



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.

Goal Setting Process for Administrators



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.

Welcome! Barne Every child is a work	of art. Create a masterpiece.	Thu, Mar 8, 12 <u>Home</u>	Add to My Links	<u>Sian out</u>
My Page Human Resources Financials Personalize <u>Content Layout</u>	Search:		My Links Sele	ct One: 🗾 💌
Enterprise Menu Control	Main Menu Image: Commitment Control Commitment Control Define or maritain budgets, budget-check, and review budgets and exceptions. Image: Contracts and the contracts and the contracts. Image: Contracts and the contracts.	Enterprise Portal News 2011 W-2 is available online The 2011 W-2 is now available o 403(b) 457 Plans 403(b) 457 Plans Universal Avail Allowable Contribution Limits Fir View All Articles and Sections	nline for viewing and p lability Notice Plus 201 al	2 Maximum
b Workist D Reporting Tools - <u>Change Mr Password</u> - <u>Mr Personalizations</u> - <u>Mr Dictionary</u>	Procurement Set up eProcurement, manage or approve eProcurement requisitions or Pos. Create Requisition Manage Requisition Review terms			

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

OCHESTE	Welcome!	Ban	ney Rubble
	Every ch	ild is a work	of art. Creat
My Page Hum	an Resources <u>Financials</u>		
Personalize <u>Con</u>	itent Layout		
Human Resou	rces Menu	ø -	Employee Leave Su
Big Human R	esources 9.1		Leave Balances
Access Hu on PeopleT	uman Resources Management Syst 'ools 8.5x.	tem 9.1 Maintenance Pack 1	Absence
			Sick
	0 K0 I		Vacation
Employee S Employee S Information and Develo	Self Service Self Service transactions; includes 1, Payroll and Compensation, Benef pipment, and employee Recruiting A AR Review	: Time Reporting, Personal fits, Stock Activity, Training activities.	Personal
Employe	ee Home		Human Resources I

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.*

Goal Setting Process for Administrators



ORACLE	
Favorites Main Menu	
Personalize Content Layout	
Menu 🗢	Ξ
Search:	
 My Favorites Self Service Manager Self Service Recruiting Workforce Administration 	
Packas → Applicant Home → Careers → C	
- <u>My Personalizations</u> - <u>My System Profile</u> - <u>My Dictionary</u>	
- <u>My Peeds</u> - <u>My Portal Home</u>	

5.4 Click on the Manager Self Service menu option.

ORACLE			MultiChannel Console	Add to Favorites	Sign o
Favorites Main Menu > Manager Self Service					
Manager Self Service					
🚳 Manager Self Service			Edit "	Manager Self Service	' Folder
Navigate to self service information and activities for people reporting to you.					
ECSD PAR Review Personnel Activity Report (PAR) Review	Review transactions that you have submitted	Time Management Manage schedules, and overtime reques Manage Schedul Report Time ar 2 More	nt view and approve reporte sts, exceptions, and more. les nd Exceptions	d and payable time, at	osence
Job and Personal Information Wanage bo and personal information for your employees. View Emolyce Personal Info View Emolyce Personal Info Request Reporting Change 32 More	Compensation and Stock Compensation and Stock Review the compensation history and total compensation picture for your direct reports, as well as review their stock option history and vesting status of share: Allocate Compensation Allocate Compensation Proposate Request Ad tho Salary Change 11 More	Learning and Dev Add and review infr employees. Current Team Pri Team Historica If Maintain Job Pro 14 More	velopment ormation related to learning o <u>files</u> Profiles files	and development for	
	Performance Management Pan, evaluate and manage performance and development for your workforce. Performance Documents	Career Planning Manage Career Plan Manage Career Plan Career Progress	nning Self Service <u>Plans</u> sion Chart		
Succession Planning Manage employee Succession Plans Succession 380' Manage Succession Plans					

5.5 Click on the <u>Performance Management</u> link.

Goal Setting Process for Administrators



ORACLE		e AdditoFavorites Signio
Favorites Main Menu > Manager Self Service		
Manager Self Service		
Performance Management	Edit	"Performance Management" Folder
Plan, evaluate and manage performance and development for your workforce.		
Partormance Documents Create. Update, and view performance documents for your workforce. Create Documents Current Documents Historical Documents Movements Movements Administrative Tasks		

5.6 Click on the <u>Performance Documents</u> link.

ORACLE		Home Worklist MultiChannel Console Add to Favorites Sion ou
Favorites Main Menu > Manager Self Service		
Manager Self Service		
📁 Performance Documents		Edit "Performance Documents" Folder
Create, update, and view performance documents for your workforce.		
Create Documents Create performance documents for your direct reports.	Update or view your employees' performance documents for the current period.	View your employees' completed performance documents.
View-Only Documents View performance documents for direct and indirect reports.	Administrative Tasks Perform various administrative tasks on your performance documents. Transfer Document	

5.7 Click on the <u>Current Documents</u> link. A roster of the employees whose evaluations are assigned to you will appear as shown below.

ORAC	ILE.					Home Worki	list MultiChannel Console	Add to Favorites	Sign out
Favorites M	ain Menu > Manager Se	elf Service > Pe	rformance Ma	inagement :	> Performance Documents > Current Documents				
							🖉 New Window	📝 Customize Page	📰 http
Current	Performance	Documents	6						
Listed below	are the current performation	ince documents fo	or which you a	re the Manag	er.				
Documents	s you own				Customize Find 🛃	First 🚺 1-15 of 15 🖸 Last			
Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status			
9913001	Fred Flintstone	RTA 2012-2013	09/02/2012	06/29/2013	Tchr-Elem 4-6	In Progress			
9913002	Barney Rubble	RTA 2012-2013	09/02/2012	06/29/2013	Tchr-Elem 4-6	In Progress			
9913003	Terry Teacher	RTA 2012-2013	09/02/2012	06/29/2013	Tchr-Elem 4-6	In Progress			
9914004	Roger Roadrunner	RTA 2012-2013	09/02/2012	06/29/2013	TCHR-KINDERGARTEN-BILINGUAL	In Progress			

5.8 Click on the <u>RTA 2012-2013</u> link next to the teacher whose goals you are ready to review.

Goal Setting Process for Administrators



ORACLE								
Favorites Main Menu	> Self Service	>	Performance Ma	nagement >	My Perfo	rmance Documents	>	Current Documents
Current Performa	nce Docume	nts						_
Document De	etails							
Barney Rubble, Tch RTA 2012-2013: 09 Performance Docum	nr-Elem 4-6 9/02/2012 - 06 nent Details	29/	2013					
Employee: Document Type: Template:	Barney Rubble RTA 2012-201 RTA Teachsca Only Mistor Slate	e 3 pe 2	Job Perio 2011_AdminDocu	Title: od: ument ID:	Tchr-Elem 09/02/201 2829	1 4-6 2 - 06/29/2013		
Document Drogress	Mister State		Stati	us:	In Progres	S		
Step	5		Status	Due Date	Action	Next Action		
Set Goals		0	Not Started	06/29/2013	Edit	Complete		
Complete Manager E	valuation	0	Not Started	06/29/2013				
Return to Select Docu	ments							

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.

Goal Setting Process for Administrators



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

Performance	Document -	- RTA	2012-2013	
1 CHIVIIII AIIVC	Doodinon	1 1 1 1 1		

Edit	Goal	Setting:	Domain	1 -	Planning	&	Preparation	
	U Uui	ocungi	Domain		1 Mining	~	i i opulution	

*Title:	Improve Student A	Improve Student Assessments				
Description:	Ensure that the st instructional outco students. This wil	udent assessments are aligned properly with omes and are adapted, as necessary, for individual I be measured by	- «			
Created By: Update	, Barney Rubble <u>Return to Performance Criteria</u>	09/14/2012 2:38PM				

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

v Goal Setting: Domain 1 - Planning & Preparation

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

Expand	<u>Collapse</u>			
👻 Improve Studen	t 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				1
Created By: Last Modified By:	Barney Rubble Mister Slate	09/14/2012 2:38PM 09/19/2012 2:48PM	Modification His	story

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.

Goal Setting Process for Administrators



ORACLE				
Favorites Main Menu > Manager Self Service > Performance Management > Performance Documents	> Current Documents			
Performance Document - RTA 2012-2013				
Complete Performance Criteria				
To confirm that you would like to complete, select the Complete button.				
Complete				

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.

ORACLE								
Favorites Main Menu	> Manager Self	Ser	vice > Perform	nance Manage	ement >	Performance Documen	ts >	Current Documents
Current Performance Documents								
Document Details								
Barney Rubble, Tchr-Elem 4-6 RTA 2012-2013: 09/02/2012 - 06/29/2013								
You have success	You have successfully completed the Set Goals step.							
Performance Document Details								
Employee: Document Type: Template:	Barney Rubble Job T RTA 2012-2013 Perio RTA Teachscape 2011_AdminDocu Only		Title: od: ument ID:	Tchr-Elem 4-6 09/02/2012 - 06/29/2013 2829				
Manager:	Mister Slate Status:		JS:	In Progress				
Document Progress								
Step			Status	Due Date	Action	Next Action		
Set Goals	Set Goals 🗸 Comple		Completed	06/29/2013	View			
Complete Manager Evaluation • Not Starte			Not Started	06/29/2013		Start		

Return to Select Documents

- 5.16 **Congratulations!** You have completed the goal setting process for this teacher.
- 5.17 Click on the <u>Return to Select Documents</u> 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.

Goal Setting Process for Administrators



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. Displayed on			
	EngageRochester site.			

8.0 REVISION HISTORY

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

End of Procedure