

Nominating a Peer Reviewer or PART Evaluator for Teacher APPR Evaluations

1.0 SCOPE

- 1.1 This work procedure describes the process for an administrator to nominate a Peer Reviewer or PART Evaluator for a teacher's evaluation. This procedure is **only valid** for teachers being evaluated under the new Annual Professional Performance Review (APPR) process who have either opted for a Peer Reviewer or who have elected to use a PART project as part of their evaluation.
- 1.2 The peer reviewer process continues to be administered by the Careers In Teaching (CIT) group. This document does **not** address any changes to the CIT processes except for how the administrator will enter the final selection of the Peer Reviewer into PeopleSoft.

2.0 RESPONSIBILITY

2.1 The administrator will be responsible for nominating the Peer Reviewer or PART Evaluator in the PeopleSoft ePerformance system.

3.0 APPROVAL AUTHORITY

3.1 Peer Reviewers are assigned by the CIT group.

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 **Peer Reviewer:** a lead teacher who has successfully completed the Teachscape Rubric course and passed the required tests. Peer Reviewers receive extensive training in peer coaching skills. Being a mentor is a pre-requisite for eligibility.
- 4.4 **PART Evaluator:** the designated person, from the teacher's PART review team, who will enter the PART team's assessment into the ePerformance system. The PART reviewer is likely to be the Principal, but may be other members of the PART review team.

4.5 <u>Required</u> Process Steps to Nominate a Peer Reviewer or PART Evaluator in ePerformance

- 4.5.1 Administrator/Reviewer step: Nominate Peer Reviewer or PART Evaluator
- 4.5.2 **Peer/PART Reviewer step:** Accept or Decline Peer Reviewer or PART Evaluator Nomination.

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5.0 PROCEDURE

- 5.1 **PREREQUISITE:** the Set Goals step must be completed **prior to** the on-line nomination of a Peer Reviewer or PART Evaluator.
- 5.2 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! Terry Every child is a work	^{Teacher} of art. Create a masterpiece.	Thu, Mar 8, 12 Home Add to My Links Stan ou	<u>t</u>
My Page Human Resources Financials Personalize Content Layout	Search:	Wy Links Select One:	•
Enterprise Menu P commitment Control b Customer Contracts b eProcurement b eProcurement b errants b errants b Employee Self Service b Project Costing b RCSD Reporting b RCSD Reporting b Pucchasing b Seportesort	Main Menu Image: Committee Control Define or maintain budgets, budget-check, and review budgets and exceptions. Image: Control C	Enterprise Portal News 2 12 2011W-2 Is available online The 2011 W-2 Is now available online for viewing and printing. 403(b) 452 Plans 403(b) 457 Plans 400(b) 457 Plans 400(b	
b Worklist b 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. <u>Create Requisition</u> <u>Manage Requisitions</u> <u>PREVENT INS</u>		

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

OCHESTE	Welcome!	Тегту	Teacher
	Every chil	ld is a work	of art. Creat
My Page Human H	Resources <u>Financials</u>		
Human Resources	Menu	ē -	Employee Leave St
Access Human on PeopleTools	Irces 9.1 Resources Management System 8.5x.	n 9.1 Maintenance Pack 1	Leave Balances Absence Sick
Employee Self Employee Self 3 and Developme ERCSD PAR F Employee He	If <u>Service</u> Service transactions; includes Ti rroll and Compensation, Benefits nt, and employee Recruiting Acti <u>Review</u> ome	ime Reporting, Personal s, Stock Activity, Training ivities.	Vacation Personal Human Resources I

5.4 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.*

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ORACLE		
Favorites Main Menu		
Personalize Content Layo	<u>out</u>	
Menu	4	
Search: D My Favorites D Self Service D Manager Self Service D Recruiting D Workforce Administration fits Packay - Applicant Home - Careers - Change My Password - My Personalizations - My System Profile	»	
– <u>My Dictionary</u> – <u>My Feeds</u> – <u>My Portal Home</u>		

5.5 Click on the Manager Self Service menu option.

ORACLE [®]		Home Worklist MultiChannel Console Add to Favorites Sign ou
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.		
Personnel Activity Report (PAR) Review	Review transactions that you have submitted	Imme Management Manage schedules, view and approve reported and payable time, absence and overtime requests, exceptions, and more. Manage Schedules Approve Time and Exceptions Report Time Z lates_
Job and Personal Information Manage pb and personal information for your employees.	Compensation and Stock Compensation and Stock Review the compensation history and total compensation picture for your ofract reports, as well as review ther stock option history and vesting status of ahares Alocate Compensation Alocate Compensation Review Compensation Proposals Review 1 More_ 11 More_	Add and review information related to learning and development for employees. Current Team Profiles Mantain Job Profiles 14 More
Team Learning Vew and maintain team learning records and objectives, and browse and search the learning catalog. Manaser Learning Center Team Members Search Catalog Slore_	Performance Management Pan, evaluate and manage performance and development for your workforce Performance Documents	Career Planning Self Service Manage Career Planning Self Service Career Planning Self Service Career Procession Chart Career Procession Chart
Succession Planning Manage employee Succession Plans Manage Succession 302 Manage Succession Plans		

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

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ORACLE	Home Worklist MultiChannel Console Add to Favorites S	gn a
Favorites Main Menu > Manager Self Service		
Manager Self Service		
Performance Management	Edit "Performance Management" Folde	£
Plan, evaluate and manage performance and development for your workforce.		
Parformance Documents Create, update, and view performance documents for your workforce. Create Documents Current Documents Matricial Documents		

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

ORACLE		Home Worklist MultiChannel Console Add to Favorites Sign 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.	

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

	CLE.							
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.

Documents	you own				Customize Find 🖪	First 🗹 1-2 of 2 🖸 Last
Employee ID▲	Employee	Document Type	Begin Date	End Date	Job Title	Status
9913004	Terry Teacher	Formal Observation	09/01/2012	04/30/2013	Tchr-Elem 4-6	In Progress
9913004	Terry Teacher	RTA 2012-2013	07/01/2012	06/30/2013	Tchr-Elem 4-6	In Progress

5.9 Click on the <u>RTA 2012-2013</u> link next to the teacher for whom you need to nominate a Peer Reviewer or PART Evaluator.

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Current Perform	ance Documer	nts					
Document D	etails						
Terry Teacher, To RTA 2012-2013: (:hr-Elem 4-6)7/01/2012 - 06/3	30/	2013				
Performance Docu	ment Details						
Employee: Document Type: Template:	Terry Teacher RTA 2012-2013 RTA Teachscap	3 pe	Job Per Doc) Title: iod: :ument ID:	Tchr-Elen 07/01/201 5934	n 4-6 12 - 06/30/2013	
Manager:	2011_Admin/Pe Deborah Depai	eer rtme	ent-ManagerSta	tus:	In Progres	SS	
Document Progres	SS						
Step			Status	Due Date	Action	Next Action	
Set Goals		~	Completed	06/30/2013	View		
Nominate Participa	nts	0	Not Started	06/30/2013		Start	
Track Nominations		0	Not Started	06/30/2013			
Review Participant	Evaluations	0	Not Started	06/30/2013			
Complete Manager	Evaluation	0	Not Started	06/30/2013		Start	
Complete Manager	Evaluation	0	Not Started	06/30/2013		Start	

5.11 Click on the Start link in the Action column for the Nominate Participants step.

ORACLE				
Favorites Main Menu > Manager Self Servio	e > Performance Management >	Performance Do	cuments >	Current Documents
Nominate Participants				
Terry Teacher, Tchr-Elem 4-6 RTA 2012-2013: 07/01/2012 - 06/30/20)13			
Participant Role: CIT Peer Reviewer	Required:	0 Maximum:3		
Nominations				
Currently there are no nominees in your nom	ination list.			
+ Add CIT Peer Reviewer				
Save	Return to Document Detail			

5.12 Click on the Add CIT Peer Reviewer link to select the Peer Reviewer for this teacher. The PeopleSoft *Person Search – Simple* page will appear as shown below.

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ORACLE					
i Maia Ma	Neese Colf Contine	. Desfermentes Ma		Barfarman an Damma ata	Current De surrente
worites Main Me	nu > Manager Self Service	> Performance Ma	anagement >		> Current Documents
Person Se	arch - Simple				
Nominate Parti	cipants				
Instructions					
Search Criteria					
Name:					
Last Name:	lewis		1		
First Name:			1		
ACName:			1		
	[
Search					

Return to Previous Page

5.13 Enter the name of the Peer Reviewer who has been assigned to this teacher and click on the **Search** button. A search by last name is generally sufficient. However, to narrow the search results, you may also enter all or part of the first name in the *First Name* field.

Note: this example is showing the Peer Reviewer Nomination Process and the Peer Reviewer should be identified via the current Peer Reviewer assignment process. When nominating a PART Evaluator, the Administrator can also nominate his/her self to be the PART Evaluator.

Person Sear	ch - Simple	
Nominate Particip	ants	
Instructions		
Search Criteria		
Name:		
Last Name:	EWIS	
First Name:		
ACName:		
Search		
Search Results		
Amy M. Lewis		6 🔺
her Le	wis	
Timo _{65.}		6
Tyra D. Lewis		0
ОК		

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5.14 In the example shown above, there were multiple results for the last name entered. If you need additional information about a person on the list to help determine if they are the desired Peer Reviewer, click on the information (1) link next to the person's name.

Person Search - Simple Details for Amy M. Lewis			
Data			
Description:	Employee		
Data			
Туре:	EMP	Active	
Department:	26105	East High School - HS	
Location:	261	East	
Туре:	EMP	Active	
Department:	00319	Tchr Hourly-Board Auth - DM	
Location:	837	School Based Personnel	
Select This Person Return to List			

5.15 The basic information about this employee will appear. Click on the **Select This Person** button to select this person as the Peer Reviewer or click on the <u>Return to List</u> link to return to the search results page and continue looking for the desired Peer Reviewer. In this example, the <u>Return to List link was clicked</u>.

ORACLE		
Favorites Main Me	nu > Manager Self Service > Performance Management > Performance Documents	> Current Documents
Person Se	arch - Simple	
Nominate Parti	cipants	
Search Criteria		
Name:		
Last Name:	LEWIS	
First Name:		
ACName:		
Search		
Search Results		
Amy M. Lewi	s 🚺 🔺	
	Lewis	
L Timou,		
Tyra D. Lewi	s ô	
ОК		

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5.16 Select the first person in the list as the desired Peer Reviewer by clicking the Check Box next to their name. Click the **OK** button to complete the selection of this Peer Reviewer.

ORACLE		
Favorites Main Menu > Manager Self Service > Performance Manag	ement > Performance Docu	uments > Current Documents
Nominate Participants		
Terry Teacher, Tchr-Elem 4-6 RTA 2012-2013: 07/01/2012 - 06/30/2013		
\bigstar You have selected nominations for addition. The nominations will be when the transaction is saved.	e added	
Participant Role: CIT Peer Reviewer	Required: 0 Maximum:3	
Nominations		
Nominee	Action	
Amy M. Lewis	Ô	
+ Add CIT Peer Reviewer		
Save Save and Submit E. Return to Document Detail		

5.17 Note the confirmation of the Peer Reviewer selection that you have made. If, for some reason, this is not the desired Peer Reviewer, click on the **Trash Can** icon to remove this Peer Reviewer nomination from your list.



- You should carefully review the selected Peer Reviewer <u>before</u> submitting this nomination. Make sure the Peer Reviewer you have selected is the Peer Reviewer identified by the CIT Peer Reviewer selection process. Also, with over 6,000 employees in the District, there are many people who have similar names. Make any necessary corrections to the Peer Reviewer nomination before clicking on the **Save and Submit** button.
- 5.18 If you click the **Save and Submit** button, your nominations will be saved and the nomination request will be placed in the Peer Reviewer's *Other's Performance Documents*. Additionally, an e-mail will be sent to the Peer Reviewer so that they can promptly **Accept** or **Decline** the request.



5.19 If you click the **Save** button, you nominations will **only** be saved, but they will not be submitted to the Peer Reviewer for their acceptance. To complete the nomination process, you **must** use the **Save and Submit** button.

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voines Main Menu	> Manager Self	Sel	vice > Perro		ement >			it Document
Current Perform	ance Docume	nts					_	
Document D	etails							
Ferry Teacher, To RTA 2012-2013: 0	hr-Elem 4-6)7/01/2012 - 06/	30/	2013					
You have succes	ssfully submitted	you	nominations.					
Performance Docu	ment Details							
Employee:	Terry Teacher		Job Title:		Tchr-Elem 4-6			
Document Type:	RTA 2012-2013	3	Pe	riod:	07/01/201	12 - 06/30/2013		
Template:	RTA Teachscape Document ID: 5934							
Manager:	2011_Admin/P Deborah Depa	2011_Admin/Peer Deborah Department-ManagerStatus:		In Progress				
Document Progres	3S		-		-			
Step			Status	Due Date	Action	Next Action		
Set Goals		~	Completed	06/30/2013	View			
Nominate Participa	nts	0	In Progress	06/30/2013	<u>Edit</u>			
Track Nominations		•	In Progress	06/30/2013	<u>Edit</u>			
Review Participant I	Evaluations	0	Not Started	06/30/2013				
Complete Manager	Evaluation	0	Not Started	06/30/2013		Start		

- 5.20 Review the page shown above. Note that the system has indicated that you have successfully **submitted** your nominations and that both the *Nominate Participants* and *Track Nominations* process steps show as *In Progress*.
- 5.21 **Congratulations** you have completed the manager portion of the Peer Nomination 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. Displayed on			
	EngageRochester site.			

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
10/17/12	Original	Original Document

End of Procedure