



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.



5.0 PROCEDURE

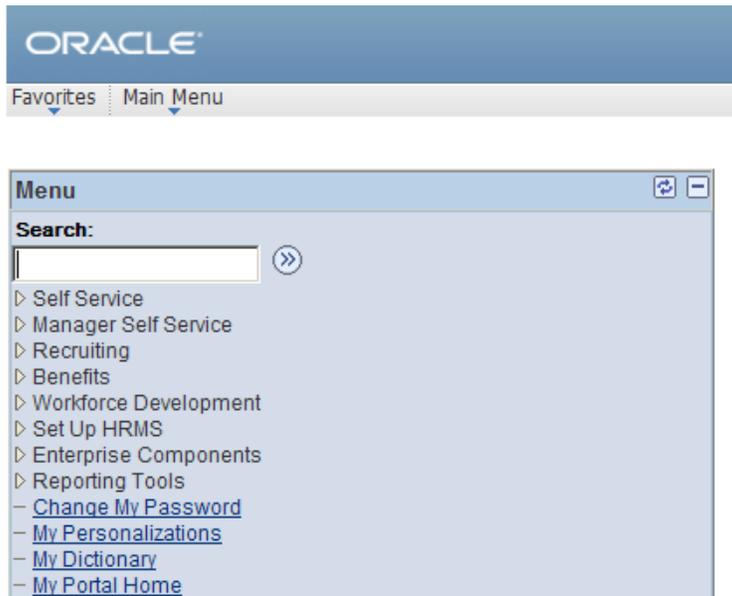
5.1 **Log in to PeopleSoft.** This example shows the PeopleSoft Portal page as the starting point as there are numerous ways to access the PeopleSoft Portal (e.g. from SharePoint, directly from a web browser window, etc.). The PeopleSoft Portal page is shown below. *Note:* your home page is likely to 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.



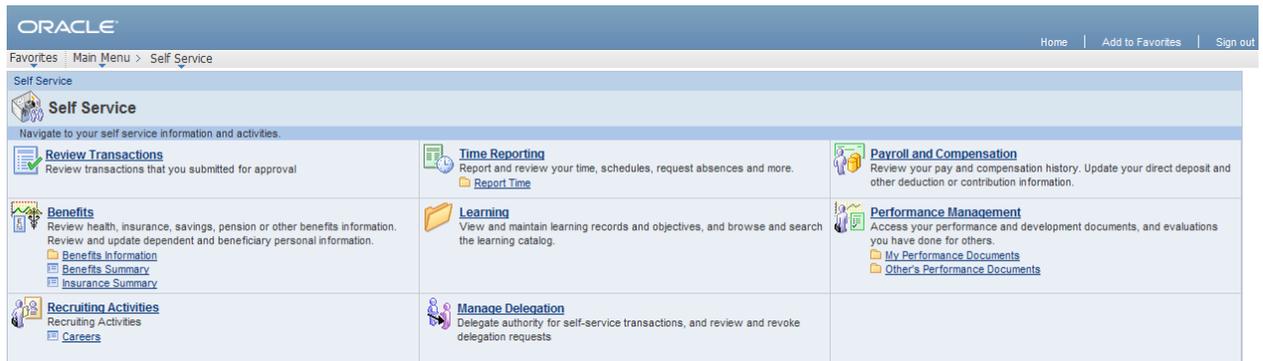
5.2 Click on the **Human Resources** tab. A page similar to the following will be displayed.



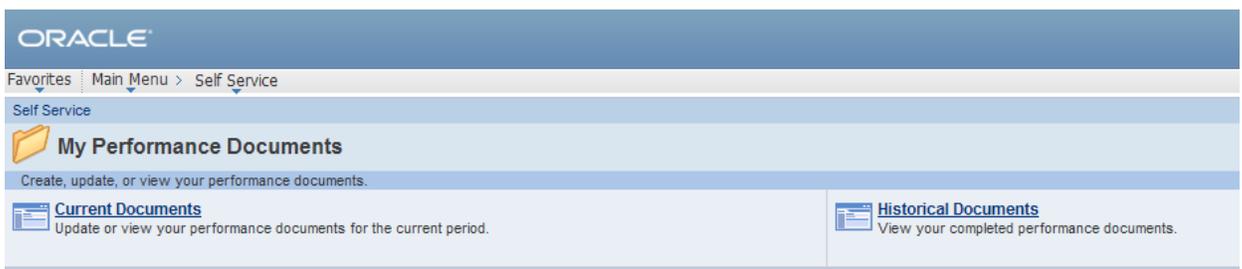
5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page).



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



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.



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

Performance Documents

Barney Rubble

Listed below are your current performance documents.

Your Documents					
Document Type	Begin Date	End Date	Job Title	Status	Manager
RTA	09/01/2011	06/30/2012	Tchr-Elem 4-6	Review Held	Mister Slate

- 5.7 Click on the [RTA](#) link next to the performance document to be reviewed. The performance document will appear as shown below.

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

Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
 RTA: 09/01/2011 - 06/30/2012

Performance Document Details			
Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6
Document Type:	RTA	Period:	09/01/2011 - 06/30/2012
Template:	RTA Teachscape 2011_60%	Document ID:	87
Manager:	Mister Slate	Status:	Review Held

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	09/30/2011	View	
Review Manager Evaluation	🕒 Review Held	06/30/2012	View	Acknowledge

[Return to Select Documents](#)

- 5.8 Select the [Acknowledge](#) 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).



ORACLE

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

Performance Document - RTA

Manager Evaluation

Barney Rubble
 RTA: 09/01/2011 - 06/30/2012

Author: Mister Slate **Role:** Manager
Status: Review Held **Due Date:** 06/30/2012
Approval: Not Required

Employee Data

Empl ID: 9913002
Department: 25104 Jos. C. Wilson Found Acdmy
Location: 291 Wilson Fnd (Madison Campus)
Plan/Grade: RTA A [RCSD Empl Class](#)

[Rating History](#)

The status of this evaluation is **Review Held**. In this status, enter comments in the **Employee Comments/Rebuttal** section, if applicable. At any time you can save any entries you make on the evaluation by using the **Save** button.

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.

 [Return to Document Detail](#)

- 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:



5.11 Type your comments in the *Comments* box.

▼ **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: 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  icon in the upper right corner of the *Employee Comments/Rebuttal Summary* section.

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

Spell Check

Field Label: Comments

Spell 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.

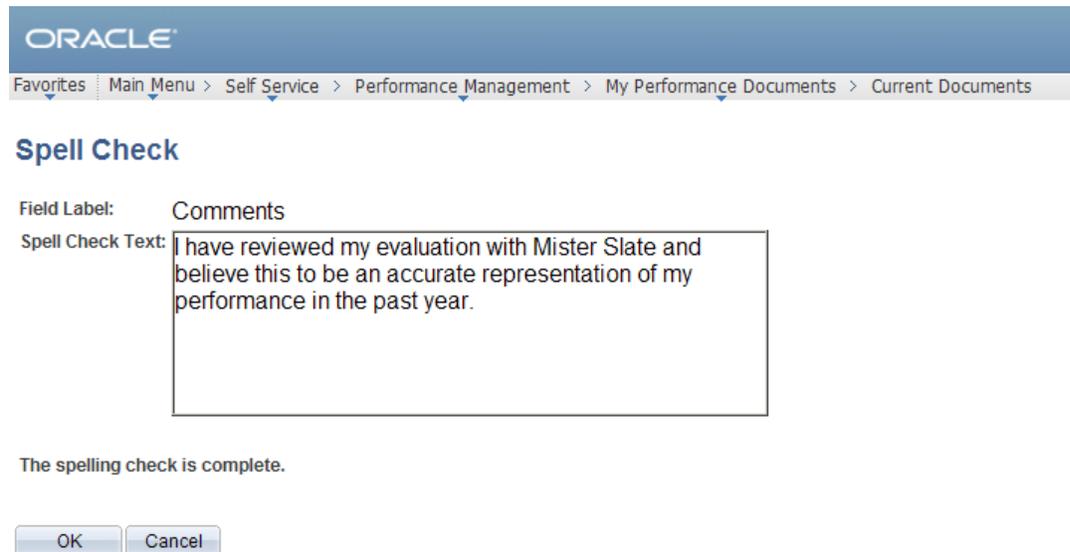
Change To:

Alternatives:

- believe ▲
- Bellevue
- belief
- believed
- believer ▼



- 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.



- 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.



- 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 Management > My Performance Documents > Current Documents

Performance Document - RTA
Acknowledge Document Review

You have chosen to acknowledge your performance evaluation. To confirm this acknowledgement, select the OK button.

5.15 Click the **OK** button to complete the comments and acknowledgement process.

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

Performance Documents
Document Details

Barney Rubble, Tchr-Elem 4-6
 RTA: 09/01/2011 - 06/30/2012

You have successfully acknowledged your evaluation.

Performance Document Details				
Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6	
Document Type:	RTA	Period:	09/01/2011 - 06/30/2012	
Template:	RTA Teachscape 2011_60%	Document ID:	87	
Manager:	Mister Slate	Status:	Acknowledged	

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	09/30/2011	View	
Review Manager Evaluation	🟢 Acknowledged	06/30/2012	View	

[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.



6.0 ASSOCIATED DOCUMENTS

6.1 None.

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:
3/23/12	Original	Original Document

End of Procedure