit member having tenure shall receive a \$1,500 incentive if that year's rating is "Exceeds District Standards." Effective in the 2006-07 school year, tenured principals are no longer eligible for this incentive. Admin is eligible for incentive this year.
<input type="radio"/> Tenured, Incentive NonEligible	A Unit member having tenure shall receive a \$1,500 incentive if that year's rating is "Exceeds District Standards." Effective in the 2006-07 school year, tenured principals are no longer eligible for this incentive. Admin is NOT eligible for incentive this year.
<input type="radio"/> Acting	Temporary assignment not to exceed a period of 12-months from effective date of appointment.
<input type="radio"/> Other	Probationary period extended to 4th year, as agreed to by the Union, District and the employee and approved by the BOE.
<input type="radio"/> Tenured, Pay for Performance	Principals Only - elected to participate in performance-based compensation as described under Article 5, Section 5 of the ASAR contract.

Select Proficiency

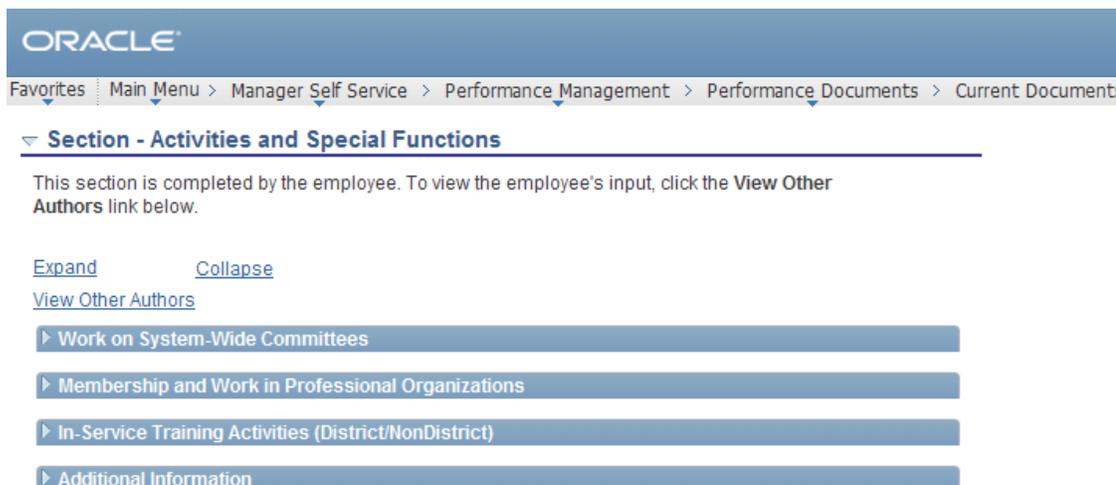
[Return to previous page](#)

5.12 Select the appropriate Tenure Status and click on the **Select Proficiency** button to save your selection and return to the *Manager Evaluation* page.



5.13 **Checkpoint:** *if any of the Employee Data, Employee Class or Employee Tenure Status data is incorrect, you should contact your HCI Zone Director to inform them of the discrepancy.*

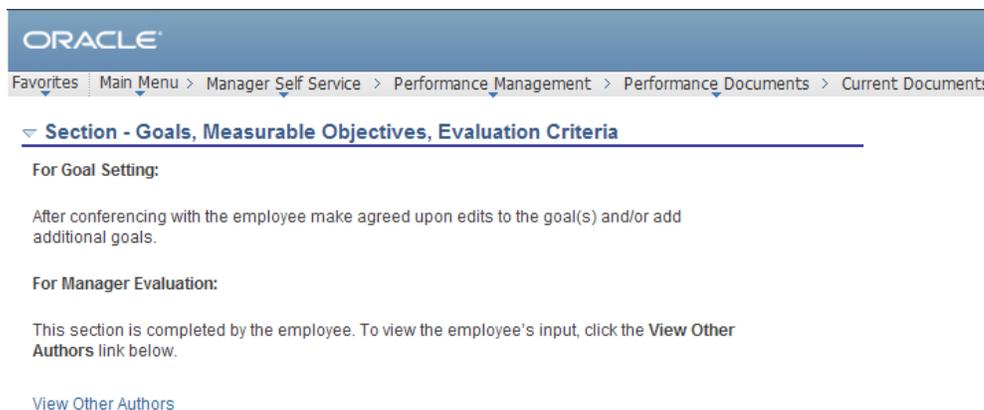
5.14 Scroll down to the *Activities and Special Functions* section.



The screenshot shows the Oracle HR system interface. At the top is the Oracle logo. Below it is a breadcrumb trail: Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. The main heading is "Section - Activities and Special Functions". Below the heading, there is a note: "This section is completed by the employee. To view the employee's input, click the View Other Authors link below." There are two links: "Expand" and "Collapse". Below these is a "View Other Authors" link. Underneath are four expandable menu items, each with a right-pointing arrow: "Work on System-Wide Committees", "Membership and Work in Professional Organizations", "In-Service Training Activities (District/NonDistrict)", and "Additional Information".

5.15 ***This section will not be used for evaluations for the 2011-2012 school year and should be skipped.***

5.16 Scroll down to the *Goals, Measurable Objectives, Evaluation Criteria* section.



The screenshot shows the Oracle HR system interface. At the top is the Oracle logo. Below it is a breadcrumb trail: Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. The main heading is "Section - Goals, Measurable Objectives, Evaluation Criteria". Below the heading, there are two sections: "For Goal Setting:" and "For Manager Evaluation:". Under "For Goal Setting:", there is a note: "After conferencing with the employee make agreed upon edits to the goal(s) and/or add additional goals." Under "For Manager Evaluation:", there is a note: "This section is completed by the employee. To view the employee's input, click the View Other Authors link below." At the bottom, there is a "View Other Authors" link.

5.17 ***This section will not be used for evaluations for the 2011-2012 school year and should be skipped.***

5.18 Click on the **Save** button. Note that saving returns you to the top of the performance document.

5.19 Click on the [Collapse All](#) link (between the row of buttons and the *Employee Tenure Status* section).



ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

[Expand All](#) [Collapse All](#) [Expand Sections](#)

- [▶ Section - Employee Tenure Status](#)
- [▶ Section - Activities and Special Functions](#)
- [▶ Section - Goals, Measurable Objectives, Evaluation Criteria](#)
- [▶ Section - Domain 1: Leadership](#)
- [▶ Section - Domain 2: Teaching and Learning](#)
- [▶ Section - Domain 3: Organizational Management](#)
- [▶ Section - Domain 4: Public Engagement](#)
- [▶ Section - Domain 5: High Performance Management](#)
- [▶ Section - For Employees Eligible for Tenure](#)
- [▶ Section - Evaluation Summary](#)
- [▶ Section - Overall Rating](#)
- [▶ Section - Recommendation of Continued Employment](#)
- [▶ Section - Recommendation to Receive Incentive](#)
- [▶ Section - Manager Comments](#)
- [▶ Section - Employee Comments/Rebuttal](#)

5.20 Scroll down to the *Domain 1: Leadership* section.

5.21 Click the twistie  to open the section and view all of the content of this Domain. The first two elements of the domain are shown below (on the next page). *Note: to ensure that the ratings are ordered consistently and don't cause confusion, we've added the L# prefix prior to each rating.*



ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Section - Domain 1: Leadership

Please click on the link below in order to access the evaluation rubric for criteria on domain expectations as well as verbiage to be used in support of your rating.

[Link to Rubric](#)

Please select N/A if an element is not part of the employee's job responsibilities.

[Expand](#) [Collapse](#)

Leadership: Element 1

Description : Provides purpose and direction for individuals and groups.

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating:

Comments: [Writing Tools](#)

Created By: Template 04/01/2012 10:49AM

Leadership: Element 2

Description : Facilitates the development of a shared strategic vision for school or department.

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating:

Comments: [Writing Tools](#)

Created By: Template 04/01/2012 10:49AM

- 5.22 Prepare and complete your ratings for each element of the **Domain 1 – Leadership** section. The system requires that you rate all elements of each domain. If a particular domain element is **not applicable** for this administrator, you should click on the **L0-Not Applicable** button. When the system computes the suggested rating for the administrator, all Domain elements that have the L0-Not Applicable rating are ignored.
- 5.23 While a *Comments* box is provided for each domain element, the system does **not** require that you comment on all Domain elements.
- 5.24 For your convenience and reference, clicking on the [Link to Rubric](#) at the top of the section will open a new window where you can view the CIAS Handbook. Click on the CIAS Handbook link to open the document (will open in a new window). Once you have opened the document, click on the to close the SharePoint window. *Note: as of this writing, the document is housed on the Office of Human Capital Initiatives SharePoint page. This may change in the future.*



5.25 Click on the button next to the rating being selected for *Leadership: Element 1*. In this example, the *L3-Meets Prof Expectations* has been selected. Once the rating button is clicked, the *Rating:* description just below the rating buttons is populated to indicate the selected rating, as shown below.

Description : Provides purpose and direction for individuals and groups.

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating: L3-Meets Prof Expectations 

5.26 If you need to confirm your understanding of this rating, click on the rating description  icon to view a general description of each rating.

Rating Description X

Leadership: Element 1

Proficiencies	
Rating	Description
<input type="radio"/> L4-Exceeds Prof Expectations	This is a level of performance that few attain. It is highly unusual and reflects the successful combination of quantitative and/or qualitative accomplishments over a sustained period of time. Virtually all elements of their job description and duties were accomplished in an exceptional manner. Has demonstrated the willingness and ability to consistently go well beyond the job responsibilities. In order for this rating to be used, the supervisor must provide additional documentation that the administrator's work is exemplary as it supports improved student performance.
<input checked="" type="radio"/> L3-Meets Prof Expectations	This is a level of performance which is expected in the majority of employees or may be the norm for some longer service employees. Employees at this level are consistently productive in meeting their responsibilities. In general, all ongoing responsibilities have been concluded and performed successfully.
<input type="radio"/> L2-Needs Improvement	This is a level of performance which is not completely satisfactory. Specific ongoing responsibilities have been unfulfilled, incomplete or not met in a timely and/or acceptable manner. The employee does not always work diligently or produce sufficiently on a consistent basis. Professional support services are to be recommended; intervention if performance does not improve.
<input type="radio"/> L1-Unsatisfactory	This is a level of performance which, unless substantial and immediate improvement is achieved, will lead to termination for cause. Key and/or basic responsibilities are not met and without good cause. Placement in this category may have been preceded by a "needs improvement" rating. Formal recommendation for intervention is required and salary withhold is to be implemented.
<input type="radio"/> L0-Not Applicable	

[Return to previous page](#)

5.26.1 Click on the [Return to previous page](#) link to return to the performance document.



Comments:
[Writing Tools](#)

Amanda clearly demonstrated her ability to establish team and individual goals for all of her instructional and non-instructional school personnel.



5.27 Enter your comments, if required, that support the rating selected, for *Leadership: Element 1*.

5.28 Check the spelling of your comments by clicking on the spellcheck  icon.

Spell Check

Field Label: Comments

Spell Check Text: Amanda clearly demonstrated her ability to establish team and individual **goals** for all of her instructional and non-instructional school personnel.

Change To: gloss

Alternatives:
gloss
goals
golfs
gold
golf

Ignore Ignore All Change Change All Add

OK Cancel

5.28.1 Select the **Change**, **Ignore** or **Add** button as appropriate. If you regularly use technical terms or acronyms not recognized by the system, clicking the **Add** button will add the selected word to your personal dictionary for future spell checks.

Change To: goals

Alternatives:
gloss
goals
golfs
gold
golf

5.28.2 If more than one alternative is suggested by the system, as shown in the example above, select the desired alternative and then click the **Change** button.



Spell Check

Field Label: Comments

Spell Check Text: Amanda clearly demonstrated her ability to establish team and individual goals for all of her instructional and non-instructional school personnel.

The spelling check is complete.

OK Cancel

5.28.3 Click on the **OK** button once all spelling errors have been corrected.

5.29 If this Administrator had a Peer Reviewer, click the [Writing Tools](#) link to view the Peer Reviewer’s comments.



5.30 Complete the ratings and comments for each of the 11 elements of Domain 1. The performance document can be saved at any time (*and it is strongly encouraged that you save frequently so that your work is not lost*). All domain elements must be rated before the *Performance Score* can be determined.

5.31 Prepare and complete your ratings for each element of the **Domain 2 – Teaching and Learning**. For your convenience and reference, a link to the CIAS handbook ([Link to Rubric](#)) has been provided.

Section - Domain 2: Teaching and Learning

Please click on the link below in order to access the evaluation rubric for criteria on domain expectations as well as verbiage to be used in support of your rating.

[Link to Rubric](#)

Please select N/A if an element is not part of the employee's job responsibilities.

[Expand](#)

[Collapse](#)

- ▶ Teaching and Learning: Element 1
- ▶ Teaching and Learning: Element 2
- ▶ Teaching and Learning: Element 3
- ▶ Teaching and Learning: Element 4
- ▶ Teaching and Learning: Element 5
- ▶ Teaching and Learning: Element 6
- ▶ Teaching and Learning: Element 7

5.32 Click the twistie (▶) next to *Teaching and Learning: Element 1* to open just that element of the domain.



[Expand](#) [Collapse](#)

▼ Teaching and Learning: Element 1

Description : Creates a school culture for learning.

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating: 

Comments: 

[Writing Tools](#)

Created By: Template 03/30/2012 4:17PM

▶ Teaching and Learning: Element 2

▶ Teaching and Learning: Element 3

▶ Teaching and Learning: Element 4

▶ Teaching and Learning: Element 5

▶ Teaching and Learning: Element 6

▶ Teaching and Learning: Element 7

5.33 Open and rate each of the 7 elements of Domain 2. Refer to the CIAS Handbook as needed and spell check each of your comments, if necessary. All elements in all domains must be rated before the *Performance Score* can be determined. Add comments for each element as required by your management.

5.34 Prepare and complete your ratings for each element of the **Domain 3 – Organizational Management**. For your convenience and reference, a link to the CIAS Handbook ([Link to Rubric](#)) has been provided.

▼ **Section - Domain 3: Organizational Management**

Please click on the link below in order to access the evaluation rubric for criteria on domain expectations as well as verbiage to be used in support of your rating.

[Link to Rubric](#)

Please select N/A if an element is not part of the employee's job responsibilities.

[Expand](#) [Collapse](#)

▼ Organizational Management: Element 1

Description : Gathers data, facts, and impressions from a variety of sources; analyzes relevant information in order to facilitate decision-making and monitoring. Manages data flow.

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating: 

Comments: 

[Writing Tools](#)

Created By: Template 04/01/2012 10:49AM



- 5.35 Open and rate each of the 7 elements of Domain 3. Refer to the CIAS Handbook as needed and spell check each of your comments, if necessary. All elements in all domains must be rated before the *Performance Score* can be determined. Add comments for each element as required by your management.

- 5.36 Prepare and complete your ratings for each element of the **Domain 4 – Public Engagement**. For your convenience and reference, a link to the CIAS Handbook ([Link to Rubric](#)) has been provided.

▼ **Section - Domain 4: Public Engagement**

Please click on the link below in order to access the evaluation rubric for criteria on domain expectations as well as verbiage to be used in support of your rating.

[Link to Rubric](#)

Please select N/A if an element is not part of the employee's job responsibilities.

[Expand](#)

[Collapse](#)

▼ **Public Engagement: Element 1**

Description : Develops common perceptions about school or District issues among various publics.

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating: 

Comments:

[Writing Tools](#) 

Created By: Template 04/01/2012 10:49AM

- 5.37 Open and rate each of the 6 elements of Domain 4. Refer to the CIAS Handbook as needed and spell check each of your comments, if necessary. All elements in all domains must be rated before the *Performance Score* can be determined. Add comments for each element as required by your management.

- 5.38 Prepare and complete your ratings for each element of the **Domain 5 – High Performance Management**. For your convenience and reference, a link to the CIAS Handbook ([Link to Rubric](#)) has been provided.



▼ **Section - Domain 5: High Performance Management**

Please click on the link below in order to access the evaluation rubric for criteria on domain expectations as well as verbiage to be used in support of your rating.

[Link to Rubric](#)

Please select N/A if an element is not part of the employee's job responsibilities.

[Expand](#)

[Collapse](#)

▼ High Performance Management: Element 1

Description : Plans and schedules work so that resources are used appropriately.

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating:

Comments: [Writing Tools](#)

Created By: Template 04/01/2012 10:49AM

5.39 Open and rate each of the 9 elements of Domain 5. Refer to the CIAS Handbook as needed and spell check each of your comments, if necessary. All elements in all domains must be rated before the *Performance Score* can be determined. Add comments for each element as required by your management.

5.40 The next section of the performance document is *For Employees Eligible for Tenure*.

▼ **Section - For Employees Eligible for Tenure**

This section is completed by the employee. To view the employee's input, click the [View Other Authors](#) link below.

HCI will generate a report of all tenure recommendations to be used for the Board of Education tenure review meetings.

[Expand](#)

[Collapse](#)

[View Other Authors](#)

- ▶ Professional Development (last three years)
- ▶ Results Summary
- ▶ Significant Accomplishments
- ▶ Looking Ahead
- ▶ Areas of Growth
- ▶ Career Goals

5.41 ***This section will not be used for evaluations for the 2011-2012 school year and should be skipped.***

5.42 Click on the twistie to open and complete the *Evaluation Summary* section.



▼ **Section - Evaluation Summary**

Summarize the performance and professional development of the employee. If applicable to the bargaining unit of this employee, utilize language from the evaluation rubric.

[Link to Rubric](#)

[Expand](#)

[Collapse](#)

▶ Areas of Strength

▶ Areas for Further Consideration

5.43 Click on the [Expand](#) link to open the sections of the *Evaluation Summary*.

▼ **Section - Evaluation Summary**

Summarize the performance and professional development of the employee. If applicable to the bargaining unit of this employee, utilize language from the evaluation rubric.

[Link to Rubric](#)

[Expand](#)

[Collapse](#)

▼ **Areas of Strength**

Comments:

Created By: Template 03/30/2012 4:17PM

▼ **Areas for Further Consideration**

Comments:

Created By: Template 03/30/2012 4:17PM

5.44 Enter your Comments for *Areas of Strength* and *Areas for Further Consideration*. Click on the spellcheck icon, as needed, to check the spelling of your comments.

5.45 The next section in the performance document is the *Overall Rating*. Do not attempt to click one of the ratings or the [Override](#) link at this time!

▼ **Section - Overall Rating**

Overall Rating Summary

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating: [Override](#)

5.46 For now, this section will be **skipped**. In the steps that follow, the system will calculate a suggested Overall Rating for the Administrator based upon your rating of each of the 40 Domain elements. If you are not in agreement with the system calculated rating for the Administrator, you will return to this section to override the calculated rating. *Note: once you use the Override*



functionality, the system will no longer calculate an overall rating, so the Override feature should only be used as a last resort.

- 5.47 The next section in the performance document is the *Recommendation of Continued Employment* section.

▼ **Section - Recommendation of Continued Employment**

Recommendation of Continued Employment for Non-Tenured Administrative and Supervisory Personnel. I recommend that this Administrator/Supervisor:

Recommendation of Continued Employment Summary

1-N/A-Tenured
 2-Continue In This Position
 3-Terminate From This Position

Rating: 

- 5.48 **Skip** the *Recommendation for Continued Employment* section until after you have calculated and finalized the Administrator’s overall rating.

- 5.49 The next section in the performance document is the *Recommendation to Receive Incentive* section.

▼ **Section - Recommendation to Receive Incentive**

I recommend that this Administrator/Supervisor:

Recommendation to Receive Incentive Summary

N/A-Not Eligible
 No
 Yes

Rating: 

- 5.50 **Skip** the *Recommendation to Receive Incentive* section until after you have calculated and finalized the Administrator’s overall rating.

- 5.51 The next section of the performance document is for the *Manager Comments* in relation to the performance review meeting with the employee.

▼ **Section - Manager Comments**

Please provide a summary of the evaluation process with this employee (i.e., timeliness, receptivity to feedback, participation, etc.).

Comments: 

- 5.52 **Skip** the *Manager Comments* section for now. This will be completed **after** the performance review conference has been conducted with the employee.

- 5.53 The next section of the performance document is for *Employee Comments/Rebuttal* to the performance evaluation.

Section - Employee Comments/Rebuttal

Employee Comments/Rebuttal Summary

Comments:

5.54 The *Employee Comments/Rebuttal* section is empty and will be until the employee being reviewed has had an opportunity to enter their comments on the evaluation. The review process is described in the *Performance Evaluation Review Process* document in your binder.



5.55 It's a good idea to periodically save your performance document so that if you have to step away from your computer for an extended period of time, your work will be saved. Note: there is no "autosave" feature in PeopleSoft. Click on the **Save** button to save the performance document.

5.56 Scroll to the bottom of the performance document. If desired, certain document types, such as Word, can be attached to the performance document to supplement the evaluation.

Attachments

No Attachments have been added to this document

[+ Add Attachment](#)

5.57 Click on the [Add Attachment](#) link to add an attachment to the performance document. Use the same guidelines currently in place for attaching a document to the written performance evaluation when determining whether to attach a document to the electronic PeopleSoft performance document.

5.58 Click on the **Browse** button to browse your system and select the document to be attached.

File Attachment ✕

C:\Documents and Settings\9913599\My Documents\Pe Browse...

Upload Cancel

5.59 After selecting the document of choice from your system, click on the **Upload** button to upload the document.

Attachments

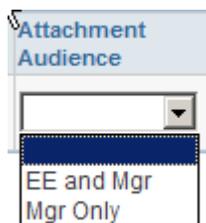
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
radio_button.png	<input type="text"/>	<input type="text" value=""/>	03/13/2012 7:52:31PM	Mister Slate	✕

[+ Add Attachment](#)

5.60 Enter a brief description for the document that has been uploaded in the *Description* field.

5.61 From the drop down for the *Attachment Audience* field (example below), select either the *EE and Mgr* or *Mgr Only* selection. Selecting the *EE and Mgr* option will enable the employee to

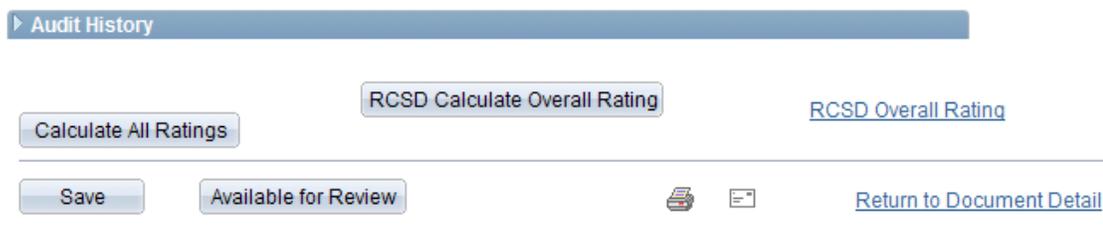
view the attached document. Selecting the *Mgr Only* will ensure that the document can only be viewed by the employee’s manager. If left blank, both the employee and the manager will be able to view the document.



5.62 If, for some reason, the attachment needs to be deleted from the performance document, simply click on the trash can  icon to delete the document.

Audit History		
Created By:	Deborah Department-Manager	03/30/2012 4:17:29PM
Last Modified By:	Deborah Department-Manager	03/31/2012 12:05:36PM

5.63 Below the attachment section is the *Audit History* section of the performance document. It shows the history of changes to this performance document. Feel free to view this as desired by clicking on the twistie  next to the *Audit History* banner (as shown above).



5.64 **Calculate Performance Rating.** Just below the *Audit History* section are several buttons that can be used to calculate the Administrator performance score. To have the PeopleSoft system calculate the overall rating, follow the 4 steps described below. Note that any time a domain element rating is changed, you must repeat these 4 steps to recompute an accurate score for the employee performance document.

5.64.1 Click on the **Calculate All Ratings** button. While the system is performing the calculations, you will notice a pinwheel spinning in the upper right hand corner of your PeopleSoft window. 

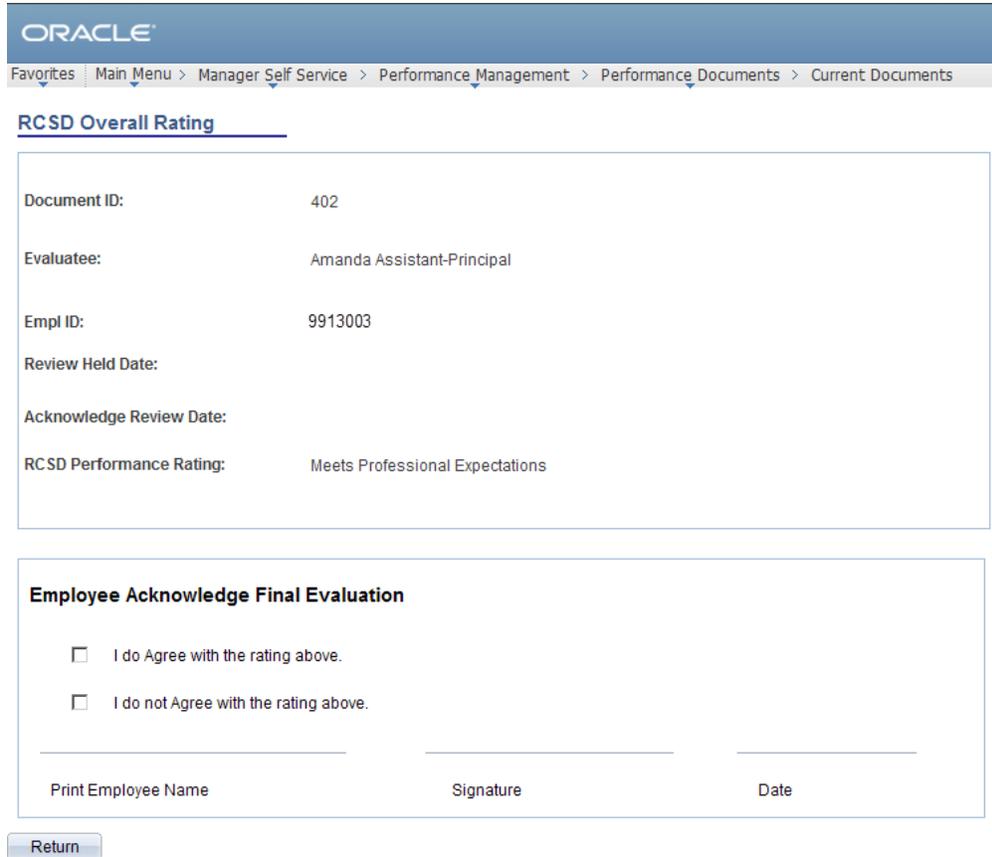
5.64.2 Click on the **Save** button to save the performance document. As above, you may notice the pinwheel while the save operation is completed. When the save has completed, you will be returned to the top of the performance document.

5.64.3 Scroll down to the bottom of the performance document and click on the **RCSD Calculate Overall Rating** button to calculate the composite score.

5.64.4 Click on the [RCSD Overall Rating](#) link to view the overall rating for the employee. This is necessary to populate a custom table with the composite scores.



5.64.5 Remember, once you **override** the overall rating in the *Overall Rating* section, these calculations will no longer affect the overall rating.



The screenshot shows the Oracle HR system interface. At the top, there is a navigation breadcrumb: Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. Below this is the 'RCSD Overall Rating' section, which displays the following information:

- Document ID: 402
- Evaluatee: Amanda Assistant-Principal
- Empl ID: 9913003
- Review Held Date:
- Acknowledge Review Date:
- RCSD Performance Rating: Meets Professional Expectations

Below the rating section is the 'Employee Acknowledge Final Evaluation' section, which contains two radio button options:

- I do Agree with the rating above.
- I do not Agree with the rating above.

At the bottom of this section are three lines for signature and date, labeled 'Print Employee Name', 'Signature', and 'Date'. A 'Return' button is located at the bottom left of the form.

5.64.6 If desired, print the evaluation summary page using print functionality from your browser's file menu (File > Print > select desired printer).

5.64.7 Click on the **Return** button at the bottom of the page to return to the *Manager Evaluation* page.

5.65 Once you have completed the performance document and are satisfied with the overall evaluation, scroll up to the *Recommendation of Continued Employment* and *Recommendation to Receive Incentive* sections (that we previously skipped) and respond to these Yes/No questions. **If you are not recommending that the Administrator continue in their current position, you should contact your HCI Zone Director immediately.**

Section - Overall Rating



The screenshot shows the 'Overall Rating Summary' section. It features a row of radio buttons for selecting a rating: L0-Not Applicable, L1-Unsatisfactory, L2-Needs Improvement, L3-Meets Prof Expectations, and L4-Exceeds Prof Expectations. Below the radio buttons, the text 'Rating:' is followed by three icons (a document, a calendar, and a link icon) and the text 'Override'.

5.66 If you are not satisfied with the system calculated overall rating, scroll back up to the *Overall Rating* section, as shown above. Click on the [Override](#) link. This will activate the overall rating



buttons and enable you to click the radio button for your final rating. Once you override the system calculated rating, the system will no longer calculate the overall rating for you.

▼ **Section - Overall Rating**

Overall Rating Summary

L0-Not Applicable
 L1-Unsatisfactory
 L2-Needs Improvement
 L3-Meets Prof Expectations
 L4-Exceeds Prof Expectations

Rating:
[Override](#)

5.67 In this example, we've decided that a final rating of *L2-Needs Improvement* is a more appropriate rating than the *L3-Meets Professional Standards* that was calculated by the system.

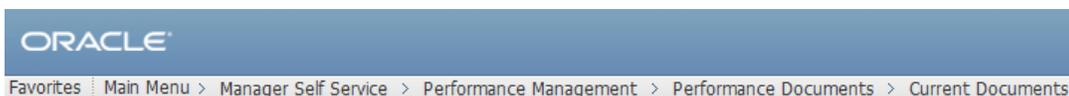
5.68 **Printing the full evaluation.** If desired, print the employee evaluation using the print icon at the bottom of the page. A separate window will open and the Manager Evaluation document will be displayed. As this is a display of the evaluation in PDF format, hover near the bottom of the new window to see the following menu bar.



5.68.1 Select the printer icon to print the evaluation.

5.68.2 When done printing/viewing the evaluation, simply close the window that opened by clicking on the print icon (e.g. X-out of the new window).

5.69 **Manager Evaluation – Mark Available for Review.** Once the performance document is completed to your satisfaction and you are ready to conduct the review meeting with the employee, you may choose to click on the *Mark Available* link.



Current Performance Documents

Document Details

Amanda Assistant-Principal, ASSISTANT PRINCIPAL
 ASAR Certificated: 09/01/2011 - 06/30/2012

Performance Document Details				
Employee:	Amanda Assistant-Principal	Job Title:	ASSISTANT PRINCIPAL	
Document Type:	ASAR Certificated	Period:	09/01/2011 - 06/30/2012	
Template:	ASAR Certificated Current	Document ID:	402	
Manager:	Deborah Department-Manager	Status:	In Progress	

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✔ Completed	06/30/2012	View	
Review Self Evaluation	⊙ Not Started	06/30/2012		
Complete Manager Evaluation	🟡 In Progress	06/30/2012	Edit	Mark Available

[Return to Select Documents](#)



5.70 Click on the [Mark Available](#) link **ONLY** when you are ready for the employee to review the performance document in PeopleSoft. When this link is clicked, the performance document will open.

ORACLE

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Performance Document - ASAR Certificated

Manager Evaluation

Amanda Assistant-Principal, ASSISTANT PRINCIPAL
 ASAR Certificated: 09/01/2011 - 06/30/2012

Author: Deborah Department-ManagerRole: Manager
 Status: In Progress Due Date: 06/30/2012
 Approval: Not Required

Employee Data

Empl ID:	9913003	
Department:	11202	#12 - James P B Duffy - ES
Location:	112	School 12
Plan/Grade:	ASA	3

[Rating History](#) [RCSD Empl Class](#)

Enter comments for each section in this evaluation.

Supervisory personnel and approved peer reviewers (if applicable), also rate each section.

At any time you can save any entries you make on the evaluation by selecting the **Save** button.

[Return to Document Detail](#)

5.71 Click on the **Available for Review** button.



ORACLE®

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Performance Document - ASAR Certificated

Manager Evaluation

Amanda Assistant-Principal, ASSISTANT PRINCIPAL
 ASAR Certificated: 09/01/2011 - 06/30/2012

Author: Deborah Department-ManagerRole: Manager
 Status: In Progress Due Date: 06/30/2012
 Approval: Not Required

Employee Data

Empl ID:	9913003	
Department:	11202	#12 - James P B Duffy - ES
Location:	112	School 12
Plan/Grade:	ASA	3

[RCSD Empl Class](#)

[Rating History](#)

⚠ Problem(s) completing your request:

- Please enter a rating for all items in the Domain 3: Organizational Management section.
- Please enter an overall summary rating in the Overall Summary section.
- Please enter a rating for all items in the Recommendation of Continued Employment section.
- Please enter a section summary rating in the Recommendation to Receive Incentive section.

Save Available for Review [Return to Document Detail](#)

5.72 If you've omitted rating any of the required domain elements or responding to any of the required questions, you'll get a warning message (see red text above) identifying any omissions from the performance document. Scroll to the identified sections and correct the error(s).



5.73 If any of the omissions noted above were in Domains 1 through 5, these omissions would affect the employee's overall performance rating. Be sure to follow the steps in section 5.63 to recompute the overall performance rating (unless you previously overrode the rating) before marking the performance document as available for review.

Performance Document - ASAR Certificated

Available for Review

You have chosen to allow the employee to view this evaluation. To confirm that the employee can view evaluation, select the OK button.

The overall rating you have assigned to this document is L2-Needs Improvement.

OK Cancel

5.74 Click the **OK** button to enable the employee to view the evaluation. An e-mail will be sent to the employee with notification that the evaluation has been completed and is now available for their review.



5.75 The *Document Details* page will be displayed as shown below. Note the text near the top of the page indicating that the document has been made available for employee review. Also, note that *Next Action* in the *Complete Manager Evaluation* step has been updated to reflect the new status.

Current Performance Documents

Document Details

Amanda Assistant-Principal, ASSISTANT PRINCIPAL
 ASAR Certificated: 09/01/2011 - 06/30/2012

You have successfully made your evaluation available for the employee's review.

Performance Document Details				
Employee:	Amanda Assistant-Principal	Job Title:	ASSISTANT PRINCIPAL	
Document Type:	ASAR Certificated	Period:	09/01/2011 - 06/30/2012	
Template:	ASAR Certificated Current CIAS	Document ID:	402	
Manager:	Deborah Department-Manager	Status:	Available for Review	

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✔ Completed	06/30/2012	View	
Review Self Evaluation	○ Not Started	06/30/2012		
Complete Manager Evaluation	● Available for Review	06/30/2012	View	Mark Review Held

[Return to Select Documents](#)

- 5.76 Click on the [View](#) link to open the evaluation in view only mode.
- 5.77 While the document is in the *Available for Review* status, the **Reopen** button will appear at the bottom of the performance document. The manager can use this button to reset the performance document to *In Progress* status to make any necessary changes to the performance document.
- 5.78 After the manager has marked the performance evaluation as “Available for Review”, the employee will receive an e-mail notifying them that the performance document is available for their review. They can log into PeopleSoft and view the performance document at any time. The ePerformance system will send e-mail notifications whenever additional steps in the evaluation process, such as *Mark Review Held* or *Acknowledge*, are completed.
- 5.79 **Congratulations!** You have completed the administrator evaluation and can proceed to the Review process.



- 5.80 **Helpful Hint: E-mailing the evaluation.** If you would like for the employee to view their performance document electronically at any time, use the e-mail icon to send a link to the employee. The employee will need to log in to PeopleSoft to view the performance document.
- 5.80.1 When the employee logs into PeopleSoft, they will be taken to the following screen to view their evaluation. They should click on the [View](#) link to review the performance document. The *Next Action* may vary depending upon when the performance document is e-mailed to the employee.

ORACLE®

Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents

Current Performance Documents

Document Details

Amanda Assistant-Principal, ASSISTANT PRINCIPAL
ASAR Certificated: 09/01/2011 - 06/30/2012

Performance Document Details			
Employee:	Amanda Assistant-Principal	Job Title:	ASSISTANT PRINCIPAL
Document Type:	ASAR Certificated	Period:	09/01/2011 - 06/30/2012
Template:	ASAR Certificated Current CIAS	Document ID:	402
Manager:	Deborah Department-Manager	Status:	Review Held

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✔ Completed	06/30/2012	View	
Review Self Evaluation	⊙ Not Started	06/30/2012		
Complete Manager Evaluation	⊙ Review Held	06/30/2012	View	Acknowledge

[Return to Select Documents](#)



6.0 ASSOCIATED DOCUMENTS

- 6.1 Reference: *ASAR Certificated Value Stream Map (VSM)* – located on the SharePoint project site in the Design Documents folder.
- 6.2 Reference: *CIAS Handbook 2010-2011*. Word document located on the SharePoint project site in the Reference -> Functional Reference Documents folder.
- 6.3 Reference: *ASAR Certificated Tenure Notification Form*. Word document located on the SharePoint project site in the Reference -> Functional Reference Documents folder.
- 6.4 Refererence: *ASAR TENURE RECOMMENDATION FORM (ATRF)*. Word document located on the SharePoint project site in the Reference -> Functional Reference Documents folder.

7.0 RECORD RETENTION

Identification	Storage	Retention	Disposition	Protection
PeopleSoft ePerformance initial implementation.	SharePoint ePerformance project site.	Until Superseded		N/A

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
3/31/12	Original	Original Document

End of Procedure