Business Process Guide
Entering Performance Evaluation Ratings

A comprehensive guide for entering Performance Evaluation Ratings in PeopleSoft 9.2

Questions?
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Overview

Performance evaluation ratings in PeopleSoft (PS) are stored in “Person Profile” within the area called “Competencies.” Though not relevant to the data entry of performance evaluation ratings, Person Profile also gives units an opportunity to track licenses, certifications, education, and degree information. This guide explains how to enter/change performance evaluation ratings and add a new employee’s profile for rating data entry using the Person Profile page.

Per SPP 1101: Personnel Records, performance evaluations must be retained in the employee’s personnel file in OHR. After entering performance evaluation rating in PS, you must send a hard copy of the evaluation to OHR. You can either send it via interoffice mail (OHR, MC1304, ATTN: Personnel File Records); drop it off at OHR [Tempe University Center (UCNTRA) at 1100 E. University Dr., Building A].

Security Roles

If you have access to Manager Self-service (MSS), you will be dynamically assigned to enter performance ratings for employees who report to you and will 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 and be approved for the Person Profile Manager security role.

IMPORTANT NOTE: Access to the Person Profile Manager role allows a person to also DELETE information. Therefore, only as-needed requests should be made.

Request a Role

MyASU → Service → Self Support → Access Requests → PeopleSoft – Submit a New Request for Access

Abbreviations Used

CY = Calendar Year
EmpID = The 10-digit employee identification number starting with the number 1
FY = Fiscal Year
Navigating to Competencies

Once you have the necessary security roles and are ready to enter performance ratings for your employees, follow the steps below to navigate to Competencies, the area of PeopleSoft currently used to enter performance ratings.

NOTE: This section is only for navigating to Competencies. To enter performance ratings, go directly to page 5.

Log in to PeopleSoft and navigate to the Competencies area within Person Profiles:
Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles
Entering Performance Evaluations

**Step 1:** On the *Person Profile* screen, the employee’s Empl ID number, name or other known value is used to search for the employee.
Step 2: Once you open the employee’s *Person Profile* screen, you will see the Competencies detail. Select *Add New Competencies* to enter a new evaluation.
Step 3: On the Competency page, these are the required fields:

1. **Effective Date:** Date evaluation given

2. **Competency:** Applicable calendar year for the rating. (Type ‘rat’ in the competency field and click on the magnifying glass. Select from the options that display. The only options that will display are the years where an employee has not yet received an evaluation.

3. **Evaluation type:** Select Supervisor/Manager

4. **Reviewer ID:** Enter the Empl ID of the supervisor who is doing the review. If the Empl ID is unknown, click on the magnifying glass to perform a name search for the employee ID.

5. **Proficiency:** Select the 1-5 rating for the annual performance rating. If the performance rating is for a period prior to calendar year 2008, the ratings available to select are: Exceeds Expectations, Satisfactory, or Unsatisfactory.

Click OK if this is the only evaluation for the employee. If there are multiple evaluations to enter for the employee, select **Apply and Add Another.**
Step 4: Select **Save** when all evaluations for the employee have been entered.
Step 5: Verify the evaluation(s) were entered and saved successfully by reviewing the employee’s profile.
Change an Existing Rating

**Step 1:** To change an existing rating, log in to PeopleSoft and navigate to the Competencies area within Person Profiles:
Main Menu > Workforce Development > Profile Management > Profiles > Person Profiles
Step 2: On the Person Profile screen, the employee’s Empl ID number, name or other known value is used to search for the employee.
Step 3: Select the Competency Rating you would like to change. In this example, Performance Rating CY12 is being changed. The update Competency page will be displayed.

- If a data entry error has been made, make the correction and follow steps 6-8.
- If you need to make an authorized change to a previously entered rating follow steps 4-8. To maintain history and data integrity, **DO NOT DELETE the Previous Rating.**
Step 4: The Update Competency page will be displayed. Select the **button on the top right corner of the details area to add a row.
**Step 5:** The new row will carry forward the information from the previous row. The only information that has changed so far is the effective date. This field will be populated with the current date. Change this date to the date the employee received the changed evaluation.
Step 6: In this example, the proficiency will be changed. You can change the proficiency by clicking on the drop-down menu and selecting the appropriate proficiency. In appropriate changes to other information also can be made now. Select OK when your changes are completed.

Add note that this is either an updated performance review or a new.
Step 7: Once the rating has been saved, there are four final steps you must take to save and submit to complete the process. Select Save.
Step 8: Verify the changed performance evaluation rating was entered and saved appropriately by reviewing the employee’s profile. You should see a yellow box to the right of the new rating. If you click on this box, the employee’s previous ratings for the evaluation period will be displayed.
Add a Profile

If the employee does not have a profile established in PeopleSoft, follow these steps to add a profile.

First, log in to PeopleSoft and navigate to Competencies area with Person Profiles:
Menu > Workforce Development > Profile Management > Profiles > Person Profiles.
Step 1: Enter Employee ID or perform a name search.

If no matching values are found, you will have to add a new profile (Step 2).
Step 2: Click the **Add a New Value** tab to enter a new profile.

Step 3: Click **Add**.

The following screen should display with the Profile Status and Status date populated.
Step 4. Enter the Employee ID and tab out of the Empl ID field. Then left click on the magnifying glass icon next to the Empl ID field. This will populate the Profile Type with `person` and the description field with the employee’s name. If the name that displays does not match the employee you are trying to add, return to the search screen to search for the employee again. Click Save.
Step 5: To verify the profile was saved, navigate back to person profile, enter the employee ID and click Search.

Step 6: The employee’s profile should display.
Step 7: Once the profile is added, Click on the + Add New Competencies to enter performance evaluation ratings for this employee. Refer to page 5 for detailed instructions on entering performance evaluation ratings.