
ROCHESTER CITY SCHOOL DISTRICT
ASAR Civil Service Annual Performance Evaluations



1.0 SCOPE

- 1.1 This procedure describes the steps necessary to enter an ASAR civil service employee's performance evaluation using the PeopleSoft ePerformance system.

2.0 RESPONSIBILITY

- 2.1 Administrators have the responsibility to ensure that all performance evaluation steps for ASAR civil service 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 Civil Service:** Association of Supervisors and Administrators of Rochester – Civil Service employees. A separate “branch” of ASAR from those holding their teaching certification.
- 4.2 **BENTE Civil Service:** Board of Education Non-Teaching Employees – Civil Service employees.
- 4.3 **Document Type:** identifies certain groups of employees, for example, ASAR Certificated, RTA, RAP, Civil Service, to name a few.
- 4.4 **Template:** identifies the evaluation form that is used to evaluate each employee's performance, for example, BENTE Performance Appraisal, ASAR Civil Service Appraisal or Civil Service 90 Day Appraisal.
- 4.5 **Empl Class:** An employee's classification in the PeopleSoft system. For Civil Service personnel, this might be Permanent CS or Provisional CS, etc.
- 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.



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.

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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.

Documents you own					
Employee	Document Type	Begin Date	End Date	Job Title	Status
Tyranus Rex	Civil Service	07/01/2011	06/30/2012	Custodian Engineer	In Progress
Barney Rubble	Civil Service	07/01/2011	06/30/2012	Asst User Suppt Instructor I	In Progress
Betty Rubble	Civil Service	09/01/2011	06/30/2012	Tchr-on-Assignment	In Progress

- 5.2 Click on the [Civil Service](#) link next to the employee whose evaluation you want to complete. For purposes of this example, we’re going to use Barney Rubble, an **ASAR** Civil Service employee.

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

Current Performance Documents

Document Details

Barney Rubble, Asst User Suppt Inst I
Civil Service: 07/01/2011 - 06/30/2012

Performance Document Details			
Employee:	Barney Rubble	Job Title:	Asst User Suppt Inst I
Document Type:	Civil Service	Period:	07/01/2011 - 06/30/2012
Template:	ASAR Civil Service Appraisal	Document ID:	2707
Manager:	Roger Roadrunner	Status:	In Progress

Document Progress				
Step	Status	Due Date	Action	Next Action
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.

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

Performance Document - Civil Service

Manager Evaluation

Barney Rubble, Asst User Suppt Instructor I
Civil Service: 07/01/2011 - 06/30/2012

Author: Roger Roadrunner **Role:** Manager
Status: In Progress **Due Date:** 06/30/2012
Approval: Not Required

▼ Employee Data

Empl ID: 9913006
Department: 64513 Instruct Tech for Schools - CS
Location: 830 Central Office
Plan/Grade: M40 D [RCSD Empl Class](#)

[Rating History](#)

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](#)


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

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RCSD Employee Class

Evaluatee: Barney Rubble
Empl ID: 9913006
Employee Classification: Permanent CS

- 5.7 Verify that the employee classification is correct.
- 5.8 Click on the **Return** button to return to the *Manager Evaluation* page.
-  5.9 **Checkpoint:** *if any of the Employee Data (see section 5.4) or the Employee Class (see section 5.5) are incorrect, you should contact your HCI Zone Director to inform them of the discrepancy.*

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5.10 Click on the [Collapse All](#) link (between the row of buttons and the *Quality of Work* section).

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

Employee Data

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.

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

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

- [Quality of Work](#)
- [Quantity of Work](#)
- [Leadership](#)
- [Job Attitude](#)
- [Job Knowledge](#)
- [Professional Development](#)
- [Relationships with People](#)
- [Attendance](#)
- [Overall Summary](#)
- [I Recommend](#)
- [Manager Comments](#)
- [Employee Comments/Rebuttal](#)

5.11 Locate the first job element to be rated – the *Quality of Work* section.

5.12 Click the twistie ▸ to open the *Quality of Work* section and view all of the content of this section.

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Quality of Work

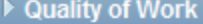
Rate only those factors that apply to the position being appraised.

Please make your comments specific, constructive and objective.

[Expand](#)

[Collapse](#)



5.13 Click the twistie for the *Quality of Work* work performance factor .

5.14 The *Quality of Work* work performance factor is shown below. *Note: to ensure that the ratings are ordered consistently and don't cause confusion, we've added the L# prefix prior to each rating (e.g. L3-Meets Expectations).*

Note: RCSD only requires that elements that are applicable to the work being performed be rated, however, the PeopleSoft system requires that all work performance factors be rated. Therefore, the L0 – Not Applicable rating has been added and should be selected for those elements that are not applicable to the work being performed by the employee being rated.

5.15 Prepare and complete your rating and comments for the *Quality of Work* section. The system requires that you rate **all** sections. If a particular work performance factor is **not applicable** for this employee, you should click on the **L0-Not Applicable** radio button. While a *Comments* box is provided for each work performance factor, the system does **not** require that you comment on all work performance factors.



5.16 Click on the radio button next to the rating being selected for *Quality of Work*. In this example, the *L4-Exceeds Expectations* rating will be 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 : Accuracy, thoroughness; completed work shows care and good judgment in its preparation. Initiative and follow-through – pays attention to details.

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

Rating: L4-Exceeds Expectations

5.17 If you need to confirm your understanding of a rating, click on the rating description icon to view the full description of each rating. These descriptions match the Work Performance Ratings descriptions on the paper evaluation form that was previously used.

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Quality of Work

Proficiencies	
Rating	Description
L4-Exceeds Expectations	Well above expectations (outstanding in this field).
L3-Meets Expectations	Performing at expectations.
L2-Needs Improvement	Below average (not quite up to par). Does not meet basic principles of job expectations.
L1-Unsatisfactory	Unacceptable work performance.
L0-Not-Applicable	Not-Applicable.

[Return to previous page](#)

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

Comments:

Barney clearly demonstrated his ability to deliver quality work on a consistent basis and was regularly recognized by his manager and peers for the quality of his work. |

5.18 Enter your comments, if required, that support the rating selected for *Quality of Work*.

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

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Spell Check

Field Label: Comments

Spell Check Text: Barney clearly demonstrated his ability to deliver quality work on a consistent basis and was regularly **recognized** by his manager and peers for the quality of his work.

Change To: recognized

Alternatives: recognized
recognised

Ignore Ignore All Change Change All Add

OK Cancel

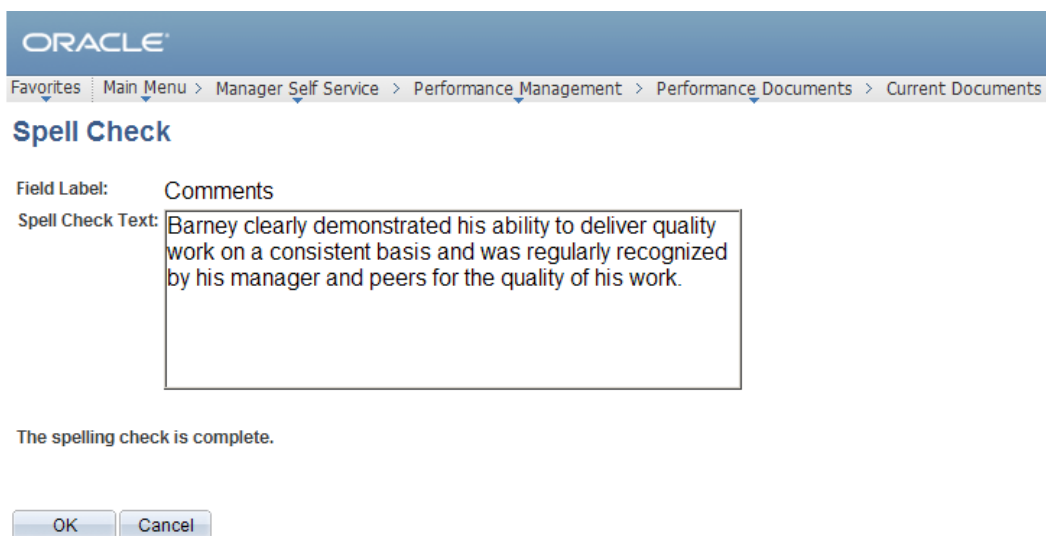
5.19.1 Select the **Change**, **Ignore** or **Add** button as appropriate. If you regularly use technical terms or acronyms not recognized by the system, clicking the **Add** button will add the selected word to your personal dictionary for future spell checks.

Change To: recognized

Alternatives: recognized
recognised

5.19.2 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.

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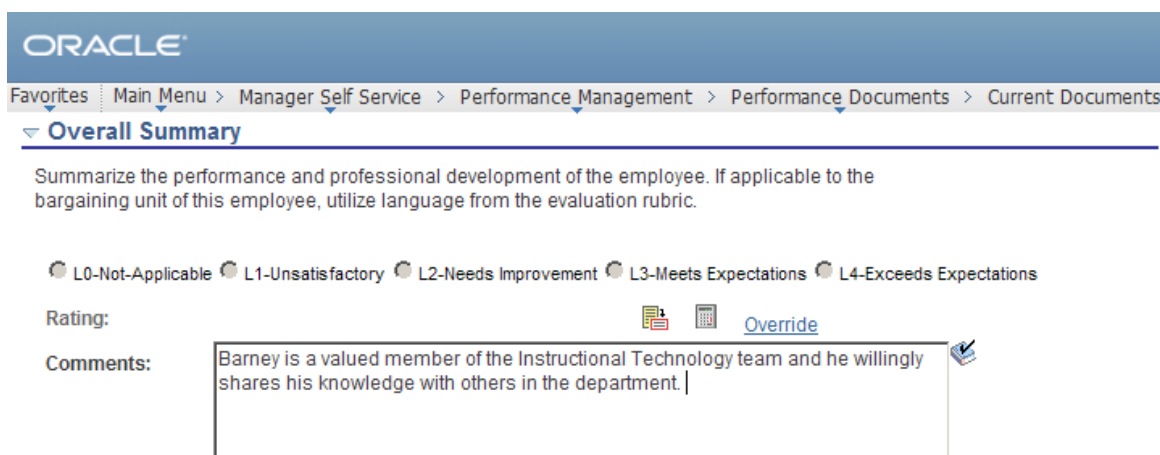
5.19.3 Click on the **OK** button once all spelling errors have been corrected.



5.20 Complete the ratings and comments for each of the 8 work performance factors for the ASAR annual evaluation. 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 work performance factors must be rated.

5.21 If your preference is to have visibility to all the sections of the performance document, click on the [Expand All](#) link at the top of the page to open all of the work performance factor sections.

5.22 After rating all 8 work performance factors, the next section of the performance document to be completed is the *Overall Summary* section. This section is for the manager's comments regarding the employee's overall performance for the year being evaluated. The overall rating for the employee will be calculated in a later step. **Warning:** once you click the [Override](#) link to override the system recommended calculation, the system will no longer compute a recommended overall rating and the burden will be on you, as the manager, to compute the final, overall rating for the current year's performance evaluation.



- 5.23 The next section on the performance document is the manager’s compensation recommendation for the employee based upon the employee’s performance during the year being evaluated. It may be beneficial to wait until you have completed the steps to have the system calculate an overall rating for the employee performance. For now, **skip this step.**

Recommend

Based on the ratings above, select the appropriate next action.

Recommend Summary	
<input type="radio"/> 1-N/A ASAR Exempt Employee	<input type="radio"/> 2-Contractual Increase Only
<input type="radio"/> 3-Withhold Salary Increase	<input type="radio"/> 4-Eligible for Bonus
Rating:	2-Contractual Increase Only

- 5.24 The *Manager Comments* section, the next section of the performance document, is for the manager’s comments relative to the performance review meeting with the employee.

Manager Comments

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

Comments:

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

- 5.26 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:

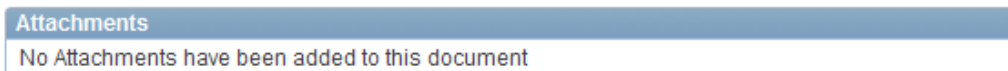
- 5.27 The *Employee Comments/Rebuttal* section is empty and will be until the employee being reviewed has had an opportunity to enter their comments on the evaluation. The review process is described in the *Performance Evaluation Review Process* document in your binder.



- 5.28 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, at the top or bottom of the page, to save the performance document.

- 5.29 Scroll to the bottom of the performance document. If desired, certain document types, such as Word documents, can be attached to the performance document to supplement the evaluation. Use the same guidelines currently in place for attaching a document to the written “paper” performance evaluation when determining whether to attach a document to the electronic PeopleSoft performance document.

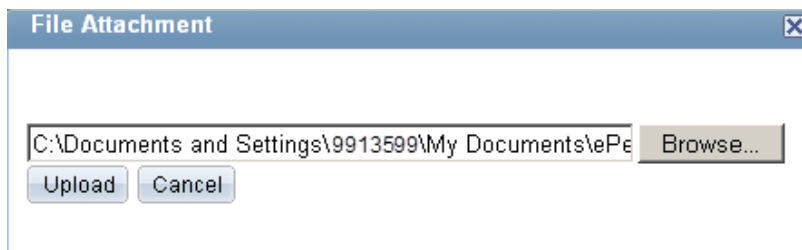
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[+](#) [Add Attachment](#)

5.30 Click on the [Add Attachment](#) link to add an attachment to the performance document.

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

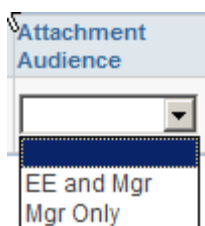


5.32 After selecting the document of choice from your system, click on the **Upload** button to upload the document.

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
radio_button.png	<input type="text"/>	<input type="text"/>	05/17/2012 3:35:00PM	Roger Roadrunner	

[+](#) [Add Attachment](#)

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



5.34 From the drop down for the *Attachment Audience* field, 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 evaluator. If left blank, both the employee and the manager will be able to view the document by default.

5.35 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.


5.36 Below the attachment section is the *Audit History* section of the performance document. The Audit History section 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. See the example below.

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Audit History		
Created By:	Roger Roadrunner	05/17/2012 3:21:11PM
Last Modified By:	Roger Roadrunner	05/17/2012 3:40:40PM

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

- 5.37.1 Click on the **Calculate All Ratings** button. While the system is performing the calculations, you may notice a pinwheel spinning in the upper right hand corner of your PeopleSoft window. 
- 5.37.2 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.
- 5.37.3 Scroll down to the bottom of the performance document and click on the **RCSD Calculate Overall Rating** button to calculate the composite score.
- 5.37.4 Click on the [RCSD Overall Rating](#) link to view the overall rating for the employee.
- 5.37.5 Remember, once you **override** the overall rating in the *Overall Summary* section, these calculations will no longer affect the overall rating.



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RCSD Overall Rating


Document ID:	2707
Evaluatee:	Barney Rubble
Empl ID:	9913006
Review Held Date:	
Acknowledge Review Date:	
RCSD Performance Rating:	Meets Professional Expectations


Employee Acknowledge Final Evaluation

I do Agree with the rating above.

I do not Agree with the rating above.

Print Employee Name _____ Signature _____ Date _____



5.37.6 If desired, print the evaluation summary page using print icon  at the bottom of the summary page.

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

5.38 If you are not satisfied with the system calculated overall rating, scroll back up to the *Overall Summary* section, as shown below.

▼ **Overall 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.

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

Rating:

[Override](#)

Comments:

Barney is a valued member of the Instructional Technology team and he willingly shares his knowledge with others in the department.

5.39 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.

5.40 Once the overall rating is finalized, the appropriate compensation recommendation can be made.

▼ **I Recommend**

Based on the ratings above, select the appropriate next action.

I Recommend Summary

1-N/A ASAR Exempt Employee
 2-Contractual Increase Only
 3-Withhold Salary Increase
 4-Eligible for Bonus

Rating: 2-Contractual Increase Only

5.41 If you need further explanation of compensation recommendation, click on the rating description icon for additional information and guidance.

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I Recommend


Proficiencies	
Rating	Description
4-Eligible for Bonus	Any member is eligible for bonus if they meet an overall rating of Exceeds Expectations.
3-Withhold Salary Increase	Any member rated as "unsatisfactory" overall will be subject to a salary increase withhold (the amount of which may be recoverable as a bonus with the approval of the Superintendent (or his/her designee) in the subsequent year, depending on performance). Any member who has any portion of salary increase withheld by the Superintendent (or his/her designee) may contest this action through the grievance process.
2-Contractual Increase Only	Any member not eligible for bonus or salary withhold based on their overall rating of Meets Expectations or Needs Improvement.
1-N/A ASAR Exempt Employee	ASAR exempt employees are not eligible for the annual bonus, regardless of his/her overall rating.

[Return to previous page](#)



5.42 In this example, the employee was rated as Meets Expectations for every work performance factor, except the Quality of Work, where he was rated as Exceeds Expectations. Since the overall rating for this employee was *Meets Expectations*, the employee is eligible for the contractual increase only. Note that the *Contractual Increase Only* radio button was selected for this employee in step 5.40 (see above).

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

5.44 **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.



5.44.1 Select the printer icon to print the evaluation.

5.44.2 When done printing/viewing the evaluation, simply close the new window that opened to display the performance evaluation by doing a File ⇒ Exit from the new window’s menu bar. Alternatively, you can X-out of the new window.

5.45 **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 mark the document as available for review.

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[Favorites](#) | [Main Menu](#) > [Manager Self Service](#) > [Performance Management](#) > [Performance Documents](#) > [Current Documents](#)

Performance Document - Civil Service

Manager Evaluation

Barney Rubble, Asst User Suppt Instructor I
 Civil Service: 07/01/2011 - 06/30/2012

Author:	Roger Roadrunner	Role:	Manager
Status:	In Progress	Due Date:	06/30/2012
Approval:	Not Required		

Employee Data

Empl ID:	9913006		
Department:	64513		Instruct Tech for Schools - CS
Location:	830		Central Office
Plan/Grade:	M40	D	RCSD Empl Class

[Rating History](#)

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.

Save
Available for Review

[Return to Document Detail](#)



5.46 Click on the **Available for Review** button **ONLY** when you are ready for the employee to review the performance document in PeopleSoft.

5.47 If any of the required work performance elements have not been rated, the system will display one or more error messages (in red text) identifying all omissions of required ratings from the performance document. Scroll to the identified sections and correct the error(s). When all errors have been corrected, click on the **Available for Review** button.

5.48 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.

5.49 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 (see highlighted text in screen shot below). Also, note that *Next Action* in the *Complete Manager Evaluation* step has been updated to reflect the new status.

Performance Document Details				
Employee:	Barney Rubble	Job Title:	Asst User Suppt Instructor I	
Document Type:	Civil Service	Period:	07/01/2011 - 06/30/2012	
Template:	ASAR Civil Service Appraisal	Document ID:	2707	
Manager:	Roger Roadrunner	Status:	Available for Review	

Document Progress				
Step	Status	Due Date	Action	Next Action
Complete Manager Evaluation	Available for Review	06/30/2012	View	Mark Review Held

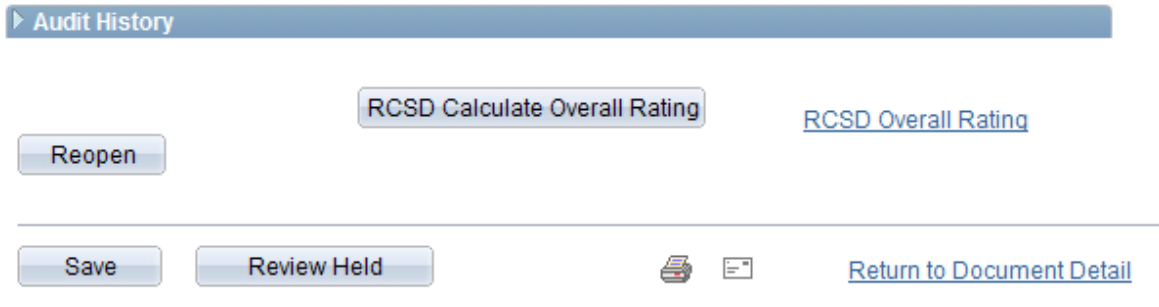
[Return to Select Documents](#)

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5.50 Click on the [View](#) link to review the performance evaluation.

5.51 Scroll to the bottom of the document.



5.52 While the document is in the *Available for Review*, *Review Held* or *Acknowledged* 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 in order to make any necessary changes to the performance document. *Please note that reopening the document also means that the status of all previously completed steps will be reset and will need to be completed again.*

5.53 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 are completed, such as *Review Held*, *Acknowledged* or *Completed*.

5.54 **Congratulations!** You have completed the employee’s evaluation and can proceed to the Review process.

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6.0 ASSOCIATED DOCUMENTS

- 6.1 Reference: *ASAR Civil Service Annual Value Stream Map (VSM)* – located on the SharePoint project site in the Design Documents folder.
- 6.2 Reference: *Annual Appraisal of Performance for Civil Service Personnel.*

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:
5/23/12	Original	Original Document

End of Procedure