Quick Reference Guide
Entering Performance Evaluation Ratings in PeopleSoft 9.2

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Entering Performance Evaluation Ratings

For PS 9.2 Data Entry of Performance Evaluation Ratings

Questions?
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Overview

Performance evaluation ratings in PeopleSoft are stored in Person Profile with “Competencies.” Person Profile also gives units an opportunity to track licenses and certifications, education and degree information. The following quick guides explain how to enter/change performance evaluation ratings using the Person Profile page.

Security Roles

If you have access to Manager Self-service (MSS), you are dynamically assigned to enter performance ratings for employees who report to you. You do not need to request a separate role.

Non-OHR and OHR Personnel: Non-managers and OHR Personnel who need access to enter performance evaluation ratings must request the Person Profile Manager security role.

Request a Role

MyASU > Service > Self Support > Access Requests > PeopleSoft – Submit a New Request for Access
QUICK GUIDE: Entering Performance Evaluation Ratings

1. **Role Required:** *Person Profile Manager.* To request a role:
   - MyASU > Service > Self Support > Access Requests >
   - PeopleSoft Submit New Request for Access

2. Navigate to Competencies:
   - Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles

3. Enter Employee ID or perform a name search. If no results are found, please refer to *Add a Profile* on page 6.

4. Click *Add New Competencies.*

5. Enter the following *required* information in the competency page:
   a. **Effective Date:** Date evaluation given.
   b. **Competency:** Calendar year the performance evaluating rating
      - (Type ‘rat’ in the competency field and select from the calendar years that display.
      - The only options that will display are the years where the employee has not yet received an evaluation.)
   c. **Evaluation Type:** Select Supervisor/Manager.
   d. **Reviewer ID:** Enter the employee ID of the supervisor doing the evaluation. If the Reviewer’s employee ID is unknown, click the magnifying glass to perform a name search for the employee ID.
   e. **Employee ID:** Enter the employee ID of the employee receiving the evaluation.
   f. **Proficiency:** Select a rating from 1-5 for the performance evaluation rating.
      - If the evaluation is for a period prior to calendar year 2008, the ratings available are: Exceeds Expectations, Satisfactory or Unsatisfactory.

6. Select **OK** if this is the only evaluation for the employee. If there are multiple evaluation ratings to be entered for the employee, select **apply and add another.**

7. Select **Save** when all evaluation ratings for the employee are entered.

8. Verify the evaluation rating(s) are entered and saved appropriately by reviewing the employee’s profile.
QUICK GUIDE: Change an Existing Performance Evaluation Rating

1. Role Required: Person Profile Manager. To request a role:
   MyASU > Service > Self Support > Access Requests >
   PeopleSoft – Submit a New Request for Access
2. Navigate to Competencies: Main Menu > Workforce Development > Profile
   Management > Profiles > Person Profiles
3. Enter Employee ID or perform a name search.
4. Select the Competency Rating you want to change.
   a. The update competency page will be displayed. If you need to make a change, select
      the + button in the top right corner of the details area to add a row. To maintain history
      and data integrity, DO NOT DELETE the previous rating.
5. Select the + button in the top right corner of the details area to add a row.
6. The following fields are required. The new row added in Step 5 will carry forward
   the information from the previous row. Make the necessary changes to the information
   that carried forward from the previous row.
   a. Effective Date: Date of changed evaluation.
   b. Competency: This information will carry forward from the previous row.
   c. Status: This information will carry forward from the previous row.
   d. Evaluation Type: This information will carry forward from the previous row.
   e. Reviewer ID: If it is different from the information carried forward from
      the previous row, enter the employee ID of the supervisor doing the evaluation.
      If the reviewer’s employee ID is unknown, click the magnifying glass to perform
      a name search for the employee ID.
   f. Employee ID: This information will carry forward from the previous row.
   g. Proficiency: Select a rating from 1-5 for the performance evaluation rating.
      If the evaluation is for a period prior to calendar year 2008, the ratings available
      will be: Exceeds Expectations, Satisfactory or Unsatisfactory.
7. When all changes are complete, select OK.
8. Select Save.
9. Verify the changed performance evaluation rating is entered and saved appropriately
   by reviewing the employee’s profile. You should see a yellow box to the right of the new rating.
   Clicking on this box will display the employee’s previous ratings for the evaluation period.
QUICK GUIDE: Add a Profile

1. **Role Required:** *Person Profile Manager.* To request a role:
   - MyASU > Service > Self Support > Access Requests >
   - PeopleSoft – Submit a New Request for Access
2. Navigate to Competencies:
   - Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles
3. Enter Employee ID or perform a name search.
4. If no matching values are found, click the **Add a New Value** tab.
5. Click **Add.**
6. Complete the following fields:
   a. **Empl ID** (10-digit employee ID number)
   b. **Profile Type:** Person
   c. **Status:** Active
   d. **Status Date:** Enter the date
   e. **Comments:** Add applicable comments.
7. Select **Save.**
8. To add a new competency, [return to page 4, step 4](#) of this Quick guide.