Quick Reference Guide for Non-Teacher Progress Conference - APPRAISER

☐ Log in to PeopleSoft (for instructions, see page 2 of this document) and navigate as follows: **Main Menu → Manager Self Service → Performance Management → Performance Documents → Create Documents.** Select the appropriate employee(s) and click **Continue.** Enter the **Period Begin Date** and the **Period End Date.** Period begin date must be no earlier than September 1, 2014. Click **Create Documents.** If no document exists for the same period dates, then verify the confirmation page indicating that the document was created successfully.

☐ Navigate as follows: **Main Menu → Manager Self Service → Performance Management → Performance Documents → Current Documents.** Click on HISD Progress Conference for your specific employee with a status of **In Progress.**

☐ Verify that the selected and loaded appraisal document is the correct document for the desired employee and date then click **Start.**

☐ Expand each Professional Competency section by clicking **Expand All** then select a rating for ALL competencies and add comments as appropriate. Failure to assign a rating for ALL competencies will result in an error code. Click on **Expand All** to view the Professional Competencies Rubric if desired.

☐ Each employee must be rated on a minimum of 1 department goal. Failure to do so may result in a lower overall rating. The appraiser may select a rating for goals that apply or allow the rating to remain **DNA-Does Not Apply** to exclude specific goals. Click on the **DNA-Does Not Apply** to calculate the overall Department Goals rating.

☐ If the employee is on an active Prescriptive Plan for Assistance (PPA), select the **Active PPA** check box at the bottom of the appraisal document and enter the start date of the PPA in the **Started On** field.

☐ Once all professional competencies have been rated, click on the **Confirm** to calculate the overall rating. Click **Save** then **Submit to Employee.** Verify and confirm the input. Click **OK** to make the appraisal document available to the employee. The employee will receive a notification email. Once the employee reviews the document, they will submit the document to the appraiser.

☐ **After the conference has been held** with the employee, the appraiser will navigate as follows: **Main Menu → Manager Self Service → Performance Management → Performance Documents → Current Documents,** click **HISD Progress Conference** for a specific employee with a status of **Available for Review.** Click **View.** Scroll to the bottom of the appraisal document and enter **Conference Date** then click **Conference Held.** Click **OK** on the confirmation page. Verify the confirmation page. The employee will receive an email notification that the conference has been held. The employee will acknowledge the conference in ePerformance. This action will complete the appraisal process.

☐ **If the employee is unable to acknowledge** the conference, the appraiser may acknowledge and complete without employee action as follows: **Main Menu → Manager Self Service → Performance Management → Performance Documents → Current Documents.** Click on HISD Progress Conference then **View.** Scroll to the bottom of the appraisal document and enter **Conference Date** then click **Conference Held.** Click **OK** on the confirmation page. Verify the confirmation page. The employee will receive an email notification that the conference has been held. Click **View** to re-open the document. Click **Acknowledgement Complete.** Select **Manager Override** then **OK.** Click **OK** on the confirmation page. This will complete the process. **Note:** The appraiser should indicate the reason for use of “Manager Override” in the comments section prior to submitting the document to the employee.

☐ **To complete a document without ratings,** **Main Menu → Manager Self Service → Performance Management → Performance Documents → Current Documents.** Open the document. Do **not** enter ratings. Click on the **Conference Not Held** check box. Select a reason from the drop down list. Reasons include: FML, other protected leave, too new to rate, resigned or no longer in my department. If **other** is selected, enter an explanation in the **explain** box and click **Complete.** This action will complete the appraisal process.
Logging in to PeopleSoft

☐ Open the Houston ISD homepage at www.houstonisd.org.

☐ Log in to the employee portal, using your portal password.

☐ On the bottom, left side of the screen, under “HISD Application Links”, click PeopleSoft Sign-In.

☐ At the “Oracle” screen, log-in using your network User ID and Password. Keep in mind that the User ID must be entered in all Capital Letters.

Quick Reference Guide Non-Teacher Progress Conference—EMPLOYEE

☐ Log in to PeopleSoft and navigate as follows: Main Menu → Self Service → Performance Management → My Performance Documents → Current Documents. Click on HISD Progress Conference. Then click View. Expand each competency section by clicking ▼ or click Expand All to review your ratings and comments. Clicking on ☐ will link to the “Professional Competencies Rubric”.

☐ Enter comments (optional). Click Save then Click Submit to Appraiser. Click OK to acknowledge initial document review. You also have the option of reviewing the document for up to five days from the date your document was made available to you. If this is the case, you may wait to submit the document to your appraiser. If you are not ready to acknowledge, click Cancel to return to the document.

☐ Your appraiser will receive an email stating that you have reviewed your HISD Performance Appraisal and will schedule a conference.

After the Conference

☐ After the conference has been held, log in to PeopleSoft and open the document as described above.

☐ Click View. Review the appraisal document and enter comments (optional). Click Save.

☐ Scroll to the bottom of the document and click Acknowledge and Complete. This is your acknowledgement of the Progress Conference.

☐ Click OK. The appraisal document will be finalized and marked as Completed. You may now sign out of PeopleSoft if desired.

☐ Your appraiser will receive an email notification that you have acknowledged the Non-Teacher Performance Appraisal.

☐ This will complete the ePerformance appraisal process.