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ROCHESTER CITY SCHOOL DISTRICT  
Performance Evaluation Review Process

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## 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.

ORACLE

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

**Current Performance Documents**

**Document Details**

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

Performance Document Details			
<b>Employee:</b>	Barney Rubble	<b>Job Title:</b>	Tchr-Elem 4-6
<b>Document Type:</b>	RTA	<b>Period:</b>	09/01/2011 - 06/30/2012
<b>Template:</b>	RTATeachscape 2011 w/ PART_60%	<b>Document ID:</b>	329
<b>Manager:</b>	Mister Slate	<b>Status:</b>	Available for Review

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	09/30/2011	<a href="#">View</a>	
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	● Available for Review	06/30/2012	<a href="#">View</a>	<a href="#">Mark Review Held</a>

[Return to Select Documents](#)

- 5.3.2 Manager clicks on the [Mark Review Held](#) link.

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

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**Performance Document - RTA**

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

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

Employee Data

Empl ID:	9913002	
Department:	14602	#46 - Charles Carroll - ES
Location:	146	School 46
Plan/Grade:	RTA	A

[Rating History](#)                      [RCSD Empl Class](#)

The status of this evaluation is **Available for Review**. In this status, you may enter comments in the **Manager Comments** section, if applicable.

At any time you can save any entries you make on the evaluation by selecting the **Save** button. If you are ready to confirm that the review was held with the employee, select the **Review Held** button to notify the employee they are able to review and acknowledge the evaluation.

Once the **Review Held** button is selected, you can no longer re-open the document to make further changes.

          [Return to Document Detail](#)

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

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

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**Performance Document - RTA**

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**Review Held**

Select the OK button to confirm that the performance review was held for this document.

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*.

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

**Current Performance Documents**

**Document Details**

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

You have successfully marked the review held for your evaluation.

Performance Document Details				
<b>Employee:</b>	Barney Rubble	<b>Job Title:</b>	Tchr-Elem 4-6	
<b>Document Type:</b>	RTA	<b>Period:</b>	09/01/2011 - 06/30/2012	
<b>Template:</b>	RTATeachscape 2011 w/ PART_60%	<b>Document ID:</b>	329	
<b>Manager:</b>	Mister Slate	<b>Status:</b>	Review Held	

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✔ Completed	09/30/2011	<a href="#">View</a>	
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	🕒 Review Held	06/30/2012	<a href="#">View</a>	<a href="#">Acknowledge</a>

[Return to Select Documents](#)

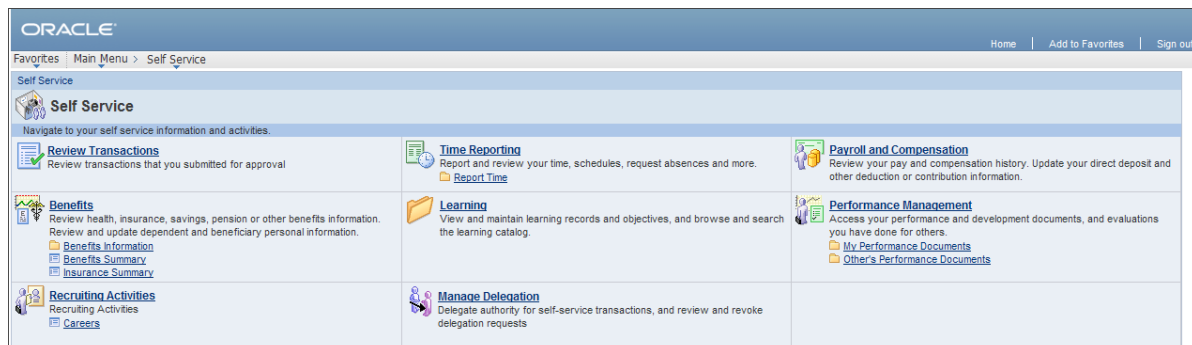
- 5.3.6 The next step in the process is for the employee to acknowledge that the review has been conducted and to add their comments to the performance document.



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**.

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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.

### 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					
<a href="#">RTA</a>	09/01/2011	06/30/2012	Tchr-Elem 4-6	Review Held	Mister Slate					

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				
<b>Employee:</b>	Barney Rubble	<b>Job Title:</b>	Tchr-Elem 4-6	
<b>Document Type:</b>	RTA	<b>Period:</b>	09/01/2011 - 06/30/2012	
<b>Template:</b>	RTATeachscape 2011 w/ PART_60%	<b>Document ID:</b>	329	
<b>Manager:</b>	Mister Slate	<b>Status:</b>	Review Held	
Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	09/30/2011	<a href="#">View</a>	
Review Manager Evaluation	🕒 Review Held	06/30/2012	<a href="#">View</a>	<a href="#">Acknowledge</a>

[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.

**ORACLE**

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

**Performance Document - RTA**

**Manager Evaluation**

Barney Rubble, Tchr-Elem 4-6  
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: 14602      #46 - Charles Carroll - ES  
Location: 146      School 46  
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](#)

5.4.8 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.

**Section - Domain 1 - Planning and Preparation**

[Expand](#)      [Collapse](#)

**Demonstrating Knowledge of Content and Pedagogy**

L1-Ineffective     L2-Developing     L3-Effective     L4-Highly Effective

Rating: L3-Effective   

Comments:

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Created By:	Template	03/13/2012 11:05AM
Last Modified By:	Mister Slate	03/13/2012 6:09PM

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



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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:

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

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

**Performance Document - RTA**

**Manager Evaluation**

Barney Rubble, Tchr-Elem 4-6  
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: 14602      #46 - Charles Carroll - ES  
Location: 146      School 46  
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](#)

5.4.11 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.



5.4.13 Employee clicks on the **OK** button to complete the acknowledgement process.

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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	<a href="#">View</a>	
Review Manager Evaluation	● Acknowledged	06/30/2012	<a href="#">View</a>	

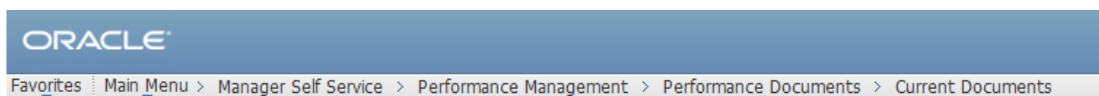
[Return to Select Documents](#)

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.



### 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
Barney Rubble	<a href="#">RTA</a>	09/01/2011	06/30/2012	Tchr-Elem 4-6	Acknowledged

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

**Current Performance Documents**

**Document Details**

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

Performance Document Details			
<b>Employee:</b>	Barney Rubble	<b>Job Title:</b>	Tchr-Elem 4-6
<b>Document Type:</b>	RTA	<b>Period:</b>	09/01/2011 - 06/30/2012
<b>Template:</b>	RTATeachscape 2011 w/ PART_60% Mister Slate	<b>Document ID:</b>	329
<b>Manager:</b>	Mister Slate	<b>Status:</b>	Acknowledged

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	09/30/2011	<a href="#">View</a>	
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	📌 Acknowledged	06/30/2012	<a href="#">View</a>	<a href="#">Complete</a>

[Return to Select Documents](#)

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

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

**Performance Document - RTA**

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

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

Employee Data

**Empl ID:** 9913002  
**Department:** 14602      #46 - Charles Carroll - ES  
**Location:** 146      School 46  
**Plan/Grade:** RTA      A      [RCSD Empl Class](#)

[Rating History](#)

The status of this evaluation is **Acknowledged**. In this status, you may enter comments in the **Manager Comments** section, if applicable.

At any time you can save any entries you make on the evaluation by selecting the **Save** button.

Select the **Complete** button to finalize this document. After the document is completed, it will be stored in Historical Documents.

          [Return to Document Detail](#)

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

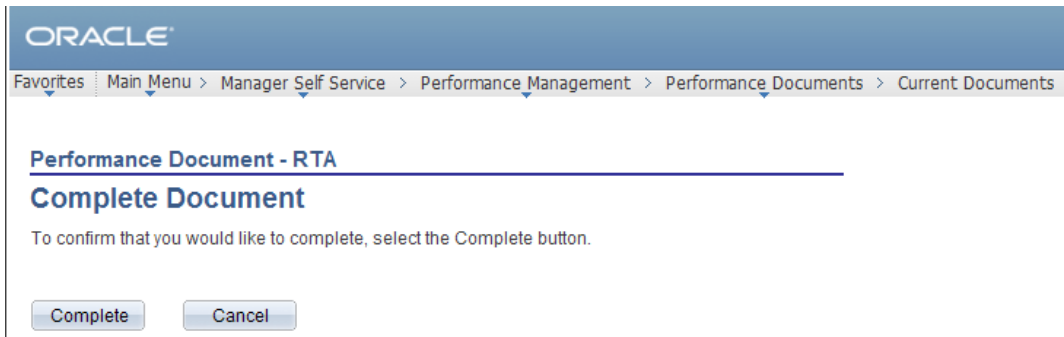
Section - Manager Comments

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

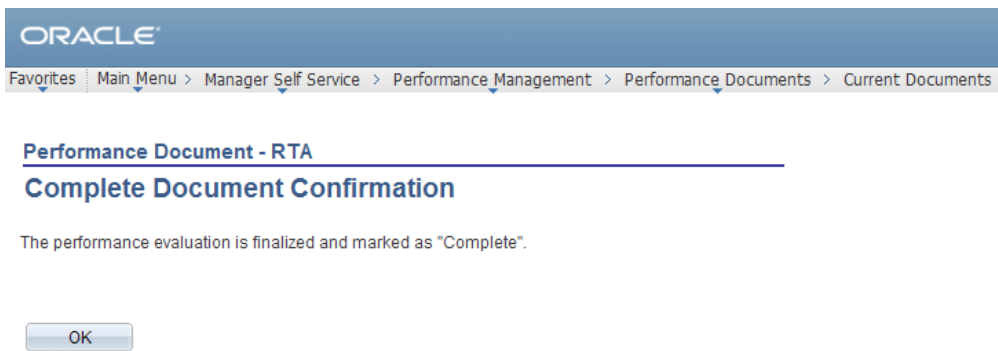
Comments:

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.

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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				
<b>Employee:</b>	Barney Rubble	<b>Job Title:</b>	Tchr-Elem 4-6	
<b>Document Type:</b>	RTA	<b>Period:</b>	09/01/2011 - 06/30/2012	
<b>Template:</b>	RTATeachscape 2011 w/ PART_60%	<b>Document ID:</b>	329	
<b>Manager:</b>	Mister Slate	<b>Status:</b>	Completed	

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✔ Completed	09/30/2011	<a href="#">View</a>	
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	<a href="#">View</a>	

[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 Superseded		N/A

## 8.0 REVISION HISTORY

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

\*\*\*End of Procedure\*\*\*