FY16 FINAL EVALUATION
PeopleSoft Processing Guide

Teacher & School-Based Leader Guide

THE SCHOOL DISTRICT
REACH FOR EXCELLENCE
PALM BEACH COUNTY

GROWING. STRONG.

Table of Contents

Introduction

The School District of Palm Beach County will be processing Teacher, Assistant Principal and Principal Evaluations in PeopleSoft as of FY16. This manual will provide the guidance needed to complete this portion of the Evaluation requirements.

T he manual will include screen shots and additional links to each processing element for easy reference.

ICON KEY
📁 Valuable information
✏️ Personal Notes
🎬 Video Assistance

The "**icon key**" at left was produced to assist you in identifying key information throughout this guide. Valuable information and video assistance will be flagged along with areas for you to take personal notes.

**School Based Employee Evaluation Responsibilities**

The flow chart below identifies the evaluation responsibilities for the Principal and the Regional Superintendent in the evaluation process of all School Based Employees.
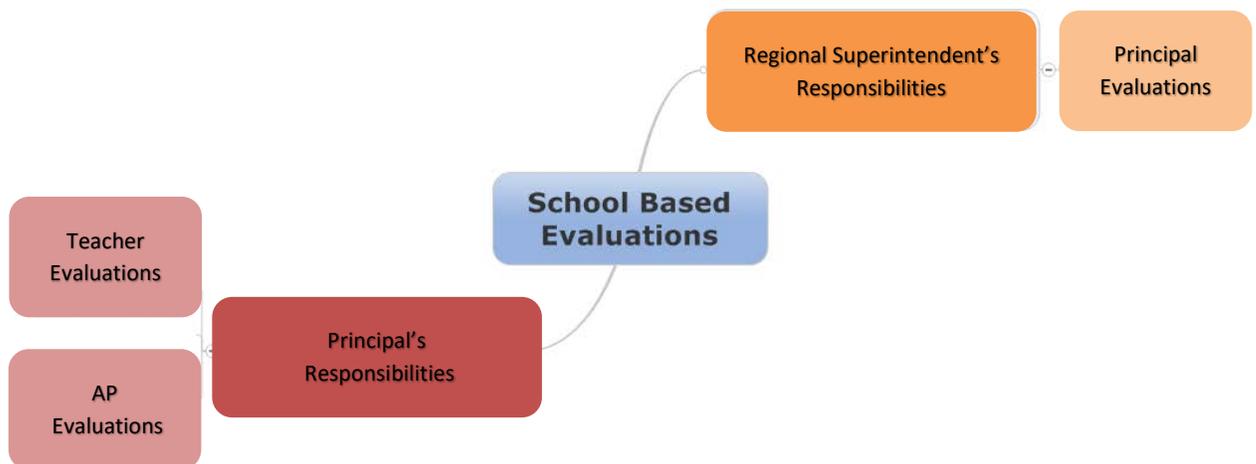
Principal Guide for Teacher Evaluation Processing

📂 Pathway - from PeopleSoft navigate to Human Capital Management then the following:

Main Menu→ Manager Self Service→ Performance Management→ PB Dept Evaluation
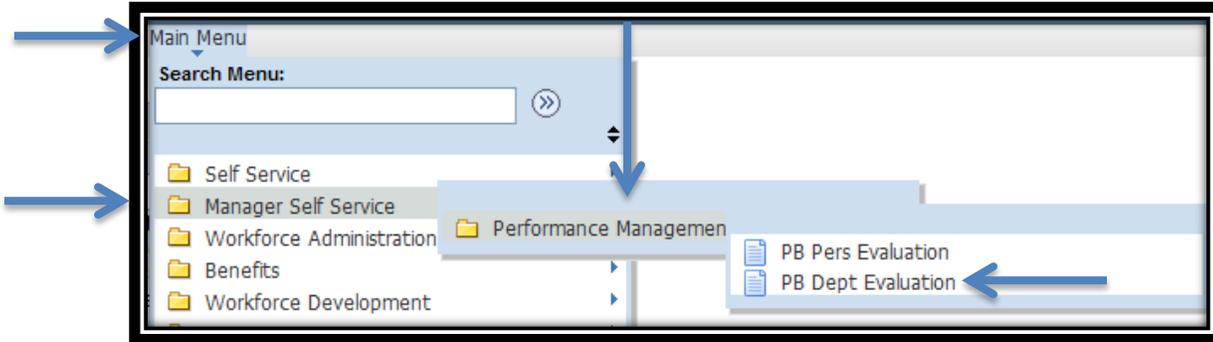
📂 **From PB Dept Evaluation screen you will be able to select the School/Department, fiscal year, evaluation type (Mid-Year, Annual), and the employee category.**
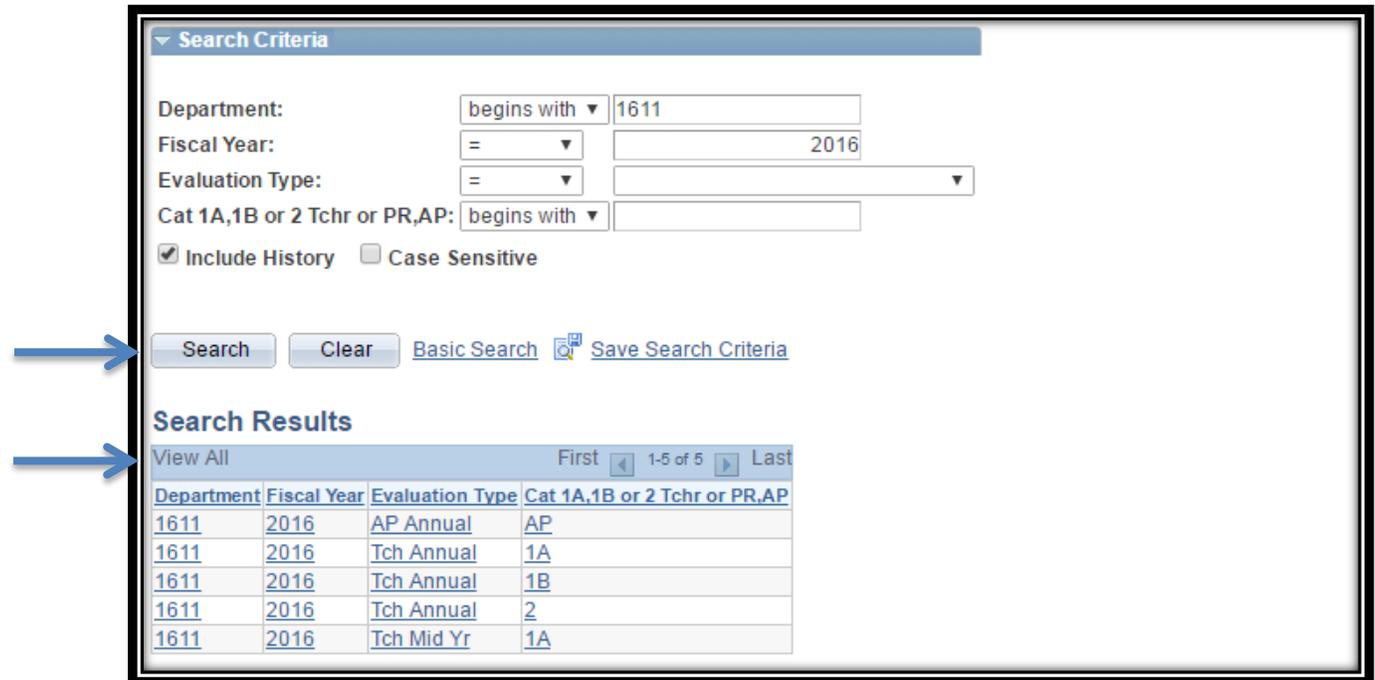
📂 Select the type of evaluation "Tch Annual" for Final Evaluation and "Tch Mid Yr" for Mid-Year Evaluation, and then select the search. The search results will be shown below the search option when the screen refreshes. To proceed click on the Teacher category for processing.

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📁 **Processing can be done individually by employee or through a grid system shown below. Instructions are at the top of the screen with a video demonstration link for additional support.**

Please check the 'Prin/Dir Approve Eval' box when you are ready to allow the employee to view and sign their Evaluation screen for their Final Evaluation result.

After the Employee signs their evaluation:

Select the button next to Emplid to transfer to Employee's evaluation screen to sign electronically.

Evaluation Demonstration Video

To print your entire department documents, click here   Manager Summary

Press the Refresh Data button to refresh the page   Refresh Data

Press the SUBMIT button below to save changes.

	Select	Empl ID	Last Name	First Name	Eval Code	Prin/Dir Approve Eval	Empl Agree to Evaluation	Empl Disagree to Evaluation	Empl Signed Evaluation	Empl Unavailable to Sign	Empl refused to sign	Supporting Docs Recvd	Prin/Dir Signed	Witness Emplid	Eff Date
1	Select	1234567	Allen	Barry	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
2	Select	1234499	Danvers	Kara	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
3	Select	1234599	Winfrey	Oprah	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
4	Select	1234699	Hanks	Thomas	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
5	Select	1234799	Dawson	Rosario	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016

Submit

📁 **To open the evaluation for Teachers to view the Principal will complete the following process:**

   o Review the grid to see the evaluation data for the Teacher(s), if there are no concerns, then check the first box titled "**Prin/Dir Approve Eval**", this will release the page to the Teacher for viewing. All or multiple Teachers can be selected on this screen, after the box is checked, then select "**Submit**" at the bottom of the screen.

📁 **Notice that from this page a Principal/Director can monitor the progress of the process, once the Teacher signs the evaluation the Principal/Director can see if the Teacher agreed/disagreed, and signed.**

📁 **Upon seeing that the Teacher signed then the Principal can complete the process by clicking the "Select" button by the Teacher's name and completing the following tasks:**

   o Review the individual page for the Teacher, if the Teacher has either agreed/disagreed and has signed the document the Principal/director will then select "**Prin/Dir Submit Signature**" and then select "**Save**" to complete the processing for this Teacher. See screen shot on next page as a reference.

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📂 **Processing Special Circumstances:**

- **Teacher not available to sign evaluation:** From the grid, click the "**Select**" button by the Teacher's name, go to the bottom of the form and click the box "**Employee Not Available to Sign**", also select "**Supporting Document Received**" and enter the Certified Mail Receipt Number to indicate that the document has been mailed to the Teacher via Certified Mail, Select the "**Prin/Dir Submit Signature**" and then select "**Save**" to complete the processing for this Teacher. Select "**Printable Version**" to have a copy that is mailed to the Teacher.

- **Teacher Refuses to Sign:** From the grid, click the "**Select**" button by the Teacher's name, go to the bottom of the form and click the box "**Employee Refuses to Sign**", then proceed to the box titled **Witness Emplid** and enter the Employee Identification number of a witness to

a conference where the Teacher refused to sign. Select "**Save**" so the witness name is then seen on the screen, proceed to the "**Prin/Dir Submit Signature**" button and then select "**Save**" to complete the processing for this Teacher. Select "**Printable Version**" and present a copy of the evaluation to the Teacher.

🗁 **Complete the process above for all Teachers by category. As a reference, Category 1A are employees whose current contract indicates less than 100 working days, Category 1B are employees whose current contract indicates 100 or more working days but less than 3 years, and Category 2 are employees whose current contract is more than 3 years.**

🗁 **The grid can be personalized by selecting the personalize option on the far right as seen below. You can also print an excel version of this grid by selecting the grid icon with the red arrow to the right of the personalize feature. It is suggested that the completed process be saved as an excel file and uploaded to the administrator evaluation as your proof of processing Teacher evaluations.**

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Principal Guide for Assistant Principal Evaluation Processing

☐ Pathway - from PeopleSoft navigate to Human Capital Management then the following:

Main Menu→ Manager Self Service→ Performance Management→ PB Dept Evaluation
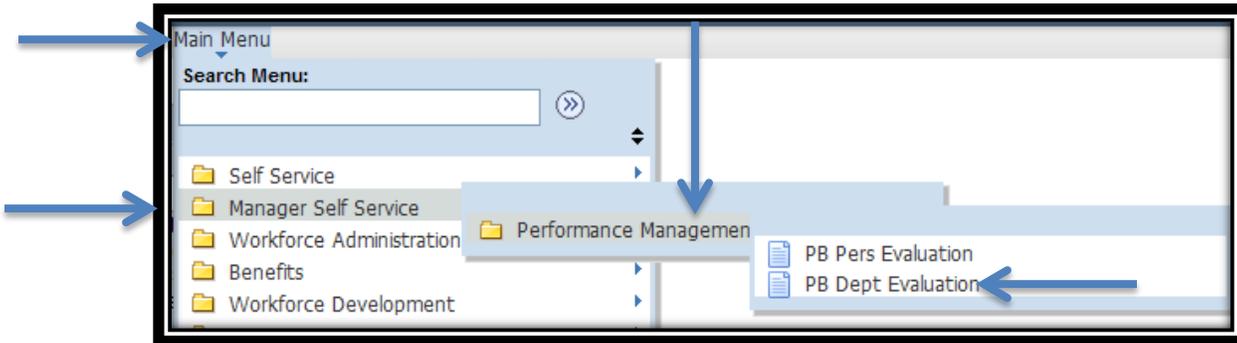
☐ **From PB Dept Evaluation screen you will be able to select the School/Department, fiscal year, evaluation type (AP Annual), and the employee category.**
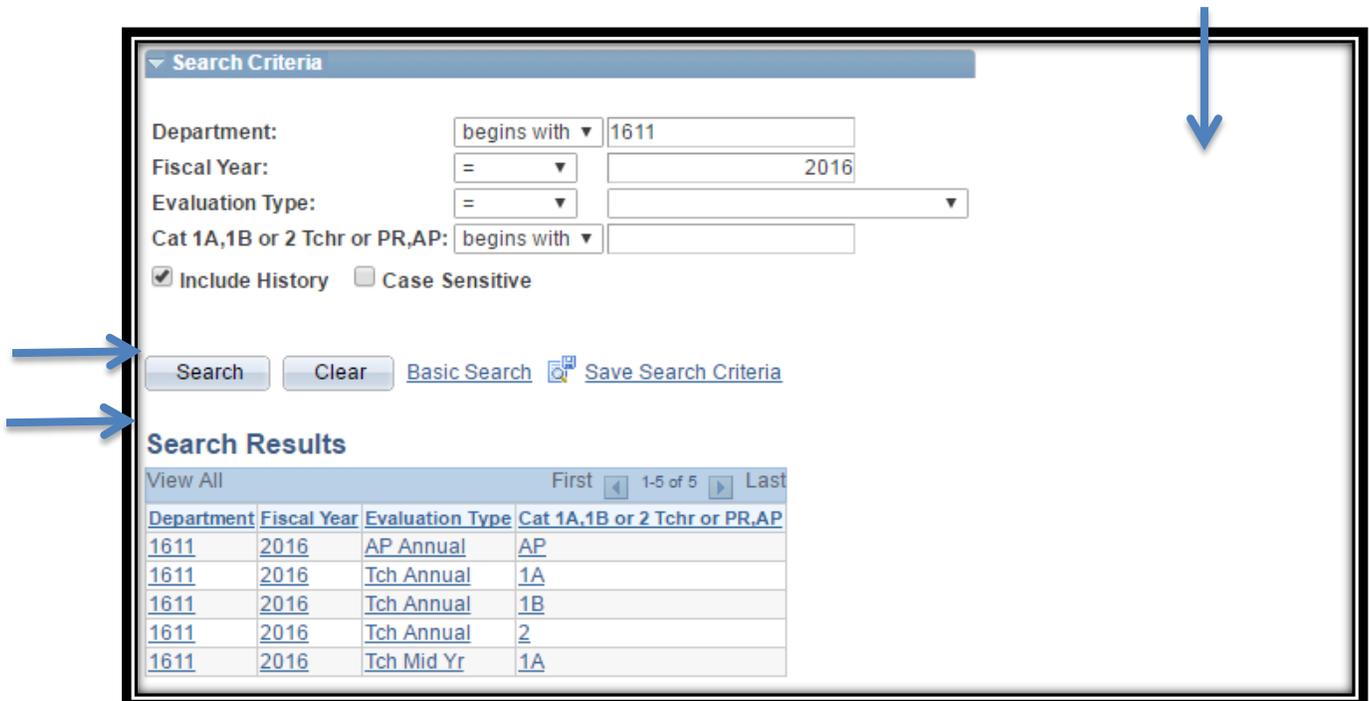
☐ **Select the type of evaluation "AP Annual" for Final Evaluation and then select the search. The search results will be shown below and click on the AP category to process.**

☐ **Processing can be done individually by employee or through a grid system shown below. Instructions are at the top of the screen with a video demonstration link for additional support.**

Please check the 'Prin/Dir Approve Eval' box when you are ready to allow the employee to view and sign their Evaluation screen for their Final Evaluation result.

After the Employee signs their evaluation:

Select the button next to Emplid to transfer to Employee's evaluation screen to sign electronically.

Press the SUBMIT button below to save changes.

Evaluation Demonstration Video

To print your entire department documents, click here   Manager Summary

Press the Refresh Data button to refresh the page   Refresh Data

Select	Empl ID	Last Name	First Name	Eval Code	Prin/Dir Approve Eval	Empl Agree to Evaluation	Empl Disagree to Evaluation	Empl Signed Evaluation	Empl Unavailable to Sign	Empl refused to sign	Supporting Docs Recvd	Prin/Dir Signed	Witness Emplid	Eff Date
1 Select	1234567	Allen	Barry	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
2 Select	1234499	Danvers	Kara	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
3 Select	1234599	Winfrey	Oprah	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
4 Select	1234699	Hanks	Thomas	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016
5 Select	1234799	Dawson	Rosario	Highly Eff	☐	☐	☐	☐	☐	☐	☐	☐		06/30/2016

Submit

📁 **To open the evaluation up for Assistant Principals to view the Principal will complete the following process:**

o Review the grid to see the evaluation data for the Assistant Principal(s), if there are no concerns, then check the first box titled "**Prin/Dir Approve Eval**", this will release the page to the Assistant Principal for viewing. All or multiple Assistant Principals can be selected on this screen, after the box is checked, then select "**Submit**" at the bottom of the screen.

📁 **Notice that from this page a Principal/Director can monitor the progress of the process, once the Assistant Principal signs the evaluation the Principal/Director can see if the Teacher agreed/disagreed, and signed.**

📁 **Upon seeing that the Assistant Principal has signed then the Principal can complete the process by clicking the Select button by the Assistant Principal's name and completing the following tasks:**

o Review the individual page for the Assistant Principal, if the Assistant Principal has either agreed/disagreed and has signed the document the Principal/director will then select "**Prin/Dir Submit Signature**" and then select "**Save**" to complete the processing for this Assistant Principal. See screen shot below as a reference.

📂 **Processing Special Circumstances:**

o **Assistant Principals not available to sign evaluation**" From the grid, click the "**Select**" button by the Assistant Principal's, go to the bottom of the form and click the box "**Employee Not Available to Sign"**, also select "**Supporting Document Received"** and enter the Certified Mail Receipt Number to indicate that the document has been mailed to the Teacher via Certified Mail, Select the "**Prin/Dir Submit Signature**" and then select "**Save**" to complete the processing for this Teacher. Select "**Printable Version**" to have a copy that is mailed to the Assistant Principal.

o **Assistant Principal Refuses to Sign:** From the grid, click the "**Select**" button by the Assistant Principal's name, go to the bottom of the form and click the box "**Employee Refuses to Sign"**, then proceed to the

box titled "**Witness Emplid**" and <u>enter the Employee Identification number of a witness to a conference where the Assistant Principal refused to sign</u>. Select "**Save**" so the witness name is then seen on the screen, proceed to the "**Prin/Dir Submit Signature**" button and then select "**Save**" to complete the processing for this Assistant Principal. Select "**Printable Version**" and <u>present a copy of the evaluation to the Assistant Principal.</u>

🗁 **The grid can be personalized by selecting the personalize option on the far right as seen below. You can also print an excel version of this grid by selecting the grid icon with the red arrow to the right of the personalize feature. <u>It is suggested that the completed process be saved as an excel file and uploaded to the administrator evaluation as your proof of processing Teacher evaluations</u>.**
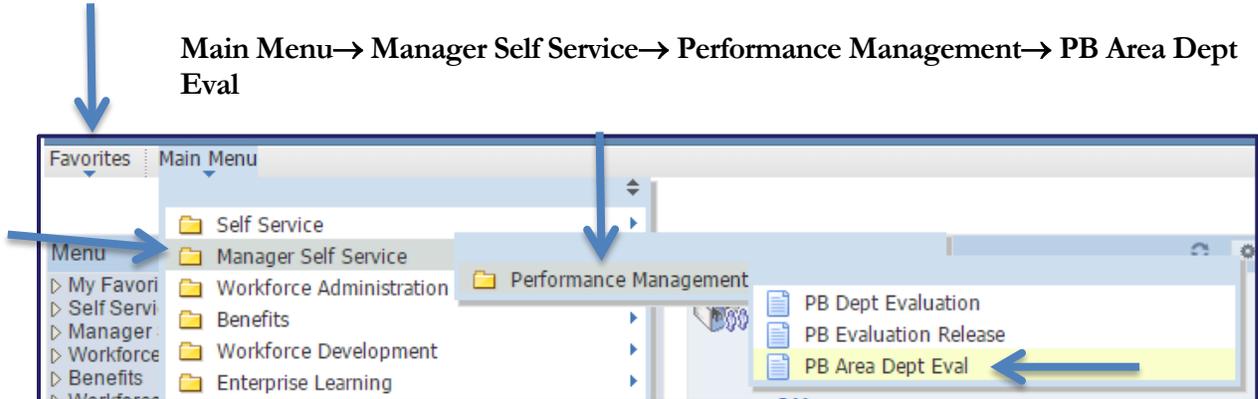
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Regional Superintendent Guide for Principal Evaluation Processing

📁 Pathway - from PeopleSoft navigate to Human Capital Management then the following:

Main Menu→ Manager Self Service→ Performance Management→ PB Area Dept Eval

📁 **From PB Area Dept Eval screen you will be able to select the School/Department, fiscal year, and evaluation type (Principal Annual). Select Principal Annual and then select Search to get a list of all Principals that report to you in the search results. See below.**
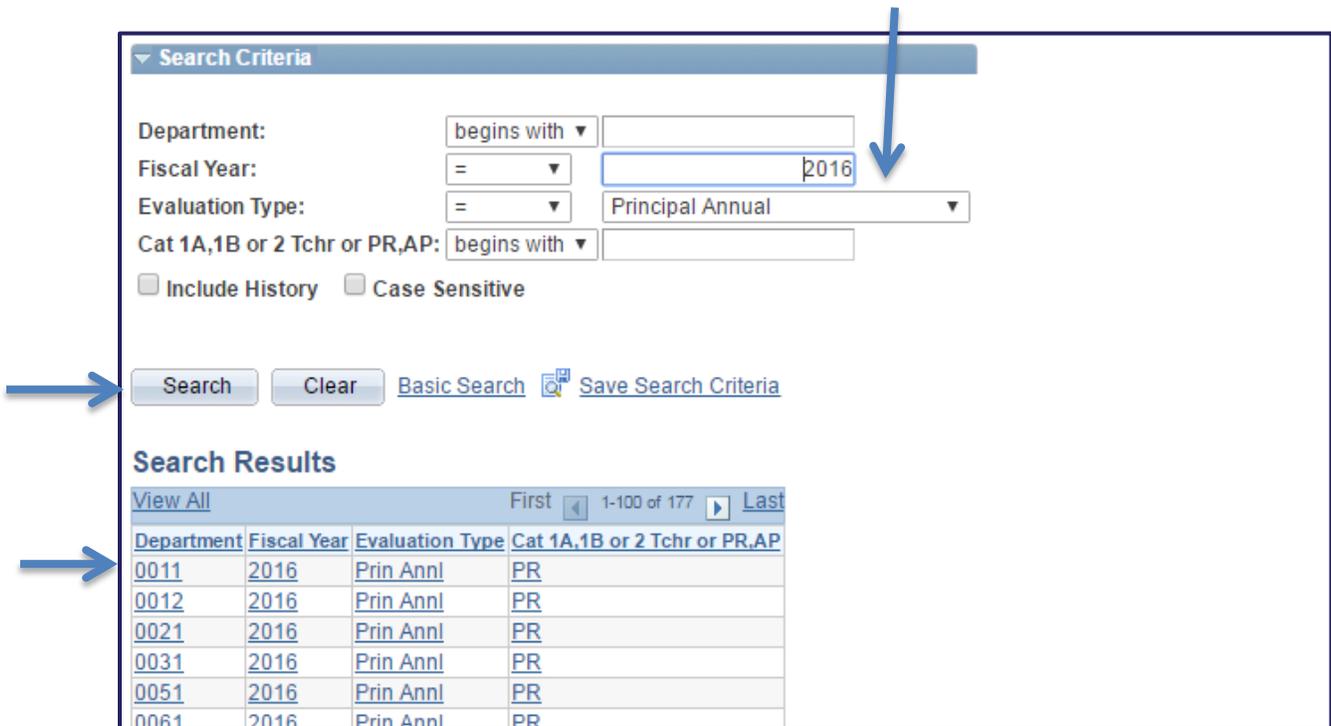
🗀 Select the first school number in the list to open the Principal Evaluation for processing. If the Eval Code is correct, place a check in the box "**Prin/Dir Approve Eval**" to open the evaluation up to Principal to sign. Then select "**Submit**" to save the action. Select "**Next in List**" to proceed to the next School that you supervise. Complete this process for all Schools that you supervise to open up the Evaluation for all Principals in your area**.**

🗀 **Notice that from this page a Regional Superintendent can monitor the progress of the process, once the Principal signs the evaluation the Regional Superintendent can see if the Principal agreed/disagreed, and signed.**

🗀 **Upon seeing that the Principal has signed then the Regional Superintendent can complete the process by clicking the Select button by the Principal's name and completing the following tasks:**

    o Review the individual page for the Principal, if the Principal has either agreed/disagreed and has signed the document the Regional Superintendent will then select "**Prin/Dir Submit Signature**" and then select "**Save**" to complete the processing for this Principal. See screen shot below as a reference.

📂 **Processing Special Circumstances:**

- **Principals not available to sign evaluation:** From the grid, click the "**Select**" button by the Principal's name, go to the bottom of the form and click the box "**Employee Not Available to Sign"**, also select "**Supporting Document Received"** and enter the Certified Mail Receipt Number to indicate that the document has been mailed to the Teacher via Certified Mail, Select the "**Prin/Dir Submit Signature**" and then select "**Save**" to complete the processing for this Teacher. Select "Printable Version" to have a copy that is mailed to the Principal.

- **Principal Refuses to Sign: F**rom the grid, click the "**Select**" button by the Principal's name, go to the bottom of the form and click the box "**Employee Refuses to Sign"**, then proceed to the box titled "**Witness**

Emplid" and <u>enter the Employee Identification number of a witness to a conference where the Principal refused to sign</u>. Select "**Save**" so the witness name is then seen on the screen, proceed to the "**Prin/Dir Submit Signature**" button and then select "**Save**" to complete the processing for this Principal. Select "**Printable Version**" and <u>present a copy of the evaluation to the Principal</u>.

📂 **The grid can be personalized by selecting the personalize option on the far right as seen below. You can also print an excel version of this grid by selecting the grid icon with the red arrow to the right of the personalize feature.**

Personalize | Find | ↗ | ⊞   First ◀ 1-16 of 16 ▶ Last

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FY16 How to Access & Sign Employee Evaluations in PeopleSoft

Please use the following step-by-step directions to access your FY16 employee evaluation. Should you encounter any difficulty along the way, please contact the Department of Professional Development at 561-649-6839 or PX 46839.

From the Portal:
• Click on the **PeopleSoft** link.
• Click **Human Capital Management.**
• Click **Main Menu.**
• Click **Self Service.**
• Click **Performance Management.**
• Click **Evaluations.**
• Select the Fiscal Year **2016** hyperlink in the Fiscal Year Column to display your 2016 Evaluation.
• Carefully review the contents.
• Select the "**I agree with the contents**" or "**I disagree with the contents**" box.
• Click on the **Submit Signature** button.
• A Signature Confirmation window will display.
• Click the **OK** button.
• Click on the **Printable Version** button to view or print the signed evaluation.

> After December 2, 2016, employees can simply click **PeopleSoft → My Evaluations → 2016**

Note:
Please follow the same pathway to return after your supervisor has signed the evaluation or to view or print at a later date a signed evaluation.   Navigate to: Self Service> Performance Management > Evaluations