#### 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, 12		
Every child	l is a work of art. Create a m	asterpiece.	Home	Add to My Links	<u>Sign out</u>
MyPage Human Resources Financials		Search:	<b></b>	My Links Sel	ect One:
Enterprise Menu  Commitment Control  Customer Contracts	Main Menu     Commitment Control     Define or maintain budgets, bud	Judget-check, and review budgets and	Enterprise Portal News 2011 W-2 is available online The 2011 W-2 is now available o	nline for viewing and	printing.
▷ eProcurement ▷ Grants ▷ Employee Self Service ▷ Project Costing	exceptions.		403(b) 457 Plans 403(b) 457 Plans Universal Avail Allowable Contribution Limits Fir		12 Maximum
▷ RCSD Reporting ▶ Purchasing ▷ PeopleSoft ▷ Worklist	Access customer contracts.		View All Articles and Sections		
▶ Reporting Tools - <u>Change My Password</u> - <u>My Personalizations</u>	POs.	or approve eProcurement requisitions or			
- <u>My Dictionary</u>	Manage Requisitions      Receive Items				

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

Welcome!	Bar	ney Rubble
Every chil	ld is a work	of art. Creat
Resources <u>Financials</u>		
s Menu	¢ -	Employee Leave Su
<b>urces 9.1</b> Resources Management Syster 8.5x.	n 9.1 Maintenance Pack 1	Leave Balances Absence Sick Vacation
yroll and Compensation, Benefits	s, Stock Activity, Training	Personal Human Resources I
	Every chil Resources <u>Financials</u> <u>Layout</u> <b>S Menu</b> urces 9.1 Resources Management System 8.5x. <b>If Service</b> Service transactions; includes T yroll and Compensation, Benefits ent, and employee Recruiting Act Review	Every child is a work  Resources Financials  Lavout  Menu  C  C  C  C  C  C  C  C  C  C  C  C  C

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	0 -
Search:	
I ⊗	
D Self Service	
Manager Self Service	
D Recruiting	
D Benefits	
<ul> <li>Workforce Development</li> <li>Set Up HRMS</li> </ul>	
D Enterprise Components	
Reporting Tools	
- Change My Password	
- My Personalizations	
- <u>My Dictionary</u>	
– <u>My Portal Home</u>	

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

ORACLE		Home   Add to Favorites   Sign
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	Time Reporting Report and review your time, schedules, request absences and more.	Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.
Benefits Review heath, insurance, savings, pension or other benefits information. Review and update dependent and beneficiary personal information. Benefits Information Engenefits 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     My Performance Documents     Other's Performance Documents
Recruiting Activities Recruiting Activities	8 Manage Delegation Delegate authority for self-service transactions, and review and revoke delegation requests	

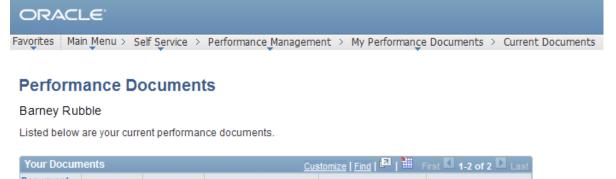
5.5 Click on the **My Performance Documents** link (under the **Performance Management** section). The *My Performance Documents* menu will appear as shown below.

ORACLE'	
Favorites Main Menu > Self Service	
Self Service	
💋 My Performance Documents	
Create, update, or view your performance documents.	
Current Documents Update or view your performance documents for the current period.	Historical Documents View your completed performance documents.

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

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Your Docur	ments		Cu	stomize   Find   🚇   🎫 🛛 F	First 🎦 1-2 of 2 🍱 Last
Document Type	Begin Date	End Date	Job Title	Status	Manager
<u>RTA</u>	09/01/2011	06/30/2012	Tchr-Elem 4-6	Review Held	Mister Slate

5.7 Click on the <u>RTA</u> link next to the performance document to be reviewed. Note: the RTA link is specifically for teacher evaluations. The name of the link will be different for other District personnel (e.g. <u>RAP</u>, <u>Civil Service</u>, <u>ASAR Certificated</u>, etc.). The performance document will appear as shown below.

	> Self Service	> P	erformance M	lana	agement > M	ly Perform	nance Documents > Cu	rrent Document
avorites Main Menu > Self Service > Performance Management > My Performance Documents > Current Documents Performance Documents								
Document D	etails							
Barney Rubble, To RTA: 09/01/2011 -	06/30/2012							_
Performance Docur	ment Details							
Employee: Document Type: Template:						87	011 - 06/30/2012	
Manager: Mister Slate				Sta	tus:	Review	Held	
Document Progres			Status		Due Date	Action	Next Action	
Set Goals		~	Completed		09/30/2011	<u>View</u>		
Review Manager Evaluation			Review Held	4	06/30/2012	View	Acknowledge	

Return to Select Documents

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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ORACL	_e <sup>.</sup>						
Favorites Mair	n Menu > Self Service > P	erformance Man	agement	> My P	erforman <u>c</u> e Documents	<ul> <li>Current Docur</li> </ul>	ments
Performan	ce Document - RTA						
Manage	r Evaluation						
Barney Rubb RTA: 09/01	ole /2011 - 06/30/2012						
Author:	Mister Slate	Role:	Manage	ŧ٢			
Status:	Review Held	Due Date:	06/30/2	012			
Approval:	Not Required						
👻 Employee D	ata						
Empl ID:	9913002						
Department:	25104	Jos. (	C. Wilson	Found /	Acdmy		
Location:	291	Wilso	n Fnd (M	adison (	Campus)		
Plan/Grade:	RTA	A	DOS	D Empl (			
Rating Histor	<u>r</u>		RUSI				
Comments/Re	The status of this evaluation is <b>Review Held</b> . In this status, enter comments in the <b>Employee</b> <b>Comments/Rebuttal</b> section, if applicable. At any time you can save any entries you make on the evaluation by using the <b>Save</b> button.						
	After adding your comments, please acknowledge that the evaluation has been reviewed with you by selecting the <b>Acknowledge Review</b> button. Your acknowledgement does not indicate agreement.						
Save	Acknowledge Review		<b>e</b> E	-	Return to Document De	tail	

- 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 - Em	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 pre	clude you from providing a written rebuttal to your evaluation.						
Employee Comn	nents/Rebuttal Summary						
Comments:							

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#### 5.11 Type your comments in the *Comments* box.

#### 

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 Com	ments/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 <sup>𝒞</sup> icon in the upper right corner of the *Employee Comments/Rebuttal Summary* section.

ORACLE	E'
Favorites Main M	enu > Self Service > Performance Management > My Performance Documents > Current Documen
Spell Chec	k
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:	believe
Alternatives:	believe A Bellevue believed believer
Ignore Ignore	All Change All Add
ОКСа	ancel

DECOVER THE EXCELLENCE

- Employee Comments and Acknowledgement of Performance Review
- 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	E.
Favorites Main	Menu > Self Service > Performance Management > My Performance Documents > Current Documents
Spell Che	ck
Field Label:	Comments
Spell Check Tex	tt 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 che	eck is complete.
ок	Cancel

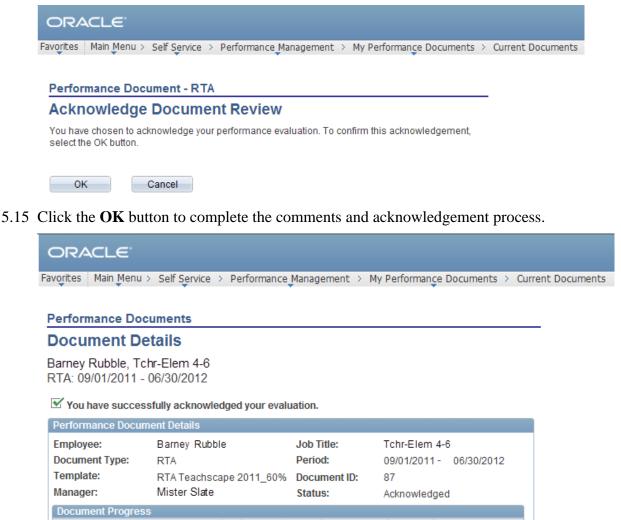
- 5.12.3 Click on the **OK** button once the spell check is complete and all spelling errors have been corrected.
- 5.13 If you need more time to complete your comments, click the **Save** button to save the comments that you have already entered. Just below the *Employee Data* section of your performance 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	5	·=	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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Document Progress					
Step		Status	Due Date	Action	Next Action
Set Goals	*	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
5/24/12	Civil Service	Modified to include civil service and other types of links employee may see.

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