

1.0 SCOPE

- 1.1 The Performance Evaluation Review process entails enabling the employee to view his/her performance evaluation, conducting a performance review meeting with each employee, the employee adding their comments to the evaluation 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 teacher. The process is similar for all District employees.

2.0 RESPONSIBILITY

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

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 first step of the Performance Evaluation Review process is to enable the employee to review their performance evaluation. In the ePerformance system, marking the employee’s performance document as *Available for Review* will enable them to review their performance document in PeopleSoft. When the performance document is marked as *Available for Review*, the system will send the employee an email notification and the employee will be able to review the content of their performance document. **Note:** depending upon your management style, you may choose to complete this step sometime prior to the Review Meeting or immediately after the review meeting has been held. Keep in mind that the employee can view the content once the document is in *Available for Review* status.



5.2 **Manager Step – Mark Available for Review.** Navigate to the employee’s evaluation document. Navigation: **Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents.**

5.3 Click on the [RTA 2012-2013](#) link next to the performance document to mark as *Available for Review*.

The screenshot shows the Oracle PeopleSoft interface. At the top, the Oracle logo is visible. Below it is a breadcrumb navigation path: Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. The main heading is 'Current Performance Documents'. Below that is 'Document Details' for Barney Rubble, Tchr-Elem 4-6, with RTA 2012-2013: 07/01/2012 - 06/30/2013. A table titled 'Performance Document Details' contains the following information:

Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6
Document Type:	RTA 2012-2013	Period:	07/01/2012 - 06/30/2013
Template:	RTA Teachscape 2011_Admin	Document ID:	7077
Manager:	Only Mister Slate	Status:	In Progress

Below this table is a 'Document Progress' table:

Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	06/30/2013	View	
Complete Manager Evaluation	🕒 In Progress	06/30/2013	Edit	Mark Available

At the bottom of the screenshot, there is a link: [Return to Select Documents](#).



5.4 Click on the [Mark Available](#) link **ONLY** when you are ready for the employee to review the performance document in PeopleSoft. When this link is clicked, the performance document will open.



ORACLE

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

Performance Document - RTA 2012-2013

Manager Evaluation

Barney Rubble, Tchr-Elem 4-6
 RTA 2012-2013: 07/01/2012 - 06/30/2013

Author: Mister Slate **Role:** Manager
Status: In Progress **Due Date:** 06/30/2013
Approval: Not Required

Employee Data

Empl ID: 9913002
Department: 14602 #46 - Charles Carroll - ES
Location: 146 School 46
Plan/Grade: RTA A [RCSD Empl Class](#)

[Rating History](#)

Rate each element and enter comments for each section in this evaluation.
 At any time you can save any entries you make on the evaluation by selecting the **Save** button.

 [Return to Document Detail](#)

5.5 Click on the **Available for Review** button.

Performance Document - RTA

Available for Review

You have chosen to allow the employee to view this evaluation. To confirm that the employee can view evaluation, select the OK button.

5.6 Click the **OK** button to enable the employee to view the evaluation. An e-mail will be sent to the employee with notification that the evaluation has been completed is now available for their review.



- 5.7 The *Document Details* page will be displayed as shown below. Note the text near the top of the page indicating that the document has been made available for employee review. Also, note that *Next Action* in the *Complete Manager Evaluation* step has been updated to reflect the next step in the review process, *Mark Review Held*. **Note:** while in “Available for Review” status, the employee can add his/her comments/rebuttal to the performance document, but they cannot complete the Acknowledge step because the review meeting has not yet been held.

ORACLE

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

Current Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
RTA 2012-2013: 07/01/2012 - 06/30/2013

You have successfully made your evaluation available for the employee's review.

Performance Document Details

Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6
Document Type:	RTA 2012-2013	Period:	07/01/2012 - 06/30/2013
Template:	RTA Teachscape 2011_Admin Only	Document ID:	7077
Manager:	Mister Slate	Status:	Available for Review

Document Progress

Step	Status	Due Date	Action	Next Action
Set Goals	✔ Completed	06/30/2013	View	
Complete Manager Evaluation	🟡 Available for Review	06/30/2013	View	Mark Review Held

[Return to Select Documents](#)

- 5.8 After the manager has marked the performance evaluation as “Available for Review”, the employee will be able to review the performance document at any time. The ePerformance system will send e-mail notifications whenever additional steps in the evaluation process, such as *Mark Review Held* or *Acknowledge*, are completed.
- 5.9 Conduct the **Performance Review** meeting with the employee. As you conduct the review, have the employee validate that their *Employee Tenure Status* and *Employee Career Level* are correct. Upon completion of the meeting, explain that you will be changing the status of the evaluation to the *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.
- 5.10 **Manager Step – 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.**



5.10.1 Click on the [RTA 2012-2013](#) link next to the document to mark as *Review Held*. The following page will appear.

ORACLE

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

Current Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
RTA 2012-2013: 07/01/2012 - 06/30/2013

Performance Document Details			
Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6
Document Type:	RTA 2012-2013	Period:	07/01/2012 - 06/30/2013
Template:	RTA Teachscape 2011_Admin Only	Document ID:	7077
Manager:	Mister Slate	Status:	Available for Review

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	06/30/2013	View	
Complete Manager Evaluation	🕒 Available for Review	06/30/2013	View	Mark Review Held

[Return to Select Documents](#)

5.10.2 Click on the [Mark Review Held](#) link.

ORACLE

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

Performance Document - RTA 2012-2013

Manager Evaluation

Barney Rubble, Tchr-Elem 4-6
RTA 2012-2013: 07/01/2012 - 06/30/2013

Author: Barney Rubble **Role:** Manager
Status: Available for Review **Due Date:** 06/30/2013
Approval: Not Required

Employee Data

Empl ID: 9913002
Department: 14602 #46 - Charles Carroll - ES
Location: 146 School 46
Plan/Grade: RTA A [RCSD Empl Class](#)

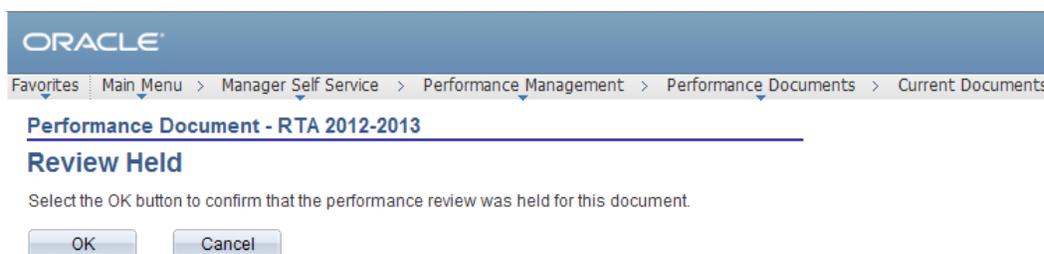
[Rating History](#)

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.

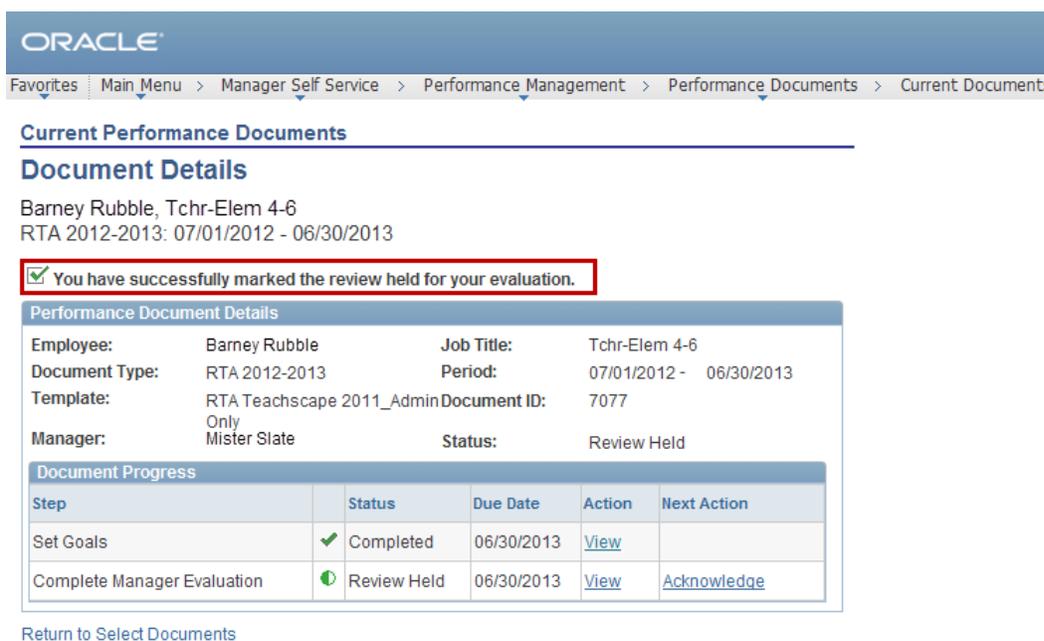
 [Return to Document Detail](#)

5.10.3 Manager clicks on the **Review Held** button.



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

5.10.5 Note that you have successfully marked the performance document as *Review Held*. The *Next Action* on the *Complete Manager Evaluation* step now shows *Acknowledge*, which is the employee’s step in the review process.



5.10.6 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.



5.11 Employee step – acknowledge review held and add employee comments to the evaluation.

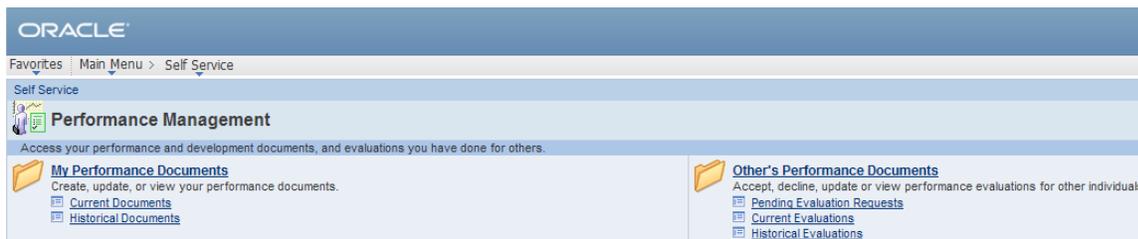
Log in to PeopleSoft. A screen similar to the following will be displayed. If logging in through Portal, the employee will need to click on the Human Resources tab followed by the Human Resources 9.1 link to see this page. For reference, see your PeopleSoft ePerformance Navigation Basics document. *Note: 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.*



5.11.1 Employee clicks on Self Service.



5.11.2 Employee clicks on Performance Management.



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



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

Performance Documents

Barney Rubble

Listed below are your current performance documents.

Your Documents						
Employee ID	Document Type	Begin Date	End Date	Job Title	Status	Manager
9913002	RTA 2012-2013	07/01/2012	06/30/2013	Tchr-Elem 4-6	Review Held	Mister Slate

5.11.5 Employee clicks on the [RTA 2012-2013](#) link next to the performance document to be reviewed and acknowledged.



Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
 RTA 2012-2013: 07/01/2012 - 06/30/2013

Performance Document Details				
Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6	
Document Type:	RTA 2012-2013	Period:	07/01/2012 - 06/30/2013	
Template:	RTA Teachscape 2011_Admin Only	Document ID:	7077	
Manager:	Mister Slate	Status:	Review Held	

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	06/30/2013	View	
Review Manager Evaluation	🕒 Review Held	06/30/2013	View	Acknowledge

[Return to Select Documents](#)

- 5.11.6 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.



5.11.7 The performance document opens and the following page appears.

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

Performance Document - RTA 2012-2013

Manager Evaluation

Barney Rubble, Tchr-Elem 4-6
 RTA 2012-2013: 07/01/2012 - 06/30/2013

Author: Mister Slate **Role:** Manager
Status: Review Held **Due Date:** 06/30/2013
Approval: Not Required

Employee Data

Empl ID: 9913002
Department: 14602 #46 - Charles Carroll - ES
Location: 146 School 46
Plan/Grade: RTA A
[RCSD Empl Class](#)

[Rating History](#)

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](#)

5.11.8 The employee can scroll down through all the sections of the document. Note that the ratings and content of the evaluation are “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.

Domain 1A

Description: Demonstrating Knowledge of Content and Pedagogy

L0-Not Rated L1-Ineffective L2-Developing L3-Effective L4-Highly Effective

Rating: L3-Effective

Comments:

Created By: Template 05/06/2013 11:48AM
 Last Modified By: Mister Slate 05/06/2013 2:43PM

5.11.9 Employee scrolls to the bottom of the evaluation – where the *Employee Comments/Rebuttal* section begins – as shown below.

Employee Comments/Rebuttal

Please provide a summary of the evaluation process with this manager (i.e., timeliness, preparation, accessibility, provided coaching and support, etc.).

If you wish to submit a rebuttal at this time, you may do so in the Comments box below. If you wish to submit a rebuttal at a later date, please indicate the following in the Comments box: "I will provide a rebuttal at a later date that will be added to my personnel file."

Employee Comments/Rebuttal Summary

Comments: Employee can add their comments/rebuttal about the evaluation in this box. The content can be copied from another document, such as a Word document, and pasted into this box.

5.11.10 The employee should add their comments and/or rebuttal to the performance document as shown above. Be sure to save after adding your comments!

Employee Comments/Rebuttal

Please provide a summary of the evaluation process with this manager (i.e., timeliness, preparation, accessibility, provided coaching and support, etc.).

If you wish to submit a rebuttal at this time, you may do so in the Comments box below. If you wish to submit a rebuttal at a later date, please indicate the following in the Comments box: "I will provide a rebuttal at a later date that will be added to my personnel file."

Employee Comments/Rebuttal Summary

Comments: Employee can add their comments/rebuttal about the evaluation in this box. The content can be copied from another document, such as a Word document, and pasted into this box.

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
Barney_Inf_Obs.pdf	Informal Obs		05/06/2013 3:44:47PM	Mister Slate	

[+ Add Attachment](#)

[▶ Audit History](#)

[RCSD Composite Score](#)

[Return to Document Detail](#)



5.11.11 Employee clicks on the **Save** button to save the comments/rebuttal they added to the performance document. The *Save* and *Acknowledge Review* buttons shown above are at the bottom of the performance document. These buttons also appear at the top of the performance document. Either may be used. Upon saving, the ePerformance system will return the employee to the top of the performance document, as shown below. Note that the system has confirmed that the employee successfully saved their input.



Performance Document - RTA 2012-2013

Manager Evaluation

Barney Rubble, Tchr-Elem 4-6

RTA 2012-2013: 07/01/2012 - 06/30/2013

Author: Mister Slate Role: Manager
 Status: Review Held Due Date: 06/30/2013
 Approval: Not Required

Employee Data

Empl ID: 9913002
 Department: 14602 #46 - Charles Carroll - ES
 Location: 146 School 46
 Plan/Grade: RTA A [RCSD Empl Class](#)

[Rating History](#)

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.

[Return to Document Detail](#)

5.11.12 Employee clicks on the **Acknowledge Review** button at the top of the page to acknowledge that the performance review meeting was held.

Performance Document - RTA 2012-2013

Acknowledge Document Review

You have chosen to acknowledge your performance evaluation. To confirm this acknowledgement, select the **OK** button.

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



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

Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
 RTA 2012-2013: 07/01/2012 - 06/30/2013

You have successfully acknowledged your evaluation.

Performance Document Details

Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6
Document Type:	RTA 2012-2013	Period:	07/01/2012 - 06/30/2013
Template:	RTA Teachscape 2011_Admin Only	Document ID:	7077
Manager:	Mister Slate	Status:	Acknowledged

Document Progress

Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	06/30/2013	View	
Review Manager Evaluation	🟢 Acknowledged	06/30/2013	View	

[Return to Select Documents](#)

5.11.14 Note, on the screen above, that the employee has successfully acknowledged that the review meeting has taken place, 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.

5.11.15 This completes the employee’s steps in the Performance Evaluation Review process.

5.12 Manager Note: while the document is in the *Available for Review*, *Review Held* or *Acknowledged* status, the **Reopen** button will appear at the bottom of the performance document. The manager can use this button to reset the performance document to the *In Progress* status in the event that any changes need to be made to the performance document. **Once the performance document has been completed, the Manager can no longer reopen it.**



5.13 Manager Steps – Adding Manager 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.

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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.

Employee ID	Employee	Document Type	Begin Date	End Date	Job Title	Status
9913002	Barney Rubble	RTA 2012-2013	07/01/2012	06/30/2013	Tchr-Elem 4-6	Acknowledged

5.13.1 Manager clicks on the [RTA 2012-2013](#) link. The screen appears below.

ORACLE

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

Current Performance Documents

Document Details

Barney Rubble, Tchr-Elem 4-6
RTA 2012-2013: 07/01/2012 - 06/30/2013

Performance Document Details			
Employee:	Barney Rubble	Job Title:	Tchr-Elem 4-6
Document Type:	RTA 2012-2013	Period:	07/01/2012 - 06/30/2013
Template:	RTA Teachscape 2011_Admin Document ID: 7077		
Manager:	Only Mister Slate	Status:	Acknowledged

Document Progress				
Step	Status	Due Date	Action	Next Action
Set Goals	✓ Completed	06/30/2013	View	
Complete Manager Evaluation	🟢 Acknowledged	06/30/2013	View	Complete

[Return to Select Documents](#)

5.13.2 Manager clicks on the [Complete](#) link to complete the performance review process for this evaluation. The performance document will open.



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

Performance Document - RTA 2012-2013

Manager Evaluation

Barney Rubble, Tchr-Elem 4-6
 RTA 2012-2013: 07/01/2012 - 06/30/2013

Author: Mister Slate Role: Manager
 Status: Acknowledged Due Date: 06/30/2013
 Approval: Not Required

Employee Data

Empl ID: 9913002
 Department: 14602 #46 - Charles Carroll - ES
 Location: 146 School 46
 Plan/Grade: RTA A [RCSD Empl Class](#)

[Rating History](#)

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](#)

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

Manager Comments

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

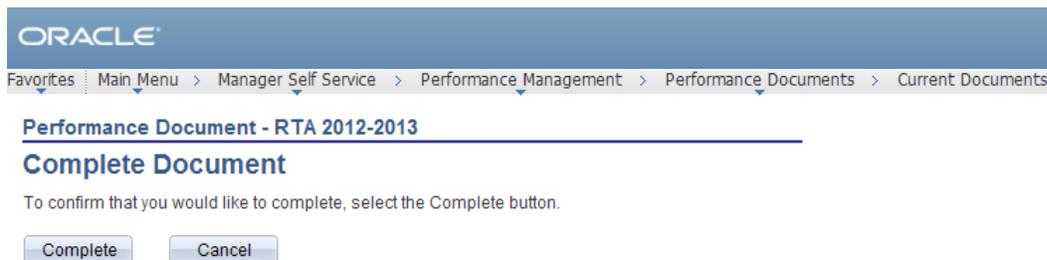
Comments:

5.13.4 Manager should add any comments to the *Manager Comments* section of the performance document. **Note:** only comments about the review process itself should be entered here. No further comments about the employee’s performance should be entered in this section of the performance document.

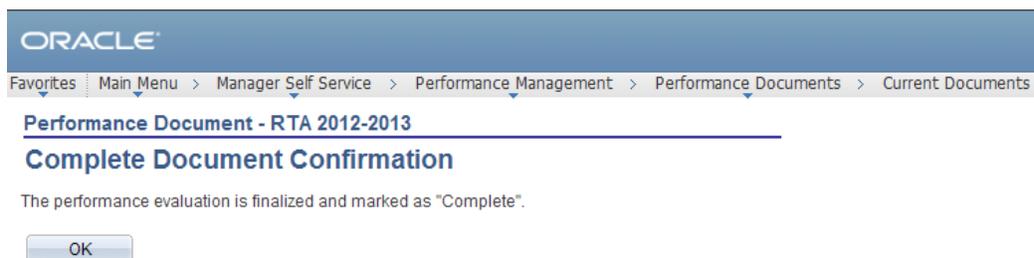
5.13.5 Scroll to the bottom of the performance document and click on the **Save** button to save the newly added manager comments about the performance review process. You’ll see a confirmation that you have successfully saved the performance document, as shown below.

You have successfully saved your evaluation.

5.13.6 Manager clicks on the **Complete** button to finalize the evaluation document, as seen on the screen (above). Once the document has been completed, it will be moved from *Current Documents* to *Historical Documents*.



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



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



[Return to Select Documents](#)

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

5.13.10 Click the [Return to Select Documents](#) link. This will take you to the Historical documents folder, where the just completed performance document now resides. Click the Current Documents “bread crumb” if you have additional performance evaluations to complete.



5.14 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.

6.0 ASSOCIATED DOCUMENTS

- 6.1 Engage Rochester site – APPR supervisor page – *Writing the APPR*
- 6.2 Engage Rochester site – APPR supervisor page – *ePerformance Document Status Aid*
- 6.3 Engage Rochester site – APPR employee page – *Employee Comments and Acknowledgements Tutorial*

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:
3/14/12	Original	Original Document
5/8/2013	2	Revised for 2012-2013

End of Procedure