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ROCHESTER CITY SCHOOL DISTRICT  
Performance Evaluation Review Process – Civil Service

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## 1.0 SCOPE

- 1.1 The Performance Evaluation Review process entails conducting a performance review meeting with each employee, the employee commenting on the review and acknowledging that the review has been held (in PeopleSoft), the manager entering his/her review meeting comments and the manager completing the evaluation.
- 1.2 The examples shown in this document illustrate the Performance Evaluation Review process for a BENTE Civil Service employee. The process is similar for all District employees.

## 2.0 RESPONSIBILITY

- 2.1 The school principal or department manager has the ultimate responsibility to ensure that all performance reviews are conducted and that evaluations are acknowledged and completed in a timely fashion for all District personnel at his/her school/department.

## 3.0 APPROVAL AUTHORITY

- 3.1 No approval process has been specified or designed into the ePerformance system.

## 4.0 DEFINITIONS

- 4.1 **Performance Review:** meeting conducted by the manager with the employee for the purpose of reviewing the employee's performance evaluation and rating for the current school year.



**5.0 PROCEDURE**

5.1 The last step of writing the evaluation has now been completed and you previously marked the employee’s performance document as *Available for Review*. Note: at this time, the manager can still open the performance document to make any necessary changes or updates to the evaluation. However, because the document was previously marked as *Available for Review*, the employee may have reviewed the evaluation by this time.

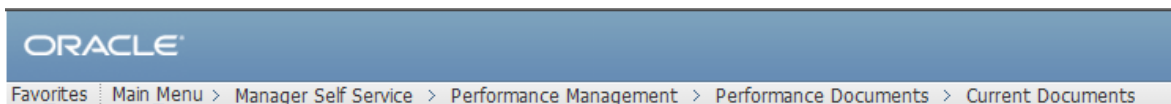


5.2 Conduct the **Performance Review** meeting with the employee. As you conduct the review, have the employee validate that their *Employee Data* and *Employee Classification* are correct. Notify your HCI Zone director if there are any discrepancies.

5.3 Upon completion of the meeting, explain that you will be marking the electronic evaluation with *Review Held* status. Remind the employee that they have a responsibility to log into PeopleSoft and acknowledge that the performance review meeting was conducted and that the performance evaluation was reviewed with them. At that time, the employee will also have the opportunity to add their comments and/or rebuttal to the performance evaluation/rating they have received.



5.4 **Manager steps – mark the evaluation as Review Held.** Navigate to the employee’s evaluation document. Navigation: **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					
Employee	Document Type	Begin Date	End Date	Job Title	Status
Tyranus Rex	<a href="#">Civil Service</a>	07/01/2011	06/30/2012	Custodian Engineer	Available for Review
Barney Rubble	<a href="#">Civil Service</a>	07/01/2011	06/30/2012	Asst User Suppt Instructor I	Available for Review
Betty Rubble	<a href="#">Civil Service</a>	09/01/2011	06/30/2012	Tchr-on-Assignment	In Progress

5.4.1 Click on the [Civil Service](#) link next to the document to mark as *Mark Review Held*. The following page will appear.



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

**Current Performance Documents**

**Document Details**

Tyranus Rex, Custodian Engineer  
Civil Service: 07/01/2011 - 06/30/2012

Performance Document Details			
Employee:	Tyranus Rex	Job Title:	Custodian Engineer
Document Type:	Civil Service	Period:	07/01-2011 - 06/30/2012
Template:	BENTE Performance Appraisal	Document ID:	2708
Manager:	Roger Roadrunner	Status:	Available for Review

Document Progress				
Step	Status	Due Date	Action	Next Action
Complete Manager Evaluation	In Progress	06/30/2012	<a href="#">Edit</a>	<a href="#">Mark Review Held</a>

[Return to Select Documents](#)

- 5.4.2 Manager clicks on the [Mark Review Held](#) link. Once this step has been completed, the employee will be able to Acknowledge that the review meeting has been held.

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

**Performance Document - Civil Service**

**Manager Evaluation**

Tyranus Rex, Custodian Engineer  
Civil Service: 07/01/2011 - 06/30/2012

Author: Roger Roadrunner      Role: Manager  
Status: Available for Review      Due Date: 06/30/2012  
Approval: Not Required

Employee Data

Empl ID: 9913005  
Department: 27805      Edison-Bus, Fin, Entre-HS  
Location: 270      Edison  
Plan/Grade: BEN      10  
[RCSD Empl Class](#)

The status of this evaluation is **Available for Review**. In this status, you may enter comments in the **Manager Comments** section, if applicable.

At any time you can save any entries you make on the evaluation by selecting the **Save** button. If you are ready to confirm that the review was held with the employee, select the **Review Held** button to notify the employee that they are able to review and acknowledge the evaluation.

          [Return to Document Detail](#)

- 5.4.3 Manager clicks on the **Review Held** button.



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

**Performance Document - Civil Service**

**Review Held**

Select the OK button to confirm that the performance review was held for this document.

OK Cancel

5.4.4 Click the **OK** button to confirm that the performance review was held.

5.4.5 Note that the *Next Action* on the *Complete Manager Evaluation* step now shows *Acknowledge*.

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

**Current Performance Documents**

**Document Details**

Tyranus Rex, Custodian Engineer  
Civil Service: 07/01/2011 - 06/30/2012

You have successfully marked the review held for your evaluation.

Performance Document Details			
<b>Employee:</b>	Tyranus Rex	<b>Job Title:</b>	Custodian Engineer
<b>Document Type:</b>	Civil Service	<b>Period:</b>	07/01/2011 - 06/30/2012
<b>Template:</b>	BENTE Performance Appraisal	<b>Document ID:</b>	2708
<b>Manager:</b>	Roger Roadrunner	<b>Status:</b>	Review Held

Document Progress				
Step	Status	Due Date	Action	Next Action
Complete Manager Evaluation	Review Held	06/30/2012	<a href="#">View</a>	<a href="#">Acknowledge</a>

[Return to Select Documents](#)

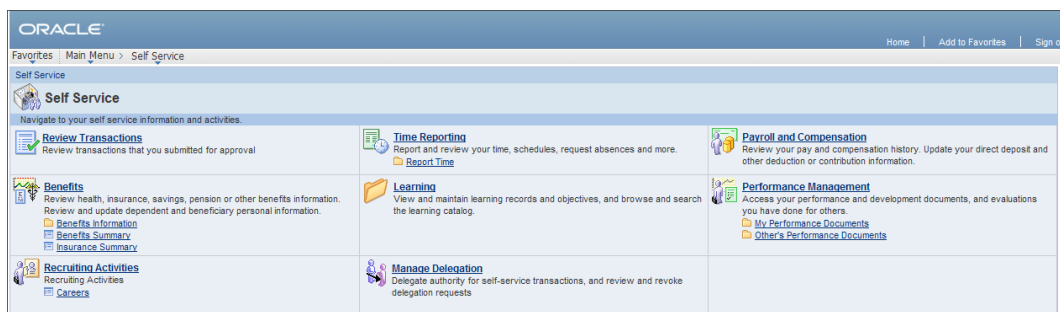
5.4.6 The next step in the process is for the employee to acknowledge that the review has been conducted and to add their comments to the performance document.



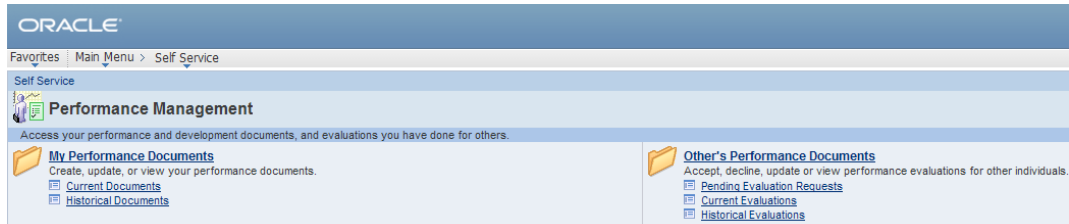
**5.5 Employee steps – acknowledge review held and add employee comments to the evaluation.** Log in to PeopleSoft. A screen similar to the following will be displayed. If logging in through Portal, the employee will need to click on the Human Resources tab followed by the Human Resources 9.1 link to see this page. For reference, see your PeopleSoft ePerformance Navigation Basics document. *Note: an e-mail will be sent to the employee requesting their action. If the employee clicks on the e-mailed link, the employee will be taken directly to the performance document if already logged into PeopleSoft. If not logged into PeopleSoft, the employee will be taken to the PeopleSoft login screen and upon logging in, will be taken directly to the performance document.*



**5.5.1 Employee clicks on Self Service.**



**5.5.2 Employee clicks on Performance Management.**



5.5.3 Employee clicks on **My Performance Documents**.



5.5.4 Employee clicks on **Current Documents**. A screen, similar to the following, will be displayed.



5.5.5 Employee clicks on the [Civil Service](#) link next to the performance document to be reviewed and acknowledged.



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[Favorites](#) | [Main Menu](#) > [Self Service](#) > [Performance Management](#) > [My Performance Documents](#) > [Current Documents](#)

**Performance Documents**

**Document Details**

Tyranus Rex, Custodian Engineer  
 Civil Service: 07/01/2011 - 06/30/2012

Performance Document Details			
<b>Employee:</b>	Tyranus Rex	<b>Job Title:</b>	Custodian Engineer
<b>Document Type:</b>	Civil Service	<b>Period:</b>	07/01/2011 - 06/30/2012
<b>Template:</b>	BENTE Performance Appraisal	<b>Document ID:</b>	2708
<b>Manager:</b>	Roger Roadrunner	<b>Status:</b>	Review Held

Document Progress				
Step	Status	Due Date	Action	Next Action
Review Manager Evaluation	Review Held	06/30/2012	<a href="#">View</a>	<a href="#">Acknowledge</a>

[Return to Select Documents](#)

- 5.5.6 Employee clicks on the [Acknowledge](#) link to acknowledge that the review meeting has been conducted and to add their post-evaluation review meeting comments to the performance document.

*By acknowledging that the review was conducted, the employee is not agreeing or disagreeing with the evaluation itself; they are only acknowledging that they have had an opportunity to review their performance evaluation with their manager.*



5.5.7 Note that the performance document opens.

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[Favorites](#) | [Main Menu](#) > [Self Service](#) > [Performance Management](#) > [My Performance Documents](#) > [Current Documents](#)

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**Performance Document - Civil Service**

**Manager Evaluation**

Tyranus Rex, Custodian Engineer  
 Civil Service: 07/01/2011 - 06/30/2012

**Author:** Roger Roadrunner      **Role:** Manager  
**Status:** Review Held              **Due Date:** 06/30/2012  
**Approval:** Not Required

Employee Data

<b>Empl ID:</b>	9913005	
<b>Department:</b>	27805	Edison-Bus, Fin, Entre-HS
<b>Location:</b>	270	Edison
<b>Plan/Grade:</b>	BEN              10	<a href="#">RCSD Empl Class</a>

The status of this evaluation is **Review Held**. In this status, enter comments in the **Employee Comments/Rebuttal** section, if applicable. At any time you can save any entries you make on the evaluation by using the **Save** button.

After adding your comments, please acknowledge that the evaluation has been reviewed with you by selecting the **Acknowledge Review** button. Your acknowledgement does not indicate agreement.

Save
Acknowledge Review

[Return to Document Detail](#)

5.5.8 The employee can scroll down through all the sections of the document. Note that the content of the evaluation is “greyed out” and cannot be changed by either the employee or the manager. Also, note the change history at the bottom of each element that is rated. A sample section of the performance document is shown below.

**Quality of Work**

Rate only those factors that apply to the position being appraised.

Please make your comments specific, constructive and objective.

[Expand](#)                      [Collapse](#)

Quality of Work

**Description:** Accuracy, thoroughness; completed work shows care and good judgement in its preparation.

L0-N/A     
  L1-Unacceptable     
  L2-Well Below Average     
  L3-Somewhat Below Average     
  L4-Average     
  L5-Somewhat Above Average  
 L6-Well Above Average

**Rating:**                      L6-Well Above Average                     

**Comments:**                      Tyranus clearly demonstrated his ability to delivery quality work on a consistent basis and was regularly recognized by his manager and peers for the quality of his work.

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Created By:	Template	05/17/2012 3:21PM
Last Modified By:	Roger Roadrunner	05/17/2012 3:40PM





5.5.9 Employee scrolls to the bottom of the evaluation – where the *Employee Comments/Rebuttal* section begins.

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 preclude you from providing a written rebuttal to your evaluation.

Employee Comments/Rebuttal Summary

Comments: Roger accurately assessed my performance for the past year and he made some good suggestions for how I can continue to enhance and improve my skills.

5.5.10 The employee should add their comments and/or rebuttal to the performance document as shown above. As with all comment boxes, the employee can also perform a spell check by clicking on the spell check icon.

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

**Performance Document - Civil Service**

**Manager Evaluation**

Tyranus Rex, Custodian Engineer  
 Civil Service: 07/01/2011 - 06/30/2012

Author: Roger Roadrunner Role: Manager  
 Status: Review Held Due Date: 06/30/2012  
 Approval: Not Required

Employee Data

Empl ID:	9913005	
Department:	27805	Edison-Bus, Fin, Entre-HS
Location:	270	Edison
Plan/Grade:	BEN	10

[RCSD Empl Class](#)

You have successfully saved your evaluation.

The status of this evaluation is **Review Held**. In this status, enter comments in the **Employee Comments/Rebuttal** section, if applicable. At any time you can save any entries you make on the evaluation by using the **Save** button.

After adding your comments, please acknowledge that the evaluation has been reviewed with you by selecting the **Acknowledge Review** button. Your acknowledgement does not indicate agreement.

Save Acknowledge Review [Return to Document Detail](#)



- 5.5.11 Employee clicks on the **Save** button to save their newly added comments on the performance document. The *Save* and *Acknowledge Review* buttons shown above are at the top of the performance document. These buttons also appear at the bottom of the performance document. Either may be used. In the screen shown above, note that the evaluation was successfully saved.
- 5.5.12 Employee clicks on the **Acknowledge Review** button at the bottom of the page to acknowledge that the performance review was held.

- 5.5.13 Employee clicks on the **OK** button to complete the acknowledgement process.

Performance Document Details				
Employee:	Tyranus Rex	Job Title:	Custodian Engineer	
Document Type:	Civil Service	Period:	07/01/2011 - 06/30/2012	
Template:	BENTE Performance Appraisal	Document ID:	2708	
Manager:	Roger Roadrunner	Status:	Acknowledged	

Document Progress				
Step	Status	Due Date	Action	Next Action
Review Manager Evaluation	Acknowledged	06/30/2012	<a href="#">View</a>	

[Return to Select Documents](#)

- 5.5.14 Note, on the screen above, that the *Status* of the performance document has changed to *Acknowledged* and that there are **no further steps for the employee** in the *Next Action* column.



5.5.15 This completes the employee’s steps for the current year’s evaluation document.

**5.6 Manager’s Final Steps – Adding Comments and Completing the Evaluation.** The manager must complete the performance document in PeopleSoft by selecting the performance document that has been acknowledged from his/her roster. Navigation: **Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents**. The following shows an abbreviated roster.

Employee	Document Type	Begin Date	End Date	Job Title	Status
Tyranus Rex	<a href="#">Civil Service</a>	07/01/2011	06/30/2012	Custodian Engineer	Acknowledged

5.6.1 Manager clicks on the [Civil Service](#) link. The following screen appears.

Step	Status	Due Date	Action	Next Action
Complete Manager Evaluation	Acknowledged	06/30/2012	<a href="#">View</a>	<a href="#">Complete</a>

5.6.2 Manager clicks on the [Complete](#) link to complete the evaluation (see next page).



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

**Performance Document - Civil Service**

**Manager Evaluation**

Tyranus Rex, Custodian Engineer  
Civil Service: 07/01/2011 - 06/30/2012

Author: Roger Roadrunner      Role: Manager  
Status: Acknowledged      Due Date: 06/30/2012  
Approval: Not Required

Employee Data

Empl ID:	9913005		
Department:	27805	Edison-Bus, Fin, Entre-HS	
Location:	270	Edison	
Plan/Grade:	BEN	10	<a href="#">RCSD Empl Class</a>

The status of this evaluation is **Acknowledged**. In this status, you may enter comments in the **Manager Comments** section, if applicable.

At any time you can save any entries you make on the evaluation by selecting the **Save** button.

Select the **Complete** button to finalize this document. After the document is completed, it will be stored in Historical Documents.

Save    Complete       [Return to Document Detail](#)

5.6.3 Manager should scroll down to the *Manager Comments* section of the performance document, as shown below.

Section - Manager Comments

Please provide a summary of the evaluation process with this employee (i.e., timeliness, receptivity to feedback, participation, etc.).

Comments:

5.6.4 Manager should add any comments to the *Manager Comments* section of the performance document. Remember, these comments should be relative to the performance evaluation review process. Click on the **Save** button to save the newly added comments.

5.6.5 **Print the Evaluation Signature or Summary page.** Scroll to the bottom of the page and click on the appropriate link, such as the [RCSD Signature Page](#) or [RCSD Overall Rating](#) link, to display the summary page. Note: the BENTE signature page is shown below. The ASAR Overall Rating page itself is different, but the procedure outlined below is the same.



ORACLE

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

**RCSD Signature Page**

Document ID:	2708
Evaluatee:	Tyranus Rex
Empl ID:	9913005

[Return](#)

5.6.5.1 Click on the Print icon to print the summary page. The summary page will be opened as a PDF document, as shown below.

**RCSD Signature Page**  
**Manager Evaluation**

Randall Schenk, Tchr-on-Assignment  
Civil Service, 09/01/201 - 06/30/2012

**Employee Data**

Document ID :	2708
Evaluatee :	Tyranus Rex
Empl ID :	9913005
Review Held Date :	05/25/12 1:37PM
Acknowledge Review Date :	05/25/12 1:37PM

**Employee Acknowledge Final Evaluation**

Print Employee Name:

Signature:

Date:

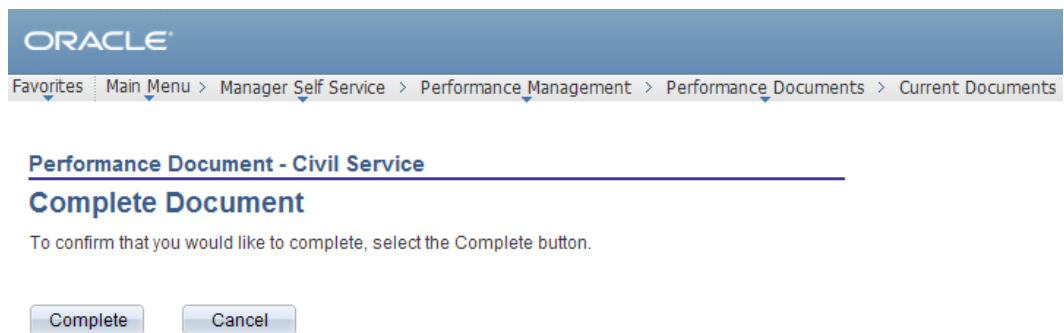
*This signature signifies only that I have read the form.*

5.6.5.2 Move your cursor to the bottom of the page or hover near the bottom of the page until the Adobe menu bar appears as shown below.

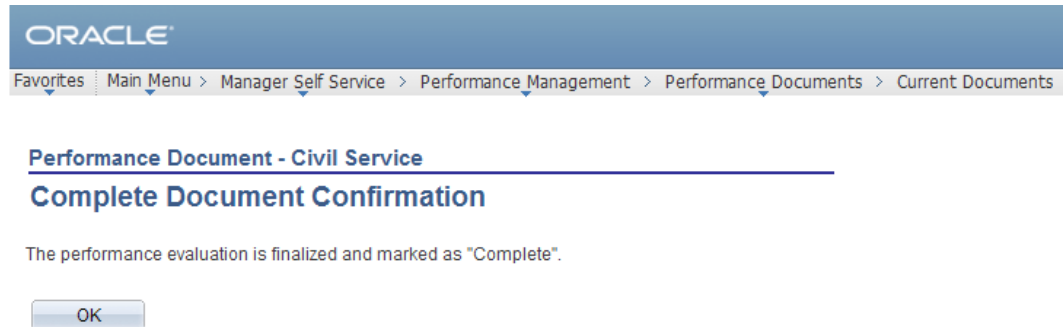




- 5.6.5.3 Click the Printer icon to print the summary page for employee sign-off.
- 5.6.5.4 When done printing/viewing the evaluation, simply close the new window that opened to display the performance evaluation by doing a File ⇒ Exit from the new window's menu bar. Alternatively, you can X-out of the new window.
- 5.6.5.5 Have the employee sign the printed summary page and scan and upload it to the HCI SharePoint site for employee evaluations.
- 5.6.6 Manager clicks on the **Complete** button to finalize the evaluation document. Once the document has been completed, it will be moved from *Current Documents* to *Historical Documents*.



- 5.6.7 Manager clicks the **Complete** button on this screen to finalize the document.



- 5.6.8 Manager clicks the **OK** button to finalize the performance evaluation and mark it as Complete.



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

**Performance Document History**

**Document Details**

Tyranus Rex, Custodian Engineer  
Civil Service: 07/01/2011 - 06/30/2012

✔ You have successfully completed your evaluation.

Performance Document Details			
Employee:	Tyranus Rex	Job Title:	Custodian Engineer
Document Type:	Civil Service	Period:	07/01/2011 - 06/30/2012
Template:	BENTE Performance Appraisal	Document ID:	2708
Manager:	Roger Roadrunner	Status:	Completed

Document Progress				
Step	Status	Due Date	Action	Next Action
Complete Manager Evaluation	✔ Completed	06/30/2012	<a href="#">View</a>	

[Return to Select Documents](#)

5.6.9 Note the *Status* has changed to *Completed* as seen above and there are no further steps in the *Next Action* column.

**5.7 Congratulations!** You have now completed the performance evaluation for this employee. To review the performance document at any time in the future, you will need to navigate to the *Historical Documents* menu option.

ROCHESTER CITY SCHOOL DISTRICT

Performance Evaluation Review Process – Civil Service



**6.0 ASSOCIATED DOCUMENTS**

6.1 Reference: *BENTE Civil Service Annual Value Stream Map (VSM)* – located on the SharePoint project site in the Design Documents folder.

**7.0 RECORD RETENTION**

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

**8.0 REVISION HISTORY**

Date:	Rev.	Description of Revision:
5/21/12	Original	Original Document
3/22/13	2	Updated graphic for signature page

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