

# Manager Self Service: Performance Management

## Completing the Orientation Review Summary

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### 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.**

### Topics Covered

Guidelines for Completing the Orientation Review Summary.....	1
Navigating to the Goal Setting Document.....	2
Entering Feedback .....	3
Employee Information.....	3
Feedback.....	4
Overall Summary.....	4
Employee, Manager Comments .....	4
Meeting with Your Employee .....	5
Acknowledging the Document.....	6
Manager Override: Acknowledge on Behalf of the Employee.....	6
Mark the Document as Complete.....	6

### Guidelines for Completing the Orientation Review Summary

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

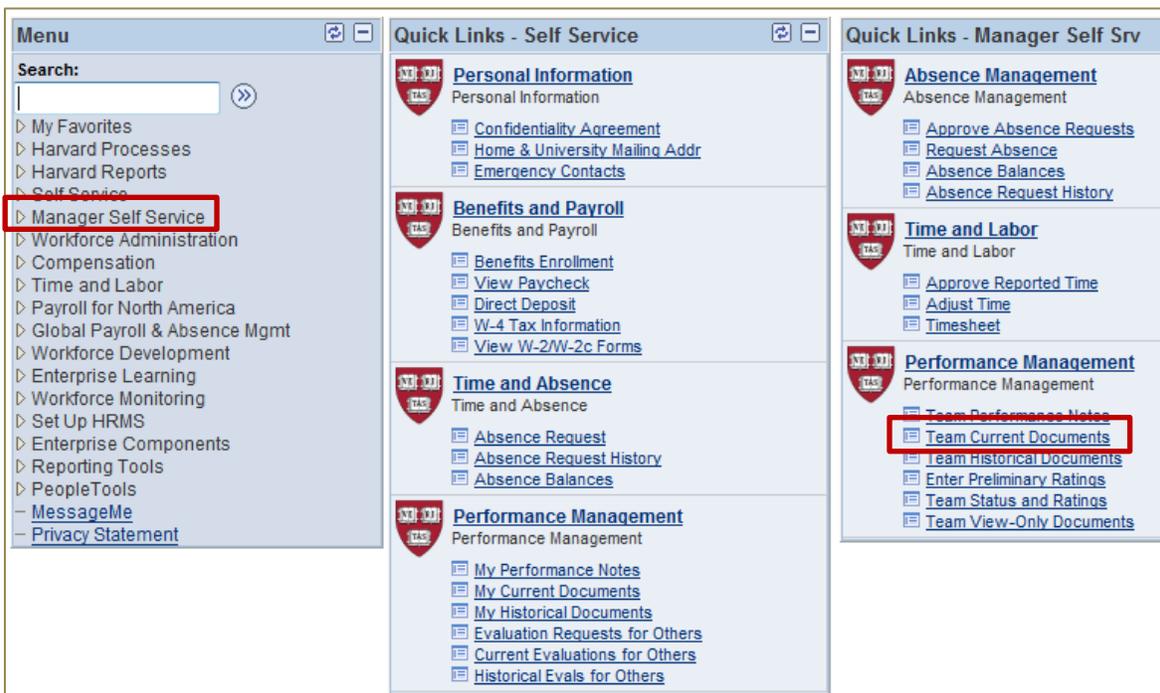
- a) You complete the form by answering the questions and providing an overall summary of the new employee’s job performance.
- b) The employee reviews the document, and you meet to discuss the employee’s performance. Then, you mark the document as having met with the employee.
- c) The employee has 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- f) Both you and your employee can view the completed document in the historical documents page (Self Service for the employee, Manager Self Service for the manager).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.						
Performance Documents <span style="float: right;">Personalize   Find   View All   First   1-15 of 15   Last</span>						
Employee ID	Employee	Document Type	Begin Date	End Date	Job Code Description	Status
40404040	Michael Davidson	<a href="#">Orientation Review Summary</a>	08/13/2013	11/13/2013	Coordinator II	In Progress
30303030	Sophie Mascioli	<a href="#">Annual Review</a>	07/01/2013	06/30/2014	Financial Administration Dir	In Progress
90909090	Caroline Daniels	<a href="#">Annual Review</a>	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 Document Details			
<b>Employee:</b>	Michael Davidson	<b>Job Code Description:</b>	Coordinator II
<b>Document Type:</b>	Orientation Review Summary	<b>Period:</b>	08/13/2013 - 11/13/2013
<b>Template:</b>	FY14 - Orientation Review	<b>Document ID:</b>	7739
<b>Manager:</b>	Susan Spinelli	<b>Status:</b>	In Progress

Document Progress				
Step	Status	Due Date	Action	Next Action
Manager's Document	In Progress	11/08/2013		<a href="#">Start</a>

[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 [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.

**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

The status of this evaluation is **In Progress**. Once you complete your evaluation, please click on [Share With Employee](#) to make this document available to them for review.

Throughout the document, you can click on [View Other Comments](#) to read the employee's self-evaluation and/or other reviewers' evaluation, if available. By clicking on [Writing Tools](#) you can select and copy their comments, and/or your own performance notes, if available.

[Save](#)    [Share With Employee](#)       [Return to Document Detail](#)

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

### 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  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  to view a description for each rating.
- Click  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.

## 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.

Employee ID	Employee	Document Type	Begin Date	End Date	Job Code Description	Status
40404040	Michael Davidson	<a href="#">Orientation Review Summary</a>	08/13/2013	11/13/2013	Coordinator II	Share w/Employee

- From the **Current Performance Documents** page, click the [Orientation Review Summary](#) 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:	Orientation Review Summary	Period:	08/13/2013 - 11/13/2013
Template:	FY14 - Orientation Review	Document ID:	7739
Manager:	Susan Spinelli	Status:	Share w/Employee

Document Progress				
Step	Status	Due Date	Action	Next Action
Manager's Document	<span style="color: green;">●</span> Share w/Employee	11/08/2013	<a href="#">View</a>	<a href="#">Met With Employee</a>

- Click [Met with Employee](#) to access the document detail. (You can also click [View](#).)

**Performance Document - Orientation Review Summary**

**Manager Evaluation**

Michael Davidson, Coordinator II  
Orientation Review Summary: 08/13/2013 - 11/13/2013

<b>Author:</b>	Susan Spinelli	<b>Role:</b>	Manager
<b>Status:</b>	Share w/Employee	<b>Due Date:</b>	11/08/2013
<b>Approval:</b>	Not Required		

The status of this evaluation is **Share With Employee**. In this status, you may enter comments in the Manager Comments section, if applicable.

At any time you can save any entries you make on the evaluation by selecting the Save button. If you are ready to confirm that you met with the employee, select the **Met With Employee** button to notify the employee they are able to acknowledge the evaluation.

[Return to Document Detail](#)

- Click [Met With Employee](#), then click  at the confirmation screen.
- 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 **Met With Employee** 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](#).

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:	Met w/Employee	

Document Progress				
Step	Status	Due Date	Action	Next Action
Manager's Document	Met w/Employee	11/08/2013	<a href="#">View</a>	<a href="#">Acknowledge</a>

- 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**.

#### Manager Evaluation

Michael Davidson, Coordinator II  
 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 you reviewed with the employee their performance evaluation. In this status, you may enter comments in the Manager Comments section, if applicable.

The employee now needs to acknowledge the review. If you need to acknowledge the evaluation on behalf of the employee, select the **Acknowledge Review** button and select a reason why you are acknowledging the evaluation for the employee.

[Return to Document Detail](#)

### 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.

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

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:	Acknowledged	

Document Progress				
Step	Status	Due Date	Action	Next Action
Manager's Document	Acknowledged	11/08/2013	<a href="#">View</a>	<a href="#">Complete</a>

- 10. Review the employee comments (if there are any).
- 11. Add any additional comments in the **Managers Comments** section. Click  to perform a spellcheck.

**Employee Comments**

Summary    Comments

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.

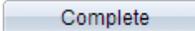
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**Manager Comments**

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. 

- 12. Click  from either the top or bottom of the document.

**Audit History**

Reopen

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Save    Complete        [Return to Document Detail](#)

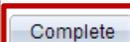
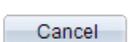
- 13. Click  on the confirmation page, or click  to return to the document and make additional edits.

**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.

- 14. Click  on the confirmation screen.

**Performance Document - Orientation Review Summary**

**Complete Evaluation Confirmation**

The performance evaluation is finalized and marked as "Complete".

