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.

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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e) Both you and your manager can be view the completed document in the historical documents page (Self Service for the employee, Manager Self Service for the manager).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 Diagram]

   

   **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 Table]

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Document Type</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Job Code Description</th>
<th>Status</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>9090909090</td>
<td>Orientation Review Summary</td>
<td>08/13/2013</td>
<td>11/13/2013</td>
<td>Coordinator</td>
<td>Share w/Employee</td>
<td>Susan Spinelli</td>
</tr>
</tbody>
</table>
3. The Document Details screen appears. Click View.

Review the Document

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

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

- Click Return to Document Detail 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 if you enter any comments.

Feedback Topics

- Click to expand an individual topic to review the description and your manager’s feedback.
- Click Expand to open all three topics.
Overall Summary

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

- Click to view a description for each rating.

Employee, Manager Comments

- **Employee Comments:** You can enter any comments now, then click .

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.

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.
6. Click **Acknowledge Review**.

7. Click **OK** on 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.