

Employee Comments and Acknowledgement of Performance Review

1.0 SCOPE

1.1 This work procedure describes the process for an employee to add comments to their performance document and to acknowledge that the review meeting with their management has been conducted.

2.0 RESPONSIBILITY

2.1 All employees are responsible for acknowledging that they have had an opportunity to review their annual performance evaluation with their supervisor/manager and that they have had an opportunity to add comments to their annual performance document.

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 Employee comments/rebuttal: employee comments and/or rebuttal following the annual performance review meeting. The employee may choose to offer comments supporting or rebutting the manager's assessment of the employee performance review.
- 4.4 **Employee acknowledgement:** the employee's confirmation that the annual performance review meeting with their immediate supervisor/manager has taken place. Acknowledging that the review has taken place **does not** signify agreement or disagreement with the evaluation; it only signifies that the review has taken place.

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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 Employee Self Service on your Enterprise Menu.

Welcome!	Barney Rubble		Thu, Mar 8, 1	2	
Every child is	s a work of art. Create a mo	asterpiece.	Home	Add to My Links	<u>Sign out</u>
MyPage <u>Human Resources Financials</u> Personalize Content Lavout		Search:	>	My Links Sele	ct One:
Enterprise Menu > Commitment Control > Customer Contracts > @ Procurement > Grants > Employee Self Service > Project Costing > RCSD Reporting	Main Menu Commitment Control Contro Control Control Control Control Control C	C - X	Enterprise Portal News 2011 W-2 is available online The 2011 W-2 is now available of 403(b) 457 Plans 403(b) 457 Plans Universal Ava Allowable Contribution Limits Fi View All Articles and Sections	online for viewing and p ilability Notice Plus 201 nal	rinting. 2 Maximum
 Purchasing PeopleSoft Worklist Reporting Tools <u>Change My Password</u> <u>My Personalizations</u> <u>My Dictionary</u> 	My Contracts	approve eProcurement requisitions or			

5.2 Click on the Human Resources tab. A page similar to the following will be displayed.

OCHESTA	Welcome!	Bari	ney Rubble
	Every chi	ld is a work	of art. Creat
<u>My Page</u> Human Personalize Conter	Resources <u>Financials</u>		
Human Resource	s Menu	Ø -	Employee Leave S
Access Human on PeopleTool	p <mark>urces 9.1</mark> n Resources Management Syste s 8.5x.	m 9.1 Maintenance Pack 1	Leave Balances Absence Sick Vacation
Employee Set Employee Set Information, Pr and Developm EncSD PAR Employee H	elf Service Service transactions; includes ayroll and Compensation, Benefit ent, and employee Recruiting Ac <u>Review</u> tome	Time Reporting, Personal :s, Stock Activity, Training :tivities.	Personal Human Resources I

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

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ORACLE	
Favorites Main Menu	
• • •	
Menu	e -
Search:	
D Self Service	
D Manager Self Service	
D Recruiting	
Development	
▷ Set Up HRMS	
Enterprise Components	
D Reporting Tools	
- Change My Password	
- My Personalizations	
- My Portal Home	

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

ORACLE		Home Add to Eavorites Sino out
Favorites Main Menu > Self Service		
Self Service		
Self Service		
Navigate to your self service information and activities.		
Review Transactions Review transactions that you submitted for approval	Report and review your time, schedules, request absences and more.	Payroll and Compensation Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.
Review health, insurance, savings, pension or other benefits information. Review and update dependent and beneficiary personal information. Benefits Information Benefits Summary Insurance Summary	Vew and maintain learning records and objectives, and browse and search the learning catalog.	Performance Management Access your performance and development documents, and evaluations you have done for others. Mv Performance Documents Other's Performance Documents
Recruiting Activities Recruiting Activities	Begate authority for self-service transactions, and review and revoke delegation requests	

5.5 Click on the **My Performance Documents** link. The *My Performance Documents* menu will appear as shown below.



5.6 Click on the **Current Documents** link.

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avorites Ma	ain Menu > S	elf Service	> Performance	lanagement > My Perfo	rmançe Documents 🚿 Curren	t Documents	
Performance Documents							
Barney Rubble							
Listed below are your current performance documents.							
Your Documents Customize Find 🗖 🛗 First 🚺 1-2 of 2 🗅 Last							
Document Type	Begin Date	End Date	Job Title	Status	Manager		

Review Held

Mister Slate

5.7 Click on the <u>RTA</u> link next to the performance document to be reviewed. The performance document will appear as shown below.

09/01/2011 06/30/2012 Tchr-Elem 4-6

<u>RTA</u>

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ORACLE [®]								
vorites Main Menu	> Self Service >	P	erformance	Mana	agement > M	ly Perform	nançe Documents 👌 C	urrent Docum
Performance Do	cuments							
Document De	etails							
Barney Rubble, To RTA: 09/01/2011 -	hr-Elem 4-6 06/30/2012							
Performance Docur	nent Details							
Employee:	Barney Rubbl	е		Job	Title:	Tchr-El	em 4-6	
Document Type:	RTA			Per	iod:	09/01/2	011 - 06/30/2012	
Template:	RTA Teachsca	pe	2011_60%	Doc	cument ID:	87		
Manager:	Mister Slate			Sta	tus:	Review	Held	
Document Progres	S							
Step			Status		Due Date	Action	Next Action	
			Completed		09/30/2011	View		
Set Goals								

5.8 Select the <u>Acknowledge</u> link in the *Next Action* column for the *ReviewManager Evaluation* step. The top section of the employee performance document will be displayed (as shown on the next page).

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RTA: 09/01/201 Author: Mist Status: Revi Approval: Not	1 - 06/30/2012 er Slate ew Held Required	Role: Due Date:	Manager 06/30/2012			
Author: M ist Status: Revi Approval: Not	er Slate ew Held Required	Role: Due Date:	Manager 06/30/2012			
- Employee Data						
Empl ID:	9913002					
Department:	25104	Jos. (C. Wilson Found Acd	lmy		
Location:	291	Wilso	on Fnd (Madison Cam	npus)		
Plan/Grade: RTA A <u>RCSD Empl Class</u> Rating History						
The status of this e Comments/Rebutta evaluation by using	valuation is Review H al section, if applicabl the Save button.	leld . In this status, le. At any time you	, enter comments in th can save any entries y	e Employee You make on the		
After adding your comments, please acknowledge that the evaluation has been reviewed with you by selecting the Acknowledge Review button. Your acknowledgement does not indicate agreement.						

- 5.9 Review your information in the *Employee Data* section at the top of the performance document. Notify your manager if any of your employee data is incorrect so that HCI can be notified and the information can be corrected.
- 5.10 Scroll down to the *Employee Comments/Rebuttal* section of the performance document. It is near the bottom of the document.

Section - Employee Comments/Rebuttal						
Please provide a summary of the evaluation process with this manager (i.e., timeliness, preparation, accessibility, provided coaching and support, etc.).						
This does not preclude you from providing a written rebuttal to your evaluation.						
Employee Comments/Rebuttal Summary						
Comments:						

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5.11 Type your comments in the Comments box.

v Section - Employee Comments/Rebuttal

Please provide a summary of the evaluation process with this manager (i.e., timeliness, preparation, accessibility, provided coaching and support, etc.).

This does not preclude you from providing a written rebuttal to your evaluation.

Employee Comn	nents/Rebuttal Summary	
Comments:	I have reviewed my evaluation with Mister Slate and beleive this to be an accurate representation of my performance in the past year.	¥
	•	

5.12 Check the spelling of your comments, if desired, by clicking the spell check ^𝔅 icon in the upper right corner of the *Employee Comments/Rebuttal Summary* section.

0	ORACLE	
Fa	vorites Main M	enu > Self Service > Performance Management > My Performance Documents > Current Documents
S	pell Chec	k
Fi	eld Label:	Comments
SI	pell Check Text:	I have reviewed my evaluation with Mister Slate and beleive this to be an accurate representation of my performance in the past year.
C	hange To:	believe
AI	Iternatives:	believe Bellevue believed believer
ļ	gnore Ignore	All Change All Add
	ОК Са	Incel

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- 5.12.1 Select the **Ignore, Ignore All, Change, Change All,** or **Add** button as appropriate. Clicking the **Add** button will add this word to your personal dictionary for future spell checks.
- 5.12.2 If more than one alternative is suggested by the system, as shown in the example above, select the desired alternative.

ORACL Favorites Main	C Menu > Self Service > Performance Management > My Performance Documents > Current Documents
Spell Che	ck
Field Label: Spell Check Te	Comments xt: I have reviewed my evaluation with Mister Slate and believe this to be an accurate representation of my performance in the past year.
The spelling ch	eck is complete. Cancel

- 5.12.3 Click on the **OK** button once the spell check is complete and all spelling errors have been corrected.
- 5.13 If you need more time to complete your comments, click the **Save** button to save the comments that you have already entered. Just below the *Employee Data* section of your performance document, you will see a confirmation that you have successfully saved your evaluation and you will be able to resume writing your comments at a later time.

	RCSD Composite Score
Save Acknowledge Review	Return to Document Detail

5.14 Once all of your comments are entered, click the **Acknowledge Review** button. By clicking on the **Acknowledge Review** button, you are **only** acknowledging that you have had an opportunity to review your performance evaluation with your supervisor or manager. It **does not** signify that you agree or disagree with the assessment given.

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Favorites Main Menu >	Self Service > Performance Ma	nagement > My P	erformance Documents >	Current Documents
		nagemene / ny r		current bocarrienta
Porformance Dec				
A elypeutledge	Decument Deview			
Acknowledge	Document Review			
You have chosen to ac select the OK button.	knowledge your performance eva	luation. To confirm t	his acknowledgement,	
ОК	Cancel			
15 Click the OK but	tton to complete the co	mments and	acknowledgement	t process.
ORACLE				
ORACLE Favorites Main Menu	> Self Service > Performance	Management > N	ly Performan <u>c</u> e Documen	nts > Current Docu
Favorites Main Menu	> Self Service > Performance	Management > N	ly Performan <u>c</u> e Documen	nts > Current Docu
Favorites Main Menu Performance Doc	> Self Service > Performance	Management > N	ly Performan <u>c</u> e Documen	nts > Current Docu
Performance Doc Document De	> Self Service > Performance cuments	Management > N	ly Performançe Documen	nts > Current Docu
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Favorites Main Menu Performance Doc Document De Barney Rubble, Tc RTA: 09/01/2011 -	> Self Service > Performance cuments ctails hr-Elem 4-6 06/30/2012	Management > N	Ny Performan <u>c</u> e Documen	nts > Current Docu
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ORACLE Favorites Main Menu Performance Doc Document De Barney Rubble, Tc RTA: 09/01/2011 - ✓ You have succes	> Self Service > Performance cuments etails hr-Elem 4-6 06/30/2012 sfully acknowledged your evalue	Management > M	ly Performan <u>c</u> e Documen	nts > Current Docu
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ORACLE Favorites Main Menu Performance Doc Document De Barney Rubble, Tc RTA: 09/01/2011 - ✓ You have succes Performance Document Performance Document Employee:	 Self Service > Performance cuments etails hr-Elem 4-6 06/30/2012 sfully acknowledged your evalu nent Details Barney Rubble 	Management > M uation. Job Title:	ly Performance Documen	nts > Current Docu
ORACLE Favorites Main Menu Performance Doc Document De Barney Rubble, Tc RTA: 09/01/2011 - ✓ You have succes Performance Document Employee: Document Type:	> Self Service > Performance cuments etails hr-Elem 4-6 06/30/2012 sfully acknowledged your evalu- nent Details Barney Rubble RTA	Management > M uation. Job Title: Period:	Iy Performance Documen Tchr-Elem 4-6 09/01/2011 - 06/30/20	nts > Current Docu
ORACLE Favorites Main Menu Performance Doc Document De Barney Rubble, Tc RTA: 09/01/2011 - ✓ You have succes Performance Document Employee: Document Type: Template:	 Self Service > Performance cuments etails hr-Elem 4-6 06/30/2012 sfully acknowledged your evalution nent Details Barney Rubble RTA RTA Teachscape 2011_60% 	Management > M uation. Job Title: Period: Document ID:	Iy Performan <u>c</u> e Documen Tchr-Elem 4-6 09/01/2011 - 06/30/20 87	nts > Current Docu

Manager. Milotor Olaco		Jun	0.	Acknowled	geu
Document Progress					
Step		Status	Due Date	Action	Next Action
Set Goals	1	Completed	09/30/2011	<u>View</u>	
Review Manager Evaluation	•	Acknowledged	06/30/2012	<u>View</u>	

Return to Select Documents

- 5.16 Note that the performance document status has changed to *Acknowledged* and that the *Next Action* column is now blank.
- 5.17 Congratulations! You have completed the employee step of the performance review process.

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6.0 ASSOCIATED DOCUMENTS

6.1 None.

7.0 RECORD RETENTION

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

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
3/23/12	Original	Original Document

End of Procedure