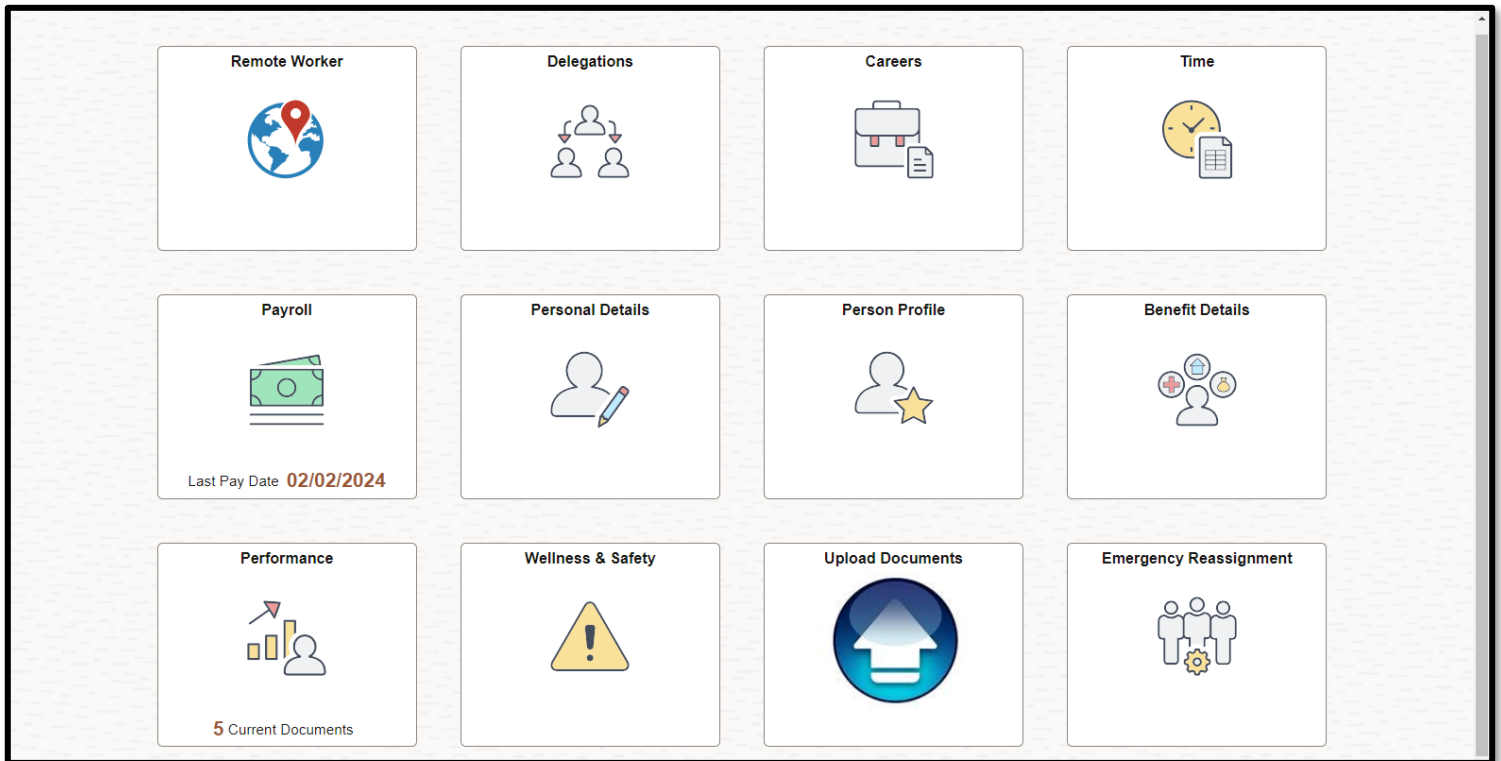


## How to Complete an Electronic Performance Evaluation

### Group 12 Employee

#### Completing a Performance Evaluation for Direct Reports

1. After successfully authenticating and logging into **PeopleSoft**, your **Employee Self Service** homepage should display as shown below. (Tiles displayed vary depending on role.)

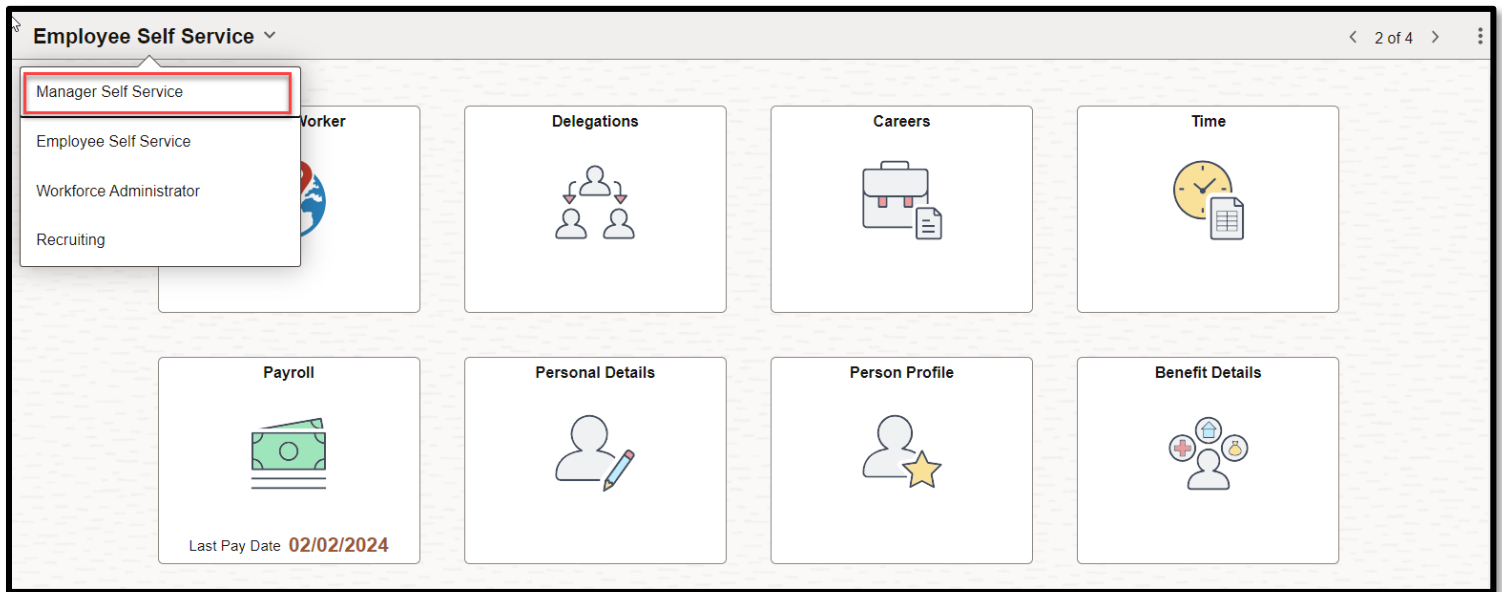


**Note:** In order to have access to **MSS**, the manager must meet the following requirements:

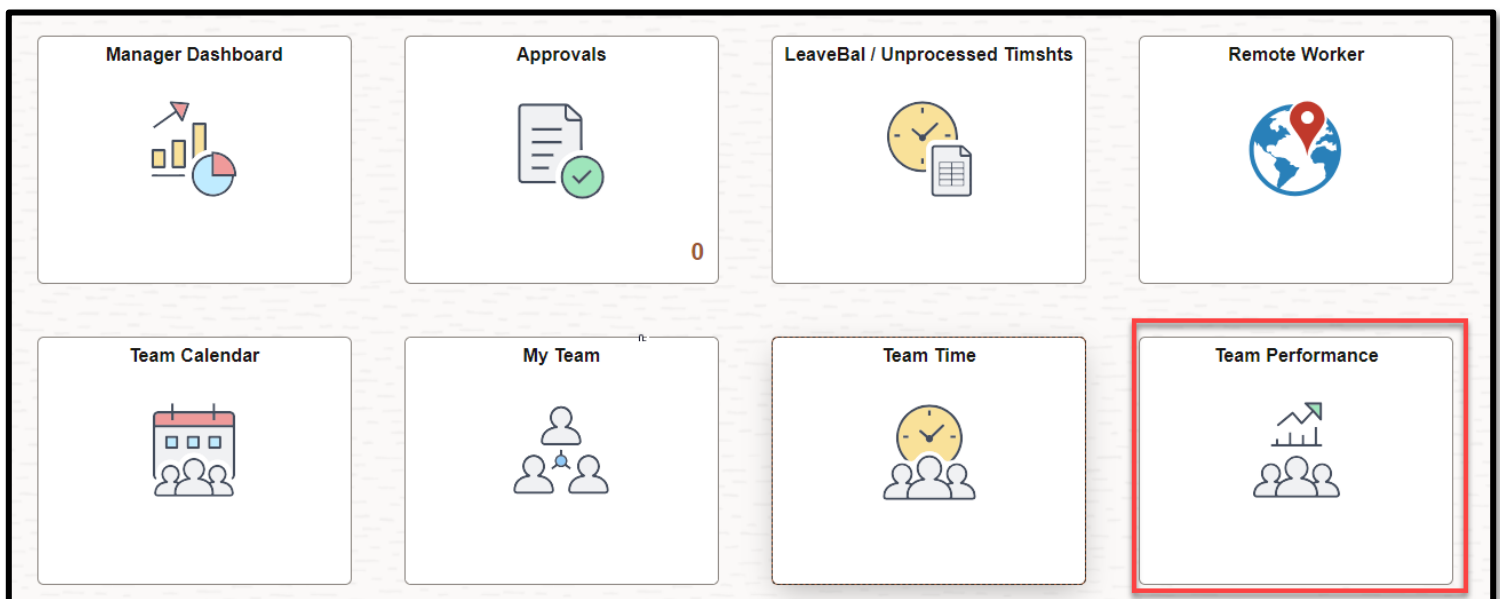
- Have direct reports in PeopleSoft.
- Have a **Completed** status for PeopleSoft Manager Self Service in your ELM **My Learning** Page.

**Please consult with your Human Resources Department if you do not meet the above requirements.**

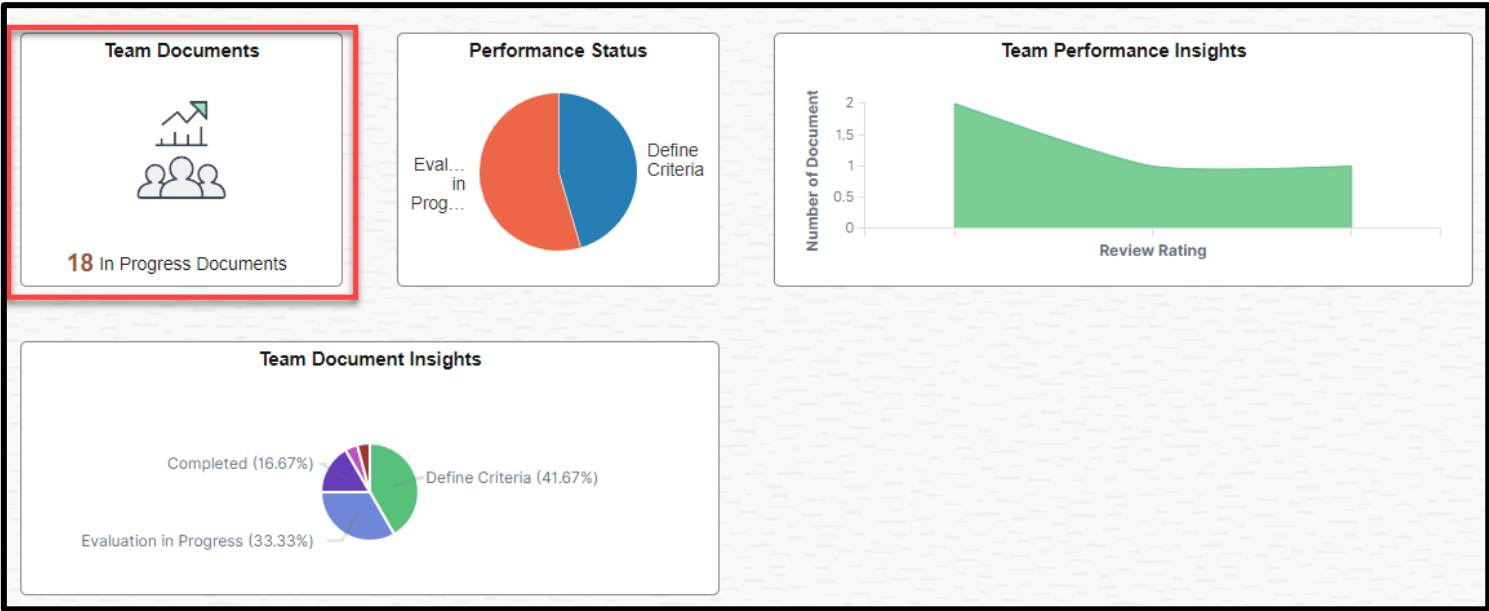
2. Select **Manager Self Service** from the dropdown menu.



3. The **Manager Self Service** homepage should display as shown below. (Tiles displayed vary depending on role.) Click on **Team Performance**.



4. In the **Team Performance Tile**, Click on **Team Documents** to display Direct Reports.










5. To begin, click on the name of the employee you will like to evaluate.

Team Documents
Delegated Documents

+ Create Documents

Search by Name...
→
⌵

Define Criteria

 <div> <div>Sr Mgmt Consultant- LI</div> <div>NYC H+H Performance Evaluation • 1 Aug 2023 - 31 Jul 2024</div> </div> <div>Due 31 Jul 2024</div> <div>⋮</div>
 <div> <div>Ast Systems Analyst (EDP)</div> <div>NYC H+H Performance Evaluation • 3 Jun 2023 - 2 Jun 2024</div> </div> <div>Due 2 Jun 2024</div> <div>⋮</div>
 <div> <div>Ast Systems Analyst (EDP)</div> <div>NYC H+H Performance Evaluation • 3 Oct 2022 - 2 Oct 2023</div> </div> <div>Due 2 Oct 2023</div> <div>⋮</div>
 <div> <div>Ast Systems Analyst (EDP)</div> <div>NYC H+H Performance Evaluation • 15 Aug 2022 - 14 Aug 2023</div> </div> <div>Due 14 Aug 2023</div> <div>⋮</div>
 <div> <div>Sr Mgmt Consultant- LI</div> <div>NYC H+H Performance Evaluation • 1 Aug 2022 - 31 Jul 2023</div> </div> <div>Due 31 Jul 2023</div> <div>⋮</div>
 <div> <div>Sr Mgmt Consultant- LI</div> <div>NYC H+H Performance Evaluation • 4 Nov 2021 - 3 Nov 2022</div> </div> <div>Due 3 Nov 2022</div> <div>⋮</div>
 <div> <div>Personnel Prog Dev Spec Lv G</div> <div>NYC H+H Performance Evaluation • 7 Dec 2020 - 6 Dec 2021</div> </div> <div>Due 6 Dec 2021</div> <div>⋮</div>

- Criteria must be reviewed at the beginning of the performance period. Navigate through the document by selecting the applicable tabs. Once reviewed, select the **Complete** button in the upper right-hand corner to start **Define Criteria** step.

In Progress

Sr Mgmt Consultant- LI

• 1 Aug 2023 - 31 Jul 2024

Step 1 of 2

Define Criteria

Complete

▼ Type of Evaluation (CB)

Evaluated by Manager

No items have been defined in this section.

▼ Instructions (CB)

Evaluated by Additional Supervisor, Manager

Responsibilities Instructions

▼ Responsibilities (CB)

Evaluated by Additional Supervisor, Manager

Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Kn

Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Kn

Human Resources Shared Services

Page 5 of 18

Revised: January 28, 2025

7. A confirmation message will appear. Manager can commence to complete Evaluation.

**Define Criteria Completed.**

[Redacted]

Sr Mgmt Consultant- LI • 1 Aug 2023 - 31 Jul 2024

📄
☰
⋮

Step 2 of 2  
**Evaluation** | ⌵

Submit for Approval

⋮

📄 Document in progress.

▼ Type of Evaluation (CB)
⋮

No items have been defined in this section.

▼ Summary

**Employee**  

[Redacted]

**Manager**  

[Redacted]


▼

↶
↷
A<sup>≡</sup> ▼
A<sup>I</sup> ▼
A ▼
A ▼
B
I
U
½=
:=
📅 ▼
📄

Type comment here...




8. The manager has the option to nominate participants for additional input into this document. Please refer to the **“How to Nominate a Participant for Additional Input”** Job Aid for more information.

Evaluation in Progress



Sr Mgmt Consultant- LI


• 1 Aug 2023 - 31 Jul 2024


Add / Review Participants

Step 2 of 2

Evaluation




Submit for Approval



Document in progress.


Type of Evaluation (CB)




No items have been defined in this section.

Summary

Employee













Manager






























Select Rating

?

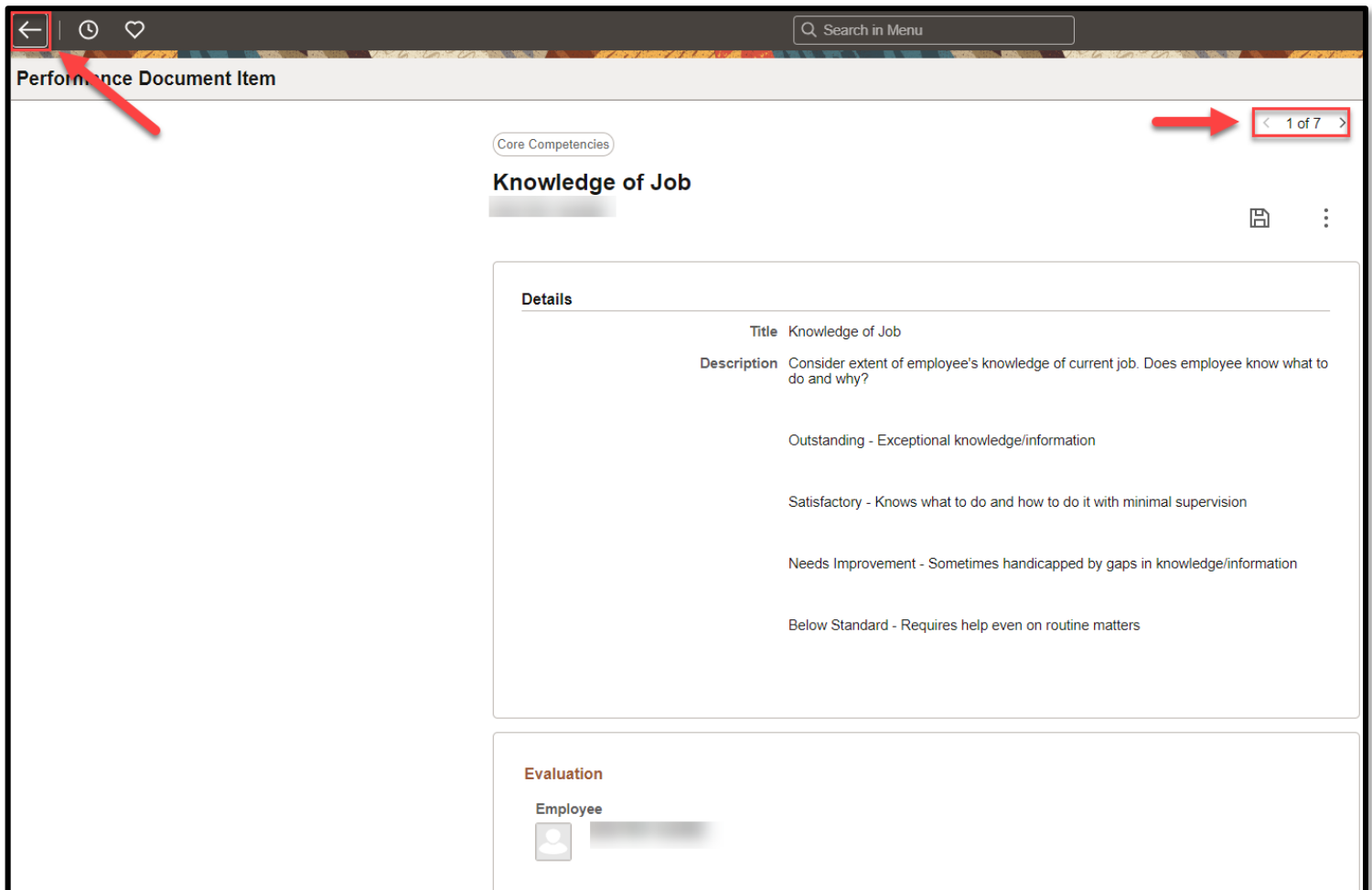
Type comment here...

9. The evaluation will display, navigate through the document by selecting the [hyperlink](#).

Responsibilities (CB)		
	<a href="#">Sr Mgmt Consultant (Business Org &amp; Methods) Lvl I &amp; II - Kn</a>	 
	<div>Title</div>	
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Kn	 
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Kn	 
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Kn	 
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Kn	 
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Qu	 
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Qu	 
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Qu	 
	Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Qu	 



10. To return to a page previous page, managers must use the **back button** located in the top left of the PeopleSoft HR screen. **Clicking arrows** on the top right of the PeopleSoft HR screen will arrow managers to move on to the next page.



Performance Document Item

Core Competencies

### Knowledge of Job

Details

Title	Knowledge of Job
Description	Consider extent of employee's knowledge of current job. Does employee know what to do and why?
Outstanding	Exceptional knowledge/information
Satisfactory	Knows what to do and how to do it with minimal supervision
Needs Improvement	Sometimes handicapped by gaps in knowledge/information
Below Standard	Requires help even on routine matters

Evaluation

Employee

[User Icon]

**11. Complete the appropriate sections and select a valid rating value. Below satisfactory ratings require comments. If a section is not applicable, select Non-Applicable.**


**Title** Sr Mgmt Consultant (Business Org & Methods) Lvl I & II - Kn

**Description** Provides consultant services to corporate personnel and citywide committees on issues concerning business organization and methods.

---


**Evaluation**

**Employee**



---

**Manager**



▼

00-Outstanding  
01-Satisfactory Plus  
02-Satisfactory  
03-Needs Improvement  
04-Unsatisfactory  
05-Not Applicable

Select Rating

?

A ▼
A ▼
B
I
U
½=
:=

▼

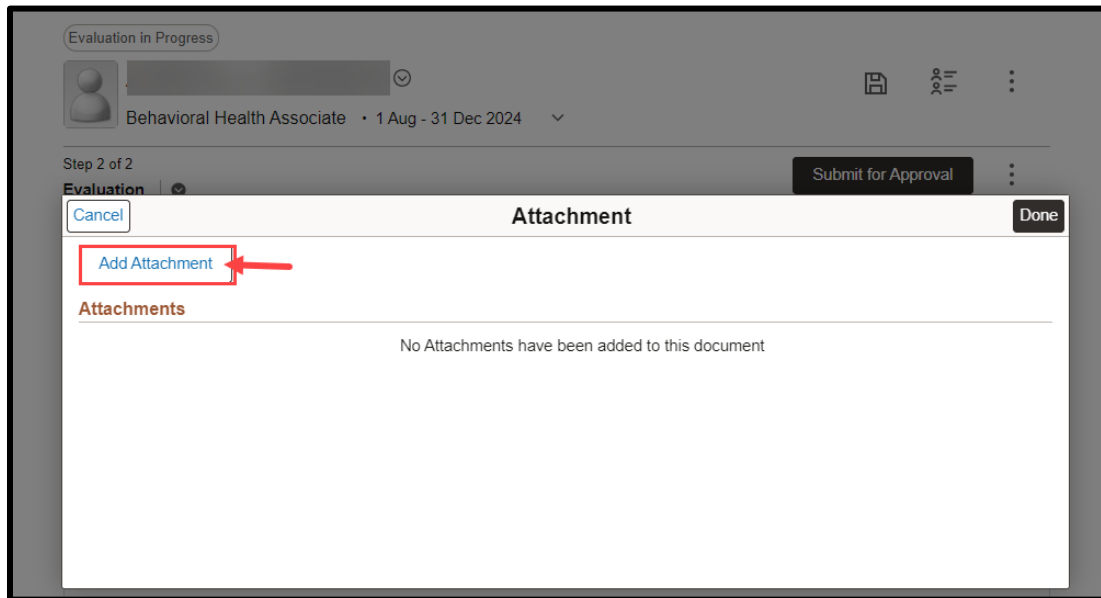
**Note:** Click the **Save** button periodically to ensure no data loss.

12. Clicking on **Document Actions** icon will allow managers to perform certain tasks.

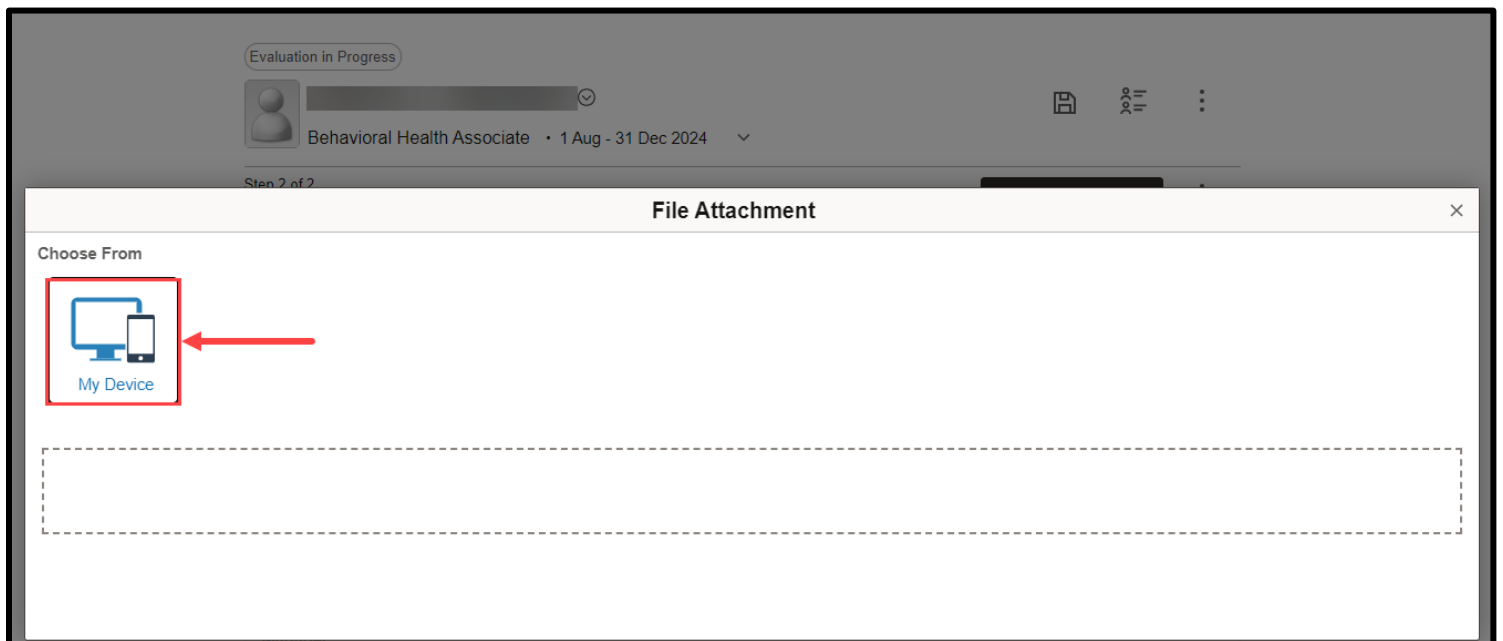
The screenshot displays a web-based evaluation form titled "Evaluation in Progress". At the top, it identifies the user as a "Behavioral Health Associate" for the period "1 Aug - 31 Dec 2024". The form is at "Step 2 of 2" and is labeled "Evaluation". A status bar indicates "Document in progress." Below this, there is a section for "Type of Evaluation (CB)" which currently has no items defined. Further down is a "Summary" section with fields for "Employee" and "Manager". The "Manager" field includes a dropdown menu and a note "Your rating is required." At the bottom, there is a rich text editor with a toolbar and a text area labeled "Type comment here...". On the right side of the form, a "Document Actions" menu is open, showing options: "Clone", "Print", "Notify", "Attachments" (highlighted with a red box and a red arrow), "Last Updated", and "Overview".

**Note: Documents must be Attached before submitting for approval.**

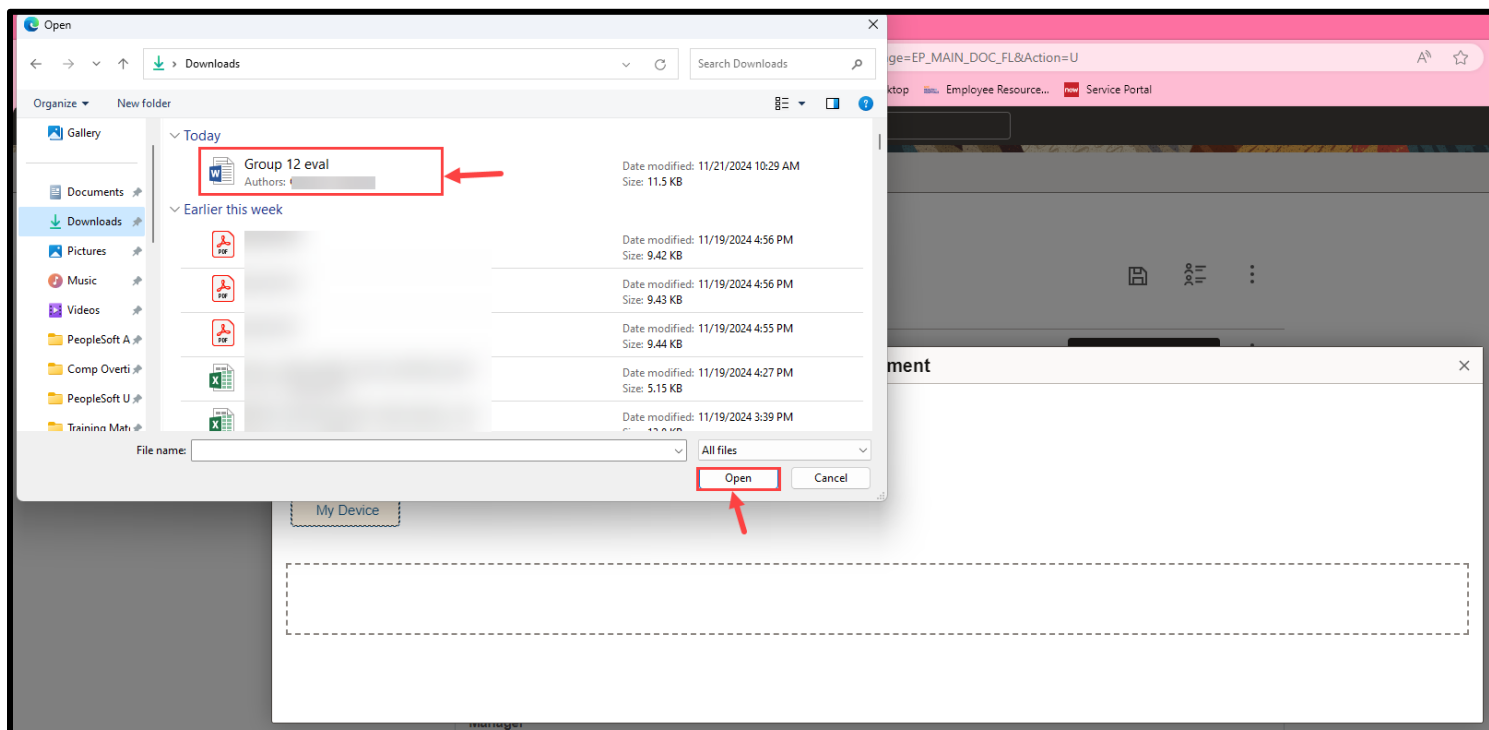
**13. Select Add Attachment.**



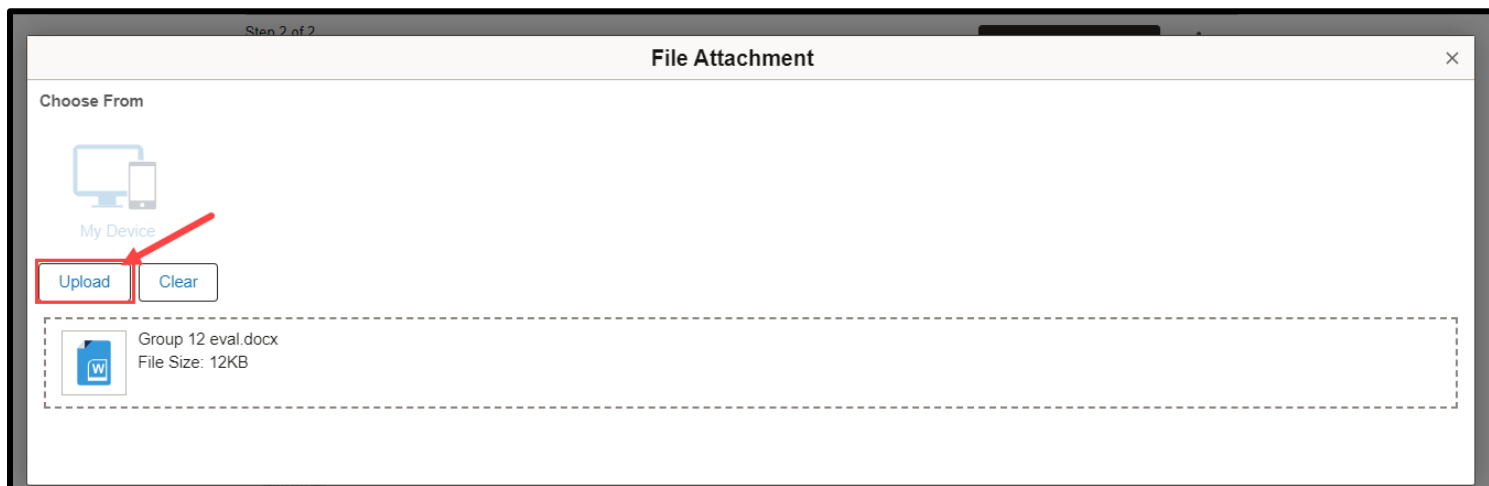
**14. Select My Device.**



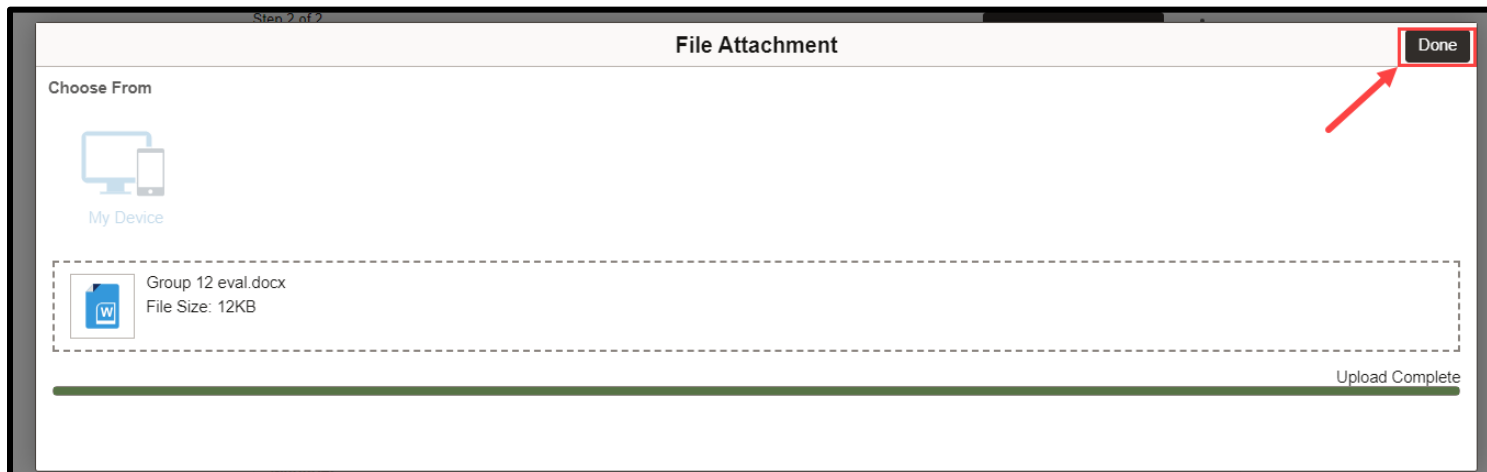
15. Select the document you would like to attach then click open.



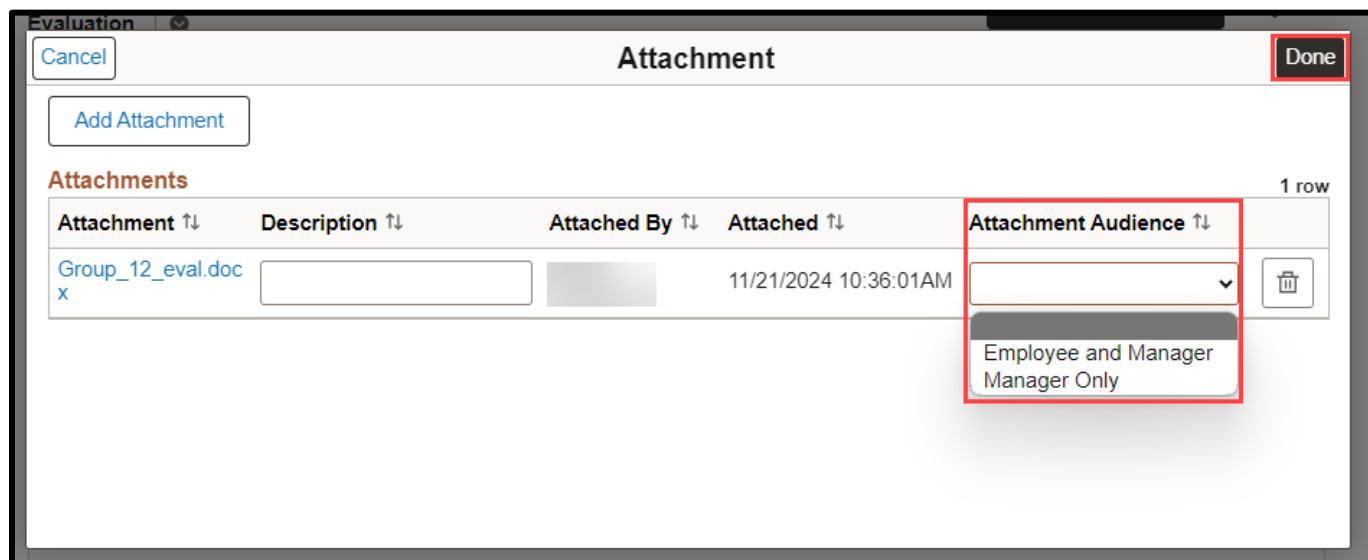
16. Select Upload



17. Once upload is complete, click **Done**.



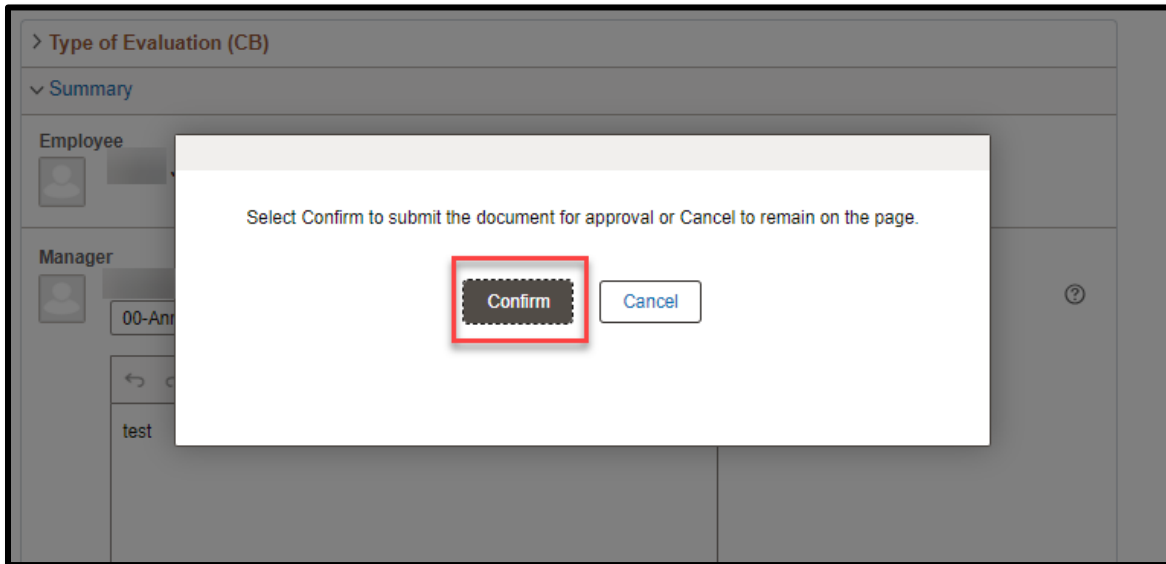
18. Selecting the **Attachment Audience** dropdown will allow managers to select who will be able to view the document. Please select **Employee and Manager**.



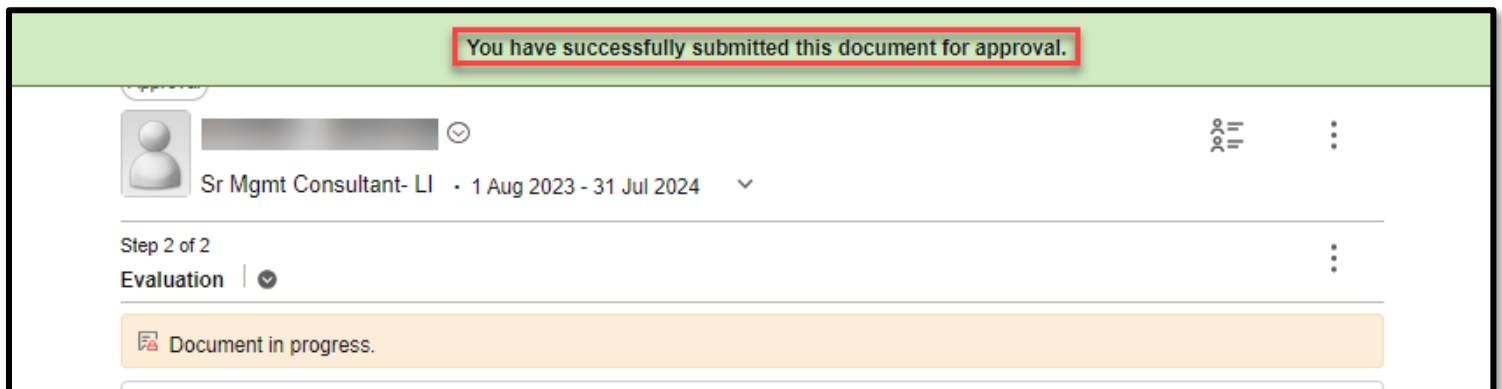
19. Once complete, click the **Submit for Approval** button.

The screenshot displays a web interface for an evaluation process. At the top, a status bar indicates 'Evaluation in Progress'. Below this, a header section shows a user profile icon, a blurred name, and a dropdown arrow. To the right of the header are icons for saving, a list, and a menu. The main content area is divided into sections. The first section is labeled 'Step 2 of 2' and 'Evaluation', with a dropdown arrow. A red arrow points to a 'Submit for Approval' button, which is highlighted with a red rectangular box. Below this is a yellow banner with a document icon and the text 'Document in progress.'. The next section is titled 'Type of Evaluation (CB)' with a dropdown arrow and a menu icon. It contains the text 'No items have been defined in this section.'. Below this is a section titled 'Summary' with a dropdown arrow. The final section is labeled 'Employee' and contains a user profile icon and a blurred name. A mouse cursor is visible over the 'Employee' section.

20. Click the **Confirm** button to continue.



21. confirmation message will appear. The reviewer will receive an email requesting approval.



**Note:** Once submitted, the **reviewer** must log into PeopleSoft and approve or deny the document. The manager will receive notification via email alerting them to the reviewer's decision.

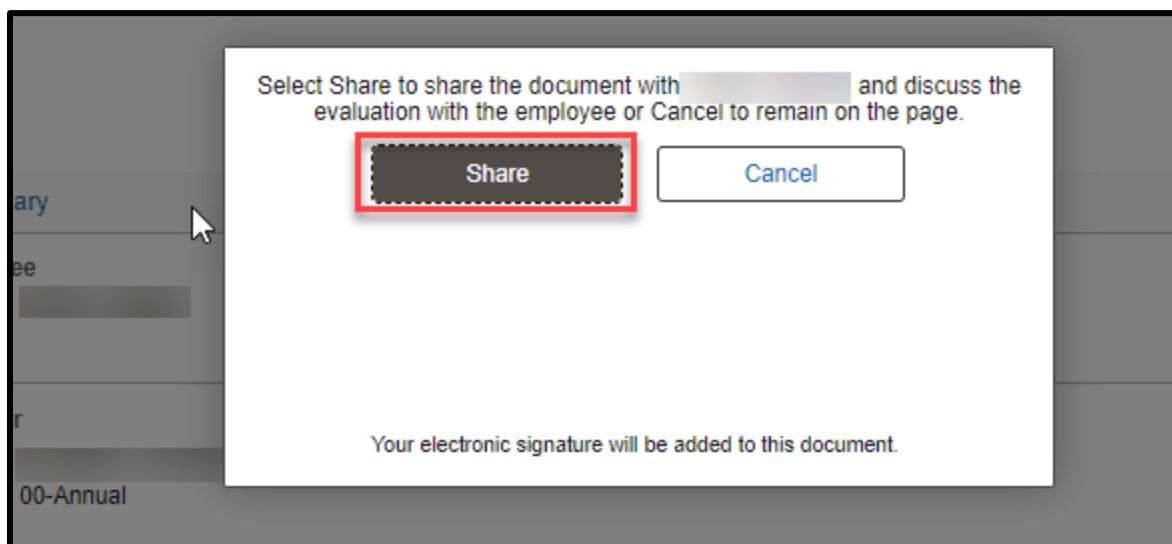


22. Once the document is approved by the reviewer, an email will be sent to the manager. Enter the evaluation once more and click **Share with Employee**.



The screenshot shows a web interface for document approval. At the top, there is a header with 'Approval' and a user profile for 'Sr Mgmt Consultant- LI' with a date range '1 Aug 2023 - 31 Jul 2024'. Below this, a 'Step 2 of 2' indicator is shown. A red arrow points to a button labeled 'Share with Employee' which is enclosed in a red rectangular box. Below the button, there is a section titled 'Type of Evaluation (CB)' which currently contains the text 'No items have been defined in this section.' and a 'Summary' section below it.

23. Click the **Share** button to continue.



The screenshot shows a modal dialog box with a white background and a gray border. The text inside reads: 'Select Share to share the document with [redacted] and discuss the evaluation with the employee or Cancel to remain on the page.' Below this text are two buttons: 'Share' and 'Cancel'. The 'Share' button is highlighted with a red dashed border. At the bottom of the dialog, it says 'Your electronic signature will be added to this document.'

24. A confirmation message will appear, which is an indicator that evaluation was sent to employee to acknowledgement.

The screenshot displays the NYC Health+ Hospitals evaluation system interface. At the top, a green banner contains a red-bordered box with the message: "You have successfully shared your evaluation with the employee." Below this, the user profile for "Sr Mgmt Consultant- LI" is shown, with a date range of "1 Aug 2023 - 31 Jul 2024". The interface indicates "Step 2 of 2" and "Evaluation" status. A button labeled "Override Acknowledgement" is visible. A yellow notification bar states: "OWEN can see the evaluation details in this document." The main content area is divided into sections: "Type of Evaluation (CB)" (which is empty, stating "No items have been defined in this section."), "Summary" (showing "Employee" and "Manager" details), and "Instructions (CB)" (showing "Responsibilities Instructions"). The "Manager" section includes a profile picture, the name "00-Annual", and a "test" label, with a note: "OWEN can see all the updates on your evaluation."

**Note:** The manager must then meet with the employee and review the evaluation document. The employee must **acknowledge** the document in order to finalize it and change the status to **Complete**.