



1.0 SCOPE

- 1.1 This procedure describes the steps necessary to enter a 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 BENTE 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 Tyranus Rex, a **BENTE** employee.



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Current Performance Documents

Document Details

Tyranus Rex, Custodian Engineer
Civil Service: 07/01/2011 - 06/30/2012

Performance Document Details			
Employee:	Tyranus Rex	Job Title:	Custodian Engineer
Document Type:	Civil Service	Period:	07/01/2011 - 06/30/2012
Template:	BENTE Performance Appraisal	Document ID:	2708
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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Performance Document - Civil Service

Manager Evaluation

Tyranus Rex, Custodian Engineer...
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:	9913005	
Department:	27805	Edison-Bus, Fin, Entre-HS
Location:	270	Edison
Plan/Grade:	BEN	10

[RCSD Empl Class](#)

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

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BENTE Civil Service Annual Performance Evaluations



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RCSD Employee Class

Evaluatee:	Tyranus Rex
Empl ID:	9913005
Employee Classification:	Permanent CS

[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 **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.*

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



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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](#)
- ▶ [Work Habits](#)
- ▶ [Job Attitude](#)
- ▶ [Job Knowledge](#)
- ▶ [Ability to Learn](#)
- ▶ [Relationships with People](#)
- ▶ [Attendance](#)
- ▶ [Overall Summary](#)
- ▶ [Manager Comments](#)
- ▶ [Employee Comments/Rebuttal](#)

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

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

▼ [Quality of Work](#)

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

Please make your comments specific, constructive and objective.

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

▶ [Quality of Work](#)

5.12 Click the twistie for the *Quality of Work* work performance factor [▶ Quality of Work](#).

5.13 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. L4-Average).*

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 – N/A 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.

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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](#)

Quality of Work

Description : Accuracy, thoroughness; completed work shows care and good judgement in its preparation.

L0-N/A
 L1-Unacceptable
 L2-Well Below Average
 L3-Somewhat Below Average
 L4-Average
 L5-Somewhat Above Average
 L6-Well Above Average

Rating:

Comments:

Created By: Template 05/17/2012 3:21PM

5.14 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-N/A** radio button. While a *Comments* box is provided for each domain element, the system does **not** require that you comment on all work performance factors.

5.15 Click on the radio button next to the rating being selected for *Quality of Work*. In this example, the *L6-Well Above Average* 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 judgement in its preparation.

L0-N/A
 L1-Unacceptable
 L2-Well Below Average
 L3-Somewhat Below Average
 L4-Average
 L5-Somewhat Above Average
 L6-Well Above Average

Rating: L6-Well Above Average



5.16 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
L6-Well Above Average	Well Above Average (Outstanding in this Group)
L5-Somewhat Above Average	Somewhat Above Average (Better than Most)
L4-Average	Average
L3-Somewhat Below Average	Somewhat Below Average (Not Quite Up to Par)
L2-Well Below Average	Well Below Average (Needs Much Improvement)
L1-Unacceptable	Unacceptable Work Performance
L0-N/A	Not Applicable

[Return to previous page](#)

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

Comments:

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

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

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



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

Spell Check

Field Label: Comments

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

Change To:

Alternatives:

5.18.1 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:

Alternatives:

5.18.2 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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Spell Check

Field Label: Comments

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

The spelling check is complete.

OK Cancel

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



- 5.19 Complete the ratings and comments for each of the 9 work performance factors for the BENTE 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.
- 5.20 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.
- 5.21 After rating all 9 work performance factors, the last section of the performance document to be completed prior to the performance review meeting with the employee is the *Overall Summary* section. There is no rating for this section – it is for the manager’s overall comments regarding the employee’s performance in the year being evaluated.

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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.

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

5.22 The next section of the performance document is for the *Manager Comments* in relation 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:

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

5.24 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:

5.25 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.



5.26 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.

5.27 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](#)

5.28 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 "paper" performance evaluation when determining whether to attach a document to the electronic PeopleSoft performance document.

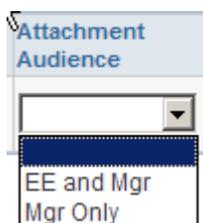
5.29 Click on the **Browse** button to browse your system and select the document to be attached.

5.30 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](#)

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



Attachment Audience

EE and Mgr
Mgr Only

5.32 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.

5.33 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.

5.34 Below the attachment section is the *Audit History* section of the performance document.

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

5.35 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 (as shown above).

 Audit History

[RCSD Signature Page](#)



[Return to Document Detail](#)

5.36 Just below the Audit History section, are a number of buttons, links and icons. If you haven’t done so recently, now would be a good time to click on the **Save** button to save the performance document. 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 Scroll down to the bottom of the performance document.



5.38 **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.



5.38.1 Select the printer icon to print the evaluation.

5.38.2 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.

5.39 **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.



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

5.41 If you’ve missed rating any of the required work performance elements, you’ll get an error message (in red text) identifying any omissions of required ratings from the performance document. Scroll to the identified sections and correct the error(s).



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Performance Document - Civil Service

Available for Review

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

OK Cancel

- 5.42 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.
- 5.43 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 the screen shot below). Also, note that *Next Action* in the *Complete Manager Evaluation* step has been updated to reflect the new status.

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

Current Performance Documents

Document Details

Tyranus Rex, Custodian Engineer
Civil Service: 07/01/2011 - 06/30/2012

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

Performance Document Details				
Employee:	Tyranus Rex	Job Title:	Custodian Engineer	
Document Type:	Civil Service	Period:	07/01/2011 - 06/30/2012	
Template:	BENTE Performance Appraisal	Document ID:	2708	
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](#)

- 5.44 Click on the [View](#) link to review the performance evaluation.
- 5.45 Scroll to the bottom of the document.



- 5.46 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.*
- 5.47 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*.
- 5.48 **Congratulations!** You have completed the employee’s evaluation and can proceed to the Review process.

ROCHESTER CITY SCHOOL DISTRICT

BENTE Civil Service Annual Performance Evaluations



6.0 ASSOCIATED DOCUMENTS

6.1 Reference: *BENTE 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:
5/18/12	Original	Original Document

End of Procedure