

1.0 SCOPE

- 1.1 This work procedure provides an introduction to the PeopleSoft ePerformance system and the basic navigation to a principal/manager's Performance Documents. Included in this work procedure will be a description of certain key employee information that may be helpful to the manager when completing the employee evaluations.

2.0 RESPONSIBILITY

- 2.1 All school principals and department managers are responsible for validating the employee data that is being displayed and for notifying Human Capital Initiatives if any of the data is incorrect and needs to be updated.

3.0 APPROVAL AUTHORITY

- 3.1 None.

4.0 DEFINITIONS

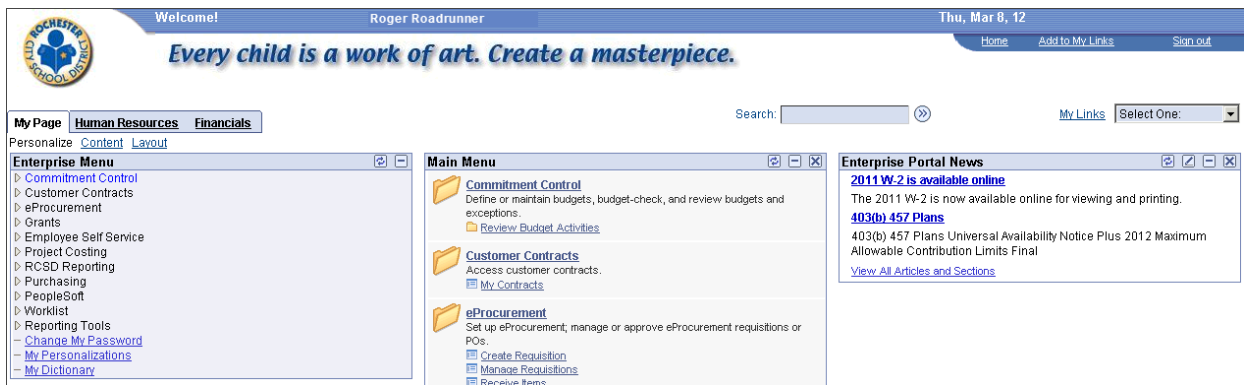
- 4.1 **ePerformance:** the PeopleSoft module used to complete and manage all District personnel evaluations beginning with the 2011-2012 school year.
- 4.2 **Performance document:** PeopleSoft performance management documents, such as an employee's Evaluation or Formal Observation document.
- 4.3 **Direct report:** any employee under the direct supervision of a manager or supervisor.

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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 the Human Resources tab – just above the Enterprise Menu.



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

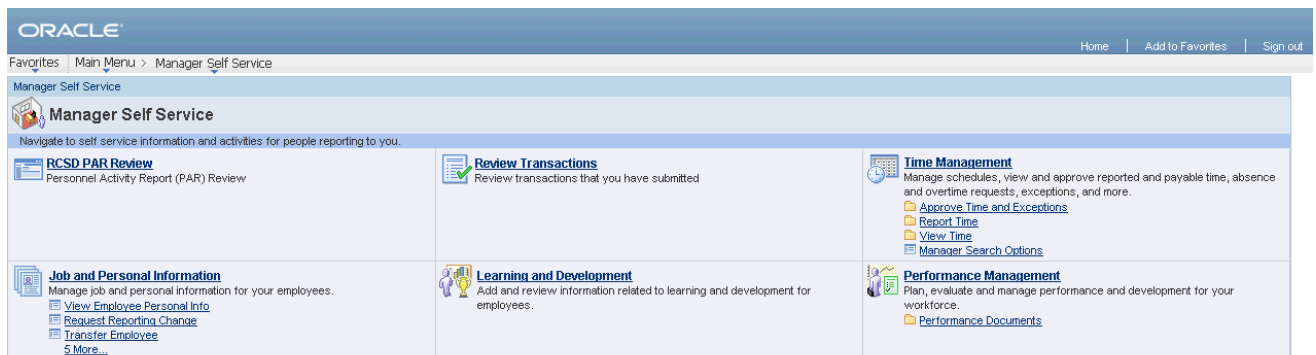


5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page).

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



5.5 Click on the **Performance Management** link. The Performance Documents menu will appear as shown on the following page. From this menu, you will be able to Create new performance documents (Formal Observations only), complete Current Documents, view Historical and View Only Documents and perform necessary administrative tasks (such as transferring a document to another administrator) from this menu.

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ORACLE

Favorites | Main Menu > Manager Self Service

Manager Self Service

Performance Management
 Plan, evaluate and manage performance and development for your workforce.

Performance Documents
 Create, update, and view performance documents for your workforce.

- Create Documents
- Current Documents
- Historical Documents
- View-Only Documents
- Administrative Tasks

5.6 To view your current performance documents, click on the **Current Documents** link. Any performance documents for your direct reports that **have not been completed** will appear in the list of *Documents you own* section as shown below.

ORACLE

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

Current Performance Documents

Listed below are the current performance documents for which you are the Manager. [Civil Service](#)

Documents you own					
Employee	Document Type	Begin Date	End Date	Job Title	Status
Fred Flintstone	RTA	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Fred Flintstone	Formal Observation	09/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Wilma Flintstone	RTA	10/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Wilma Flintstone	Formal Observation	10/01/2011	06/30/2012	TCHR-SPEC ED	In Progress
Tyranus Rex	Civil Service	07/01/2011	06/30/2012	Custodian Engineer	In Progress
Barney Rubble	Civil Service	09/01/2011	06/30/2012	Asst User Suppt Instructor I	In Progress
Betty Rubble	Civil Service	09/01/2011	06/30/2012	Tchr-on-Assignment	In Progress



5.7 To view completed or prior year performance evaluations for your current direct reports, click on the **Historical Documents** link.

Employee	Document Type	Begin Date	End Date	Job Title	Status	Rating
Blaise Pascal	RTA	09/01/2011	06/30/2012	Tchr-Computer Science	Completed	L4-Proficient
Jane Reference	RTA	09/01/2011	06/30/2012	LIBRARY MEDIA SPECIALIST	Completed	L4-Proficient
Rosetta Stone	RTA	09/01/2011	06/30/2012	TCHR-FOREIGN LANGUAGE	Completed	L3-Meets Prof. Standards

5.8 Congratulations! You now know how to navigate to the performance documents for your direct reports. From here, you can navigate to the specific function you'd like to access by returning to the main menu or by selecting the desired function from the “bread crumbs” at the top of the PeopleSoft window, as shown below.

5.9 Navigation Pointers:

- 5.9.1 Do NOT use the Back or Forward browser buttons to navigate within PeopleSoft.
- 5.9.2 Do NOT use Multichannel Window.
- 5.9.3 Consider adding the Performance Documents to your favorites for ease of access.
- 5.9.4 Sign out of PeopleSoft, don't "X-out" of the browser window.
- 5.9.5 Remember that there is a 2 hour time-out for PeopleSoft. If you're going to be away from your desk for more than 2 hours, be sure to save your work!
- 5.9.6 Remember that the % sign is a wildcard when searching for specific values.



ASSOCIATED DOCUMENTS

5.10 None.

6.0 RECORD RETENTION

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

7.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
3/9/12	Original	Original Document
5/17/12	Civil Service	Added Civil Service to List
3/22/13	2	Minor correction on page 2.

End of Procedure