1.0 SCOPE

1.1 This work procedure describes the Goal Setting process for administrators. The employee steps for entering goals are described in a separate document.

2.0 RESPONSIBILITY

2.1 Teachers and administrators are responsible for working collaboratively to establish the teacher's goals for each school year.

2.2 While there may be preliminary discussions between the teacher and the administrator regarding the goal setting process, the teacher will be responsible for initiating the goal setting process by entering their goals into the PeopleSoft ePerformance system.

2.3 The administrator will be responsible for reviewing and approving the goals entered into the PeopleSoft ePerformance system and, after making any agreed upon changes with the teacher, for "completing" the goals in the system.

3.0 APPROVAL AUTHORITY

3.1 Administrators are responsible for approving and completing the goal setting process for each teacher in the PeopleSoft ePerformance system.

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. Beginning with the 2012-2013 school year, the Goal Setting process has been integrated into the performance document.

4.3 **Performance Goal:** a measurable, desired result to be achieved in a specified time period that is agreed upon between the teacher/employee and their principal/manager.

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 next to the *My Page* tab and 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). *Note: the menu options available for your use will vary depending upon your job responsibilities and the associated system security. For brevity, a number of menu options for this manager are not shown in the graphic below.*

5.4   Click on the **Manager Self Service** menu option.
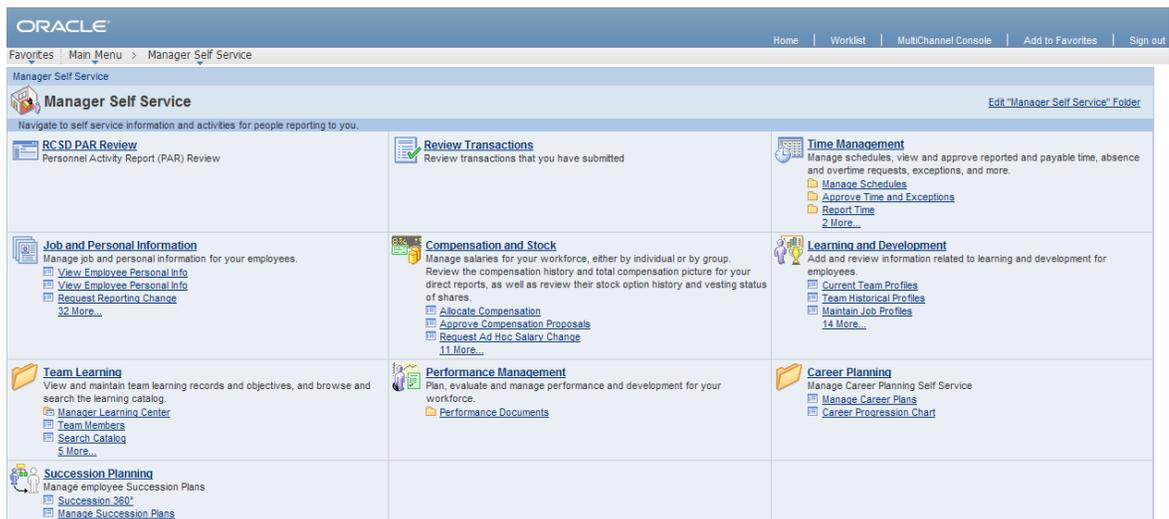
5.5   Click on the Performance Management link.

5.6 Click on the Performance Documents link.
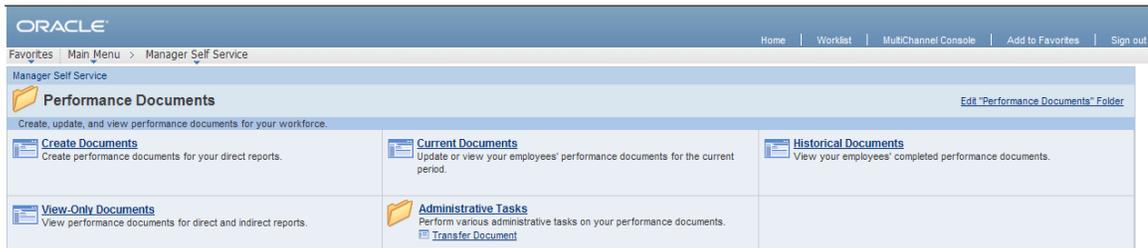
5.7 Click on the Current Documents link. A roster of the employees whose evaluations are assigned to you will appear as shown below.
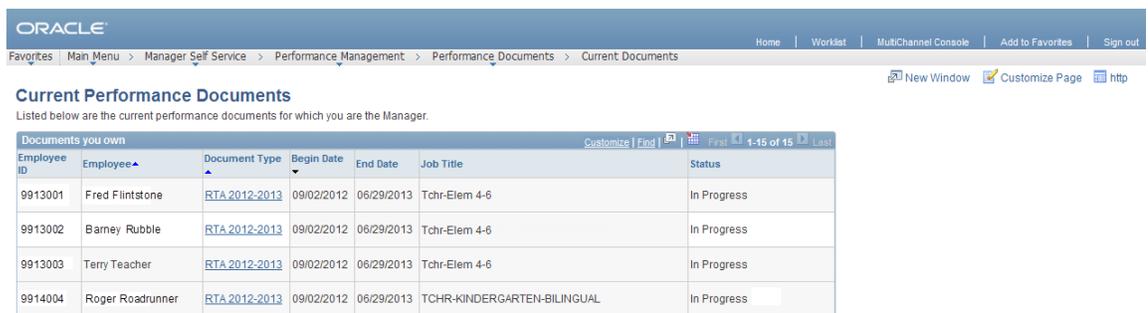
5.8 Click on the RTA 2012-2013 link next to the teacher whose goals you are ready to review.

ORACLE

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

Current Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
RTA 2012-2013: 09/02/2012 - 06/29/2013

Performance Document Details			
Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6
Document Type:	RTA 2012-2013	Period:	09/02/2012 - 06/29/2013
Template:	RTA Teachscape 2011_Admin	Document ID:	2829
	Only		
Manager:	Mister Slate	Status:	In Progress

Document Progress					
Step		Status	Due Date	Action	Next Action
Set Goals	○	Not Started	06/29/2013	Edit	Complete
Complete Manager Evaluation	○	Not Started	06/29/2013		

Return to Select Documents

5.9   Click on the Edit link in the *Action* column for the *Set Goals* step.

ORACLE

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

Performance Document - RTA 2012-2013

Performance Criteria

Barney Rubble, Tchr-Elem 4-6
- -
RTA 2012-2013: 09/02/2012 - 06/29/2013

[Save]   [Complete]   🖨 ✉   Return to Document Detail

Expand All   Collapse All   Expand Sections

▽ **Professional Development Incentive**

Click on the link below to select to view the employee's participation choice in PDI- Professional Development Incentive.

    RCSD Professional Development Incentive Link

▽ **Goal Setting: Domain 1 - Planning & Preparation**

After conferencing with the employee, make agreed upon edits to the goals and/or add additional goals.

Expand   Collapse
▷ Improve Student Assessments
[+] Add Goal Setting: Domain 1 - Planning & Preparation

▽ **Goal Setting: Domain 2 - Classroom Environment**

5.10 Use the Expand All or the Expand link within each section to display the responses to the PDI questions, TIF questions and the goals that were entered by the teacher.

5.11 As you collaborate with the teacher, if you agree to edit a particular goal, click on the Edit ✎ icon to edit the goal. For example, you may agree how the achievement of the goal will be measured.

Performance Document - RTA 2012-2013

Edit Goal Setting: Domain 1 - Planning & Preparation

*Title:	Improve Student Assessments
Description:	Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students. This will be measured by ...|

Created By: Barney Rubble   09/14/2012 2:38PM

[Update]   Return to Performance Criteria

5.12 Click the **Update** button to update the goal with the agreed language.

▽ **Goal Setting: Domain 1 - Planning & Preparation**

After conferencing with the employee, make agreed upon edits to the goals and/or add additional goals.

Expand   Collapse

▽ Improve Student Assessments

Description : Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students. This will be measured by ...

Created By:	Barney Rubble	09/14/2012 2:38PM	
Last Modified By:	Mister Slate	09/19/2012 2:48PM	Modification History

5.13 After reviewing and making any agreed-upon edits to the remainder of the goals, the manager will need to "Complete" the goal setting process.

▶ **Audit History**

[Save]   [Complete]   🖨 ▣   Return to Document Detail

Note: the example shown here assumes that the administrator, while collaborating with the teacher, will make the edits to the goals. If desired, the administrator can have the teacher make the agreed upon changes to the goals. However, the administrator will still be responsible for completing the goal setting process in the PeopleSoft ePerformance system once all of the edits are made to the goals.

5.14 Click on the **Complete** button to finalize the goal setting portion of the performance document.

5.15 Once again, click on the **Complete** button to finalize the goal setting step. A confirmation page will appear indicating that you have successfully completed the *Set Goals* step.

5.16 **Congratulations!** You have completed the goal setting process for this teacher.

5.17 Click on the Return to Select Documents link to return to your roster of teachers to evaluate if you have additional goal setting meetings to conduct or simply **Sign out** of PeopleSoft if you have completed all of your goal setting meetings.

6.0 ASSOCIATED DOCUMENTS

6.1 None.

7.0 RECORD RETENTION

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

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
9/25/12	Original	Original Document

End of Procedure