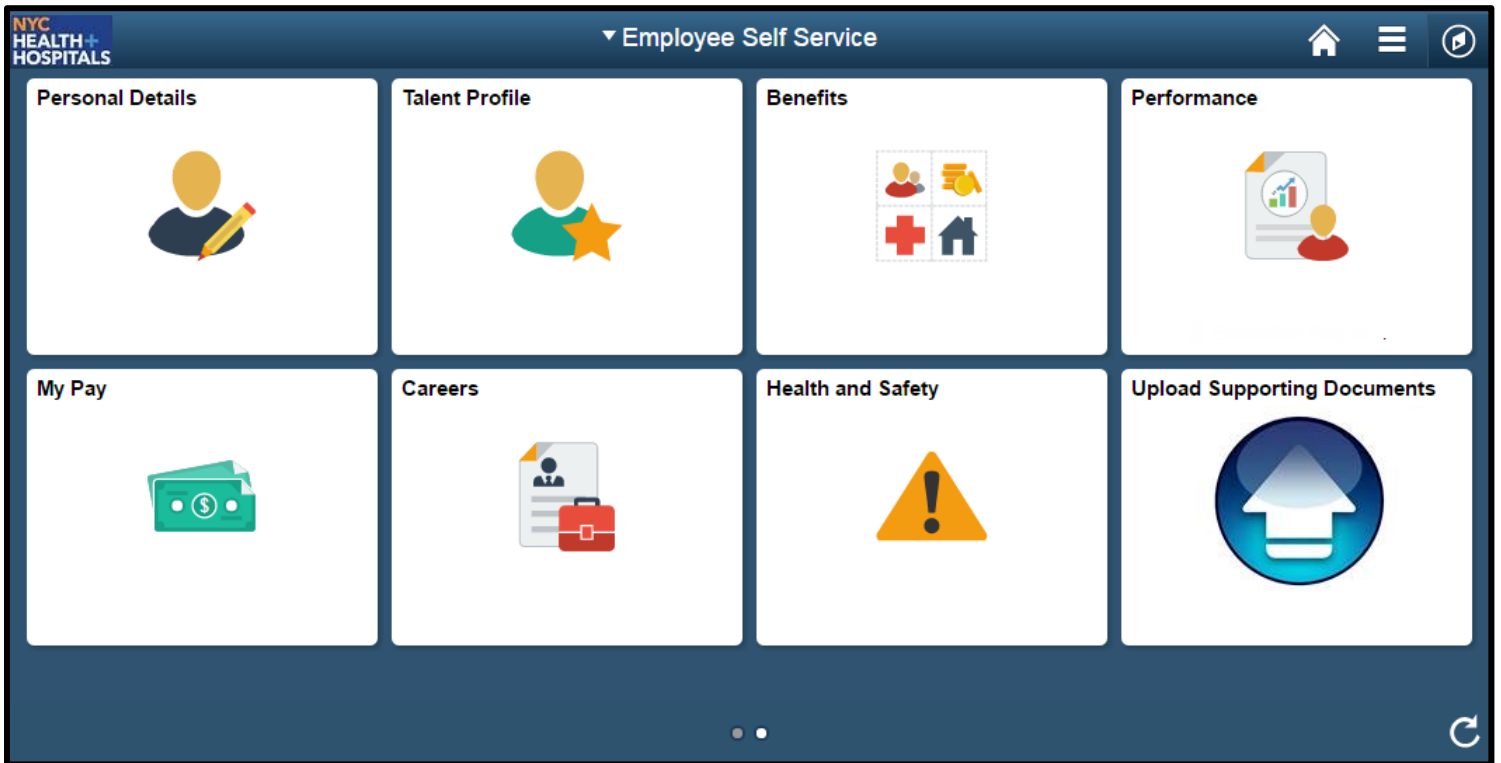


## How to Complete a Performance Evaluation - Group 12 Employee

### 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.)**

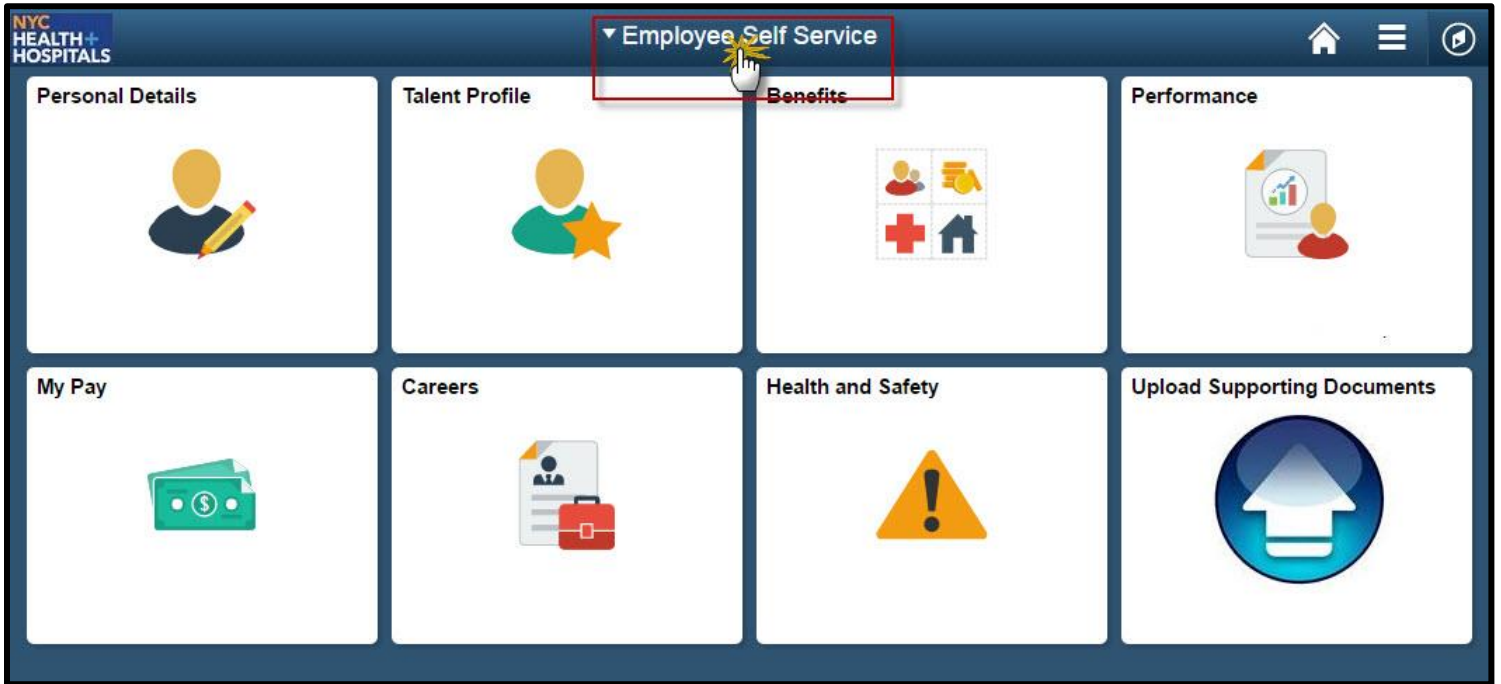


**Note:** In order to have access to **MSS**, you must meet the following requirements:

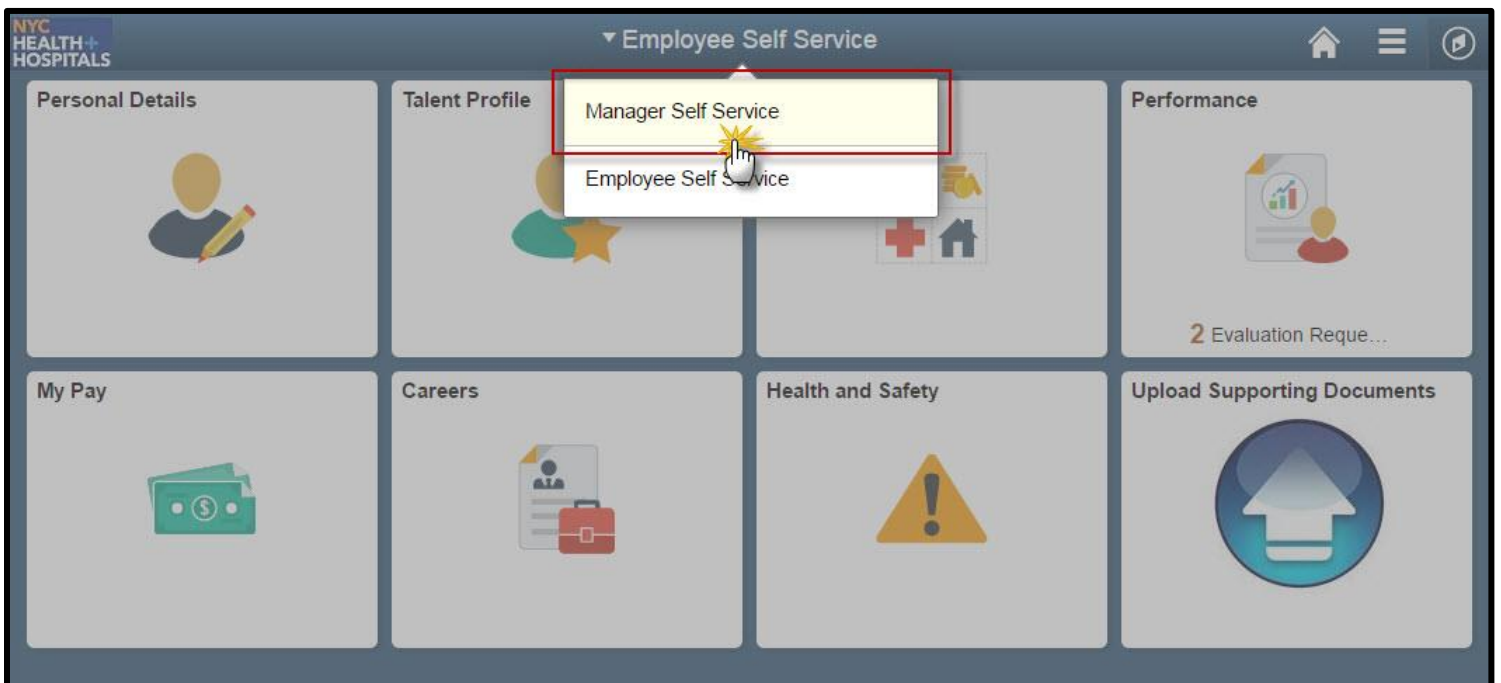
- You must have direct reports in PeopleSoft.
- You must have a **Completed** status for PeopleSoft Manager Self Service in your ELM **My Learning** Page.

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

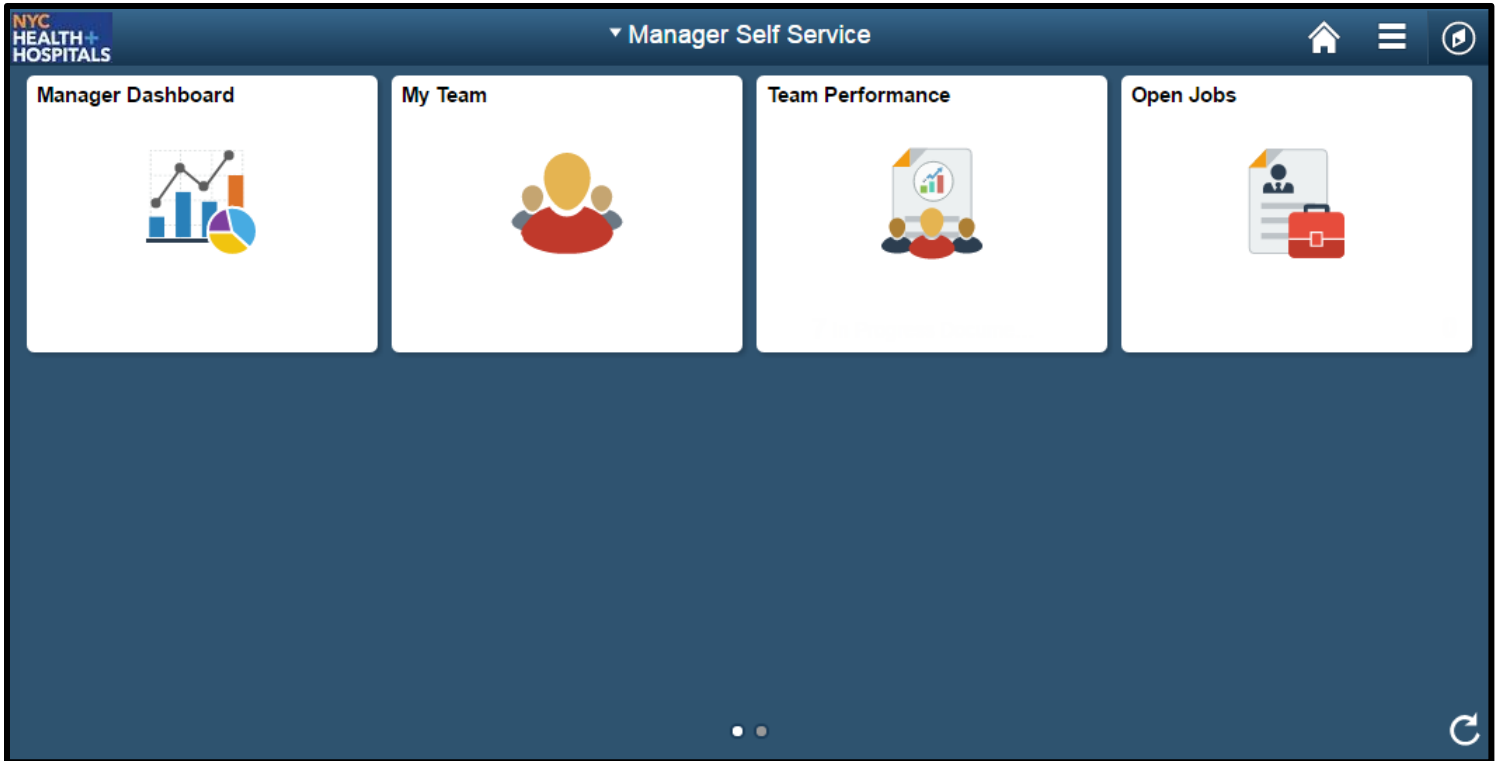
2. Click on **Employee Self Service** at the top of the homepage to view the dropdown menu.



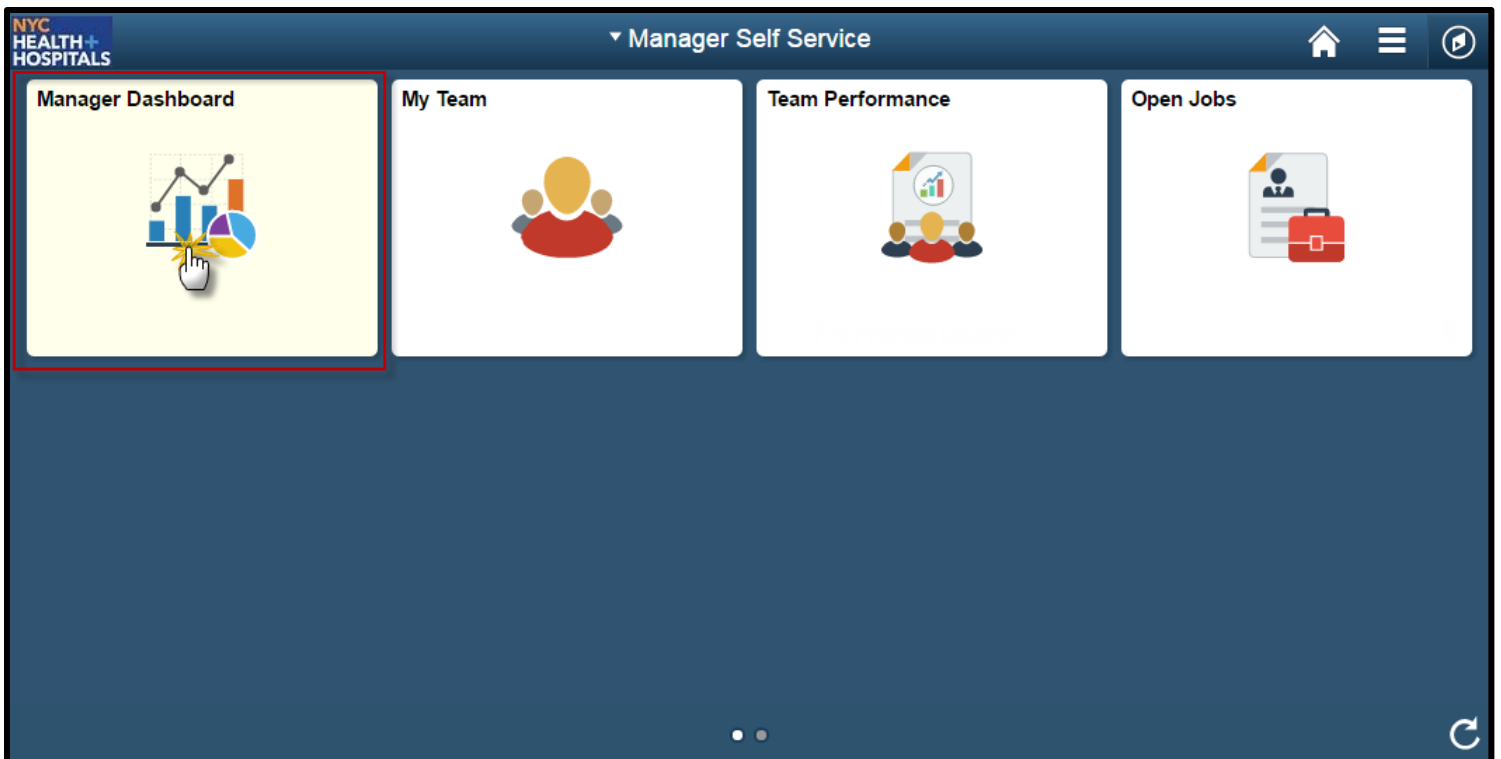
3. Select **Manager Self Service** from the dropdown menu.



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



5. Select the **Manager Dashboard** tile.



6. On the Manager Dashboard, a list of evaluations is displayed under the **Direct Reports Performance Documents** Pagelet.

Manager Dashboard

**Alerts**  
You have no Alerts right now.

**Pending Approvals**  
No approvals are pending at this time.

**Direct Reports' Perf Documents**

Critical Alert	Employee	Period End Date
■	EMELIE EMPLOYEE	11/04/2014
✓	ESTER EMPLOYEE	01/06/2015
◆	ERIC EMPLOYEE	02/05/2015

**Direct Line Reports**

Find | View All | 1-3 of 3

Name	Job Title
EMELIE EMPLOYEE	Pharmacist Interne
ERIC EMPLOYEE	Pharmacy Technician
ESTER EMPLOYEE	Pharmacy Technician

**Direct Reports' Expiring Lic**  
No expiring licenses in the next 60 days

**My Expiring Licenses**  
No expiring licenses in the next 60 days

**My Open Jobs**  
You are not assigned to any open jobs.

**Direct Reports' Comp Property**

7. Below are definitions of what each **Critical Alert** represents:

- ✓ indicates evaluations that have been completed
- ◆ indicates upcoming evaluations that have yet past due
- ▼ indicates evaluations that are due within 60 days
- indicates evaluations that are at least 60 days overdue
- ✕ indicates evaluations that have been cancelled or auto closed by HR

8. To begin, click on the name of the employee you would like to evaluate.

**Manager Dashboard**

**Alerts**  
You have no Alerts right now.

**Pending Approvals**  
No approvals are pending at this time.

**Direct Reports' Perf Documents**

Critical Alert	Employee	Period End Date
■	EMELIE EMPLOYEE	11/04/2014
✓	ESTER EMPLOYEE	01/06/2015
◆	ERIC EMPLOYEE	02/05/2015

**Direct Line Reports**

Summary | Job Details | Contact

**Name**

- EMELIE EMPLOYEE ▾ Actions
- ERIC EMPLOYEE ▾ Actions
- ESTER EMPLOYEE ▾ Actions

9. Verify that the correct template (type of evaluation) is attached. You must contact your Human Resources Department if this information is incorrect.

**Performance Process**

Steps and Tasks

- ERIC EMPLOYEE HHC Performance Documents 02/06/2014 - 02/05/2015 [Overview](#)
- Define Criteria (Due Date: 02/05/2015)
  - Update and Approve
- Nominate Participants (Due Date: 02/05/2015)
- Review Participant Evaluations (Due Date: 04/06/2015)
- Complete Manager Evaluation (Due Date: 04/06/2015)

**HHC Performance Documents** Define Criteria - Update and Approve

**ERIC EMPLOYEE**

Job Title Pharmacy Technician  
 Document Type HHC Performance Documents  
 Template **Group12 Non-Criteria Based**  
 Status In Progress

Manager MARIA MANAGER  
 Period 02/06/2014 - 02/05/2015  
 Document ID 100286  
 Due Date 02/05/2015

- Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
- Make any necessary adjustments to the criteria and review your changes with the employee.
- Once the performance criteria is correct select the approve button to complete this step.

Expand All | Collapse All

Section 1 - Type of Evaluation (NC)  
 Type of Evaluation (NC) will be evaluated by: Manager

Section 2 - Job Assignment  
 Job Assignment will be evaluated by: Additional Supervisor, Manager

Expand | Collapse

Job Assignment

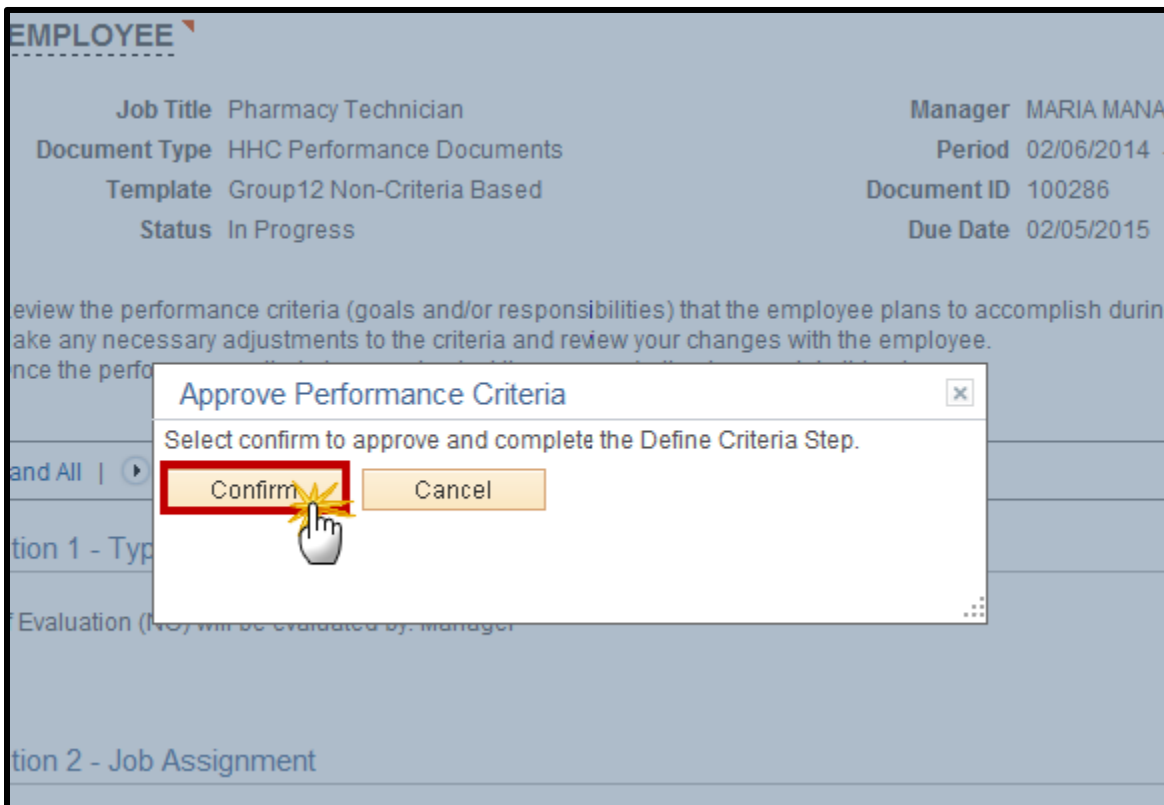
Description: Briefly describe major tasks of employee in order of importance not more than five items



**Note:** If you would like a review of each step before initiating the evaluation process, click the **Overview** hyperlink as a reference.

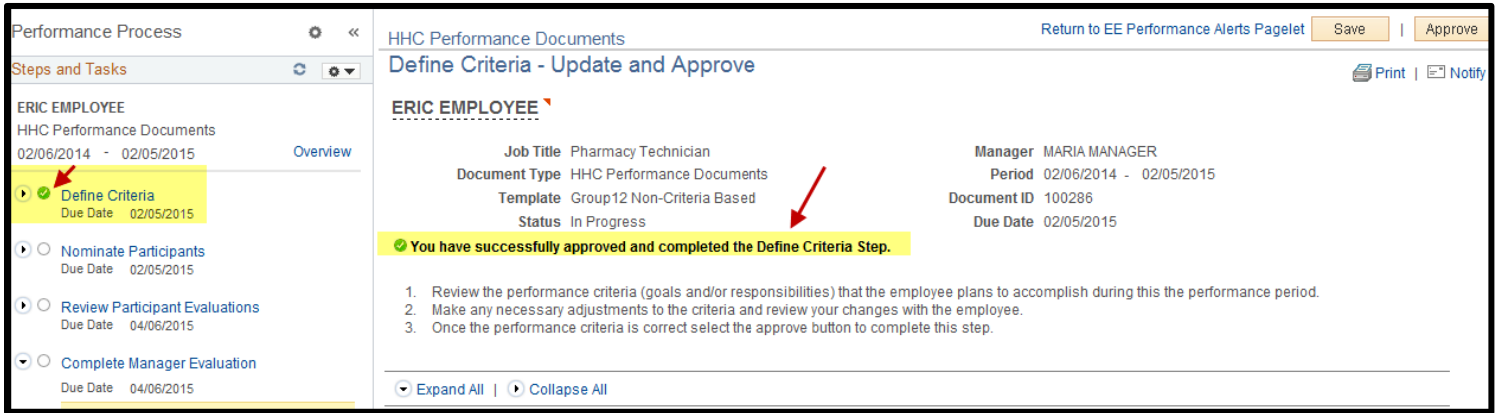
10. You must define criteria at the beginning of the performance period. Once completed, select the **Approve** button.



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



12. You will receive the following confirmation on your screen. The icon on the Performance Process section will change from  to .



Performance Process

HHC Performance Documents

Define Criteria - Update and Approve

ERIC EMPLOYEE

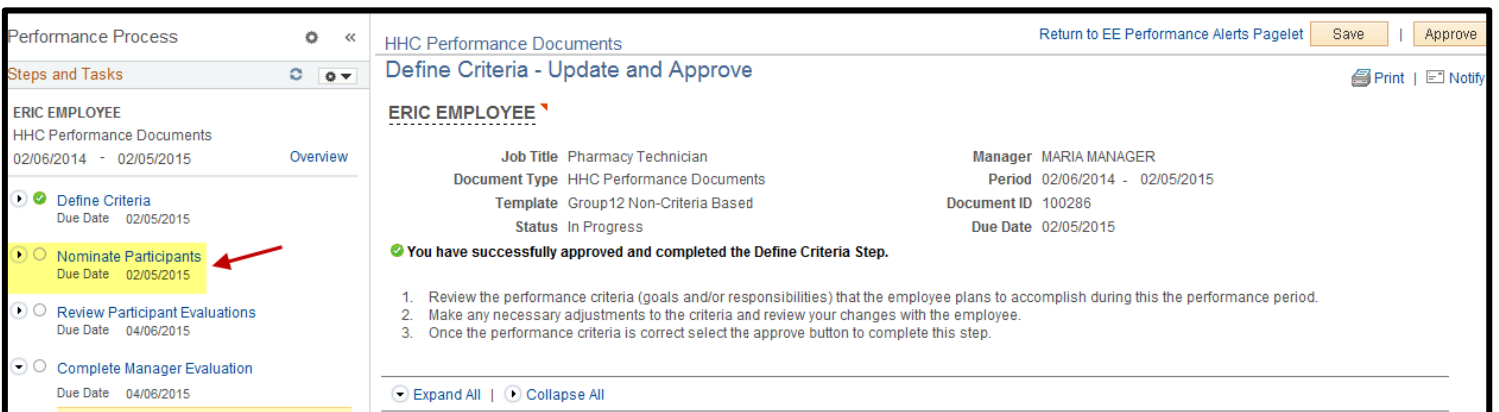
Job Title Pharmacy Technician  
Document Type HHC Performance Documents  
Template Group12 Non-Criteria Based  
Status In Progress

Manager MARIA MANAGER  
Period 02/06/2014 - 02/05/2015  
Document ID 100286  
Due Date 02/05/2015

**You have successfully approved and completed the Define Criteria Step.**

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

13. After you have defined criteria, you have 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.



Performance Process

HHC Performance Documents

Define Criteria - Update and Approve

ERIC EMPLOYEE

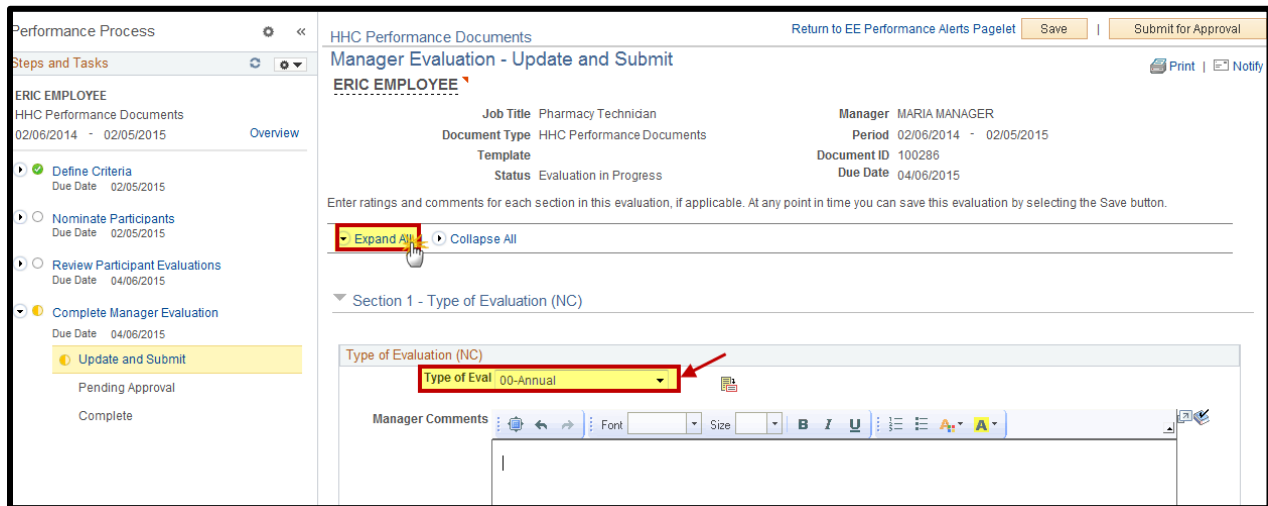
Job Title Pharmacy Technician  
Document Type HHC Performance Documents  
Template Group12 Non-Criteria Based  
Status In Progress

Manager MARIA MANAGER  
Period 02/06/2014 - 02/05/2015  
Document ID 100286  
Due Date 02/05/2015

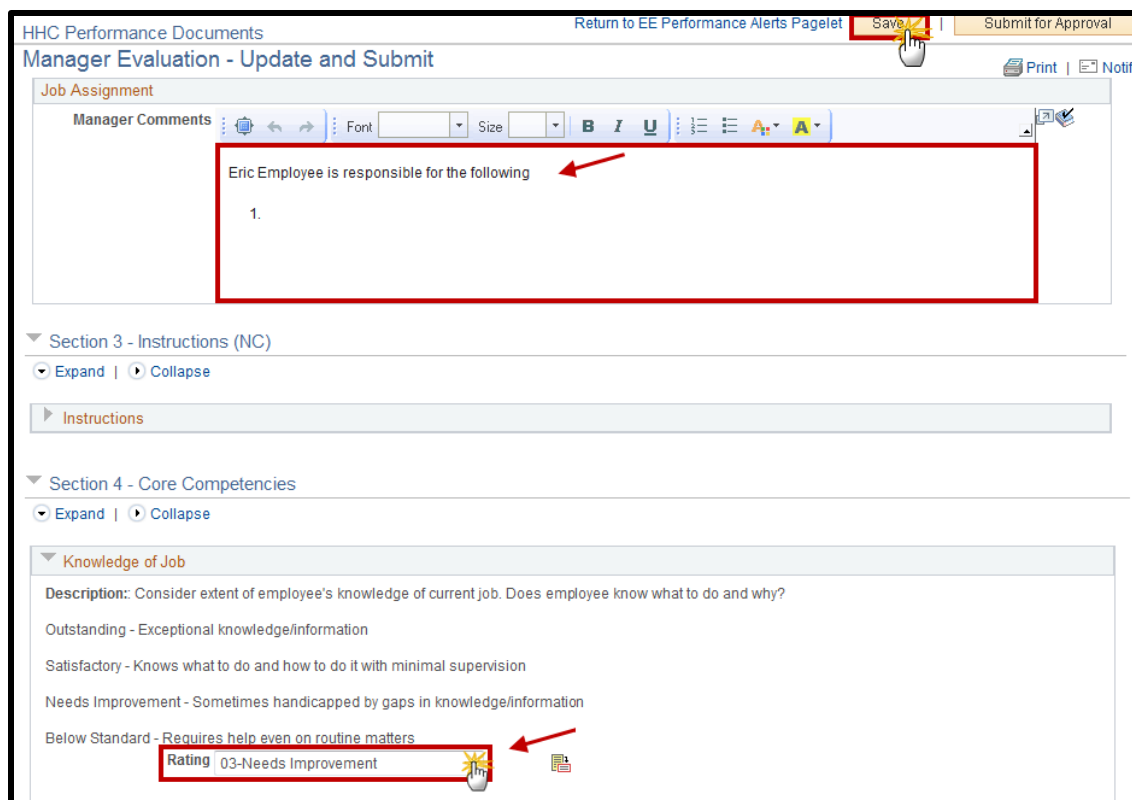
**You have successfully approved and completed the Define Criteria Step.**

1. Review the performance criteria (goals and/or responsibilities) that the employee plans to accomplish during this the performance period.
2. Make any necessary adjustments to the criteria and review your changes with the employee.
3. Once the performance criteria is correct select the approve button to complete this step.

14. At the end of the evaluation period, return to the document to complete the evaluation. Click **Expand All** to view all fields. Then, select the type of evaluation from the dropdown.



15. Proceed to populate all fields. Complete the appropriate sections and select a valid rating value. All ratings above or below satisfactory require comments. If a section is not applicable, select **Non-Applicable**. Click the Save button periodically to ensure no data loss.







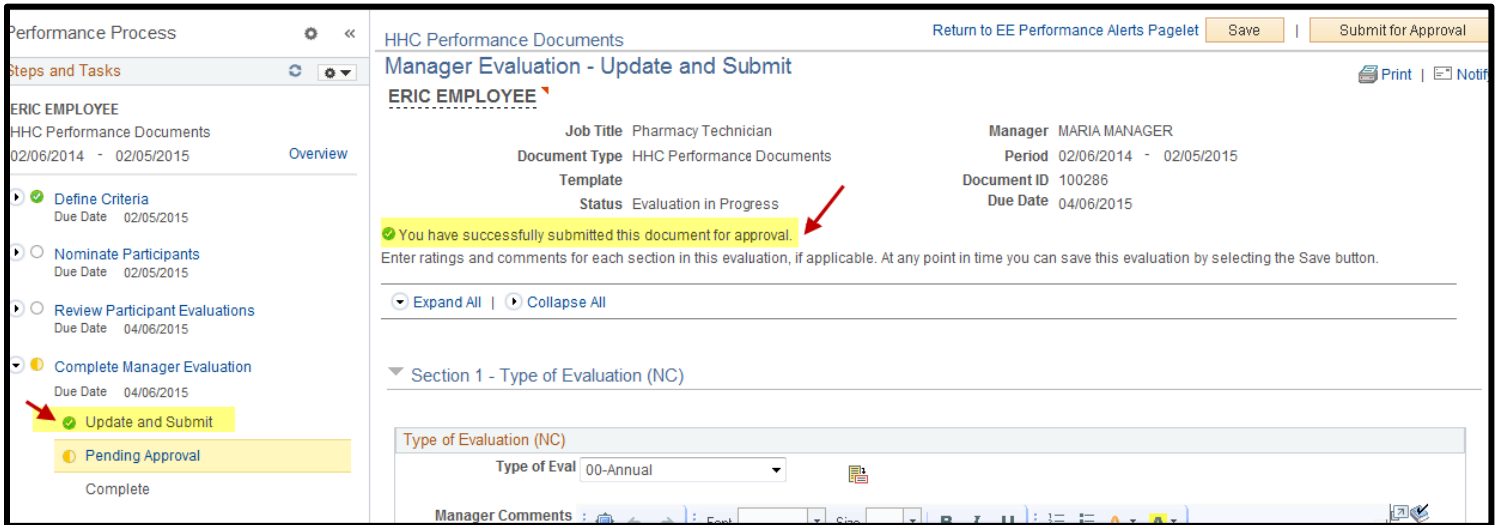
16. After review, return to the document and click the **Submit for approval** button.

The screenshot shows the 'Manager Evaluation - Update and Submit' interface for 'ERIC EMPLOYEE'. The left sidebar lists steps: Define Criteria, Nominate Participants, Review Participant Evaluations, Complete Manager Evaluation, and Update and Submit (highlighted). The main area shows employee details (Job Title: Pharmacy Technician, Manager: MARIA MANAGER) and a status of 'Evaluation in Progress'. A 'Submit for Approval' button is highlighted in the top right corner with a red box and a mouse cursor. Below the status, there is a section for 'Type of Evaluation (NC)' with a dropdown menu set to '00-Annual'.

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

The screenshot shows a 'Submit for Approval' dialog box overlaid on the evaluation page. The dialog contains the text: 'Select confirm to submit this document for approval. Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.' At the bottom of the dialog, there are two buttons: 'Confirm' (highlighted with a red box and a mouse cursor) and 'Cancel'.

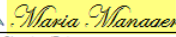

18. You will receive the confirmation screen below. The icon on the **Performance Process** section will change from  to . In addition, the reviewer will receive an email requesting approval.



**Note:** Once submitted, the **reviewer** must log into PeopleSoft and approve or deny the document. Once the reviewer makes a decision, the manager will receive notification via email.

19. You must then enter the evaluation once again and click the **Print** icon. You must then meet with their employee and review the evaluation document. Ensure you obtain the appropriate signatures for the last page and submit the evaluation to your Human Resources Department.

Supervisor Signatures Section  
NOTE: The following signatures indicate that the managerial employee and his/her supervisor have mutually discussed the evaluation for the performance period indicated.

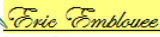
<u>Maria Manager</u> Supervisor/Manager Name (please print)	<u>Robert Reviewer</u> Reviewer Name (please print)
<u>Health Systems Pharmacist</u> Job Title	<u>Director of Pharmacy</u> Job Title
 Signature/Date	 Signature/Date

Employee Acknowledgments & Signature Section  
My signature on this page merely indicates that I have read the evaluation and have received a completed copy of its contents, including my evaluation and the following 0 competency checklists (if any):

It does not mean that I agree with the statements made nor does it waive my rights to appeal.  
I acknowledge that I have been advised of my rights to submit a written rebuttal to my supervisor within the next ten (10) calendar days. My rebuttal will be attached to and retained with this evaluation.

Eric Employee  
Employee Name (please print)

Pharmacy Technician  
Job Title

  
Signature/Date