1.0 SCOPE

1.1 This work procedure provides an introduction to the PeopleSoft ePerformance system and the basic navigation to a principal/manager's Performance Documents. Included in this work procedure will be a description of certain key employee information that may be helpful to the manager when completing the employee evaluations.

2.0 RESPONSIBILITY

2.1 All school principals and department managers are responsible for validating the employee data that is being displayed and for notifying Human Capital Initiatives if any of the data is incorrect and needs to be updated.

3.0 APPROVAL AUTHORITY

3.1 None.

4.0 DEFINITIONS

4.1 **ePerformance:** the PeopleSoft module used to complete and manage all District personnel evaluations beginning with the 2011-2012 school year.

4.2 **Performance document:** PeopleSoft performance management documents, such as an employee's Evaluation or Formal Observation document.

4.3 **Direct report:** any employee under the direct supervision of a manager or supervisor.

5.0 PROCEDURE

5.1 **Log in to PeopleSoft.** This example shows the PeopleSoft Portal page as the starting point as there are numerous ways to access the PeopleSoft Portal (e.g. from SharePoint, directly from a web browser window, etc.). The PeopleSoft Portal page is shown below. *Note:* your home page is likely to be different from anyone else's home page, but the common PeopleSoft functionality should be visible. Specifically, you should see Manager Self Service on your Enterprise Menu.
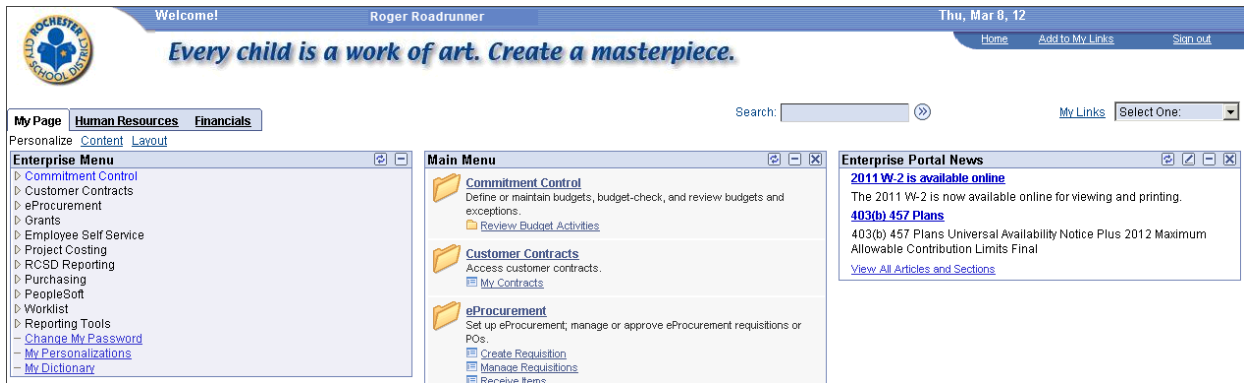
5.2 Click on the **Human Resources** tab. A page similar to the following will be displayed.
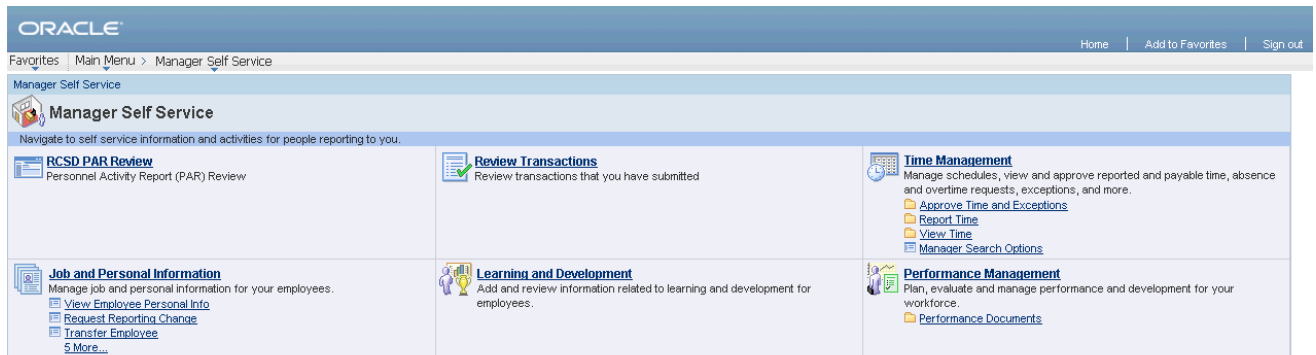

5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page).

5.4 Click on the **Manager Self Service** link. A page similar to the following will appear.

5.5 Click on the **Performance Management** link. The Performance Documents menu will appear as shown on the following page. From this menu, you will be able to Create new performance documents (Formal Observations only), complete Current Documents, view Historical and View Only Documents and perform necessary administrative tasks (such as transferring a document to another administrator) from this menu.
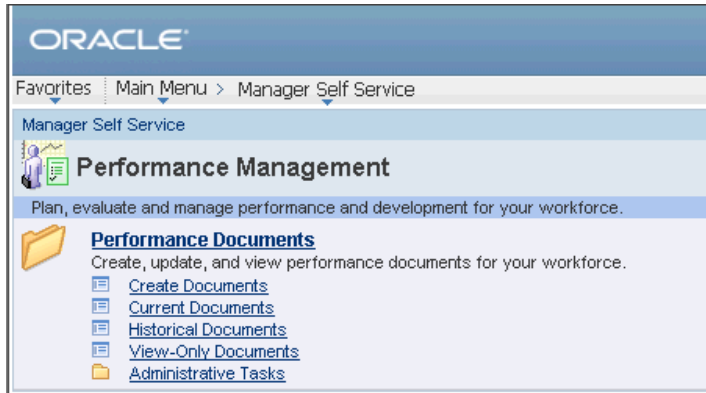
5.6 To view your current performance documents, click on the **Current Documents** link. Any performance documents for your direct reports that **have not been completed** will appear in the list of *Documents you own* section as shown below.

5.7 To view completed or prior year performance evaluations for your current direct reports, click on the **Historical Documents** link.

5.8 Congratulations! You now know how to navigate to the performance documents for your direct reports. From here, you can navigate to the specific function you'd like to access by returning to the main menu or by selecting the desired function from the "bread crumbs" at the top of the PeopleSoft window, as shown below.

5.9 Navigation Pointers:

5.9.1 Do NOT use the Back or Forward browser buttons to navigate within PeopleSoft.

5.9.2 Do NOT use Multichannel Window.

5.9.3 Consider adding the Performance Documents to your favorites for ease of access.

5.9.4 Sign out of PeopleSoft, don't "X-out" of the browser window.

5.9.5 Remember that there is a 2 hour time-out for PeopleSoft. If you're going to be away from your desk for more than 2 hours, be sure to save your work!

5.9.6 Remember that the % sign is a wildcard when searching for specific values.

ASSOCIATED DOCUMENTS

5.10   None.

6.0 RECORD RETENTION

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

7.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
3/9/12	Original	Original Document
5/17/12	Civil Service	Added Civil Service to List

End of Procedure