# Manager Self Service: Performance Management Completing the Orientation Review Summary

#### Overview

This document describes the steps to completing the Orientation Review Summary for new employees as they complete their orientation period (also known as the 90-Day Review). Like any other performance management procedure, the employee and manager will also meet with the employee to discuss the form and provide verbal feedback.

# Note: Employees will be able to read your comments on this form. Discuss with your manager and/or Human Resource contact if you have questions on completing this form.

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### **Guidelines for Completing the Orientation Review Summary**

You and your employee can follow these guidelines when completing the Orientation Review Summary:

- a) You complete the form by answering the questions and providing an overall summary of the new employee's job performance.
- b) The employee reviews the document, and you meet to discuss the employee's performance. Then, you mark the document as having met with the employee.
- c) The employee has the opportunity to provide their own comments. During this step, they acknowledge that they have reviewed the document and met with you.
- d) You review the document including the employee's comments, add your own final comments (if applicable), and mark the document as Completed.
- e) The employee is notified that the document is completed.
- f) Both you and your employee can view the completed document in the historical documents page (Self Service for the employee, Manager Self Service for the manager).

You will receive an email reminder on the first business day of the month if you have at least one Orientation Review Summary that is overdue for completion the day the email is sent.

## Navigating to the Goal Setting Document

1. Access the Orientation and Review Document through Quick Links or the PeopleSoft Menu:



Menu Navigation: Manager Self Service > Performance Management > Performance Documents > Current Documents

The **Current Performance Documents** screen displays a list of the performance documents for the employees you manage or act as the administrator for (example: for Faculty Assistants).

2. Access the form by clicking Orientation Review Summary in the Document Type field (noted in the image below).

Current Performance Documents Listed below are the current performance documents for which you are the Manager.								
Performance Documents Personalize   Find   View All   🚨   🛗 First 🗹 1-15 of 15 D Las								
Employee ID	Employee	Document Type -	Begin Date	End Date -	Job Code Description	Status		
40404040	Michael Davidson	Orientation Review Summary	08/13/2013	11/13/2013	Coordinator II	In Progress		
30303030	Sophie Mascioli	Annual Review	07/01/2013	06/30/2014	Financial Administration Dir	In Progress		
90909090	Caroline Daniels	Annual Review	07/01/2013	06/30/2014	Coordinator II	In Progress		

3. The Document Details screen appears. Click Start.

Current Performance Documents							
Document Details							
Michael Davidson, Coordinator II Orientation Review Summary: 08/13/2013 - 11/13/2013							
Performance Docum	ent Details						
Employee: Document Type: Template: Manager:	Michael Da Orientation FY14 - Orie Susan Spir	Rev ntati	iew Summary	Job Code Descr Period: Document ID: Status:	08/1: 7739	3/2013 -	11/13/2013
Document Progress							
Step			Status	Due Date	Action	Next Actio	n
Manager's Document	Vanager's Document 🔹 🛛 In Progress		11/08/2013		<u>Start</u>		
Return to Select Documents							

### **Entering Feedback**

4. Complete the form as described below. The **Orientation Review Summary** document is very similar in appearance and function to the other Performance Management documents in PeopleSoft. Each section has its own set of instructions written on the page:

Note: the employee will not be able to view any detail of the document until after Share With Employee has been clicked.

#### **Employee Information**

General information about the document, including its current status, is displayed.

- Click <u>Return to Document Detail</u> to go back to the document detail page.
- Click Expand All to view the full detail of each section of the document.
- Click save if you want to save your work and return to the document at a later time.
- Click Share With Employed when you are ready to review your feedback with your employee.

Performance Document - Orientation Review Summary								
Manager Evaluation								
Michael Davidson, Coordinator II								
Orientation Review Summary: 08/13/2013 - 11/13/2013								
Author:	Susan Spinelli	Role:	Manager					
Status:	In Progress	Due Date:	11/08/2013					
Approval:	Not Required							
Share With E Throughout the evaluation and	this evaluation is In Progra mployee to make this doct the document, you can click id/or other reviewers' evalu- py their comments, and/or	ument available to on View Other Co ation, if available. E	them for review. mments to read th By clicking on Writi	ne employee's self- ing Tools you can				
Save	Share With Employe		5	Return to Document Detail				
Expand All	Collapse All		Expand Sections					

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#### Feedback

Provide feedback, up to 254 characters, on each of the three topics: *Areas of Strength*, *Areas of Improvement*, and *Job Responsibility*.

- Click to expand an individual topic to view the description and add feedback.
- Click Expand to open all three topics.
- Click <sup>e</sup> to perform a Spell Check on a section.

Feedba	:k	Summary	> Com	ments			
		eriod is a criti expectations.		nsure you d	scuss and cla	arify your staf	f
ase click on e band	expand to view Collapse	w and/or provi	de your com	nments in th	e following are	eas:	
Areas of Stre	ength						
Description ·							
		ed the basic fu ire the employ					×
las the empl brief explana		ire the employ	ee's signific				<i>K</i>

#### **Overall Summary**

Select from one of the three overall ratings: Meeting Expectations, Not Meeting Expectations, or Partially Meeting Expectations, and provide any overall comments about the new employee's comments.

- Click to view a description for each rating.
- Click <sup>e</sup> to perform a Spell Check on a section.

#### **Employee, Manager Comments**

- Employee Comments: View-only for the manager. Employees will be able to add comments once the manager has clicked Share With Employee.
- *Manager Comments:* Include any additional comments after meeting with the employee.

> Summ	ary	Comments	
Employee's co	mments be	efore acknowledging the evaluation.	
Comments:			
<sup>,</sup> Manager O	comment	ts	
Summ	ary	Comments	
Jumm			
/	nments bef	fore completing the evaluation.	
/	nments bef	fore completing the evaluation.	

Overall Summary

Comments:

Summary

Comments

Meeting Expectations O Not Meeting Expectations O Partially Meeting Expectations

Please provide an overall rating and a meaningful summary.

#### Meeting with Your Employee

After Share With Employee is clicked, the employee can view your feedback and will have the ability to add their own comments, which is optional. After you meet with the employee to review the document, the next step is to indicate that the meeting occurred.

#### **Current Performance Documents**

Listed below are the current performance documents for which you are the Manager.

Performan	ce Documents		alize   Find   View All   🛃	🛗 First 🗹 1-15 of 15 Ď Last		
Employee ID	Employee	Document Type▼	Begin Date	End Date 🔺	Job Code Description	Status
40404040	Michael Davidson	Orientation Review Summary	08/13/2013	11/13/2013	Coordinator II	Share w/Employee

5. From the **Current Performance Documents** page, click the <u>Orientation Review Summary</u> for the employee. *Note the current status: Share with Employee.* 

Current Performance Documents							
Document Details							
Michael Davidson, Coordinator II Orientation Review Summary: 08/13/2013 - 11/13/2013							
Performance Document Details Employee: Michael Davidson Job Code Description: Coordinator II							
Document Type:			eview Summary	Period: 08/13/2013 - 11/13/2013			
Template:	FY14 - Ori	ienta	ation Review	Document ID:	77	39	
Manager:	Susan Sp	inel	li	Status:	Sh	are w/Employee	
Document Progress							
Step			Status	Due Date	Action	Next Action	
Manager's Document 🔹 Share w/Employee				11/08/2013	<u>View</u>	<u>Met With</u> Employee	

6. Click Met with Employee to access the document detail. (You can also click View.)



8. The status of the document is now **Acknowledge** – the employee will be emailed that their next step is to acknowledge that they have reviewed the document and met with their manager.

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		nag	jer does	s have the c	ption t	o override on b
Performance Docur	nent Details					
Employee: Document Type: Template: Manager:	Orientation FY14 - Orien	Revie ntatior	w Summary	Job Code Descrip Period: Document ID: Status:	08/13 7739	dinator II /2013 - 11/13/2013 /Employee
Document Progres	S					
Step		5	Status	Due Date	Action	Next Action
Manager's Documer	nt			11/08/2013	<u>View</u>	Acknowledge
Michael Davidson, C Orientation Revie Author: Susar Status: Met w/ Approval: Not Re The status of this eva their performance eva section, if applicable. The employee now m behalf of the employe	oordinator II w Summary o Spinelli Employee equired Iuation is Met aluation. In this eeds to acknor e, select the A	with E s statu wledg Acknov	Role: Due Dat Employee, m Is, you may e le the review. wledge Revie	Manager te: 11/08/2013 eaning that you revi nter comments in t If you need to ackn	he Manage owledge th	r Comments le evaluation on
	email notification of the Employ the document Employee: Document Type: Template: Manager: Document Progres Step Manager's Document Manager's Manager's Ma	email notification to the of the Employee the document, the main employee: Michael Da Document Type: Orientation Template: FY14 - Orie Manager: Susan Spir Document Progress Step Manager's Document Manager's Document Manager's Document Manager's Document Michael Davidson, Coordinator II Orientation Review Summary Author: Susan Spinelli Status: Met w/Employee Approval: Not Required The status of this evaluation is Met their performance evaluation. In this section, if applicable. The employee now needs to ackno behalf of the employee, select the A	email notification to the email notification to the email         of the Employee         the document, the manage         Employee:       Michael Davidsor         Document Type:       Orientation Revie         Template:       FY14 - Orientation         Manager:       Susan Spinelli         Document Progress       Step         Manager's Document       Image: Coordinator II         Orientation Review Summary: 08/       Author:         Susan Spinelli       Status:         Methael Davidson, Coordinator II       Orientation Review Summary: 08/         Author:       Susan Spinelli         Status:       Met WEmployee         Approval:       Not Required         The status of this evaluation is Met with 1 their performance evaluation. In this statu section, if applicable.         The employee now needs to acknowledge behalf of the employee, select the Acknowledge	email notification to the employee.         of the Employee         the document, the manager does         Performance Document Details         Employee:       Michael Davidson         Document Type:       Orientation Review Summary         Template:       FY14 - Orientation Review         Manager:       Susan Spinelli         Document Progress       Status         Manager's Document       Met         W/Employee       Met         Manager's Document       Orientation Review Summary: 08/13/2013 - 1         Author:       Susan Spinelli         Orientation Review Summary: 08/13/2013 - 1         Author:       Susan Spinelli         Role:       Status:         Met w/Employee       Due Dat         Approval:       Not Required         The status of this evaluation is Met with Employee, m       their performance evaluation. In this status, you may e section, if applicable.         The employee now needs to acknowledge the review.       The employee now needs to acknowledge the review.	email notification to the employee.         of the Employee         the document, the manager does have the complexity of the document, the manager does have the complexity of the document process. <u>Performance Document Details</u> Employee: Michael Davidson Job Code Description Document Type: Orientation Review Summary Period:             Template: FY14 - Orientation Review Document ID:             Manager: Susan Spinelli Status: <u>Document Progress             step                                     </u>	of the Employee         the document, the manager does have the option to         Performance Document Details         Employee:       Michael Davidson         Job Code Description: Coord         Document Type:       Orientation Review Summary         Period:       08/13         Template:       FY14 - Orientation Review         Document ID:       7739         Manager:       Susan Spinelli         Status:       Met w         Document Progress       Status         Step       Met         Manager's Document       Met         WEmployee       11/08/2013         Wichael Davidson, Coordinator II       Orientation Review Summary: 08/13/2013 - 11/13/2013         Author:       Susan Spinelli         Role:       Manager         Status:       Met w/Employee         Dorientation Review Summary: 08/13/2013 - 11/13/2013         Author:       Susan Spinelli         Role:       Manager         Status:       Met w/Employee         Due Date:       11/08/2013         Approval:       Not Required         The status of this evaluation is Met with Employee, meaning that you reviewed with their performance evaluation. In this status, you may enter comments in the Manage section, if applicabl

Mark the Document as Complete The final step in this process is to mark the document as Complete. After the document is completed, it can be viewed from the Historical Documents page in Manager Self Service.

9. From the Document Details page, click <u>View</u> or <u>Complete</u>.

Performance Document Details							
Employee:	Michael Davidson			Job Code Description: Coordinator II			
Document Type:	Orientation F	Revie	iew Summary Period:		08/13/201	3 - 11/13/2013	
Template:	FY14 - Orien	itatio	tion Review D		ment ID:	7739 Acknowledged	
Manager:	Susan Spin	elli		Status:			
<b>Document Progres</b>	S						
Step			Status		Due Date	Action	Next Action
Manager's Documer	nt	•	Acknowledg	ed	11/08/2013	View	Complete

10. Review the employee comments (if	
there are any).	Summary Comments
<ol> <li>Add any additional comments in the Managers Comments section.</li> <li>Click  to perform a spellcheck.</li> </ol>	Employee's comments before acknowledging the evaluation. Comments: The past few months have been going pretty well. I have plenty to learn, but I am confident that I will be brought up to speed with the continued help of my team.
	Summary         Comments           Manager's comments before completing the evaluation.         Comments:           Overall, Michael is doing a terrific job in his new role as Functional Coordinator. He dived right into his assignment and is learning the job functions very quickly. I am
	pleased to have him as a new member of the team.
	▶ Audit History
12. Click Complete from either the top or bottom of the document.	Reopen Save Complete Additional Return to Document Detail
13. Click Complete on the confirmation page, or click Cancel to return to the document and make additional edits.	Performance Document - Orientation Review Summary Complete Evaluation You have almost finalized your evaluation. To confirm that you would like to mark the evaluation as completed, select the Complete button. Do not complete this evaluation until you have finalized each section.
	Complete
14. Click on the confirmation screen.	Performance Document - Orientation Review Summary Complete Evaluation Confirmation The performance evaluation is finalized and marked as "Complete".