1.0 SCOPE

1.1 This work procedure describes the Goal Setting process for teachers.

2.0 RESPONSIBILITY

2.1 Teachers and administrators are responsible for working collaboratively to establish the teacher's goals for each school year.

2.2 While there may be preliminary discussions between the teacher and the administrator regarding the goal setting process, the teacher will be responsible for initiating the goal setting process by entering their goals into the PeopleSoft ePerformance system.

2.3 The administrator will be responsible for reviewing and approving the goals entered into the PeopleSoft ePerformance system and, after making any agreed upon changes with the teacher, for "completing" the goals in the system.

3.0 APPROVAL AUTHORITY

3.1 Administrators are responsible for approving and completing the goal setting process for each teacher in the PeopleSoft ePerformance system.

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 **Performance Goal:** a measurable, desired result to be achieved in a specified time period that is agreed upon between the teacher/employee and their principal/manager.

5.0 PROCEDURE

5.1 **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.
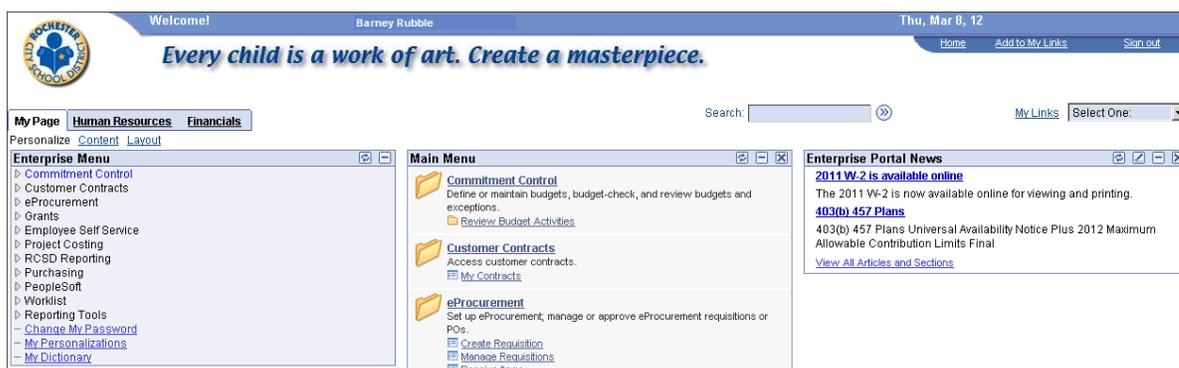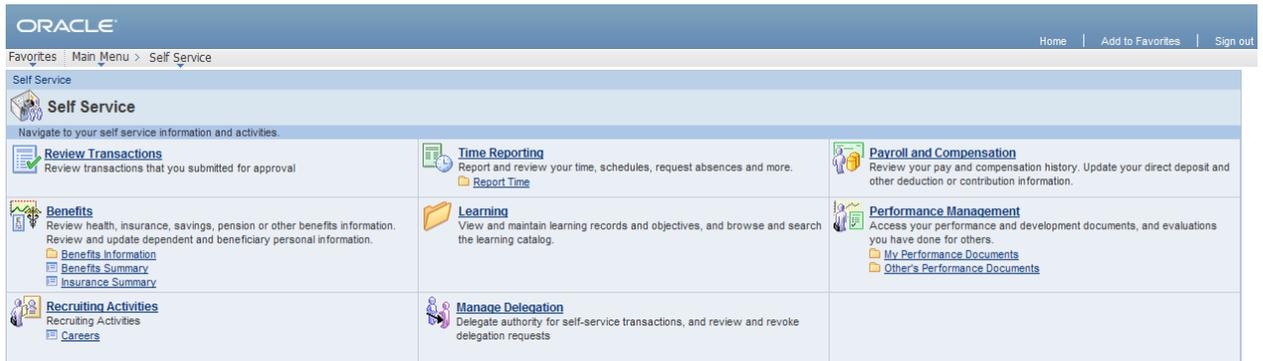

5.2 Click on the **Human Resources** tab. A page similar to the following will be displayed.
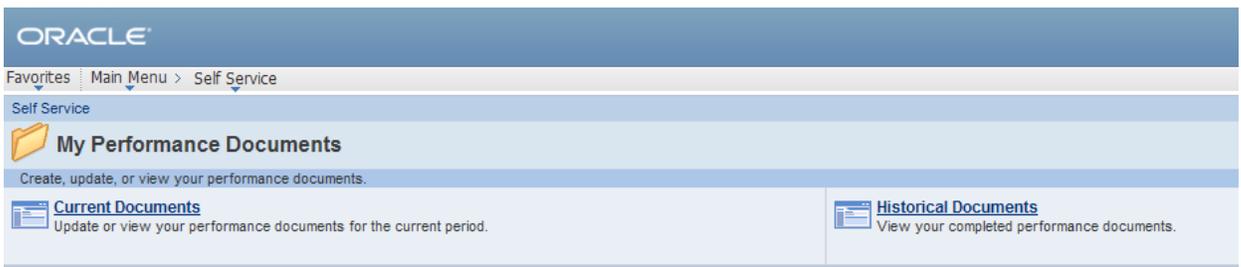

5.3 Click on the **Human Resources 9.1** link. Your PeopleSoft Human Resources Main Menu will appear (see next page).
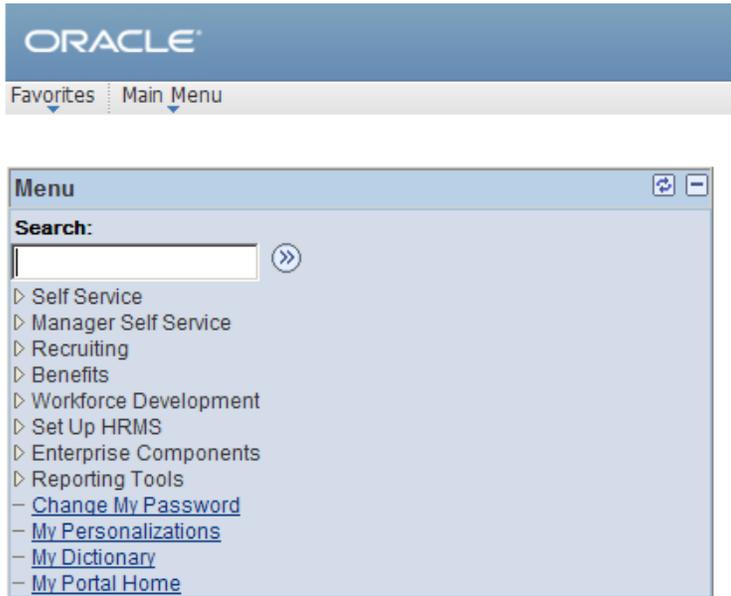
5.4 Click on the **Self Service** link. A page similar to the following will appear.

5.5 Locate and click on the **My Performance Documents** link (under the **Performance Management** section). The *My Performance Documents* menu will appear as shown below.

5.6 Click on the **Current Documents** link.

5.7 Click on the RTA 2012-2013 link in the *Document Type* column next to the performance document to be reviewed. Note: the RTA link is specifically for teacher evaluations. The name of the link will be different for other District personnel (e.g. RAP, Civil Service, ASAR Certificated, etc.). The performance document will appear as shown below.

5.8 Confirm that the *Template* information in the *Performance Document Details* section matches the template that you selected during the Teacher Evaluation Selection process at the beginning of the school year. Notify your manager if the incorrect template has been assigned to you. **Do not proceed with the Goal Setting process until the correct template has been assigned to you!** Note: if a selection was not made, the "RTA Teachscape 2011_Admin Only" template was assigned for your evaluation. Also, some teachers did not participate in the teacher evaluation

selection process because they have an evaluation template that is specific to their job responsibilities (e.g. School Psychologists, School Counselors, School Social Workers).

5.9 Select the Start link in the *Action* column for the *Set Goals* step. The *Performance Criteria* portion of the employee performance document will be displayed (top portion only is shown below).

5.10 Click on the RCSD Professional Development Incentive Link. The following page will be displayed.

These goals will serve as my professional learning goals for the year and I plan to take part in the Professional Development Incentive.
No official RCSD/RTA enrollment form is required.

Professional Development Incentive Summary
○ No   ◉ Yes

5.11 In the *Professional Development Incentive Summary* section, click on the **Yes** radio button if you plan to take part in the Professional Development Incentive (PDI) for the current school year or the **No** radio button if you do not wish to take part in the Professional Development Incentive this year.

I certify that I teach in a TIF school.

TIF School
○ No   ◉ Yes

5.12 If you intend to complete Teacher Incentive Fund (TIF) professional hours, you must first certify that you teach in a TIF school by clicking on the **Yes** radio button in the *TIF School* section. If you do not teach in a TIF school, click on the **No** radio button.

My intent is to complete TIF professional hours in addition to the PDI hours.

TIF Professional hours and PDI hours
◉ No   ○ Yes

5.13 If you intend to complete TIF professional hours in addition to your PDI hours, you must teach in a TIF school (as certified in the prior section) **and** click on the **Yes** radio button in the *TIF Professional Hours and PDI Hours* section. If you do not teach in a TIF school or you do not intend to complete TIF professional hours, click on the **No** radio button.

5.14 In the example shown above, the teacher is planning to participate in the Professional Development Incentive. Even though the teacher participates in a TIF school, they have elected not to complete the additional Teacher Incentive Fund professional hours.

5.15 Click on the **SAVE** button once your PDI and TIF selections have been made.

5.16 Click on the **RETURN** button and you will be returned to the *Performance Criteria* section of your performance document. Note: you will be able to change your Professional Development Incentive and/or Teacher Incentive Fund selections up until the time the Goal Setting process has been completed (in the system) by your administrator.

5.17 The section immediately below the *Professional Development Incentive* section is the Goal Setting section for Domain 1 – Planning and Preparation and is shown below.

▽ **Goal Setting: Domain 1 - Planning & Preparation**

After reviewing the rubric in the Teacher Evaluation Guide, determine the area/areas that will enhance your practice and that will guide your professional learning for the year. Per your goal setting meeting with your Administrator, a goal may be added to this section.

Link to Rubric

[+] Add Goal Setting: Domain 1 - Planning & Preparation

5.18 As you begin thinking about your goals for the coming school year, you may want to reference the Teachscape rubric. For your convenience, a link to the rubric has been provided. Click on the Link to Rubric link if you wish to use this reference. It will open in a separate window, which you can simply close when done referring to the rubric.

The system requires that a minimum of one goal be entered, which could be for any one of the domains. The system will also allow multiple goals to be entered for a given domain, if desired. ***Be sure to collaborate with your administrator for their guidance on the Goal Setting Process.***

5.19 Click on the Add Goal Setting: Domain 1 – Planning & Preparation link to enter your goals, if any, for Domain 1. The following page will appear:

ORACLE

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

Performance Document - RTA 2012-2013

Add Goal Setting: Domain 1 - Planning & Preparation

*Title:

Description:

[Update]   Return to Performance Criteria

5.20 Enter a short title, or descriptor, for the first goal. This should be a meaningful descriptor as it will always be visible in the goal setting section of the performance document (even when all sections have been "collapsed").

5.21 Enter the full description of the goal in the *Description* box. A sample is shown below.

Performance Document - RTA 2012-2013

Add Goal Setting: Domain 1 - Planning & Preparation

*Title: Improve Student Assessments

Description: Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual studnts.

[Update] Return to Performance Criteria

5.22 Click on the spell check ✍ icon in the upper right corner of the *Description* box to check the spelling for this goal. Note: It is recommended that you use the spell check feature so that your goal setting document is completed with no mis-spelled words.

ORACLE

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

Spell Check

Field Label: Long Description

Spell Check Text: Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual studnts.

Change To: students

Alternatives:
students
stunts

[Ignore] [Ignore All] [Change] [Change All] [Add]

[OK] [Cancel]

5.22.1 Note that the intended word, "students", has been misspelled in the goal description and that the system recommended option is "students".
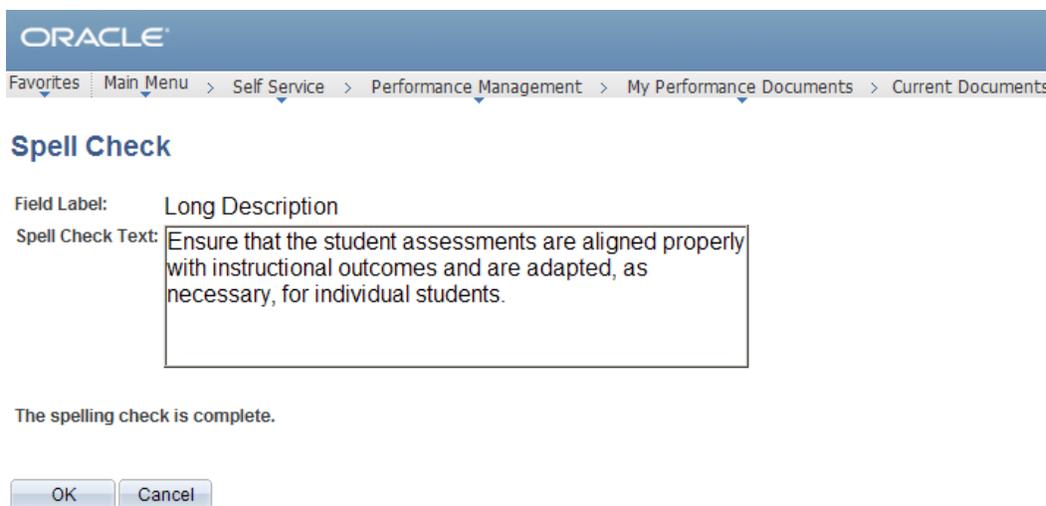
5.22.2 Select the **Ignore, Ignore All, Change, Change All,** or **Add** button as appropriate. In this example, we will click the **Change** button. The other buttons function as follows:

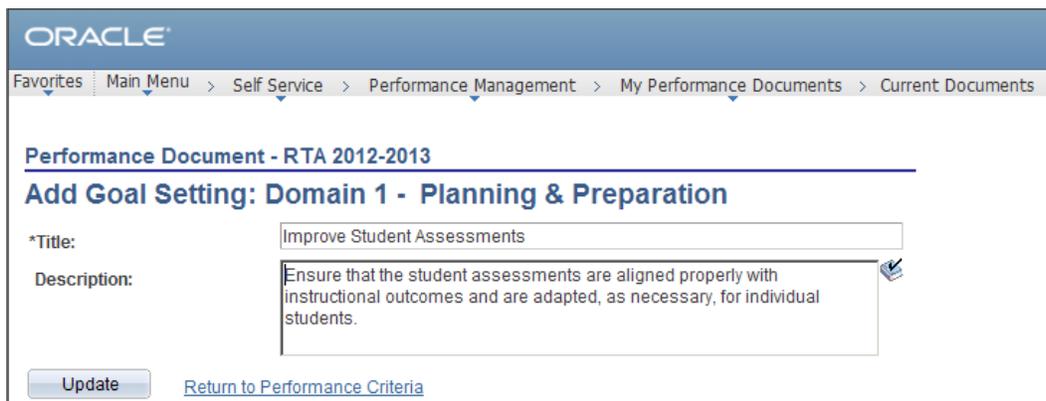5.22.2.1 Ignore will ignore a single instance of the misspelled word.

5.22.2.2 Ignore All will ignore all instances of the misspelled word (if it occurs more than once).

5.22.2.3 Change will change a single instance of the misspelled word.

5.22.2.4 Change All will change all instances of the misspelled word (if it occurs more than once).

5.22.2.5 Clicking the **Add** button will add this word to your personal dictionary for future spell checks. This may be appropriate if there is specific terminology or acronyms that are used in your area of expertise.

5.22.3 If more than one alternative is provided by the system, as shown in the example above, select the desired alternative and then click on the **Change** button.

5.22.4 Repeat the above process for each misspelled word until all spelling errors in the goal description have been corrected.

ORACLE

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

Spell Check

Field Label: Long Description

Spell Check Text: Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students.

The spelling check is complete.

OK   Cancel

5.22.5 Click on the **OK** button once the spell check is complete and all spelling errors have been corrected.

ORACLE

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

Performance Document - RTA 2012-2013

Add Goal Setting: Domain 1 - Planning & Preparation

*Title: Improve Student Assessments

Description: Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students.

Update   Return to Performance Criteria

5.22.6 Click the **Update** button to update the corrected goal with the spelling changes just made and return to the Goal Setting page.

▽ **Goal Setting: Domain 1 - Planning & Preparation**

After reviewing the rubric in the Teacher Evaluation Guide, determine the area/areas that will enhance your practice and that will guide your professional learning for the year. Per your goal setting meeting with your Administrator, a goal may be added to this section.

Link to Rubric

Expand   Collapse

▼ **Improve Student Assessments**

Description : Ensure that the student assessments are aligned properly with instructional outcomes and are adapted, as necessary, for individual students.

Created By: Barney Rubble   09/14/2012 2:38PM

+ Add Goal Setting: Domain 1 - Planning & Preparation

5.22.7 The Goal Setting page is displayed, as shown above, and reflects the spell-checked goal. At this time, you can enter additional goals for Domain 1 if desired. Click on the Add Goal Setting: Domain 1 – Planning & Preparation link if you wish to add additional goals for Domain 1 and follow the steps described above, beginning with section 5.15, to complete te entry of your goals for Domain 1.

5.23 Enter your goal(s), if any, for Domain 2 by clicking on the Add Goal Setting: Domain 2 – Classroom Environment link. Follow the same steps as described above, beginning with section 5.15, to complete the entry of your goals for Domain 2.

5.24 Enter your goal(s), if any, for Domain 3 by clicking on the Add Goal Setting: Domain 3 – Instruction link. Follow the same steps as described above, beginning with section 5.15, to complete the entry of your goals for Domain 3.

5.25 Enter your goal(s), if any, for Domain 4 by clicking on the Add Goal Setting: Dom 4 – Professional Responsibilities link. Follow the same steps as described above, beginning with section 5.15, to complete the entry of your goals for Domain 4.

▽ **Goal Setting: Dom 4-Professional Responsibilities**

After reviewing the rubric in the Teacher Evaluation Guide, determine the area/areas that will enhance your practice and that will guide your professional learning for the year. Per your goal setting meeting with your Administrator, a goal may be added to this section.

Link to Rubric

+ Add Goal Setting: Dom 4-Professional Responsibilities

▶ **Audit History**

[Save]   🖨 ▣   Return to Document Detail

5.26 Click the **Save** button to save the goals you have entered. The Save button can be checked at any time during the entry of your goals. It is highly recommended that you click the save button periodically so that your work is not lost. Note that the system inactivity time-out is currently 2 hours. Any work entered, but not saved, prior to an inactivity time-out will be lost.
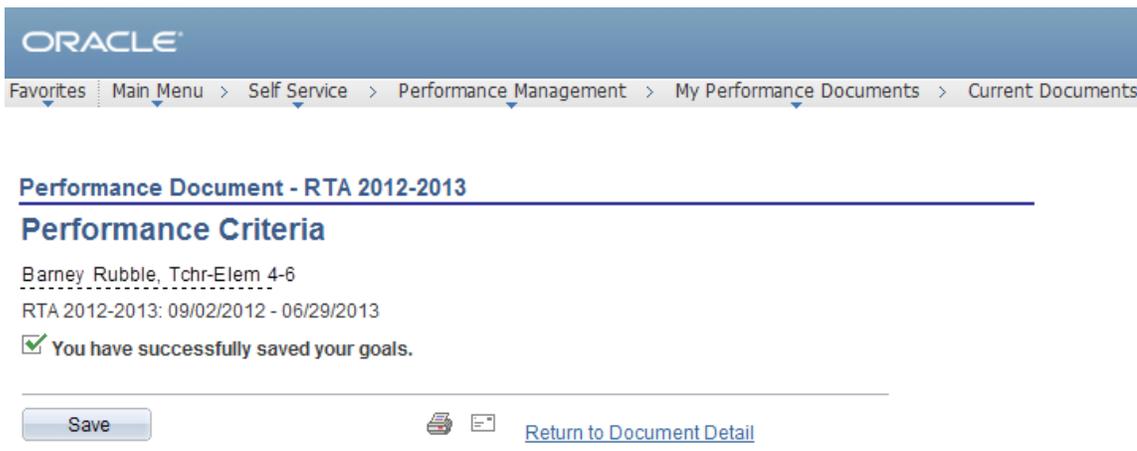
5.27 Upon saving, you will be returned to the top of the Performance Document where you can see the confirmation message that your goals have been successfully saved.

5.28 Once you are satisfied with the goals you have entered, inform your Administrator that you are ready to discuss your specific goals for the coming year. Your Administrator will then be able to complete their portion of the Goal Setting Process in the system.

Note: Either you or your administrator will be able to make any mutually-agreeable changes to your goals **prior to** your administrator "Completing" their portion of the Goal Setting process in the system.
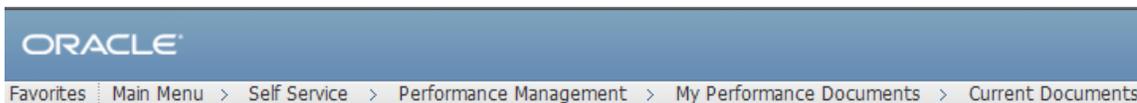
5.29 If you have additional tasks to perform in PeopleSoft, such as Time Entry or View Paycheck, click on the **Main Menu** drop-down from the "breadcrumbs" (shown above) and select the desired system function.
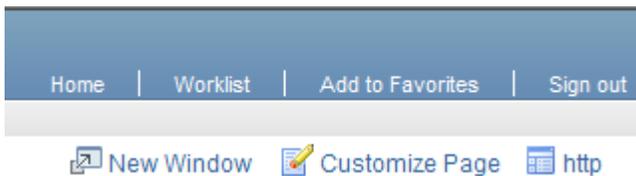
5.30 If you have no additional tasks to perform in PeopleSoft, click on the **Sign out** link in the upper right hand corner of your window.

5.31 **Congratulations!** You have completed the Teacher portion of the goal setting process.

6.0 ASSOCIATED DOCUMENTS

6.1 None.

7.0 RECORD RETENTION

Identification	Storage	Retention	Disposition	Protection
PeopleSoft ePerformance initial implementation.	SharePoint ePerformance project site. Displayed on EngageRochester site.	Until Superceded		N/A

8.0 REVISION HISTORY

Date:	Rev.	Description of Revision:
9/25/12	Original	Original Document

End of Procedure