1.0 SCOPE

1.1 The Performance Evaluation Review process entails conducting a performance review meeting with each employee, the employee commenting on the review and acknowledging that the review has been held (in PeopleSoft), the manager entering his/her review meeting comments and the manager completing the evaluation.

1.2 The examples shown in this document illustrate the Performance Evaluation Review process for a teacher. The process is similar for all District employees.

2.0 RESPONSIBILITY

2.1 The school principal has the ultimate responsibility to ensure that all performance reviews are conducted, that evaluations are acknowledged and completed in a timely fashion for all District personnel at his/her school.

3.0 APPROVAL AUTHORITY

3.1 No approval process has been specified or designed into the ePerformance system.

4.0 DEFINITIONS

4.1 **Performance Review:** meeting conducted by the manager with the employee for the purpose of reviewing the employee's performance evaluation and rating for the current school year.

5.0 PROCEDURE

5.1 The last step of writing the evaluation has now been completed and you previously marked the employee's performance document as *Available for Review.* Note: at this time, the manager can still open the performance document to make any necessary changes or updates to the evaluation. However, because the document was previously marked as *Available for Review*, the employee may have reviewed the evaluation by this time.

5.2 Conduct the **Performance Review** meeting with the employee. As you conduct the review, have the employee validate that their *Employee Tenure Status* and *Employee Career Level* are correct. Upon completion of the meeting, explain that you will be marking the evaluation with *Review Held* status. Remind the employee that they have a responsibility to log into PeopleSoft and acknowledge that the performance review meeting was conducted and that the performance evaluation was reviewed with them. At that time, the employee will also have the opportunity to add their comments and/or rebuttal to the performance evaluation/rating they have received.

5.3 **Manager steps – mark the evaluation as Review Held.** Navigate to the employee's evaluation document. Navigation: **Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents**.

    5.3.1 Click on the RTA link next to the document to mark as *Review Held.* The following page will appear.

    5.3.2 Manager clicks on the Mark Review Held link.

5.3.3 Manager clicks on the **Review Held** button.

5.3.4 Click the **OK** button to confirm that the performance review was held.

5.3.5 Note that the *Next Action* on the *Complete Manager Evaluation* step now shows *Acknowledge.*

5.3.6 The next step in the process is for the employee to acknowledge that the review has been conducted and to add their comments to the performance document.

⚠ 5.4 **Employee steps – acknowledge review held and add employee comments to the evaluation.**
Log in to PeopleSoft. A screen similar to the following will be displayed. If logging in through Portal, the employee will need to click on the Human Resources tab followed by the Human Resources 9.1 link to see this page. For reference, see your PeopleSoft ePerformance Navigation Basics document. *Note: an e-mail will be sent to the employee requesting their action. If the employee clicks on the e-mailed link, the employee will be taken directly to the performance document if already logged into PeopleSoft. If not logged into PeopleSoft, the employee will be taken to the PeopleSoft login screen and upon logging in, will be taken directly to the performance document.*

5.4.1 Employee clicks on **Self Service.**
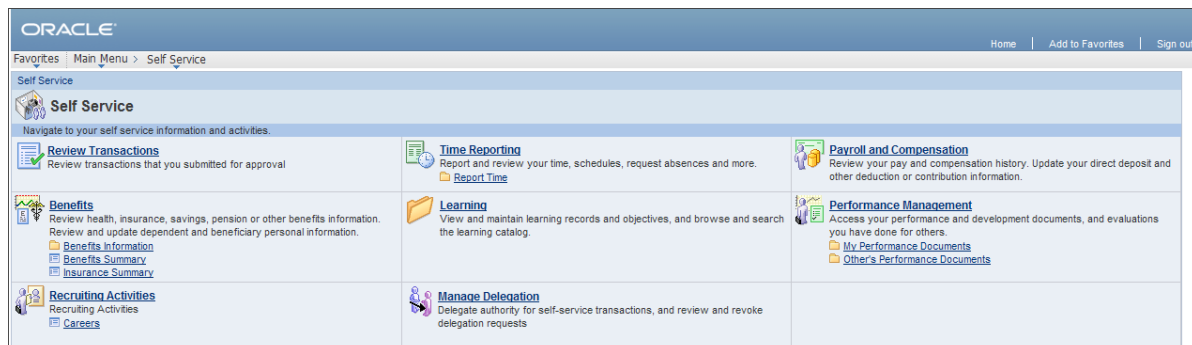
5.4.2 Employee clicks on **Performance Management.**

5.4.3 Employee clicks on **My Performance Documents.**

5.4.4 Employee clicks on **Current Documents**. A screen, similar to the following, will be displayed.

5.4.5 Employee clicks on the RTA link next to the performance document to be reviewed and acknowledged.

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:	RTATeachscape 2011 w/ PART_60%	Document ID:	329
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

5.4.6   Employee clicks on the Acknowledge link to acknowledge that the review meeting has been conducted and to add their post-evaluation review meeting comments to the performance document.

By acknowledging that the review was conducted, the employee is not agreeing or disagreeing with the evaluation itself; they are only acknowledging that they have had an opportunity to review their performance evaluation with their manager.

5.4.7 Note that the performance document opens.

5.4.8 The employee can scroll down through all the sections of the document. Note that the content of the evaluation is "greyed out" and cannot be changed by either the employee or the manager. Also, note the change history at the bottom of each element that is rated. A sample section of the performance document is shown below.

5.4.9 Employee scrolls to the bottom of the evaluation – where the *Employee Comments/Rebuttal* section begins.

5.4.10 The employee should add their comments and/or rebuttal to the performance document as shown above.

5.4.11 Employee clicks on the **Save** button to save their newly added comments on the performance document. The *Save* and *Acknowledge Review* buttons shown above are at the top of the performance document. These buttons also appear at the bottom of the performance document. Either may be used.

5.4.12 Employee clicks on the **Acknowledge Review** button at the bottom of the page to acknowledge that the performance review was held.

Performance Document - RTA

Acknowledge Document Review

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

[OK]   [Cancel]

5.4.13 Employee clicks on the **OK** button to complete the 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:	RTATeachscape 2011 w/ PART_60%	Document ID:	329
Manager:	Mister Slate	Status:	Acknowledged

Document Progress

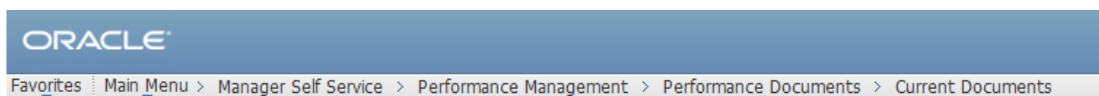| Step		Status	Due Date	Action	Next Action
Set Goals	✔	Completed	09/30/2011	View	
Review Manager Evaluation	◑	Acknowledged	06/30/2012	View	

Return to Select Documents

5.4.14 Note, on the screen above, that the *Status* of the performance document has changed to *Acknowledged* and that there are no further steps for the employee in the *Next Action* column.

5.4.15 This completes the employee's steps for the current year's evaluation document.

⚠ **5.5** **Manager Steps – Adding Comments and Completing the Evaluation.** The manager must complete the performance document in PeopleSoft by selecting the performance document that has been acknowledged from his/her roster. Navigation: **Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents**. The following shows an abbreviated roster.

5.5.1 Manager clicks on the RTA link. The following screen appears (next page).

5.5.2 Manager clicks on the Complete link to complete the evaluation (see next page).

5.5.3 Manager should scroll down to the *Manager Comments* section of the performance document, as shown below.

5.5.4 Manager should add any comments to the *Manager Comments* section of the performance document. Click on the **Save** button to save the newly added comments.

5.5.5 Manager clicks on the **Complete** button to finalize the evaluation document, as seen on the screen (above). Once the document has been completed, it will be moved from *Current Documents* to *Historical Documents*.
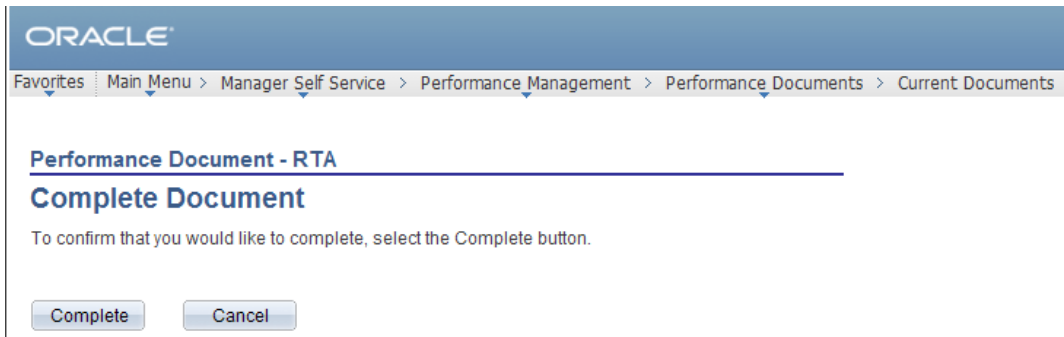
5.5.6   Manager clicks the **Complete** button on this screen to finalize the document.
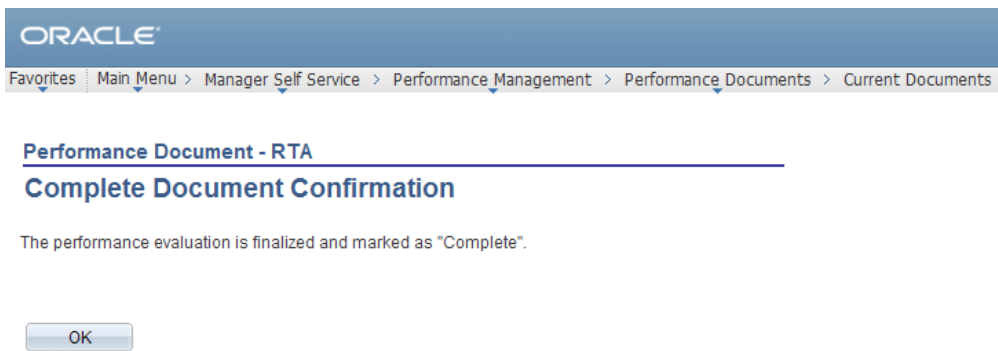
5.5.7   Manager clicks the **OK** button to finalize the performance evaluation and mark it as Complete.

ORACLE

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

Performance Document History

Document Details

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

☑ You have successfully completed 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:	RTATeachscape 2011 w/ PART_60%	Document ID:	329
Manager:	Mister Slate	Status:	Completed

Document Progress

Step		Status	Due Date	Action	Next Action
Set Goals	✔	Completed	09/30/2011	View	
Nominate Participants	○	Not Started	02/06/2012		
Track Nominations	○	Not Started	02/06/2012		
Review Participant Evaluations	○	Not Started	06/30/2012		
Complete Manager Evaluation	✔	Completed	06/30/2012	View	

Return to Select Documents

5.5.8 Note the *Status* has changed to *Completed* as seen above and there are no further steps in the *Next Action* column.

5.6 **Congratulations!** You have now completed the performance evaluation for this employee. To review the performance document at any time in the future, you will need to navigate to the *Historical Documents* menu option.

6.0 ASSOCIATED DOCUMENTS

6.1 Reference: *RTA APPR Annual* Value Stream Map (VSM) – located on the SharePoint project site in the Design Documents folder.

7.0 RECORD RETENTION

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

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
3/14/12	Original	Original Document

End of Procedure