Viewing a Performance Document for a Direct Report in ePerformance



1.0 SCOPE

- 1.1 This document describes how to view a performance evaluation for an employee who is currently a direct report in your department, but whose evaluation (current or prior year) is assigned to another administrator, such as an Assistant Principal.
- 1.2 The procedure described herein should be run by the School Principal or Department Manager. The procedure will only allow the viewing of a performance document for an employee who is/was in your department on the date specified. First line administrators, such as Assistant Principals, do not have any "direct reports" and will receive no results if they use this procedure.

2.0 PROCEDURE

2.1 This job aid assumes that you are logged in to the PeopleSoft Human Resources system and are navigating from the Human Resources Main Menu (as shown below).

ORACLE	
Favorites Main_Menu	
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Menu	ē —
Search:	
D Self Service	
▷ Manager Self Service	
▷ Recruiting	
Vorkforce Administration	
D Time and Labor	
Vorkforce Development	
Organizational Development	
▷ Set Up HRMS	
Enterprise Components	
Reporting Tools	
RCSD CO Volunteers	
 My Personalizations 	
- My Dictionary	
 My Portal Home 	

2.2 Click on the Manager Self Service menu option from the Human Resources main menu.

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ORACLE		Home Add to Favorites Sign ou
Favorites Main Menu > Manager Self Service		
Manager Self Service		
Manager Self Service		
Navigate to self service information and activities for people reporting to you.		
Personnel Activity Report (PAR) Review	Review Transactions that you have submitted	Ime Management Manage schedules, view and approve reported and payable time, absence and overtime requests, exceptions, and more. Approve Time and Exceptions Report Time View Time Manager Search Options
Job and Personal Information Manage job and personal information for your employees. Manage in the second	Add and review information related to learning and development for employees.	Performance Management Pan, evaluate and manage performance and development for your workforce. Performance Documents

2.3 Click the <u>Performance Management</u> link.



2.4 Click the <u>Performance Documents</u> link.

ORACLE		Home Addito Favorites Sino o
Favorites Main Menu > Manager Self Service		
Manager Self Service		
Performance Documents		
Create, update, and view performance documents for your workforce.		
Create Documents Create performance documents for your direct reports.	Current Documents 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.	

2.5 Click the View-Only Documents link.

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	es Main Menu > Manager Seir	Service > Performance Manager	nent > Performance L	ocuments > View-Only Document
ie	w-Only Documents			
ew	documents for one of your employ	ees.		
Ins	structions			
l٥١	v this 3-step process to view docu	ments for one of your employees:		
1.	Enter the date used to find the en	nployees that report to you. You will	be able to view	
2	Select the employee you would li	yees that report to you as of this dat ike to view documents for	e.	
3.	Select the document type hyperlin	nk for the document you would like t	to view details for.	
		-		_
ite	r the as of date			
er	the effective date for determining y	our employees. 09/	09/2013 🛐	-
er	the effective date for determining y	our employees. 09/	09/2013 🛐	
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el uri Dai	the effective date for determining y ect Your Job rently, you hold multiple positions position you select here will dete ta Job Title PRINCIPAL-SECONDARY	- Please select the position that ye rmine the employees that you can Department East High School - HS	09/2013 🗊 ou'd like to work with. process on the next pa Supervisor Name	ges. Company ROCHESTER CITY SCHOOL DISTRICT

- 2.6 As shown above, the "effective date for determining your employees" will default to the current date and your job will default to your primary (Principal) job title. If you only have one potential job title, the "Select Your Job" section will not appear.
- 2.7 Click the **Continue** button. A roster of all employees (including teachers, teaching assistants, paraprofessionals, administrators and civil service personnel) whose evaluation(s) you are eligible to review will appear as shown below. The names and employee ID's have been purposely "blurred" in the example.

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OR	ACLE								
vorite Vie Selec	orites Main Menu > Manager Self Service > Performance Management > Performance Documents > View-Only Documents /iew-Only Documents relect the employee to view documents for.								
✓ Inst Select Once y Return	Instructions elect the employee you would like to view documents for. Ince you have finished select <i>Continue</i> to enter the document details.								
Selec	<u>«turn to Previous Page</u> elect Employees								
Repo	orts To:	-		A	s Of: 09/09/2013				
Sol	Continue			Customics First [7]					
Jei	Name	Empl ID	HR Status	Job Code Description	Department	ası			
0	Maria Sura	-0+1000	Active	TCHR-SCIENCE	East High School - HS				
0	telefonden († 1740-1744)	141700	Active	TCHR-SOCIAL STUDIES	East High School - HS				
o	Maria / Miccargolite	100010	Active	PROGRAM ADMINISTRATOR	East High School - HS				
0	Maria - Prantas	200034	Active	TCHR-SCIENCE	East High School - HS				
0	Mittan Langer	114666	Active	CUSTODIAL ASSISTANT	East High School - HS				
0	19,1,2,2,3,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1	10003344	Active	TCHR-SPEC ED	East High School - HS				
0	integ / Reprinter	2008110	Active	TCHR-SPEC ED	East High School - HS				

- 2.8 Click the radio button (^C) next to the employee name whose evaluation you want to review. You can only select one employee at a time.
- 2.9 Click the **Continue** button.



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avorites M	vorites Main Menu > Manager Self Service > Performance Management > Performance Documents > View-Only Documents								
View Pe	/iew Performance Documents								
Listed below	v are all the perform	mance documents for the o	lirect report you	selected.					
Performan	Performance Documents								
Employee ID	Employee	Document Type	Evaluation Begin	Evaluation End	Job Title	Status	Manager	Rating	
117700	10000110000	RTA	09/01/2011	06/30/2012	TCHR-SOCIAL STUDIES	Completed		- Hiller -	
11177000	1000011000	Formal Observation	09/01/2012	04/30/2013	TCHR-SOCIAL STUDIES	Completed	000000198000		
117708	10000110000	RTA 2012-2013	07/01/2012	06/30/2013	TCHR-SOCIAL STUDIES	Completed	00108679688		

- Return to Select Employees
- 2.10 All performance documents for the direct report you selected are displayed in the list shown. In this example, you can see that this was a social studies teacher and the performance documents available for review are the 2011-2012 Year End Evaluation and the 2012-2013 Formal Observation and 2012-2013 Year End Evaluation. The number of performance documents for a given employee will vary based upon their status, hire date and whether they were part of your department on the date specified in the selection criteria steps above.
- 2.11 Click on the appropriate link for the performance document you with to view (in the *Document Type*) column.
- 2.12 To view additional performance documents, click the <u>Return to Document Detail</u> link to exit the employee's performance document.
- 2.13 Click the <u>Return to Select Documents</u> link to return to the list of performance documents for this employee.
- 2.14 Click the <u>Return to Select Employees</u> link to return to the selection criteria page so that you can view the performance document(s) for a different employee.

*** End of Job Aid ***