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 to discuss the form and provide verbal feedback.

Topics Covered

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Guidelines for Completing the Orientation Review Summary

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

- a) Your manager completes the form by answering the questions and providing an overall summary of your job performance.
- b) You review the document and discuss it with your manager. Your manager marks the document as having met with you.
- c) You enter any additional comments, then acknowledge that you have reviewed the document and met with your manager.
- d) Your manager reviews your comments, and marks the document as Completed.
- e) Both you and your manager can be view the completed document in the historical documents page (Self Service for the employee, Manager Self Service for the manager).

Navigating to the Goal Setting Document

- Once your manager has marked the document as ready for your review ("Share With Employee" status):
 - 1. Access the **Orientation Review Summary** through **Quick Links** or the **PeopleSoft Menu**:



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

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

Note the status is "Share w/Employee." You cannot access the details of the document until it is in this status.

Current Performance Documents								
Daniels,C	Daniels,Caroline							
Listed belov	Listed below are your current performance documents.							
Performan	ce Documents			Personalize	Find View All 🗖 🛗	First K 1-2 of 2 Last		
Employee ID	Document Type	Begin Date	End Date	Job Code Description	Status	Manager		
90909090	Orientation Review Summary	08/13/2013	11/13/2013	Coordinator	Share w/Employee	Susan Spinelli		

3. The Document Details screen appears. Click View.

Current Performance Documents								
Document De	Document Details							
Caroline Daniels, Financial Administration Dir Orientation Review Summary: 08/13/2013 - 11/13/2013								
Performance Docum	ent Details							
Employee: Document Type:	Caroline Da	niels Zovie	w Summan	Job Code Description: Financial Administration Dir				
Template:	FY14 - Orientation Review			Docu	iment ID:	7740	.013	11/13/2013
Manager:	Susan Spinelli			Statu	IS:	Share	w/Er	nployee
Document Progress								
Step Status				Due Date	Action		Next Action	
Review Manager's Document					11/08/2013	<u>View</u>		

Review the Document

4. Review the form as described below, and if you choose to enter comments, click

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 to print a PDF copy of the document.
- Click Save if you enter any comments.

Performa	Performance Document - Orientation Review Summary						
Manager Evaluation							
Caroline Daniels, Financial Administration Dir							
Orientation	n Review Summary: 0	8/13/2013 - 11/13	3/2013				
Author:	Susan Spinelli	Role:	Manager				
Status:	Share w/Employee	Due Date:	11/08/2013				
Approval:	Not Required						
The status of this evaluation is Share With Employee , meaning that your manager has completed their evaluation and made it available to you for review. In this status, you may enter comments in the Employee Comments section, if applicable. At any time you can save any entries you make on the evaluation by selecting the Save button.							
Save Beturn to Document Detail							
Expand All	Collapse All	Expand	<u>I Sections</u>				

Save

Feedback Topics

- Click to expand an individual topic to review the description and your manager's feedback.
- Click <u>Expand</u> to open all three topics.

✓ Section Header							
Feedback	Summar	ry Comments					
The Orientation and Review period is a critical time to ensure you discuss and clarify your staff member's job goals and your expectations.							
Please click on exp	and to view and/or p	provide your comments in the following areas:					
Expand	Collapse						
Areas of Streng	th						
Areas of Improv	vement						
Description : Are there any areas of improvement? What additional training/support is needed to make these improvements? Comments: Caroline needs to continue to gain knowledge about our department and where it intersects with our internal Harvard clients. She can accomplish this through on-the-job informal training with other members of the team.							
Created By:	Template	09/05/2013 10:49AM					
		000000000000000000000000000000000000000					

Overall Summary

Review the rating your manager selected and the overall summary comments.

Click to view a description for each rating.

Overall Summary Summary Comments Meeting Expectations Not Meeting Expectations Meeting Expectations Meeting Expectations Meeting Expectations Overall, Caroline is doing a terrific job as she learns about her responsibilities. Her positive attitude and excellent work ethic are a great benefit to the department.

Employee, Manager Comments

 Employee Comments: You can enter any comments now, then click
Save

Before you "Acknowledge" the document, you will have another opportunity to add or edit the comments.

• Manager Comments: View-Only. If managers have additional comments after meeting with you, they will display here.

Summar	ry Comments						
Employee's com	ments before acknowledging the evaluation.						
Comments:	Comments:						
Summary Comments							
Manager's comm	nents before completing the evaluation.						
Comments:							

Meeting with your Manager

Once you have reviewed the document, you can meet with your manager for review. No action is required in PeopleSoft. After you have met, your manager will mark the document "Met with Employee." The next step is for you to "Acknowledge" the document.

Acknowledging the Document

Once your manager updates the document status to indicate that you have met to review the document, you will receive an email to acknowledge that you have reviewed the document and have reviewed it with your manager as well.

5. From the **Document Details** page, click View or Acknowledge.

Current Performance Documents							
Document De	Document Details						
Caroline Daniels, Financial Administration Dir Orientation Review Summary: 08/13/2013 - 11/13/2013							
Performance Docum	ent Details						
Employee:	Caroline Daniels Job Code Description: Financial Administration Dir						
Document Type:	Orientation Review Summary Period:				08/13/2013 - 11/13/2013		
Template:	FY14 - Orientation Review			Document ID:	7740		
Manager:	Susan Spinelli			Status:	Met w	/Employee	
Document Progress							
Step	Status			Due Date	Action	Next Action	
Review Manager's Document			11/08/2013	<u>View</u>	<u>Acknowledge</u>		

- 6. Click Acknowledge Review
- 7. Click or the confirmation page.
- 8. Once your manager has completed the document, you will be able to review it from the **Historical Documents** page in Self Service.

Performance Document - Orientation Review Summary							
Manager Evaluation							
Caroline Daniels, Financial Administration Dir							
Orientatior	n Review Summary: 08/	13/2013 - 11/13	3/2013				
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 your manager has met with you to review the performance document. In this status, you may enter comments in the Employee Comments section, if applicable. At any time you can save any entries you make on the evaluation by using the Save button. If you are ready to acknowledge the evaluation, select the Acknowledge button.							
Save	Acknowledge Review	5	Return to Document Detail				