

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

| | |
|---|---|
| Guidelines for Completing the Orientation Review Summary..... | 1 |
| Navigating to the Goal Setting Document..... | 2 |
| Review the Document..... | 3 |
| Employee Information..... | 3 |
| Feedback Topics..... | 3 |
| Overall Summary..... | 4 |
| Employee, Manager Comments..... | 4 |
| Meeting with your Manager..... | 4 |
| Acknowledging the Document..... | 4 |

Guidelines for Completing the Orientation Review Summary

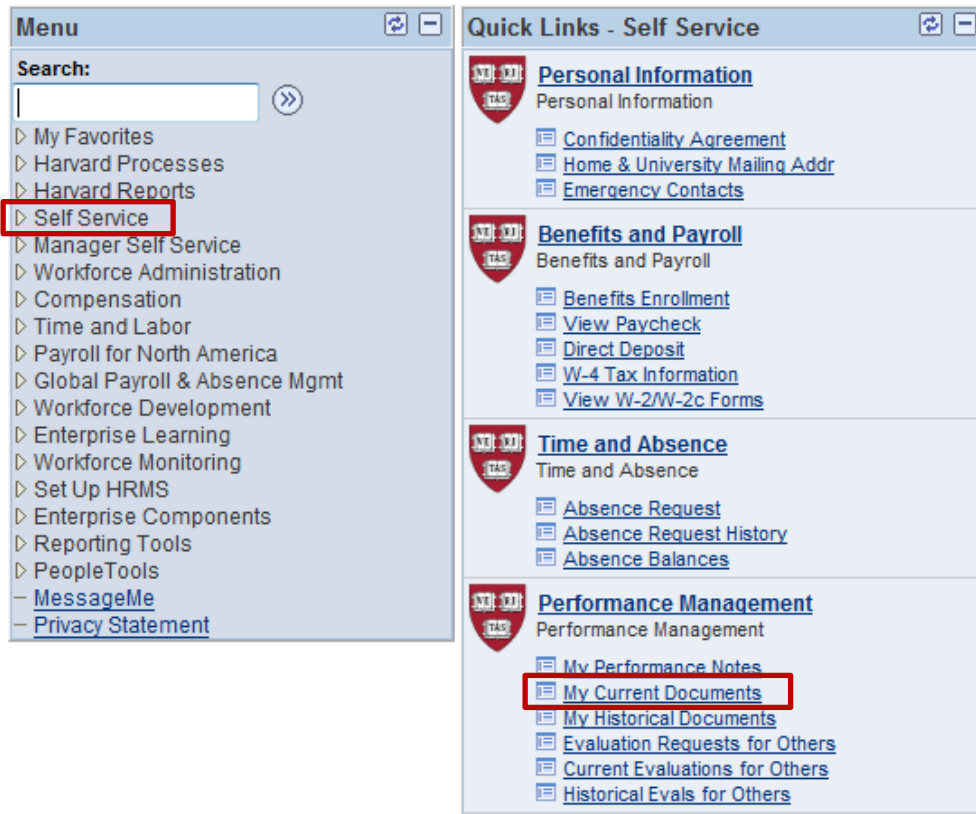
You and your manager can follow these guidelines when completing the Orientation Review Summary:

- 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- e) Both you and your manager can view the completed document in the historical documents page (Self Service for the employee, Manager Self Service for the manager).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, Caroline | | | | | | |
| Listed below are your current performance documents. | | | | | | |
| Performance Documents | | | | | | |
| 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 Details

Caroline Daniels, Financial Administration Dir
Orientation Review Summary: 08/13/2013 - 11/13/2013

| Performance Document 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: | Share w/Employee |

| Document Progress | | | | |
|---------------------------|------------------|------------|----------------------|-------------|
| Step | Status | Due Date | Action | Next Action |
| Review Manager's Document | Share w/Employee | 11/08/2013 | 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.

Performance Document - Orientation Review Summary

Manager Evaluation

Caroline Daniels, Financial Administration Dir
Orientation Review Summary: 08/13/2013 - 11/13/2013

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.

[Return to Document Detail](#)

[Expand All](#) [Collapse All](#) [Expand Sections](#)

Feedback Topics

- Click to expand an individual topic to review the description and your manager's feedback.
- Click [Expand](#) to open all three topics.

Section Header

Feedback
 Summary
 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 **expand** to view and/or provide your comments in the following areas:

[Expand](#) [Collapse](#)

Areas of Strength

Areas of Improvement


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
 Last Modified By: Susan Spinelli 09/09/2013 10:40AM

Job Responsibility

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

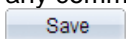
Meeting Expectations
 Not Meeting Expectations
 Partially Meeting Expectations

Rating: Meeting Expectations 

Comments: 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



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.

Employee Comments

Summary Comments

Employee's comments before acknowledging the evaluation.

Comments:

Manager Comments

Summary Comments

Manager's comments 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.


- From the **Document Details** page, click [View](#) or [Acknowledge](#).

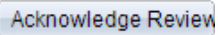
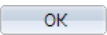
Current Performance Documents

Document Details

Caroline Daniels, Financial Administration Dir
Orientation Review Summary: 08/13/2013 - 11/13/2013

| Performance Document 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 |  Met w/Employee | 11/08/2013 | View | Acknowledge |

6. Click .
7. Click  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.

Performance Document - Orientation Review Summary


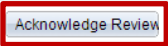

Manager Evaluation

Caroline Daniels, Financial Administration Dir
Orientation 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 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.

   [Return to Document Detail](#)