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f) Both you and your employee can view the completed document in the historical documents page (Self Service for the employee, Manager Self Service for the manager).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 any Orientation Review Summary documents.
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.

   - Employee ID: 40404040, Employee: Michael Davidson, Document Type: Orientation Review Summary
   - Employee ID: 30303030, Employee: Sophie Mascoli, Document Type: Annual Review
   - Employee ID: 90009000, Employee: Caroline Daniels, Document Type: Annual Review
3. The **Document Details** screen appears. Click **Start**.

![Current Performance Documents - Document Details](image)

**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:** Orientation Review Summary  
- **Period:** 08/13/2013 - 11/13/2013  
- **Template:** FY14 - Orientation Review  
- **Document ID:** 7739  
- **Manager:** Susan Spinelli  
- **Status:** In Progress

**Document Progress**

- **Step:** Manager's Document  
- **Status:** In Progress  
- **Due Date:** 11/08/2013  
- **Action:** Start

***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 [Start] has been clicked.*

**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 **Save** if you want to save your work and return to the document at a later time.
- Click **Share With Employee** when you are ready to review your feedback with your employee.
Feedback
Provide feedback, up to 254 characters, on each of the three topics: Areas of Strength, Areas of Improvement, and Job Responsibility.

- Click \( \text{expand} \) to expand an individual topic to view the description and add feedback.
- Click \( \text{Expand} \) to open all three topics.
- Click \( \text{spell check} \) to perform a Spell Check on a section.

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 \( \text{view description} \) to view a description for each rating.
- Click \( \text{spell check} \) 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 \( \text{share with employee} \).
- Manager Comments: Include any additional comments after meeting with the employee.
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.

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

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

7. Click Met with Employee, then click [OK] at the confirmation screen.

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.
Acknowledging the Document

After is clicked, the employee should acknowledge the document and can also enter their own comments. PeopleSoft will send an automatic email notification to the employee.

Manager Override: Acknowledge on Behalf of the Employee

If the employee cannot or will not acknowledge the document, the manager does have the option to override on behalf of the employee:

- From the Document Details page, click View or Acknowledge.
- Click Acknowledge Review.
- Indicate whether the override is due to needing to acknowledge on behalf of the employee, or whether the employee has refused to acknowledge the document.
- Click OK.

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 View or Complete.
10. Review the employee comments (if there are any).

11. Add any additional comments in the **Managers Comments** section. Click 📄 to perform a spellcheck.

12. Click ✅ Complete from either the top or bottom of the document.

13. Click ✅ Complete on the confirmation page, or click ✖️ Cancel to return to the document and make additional edits.

14. Click OK on the confirmation screen.