

1.0 SCOPE

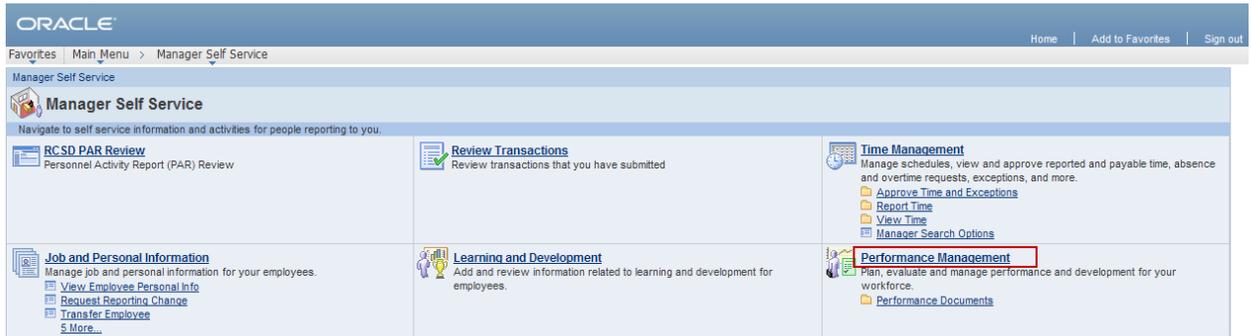
- 1.1 This document describes how to view a performance evaluation for an employee who is currently a direct report in your department, but whose evaluation (current or prior year) is assigned to another administrator, such as an Assistant Principal.
- 1.2 The procedure described herein should be run 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

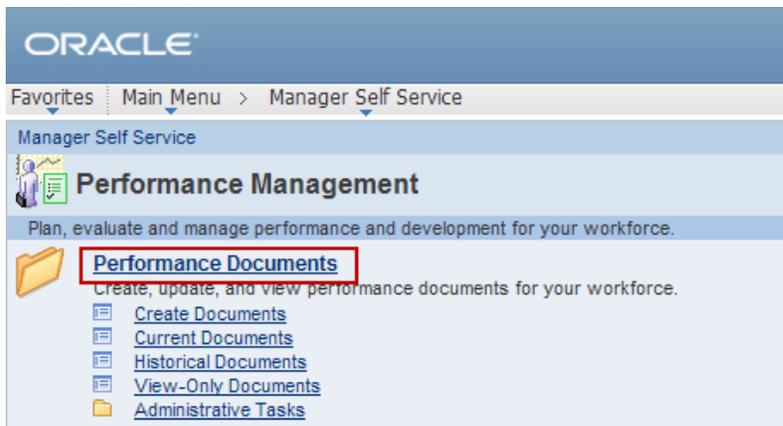
- 2.1 This job aid assumes that you are logged in to the PeopleSoft Human Resources system and are navigating from the Human Resources Main Menu (as shown below).



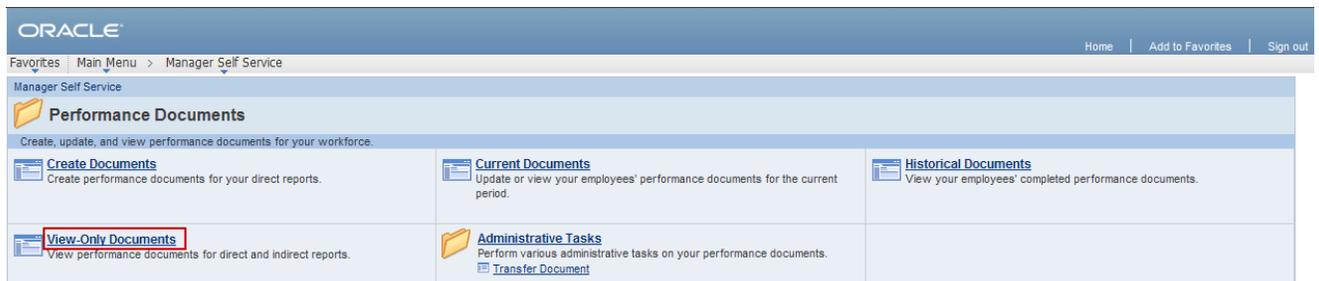
- 2.2 Click on the Manager Self Service menu option from the Human Resources main menu.



2.3 Click the [Performance Management](#) link.



2.4 Click the [Performance Documents](#) link.



2.5 Click the [View-Only Documents](#) link.



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Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > View-Only Documents

View-Only Documents

View documents for one of your employees.

Instructions

Follow this 3-step process to view documents for one of your employees:

1. Enter the date used to find the employees that report to you. You will be able to view documents for only those employees that report to you as of this date.
2. Select the employee you would like to view documents for.
3. Select the document type hyperlink for the document you would like to view details for.

Enter the as of date

Enter the effective date for determining your employees.

Select Your Job

Currently, you hold multiple positions - Please select the position that you'd like to work with.
The position you select here will determine the employees that you can process on the next pages.

Data			
Job Title	Department	Supervisor Name	Company
<input checked="" type="radio"/> PRINCIPAL-SECONDARY	East High School - HS	[blurred]	ROCHESTER CITY SCHOOL DISTRICT
<input type="radio"/> TCHR HOURLY - BOARD AUTHORIZED	Tchr Hourly-Board Auth - DM	[blurred]	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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Favorites Main Menu > Manager Self Service > Performance Management > Performance Documents > View-Only Documents

View-Only Documents

Select the employee to view documents for.

▼ Instructions

Select the employee you would like to view documents for.

Once you have finished select *Continue* to enter the document details.

[Return to Previous Page](#)

Select Employees

Reports To: As Of: 09/09/2013

Select Employee					
Customize Find First 1-50 of 262 Last					
	Name▲	Empl ID	HR Status	Job Code Description▲	Department
<input type="radio"/>	[Name]	[Empl ID]	Active	TCHR-SCIENCE	East High School - HS
<input type="radio"/>	[Name]	[Empl ID]	Active	TCHR-SOCIAL STUDIES	East High School - HS
<input type="radio"/>	[Name]	[Empl ID]	Active	PROGRAM ADMINISTRATOR	East High School - HS
<input type="radio"/>	[Name]	[Empl ID]	Active	TCHR-SCIENCE	East High School - HS
<input type="radio"/>	[Name]	[Empl ID]	Active	CUSTODIAL ASSISTANT	East High School - HS
<input type="radio"/>	[Name]	[Empl ID]	Active	TCHR-SPEC ED	East High School - HS
<input type="radio"/>	[Name]	[Empl ID]	Active	TCHR-SPEC ED	East High School - HS

2.8 Click the radio button (○) 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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Favorites | Main Menu > Manager Self Service > Performance Management > Performance Documents > View-Only Documents

View Performance Documents

Listed below are all the performance documents for the direct report you selected.

Employee ID	Employee	Document Type	Evaluation Begin	Evaluation End	Job Title	Status	Manager	Rating
1017586	WANDA LLOYD	RTA	09/01/2011	06/30/2012	TCHR-SOCIAL STUDIES	Completed	WANDA LLOYD	1.00000000
1017586	WANDA LLOYD	Formal Observation	09/01/2012	04/30/2013	TCHR-SOCIAL STUDIES	Completed	WANDA LLOYD	
1017586	WANDA LLOYD	RTA 2012-2013	07/01/2012	06/30/2013	TCHR-SOCIAL STUDIES	Completed	WANDA LLOYD	

[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 wish to view (in the *Document Type*) column.
- 2.12 To view additional performance documents, click the [Return to Document Detail](#) link to exit the employee's performance document.
- 2.13 Click the [Return to Select Documents](#) link to return to the list of performance documents for this employee.
- 2.14 Click the [Return to Select Employees](#) 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 ***