



Performance Rating Job Aid

Here are the step-by-step instructions to enter a performance rating from an employee's performance evaluation for the following scenarios:

- *An employee who has not had a rating entered in PeopleSoft previously;*
- *An employee who has had a rating entered in PeopleSoft and has not changed supervisors since their last rating; and*

- *An employee who has had a rating in PeopleSoft and the supervisor has changed since their last rating;*
- *Entering a performance rating for an employee who has multiple supervisors.*

Security Roles

Non-OHR Personnel: *HCM Department View* for non-managers (managers who have access to MSS are dynamically assigned this function and do not need to request a separate role).

OHR Personnel: *OHR Personnel General User*

All transactions are done through [PeopleSoft](#). Click on the link to log in.

HOW TO ENTER A PERFORMANCE RATING FOR AN EMPLOYEE

WHO **HAS NOT HAD** A PREVIOUS RATING ENTERED IN PEOPLESOFT.

<u>Step</u>	<u>Action</u>
1.	Select the Workforce Development link
2.	Select the Competency Management link Select the Track Person Competencies link Or, skip Track Personal Competencies and go straight to the Competencies link via <ul style="list-style-type: none">➤ Workforce Development➤ Track Person Competencies➤ Competencies
3.	Select Competencies link
4.	Enter an affiliate ID number, name, or other known value for the employee. Click the Search button.



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5. Information must be entered on the first tab, **Competency Evaluation**, for the required fields to enable data into the next tab.
6. *Enter information for the following required fields*:*
 - Evaluation ID:**
This field will auto populate and you will not need to change it
 - Evaluation Type:**
Select the most appropriate option for who the evaluation was completed by. In most cases, this is the Supervisor/Manager.
 - Review Active:** ensure this box is checked
(*Required field)
7. *Enter information for the following optional fields:*
 - Review Date:**
Enter the end review period date or the date that the review was signed by the employee.
 - Reviewer ID:**
(No action needed.)
 - Reviewer Name:**
Enter the name of the person who completed the evaluation (last, first).
 - Reviewer is Approved:**
This field is not currently used (no action needed)
8. Click on the **Competency Assignment** tab.
The description information must be selected in this tab to rate the competency in the **Competency Rating** tab.



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9. Click the arrow for the **Category** menu and select **Skill** (located on top right hand side of screen).

10. Click the arrow for the **Type** menu and select **Rating**.

This will cause **Performance Rating** to appear under **Description** in the **Source Competencies** column.

11. Click on the check box next to **Performance Rating** and then click on the add button (<<).

This will cause **Performance Rating** to appear under the **Description** under the **Assigned Competencies** column.

12. Select the **Competency Rating** tab

The Performance Rating row should already be populated with the **Review Date** from the **Competency Evaluation** tab.

13. Click the arrow for the **Proficiency** menu and select the rating. The ratings in PeopleSoft are the equivalent ASU ratings below:
 - **Exceeds Expectations = 3**
 - **Satisfactory = 2**
 - **Unsatisfactory = 1**
The **Interest Level** menu on the **Competency Rating** tab is not used at this time.

14. Click **Save** at the bottom of screen to save the performance evaluation rating.

NOTE: The **Competency Verification** tab is not used at this time.

15. This completes the process to add a performance evaluation rating for an employee. You can now click on **Return to Search** to enter the next performance evaluation rating.



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ENTERING A PERFORMANCE RATING FOR AN EMPLOYEE WHO HAS HAD A RATING ENTERED IN PEOPLESOFT AND THE SUPERVISOR HAS NOT CHANGED SINCE THEIR LAST RATING

<u>Step</u>	<u>Action</u>
1.	Select the Workforce Development link.
2.	Select the Competency Management link. Select the Track Person Competencies link. Or, skip Track Personal Competencies and go straight to the Competencies link via <ul style="list-style-type: none">➤ Workforce Development➤ Track Person Competencies➤ Competencies.
3.	Select Competencies link.
4.	Enter an affiliate ID number, name, or other known value for the employee. Click the Search button. Information entered previously in the Competency Evaluation tab should be populated. No new information will need to be added. NOTE: If there is no information or very little information in the Competency Evaluation tab, please add information as needed using steps 6 and 7 on the “ Entering a Performance Rating for an Employee Who Has Not Had a Rating Entered in PeopleSoft Previously ” job aid above.
5.	Click on the Competency Assignment tab. If Performance Rating is already listed under the Description field under the Assigned Competencies column, then you will not need to re-enter. If it is not listed, follow steps 9-11 on the “ Entering a Performance Rating for an Employee Who Has Not Had a Rating Entered in PeopleSoft Previously ” job aid above.
6.	Click on the Competency Rating tab. There should be a performance rating row that has already been assigned a rating from the previous evaluation entered.
7.	Click on the + in the existing performance rating row to add a new performance rating row.



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8. Enter the new **Effective Date** which should be the date the evaluation was signed.
Note: The default date will be today's date.
9. Click the arrow for the **Proficiency** menu and select the rating.
The ratings in PeopleSoft are the equivalent ASU ratings below:
 - **Exceeds Expectations = 3**
 - **Satisfactory = 2**
 - **Unsatisfactory = 1**

The **Interest Level** menu on the **Competency Rating** tab is not used at this time.
10. Click **Save** at the bottom of screen to save the performance evaluation rating.

NOTE: The **Competency Verification** tab is not used at this time.
11. This completes the process to add a performance evaluation rating for an employee. You can now click on **Return to Search** to enter the next performance evaluation rating.

ENTERING A PERFORMANCE RATING FOR AN EMPLOYEE WHO HAS HAD A RATING IN PEOPLESOFT AND HAS ALSO CHANGED SUPERVISORS SINCE THEIR LAST RATING

<u>Step</u>	<u>Action</u>
1.	Select the Workforce Development link.
2.	Select the Competency Management link. Select the Track Person Competencies link. Or, skip Track Personal Competencies and go straight to the Competencies link via <ul style="list-style-type: none">➤ Workforce Development➤ Track Person Competencies➤ Competencies.
3.	Select Competencies link.
4.	Enter an affiliate ID number, name, or other known value for the employee. Click the Search button.



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5. The Competency Evaluation tab will be populated with the previous performance rating information and supervisor. Click on **+** located next to the **Licenses and Certificates** link.

A blank **Competency Evaluation** will appear with **Evaluation ID** 02, 03, etc. You will not need to change this number. You will need to make note of this number to reference on the **Competency Assignment** and **Competency Rating** tabs.

Information must be entered on the first tab, **Competency Evaluation**, for the required fields to enable data into the next tab.
6. *Enter information for the following required fields*:*
Evaluation ID:
This field will auto populate and you will not need to change it.

Evaluation Type:
Select the most appropriate option for who the evaluation was completed by. In most cases, this is the Supervisor/Manager.

Review Active: Ensure this box is checked.
(*Required field)
7. *Enter information for the following optional fields:*
Review Date:
Enter the end review period date or the date that the review was signed by the employee.

Reviewer ID:
(No action needed.)

Reviewer Name: Enter the name of the person who completed the evaluation (last, first).

Reviewer is Approved:
This field is not currently used (no action needed)
8. Click on the **Competency Assignment** tab. The description information must be selected in this tab in order to rate the competency in the **Competency Rating** tab.



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9. Click on the **View All** link contained on the right side of the grey **Competency Evaluation** bar. The new evaluation ID that you created should appear without **Performance Rating** in the **Description** field of the **Assigned Competencies**. (If it does, skip to step 13 below.)
10. Under the new evaluation ID, click the arrow for the **Category** menu and select **Skill**.
11. Click the arrow for the **Type** menu and select **Rating**.

This will cause **Performance Rating** to appear under **Description** in the **Source Competencies** column.
12. Click on the check box next to **Performance Rating** and then click on the add button (<<).

This will cause **Performance Rating** to appear under the **Description** under the **Assigned Competencies** column.
13. Click on the **Competency Rating** tab. (If all evaluation ID's are not showing, then click on the **View All** link contained on the right side of the grey **Competency Evaluation** bar.)

The Performance Rating row under the new evaluation ID should already be populated with the **Review Date** from the **Competency Evaluation** tab.
14. Click the arrow for the **Proficiency** menu and select the rating.
The ratings in PeopleSoft are the equivalent ASU ratings below:
 - **Exceeds Expectations = 3**
 - **Satisfactory = 2**
 - **Unsatisfactory = 1**
The **Interest Level** menu on the **Competency Rating** tab is not used at this time.
15. Click **Save** at the bottom of screen to save the performance evaluation rating.

NOTE: The **Competency Verification** tab is not used at this time.
16. This completes the process to add a performance evaluation rating for an employee. You can now click on **Return to Search** to enter the next performance evaluation rating.



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ENTERING A PERFORMANCE RATING FOR AN EMPLOYEE WHO HAS MULTIPLE SUPERVISORS

<u>Step</u>	<u>Action</u>
1.	Select the Workforce Development link.
2.	Select the Competency Management link. Select the Track Person Competencies link. Or, skip Track Personal Competencies and go straight to the Competencies link via <ul style="list-style-type: none">➤ Workforce Development➤ Track Person Competencies➤ Competencies
3.	Select Competencies link.
4.	Enter an affiliate ID number, name, or other known value for the employee. Click the Search button.
5.	If underlined, click on the View All link contained on the right side of the grey Competency Evaluation bar and move on to step 6 below. (An underlined View All link means that there are several supervisor rows.) If not underlined, see step 6b below.
6.	IF... <ul style="list-style-type: none">a. The employee you are entering a performance rating for has a previous rating under the supervisor notated on the performance evaluation, then make note of which evaluation ID the supervisor is attached to and follow steps 7-15 below.b. The employee you are entering a performance rating for has no previous rating under the supervisor notated on the performance evaluation and there is an evaluation for another supervisor, then follow steps 16-27 below.
7.	Click on the Competency Assignment tab.



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8. Click on the **View All** link contained on the right side of the grey **Competency Evaluation** bar. Ensure that **Performance Rating** is already listed under the **Description** under the **Assigned Competencies** column for the evaluation ID the supervisor is attached to. If it is not listed, follow steps 9-11 on the “**Entering a Performance Rating for an Employee Who Has Not Had a Rating Entered in PeopleSoft Previously**” job aid above.
9. Click on the **Competency Rating** tab. (If all evaluation ID’s are not showing, then click on the **View All** link contained on the right side of the grey **Competency Evaluation** bar.) There should be a performance rating row that has already been assigned a rating from the previous evaluation entered.
10. Locate the evaluation ID for this supervisor. Click on the **+** in the existing performance rating row to add a new performance rating row.
11. Enter the new **Effective Date** which should be the date the evaluation was signed. Note: The default date will be today’s date.
12. Click the arrow for the **Proficiency** menu and select the rating. The ratings in PeopleSoft are the equivalent ASU ratings below:
 - **Exceeds Expectations = 3**
 - **Satisfactory = 2**
 - **Unsatisfactory = 1**
13. The **Interest Level** menu on the **Competency Rating** tab is not used at this time.
14. Click **Save** at the bottom of screen to save the performance evaluation rating.

NOTE: The **Competency Verification** tab is not used at this time.
15. This completes the process to add a performance evaluation rating for an employee. You can now click on **Return to Search** to enter the next performance evaluation rating.



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16. Click on + located next to the **Licenses and Certificates** link.
- A blank **Competency Evaluation** will appear with **Evaluation ID** 02, 03, etc. You will not need to change this number. You will need to make note of this number to reference on the **Competency Assignment** and **Competency Rating** tabs.
- Information must be entered on the first tab, **Competency Evaluation**, for the required fields to enable data into the next tab.
17. *Enter information for the following required fields*:*
- Evaluation ID:**
This field will auto populate and you will not need to change it.
- Evaluation Type:**
Select the most appropriate option for who the evaluation was completed by. In most cases, this is the Supervisor/Manager.
- Review Active:**
Ensure this box is checked.
(*Required field)
18. *Enter information for the following optional fields:*
- Review Date:**
Enter the end review period date or the date that the review was signed by the employee.
- Reviewer ID:**
(No action needed.)
- Reviewer Name:**
Enter the name of the person who completed the evaluation (last, first).
- Reviewer is Approved:**
This field is not currently used.
(No action needed.)
19. Click on the **Competency Assignment** tab. The description information must be selected in this tab to rate the competency in the **Competency Rating** tab.



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20. Click on the **View All** link contained on the right side of the grey **Competency Evaluation** bar. The new evaluation ID that you created should appear without **Performance Rating** in the **Description** field of the **Assigned Competencies**. (If it does, **skip to step 24** below.)
21. Under the new evaluation ID, click the arrow for the **Category** menu and select **Skill**.
22. Click the arrow for the **Type** menu and select **Rating**.

This will cause **Performance Rating** to appear under **Description** in the **Source Competencies** column.
23. Click on the check box next to **Performance Rating** and then click on the add button (<<).

This will cause **Performance Rating** to appear under the **Description** under the **Assigned Competencies** column.
24. Click on the **Competency Rating** tab. (If all evaluation ID's are not showing, then click on the **View All** link contained on the right side of the grey Competency Evaluation bar.)

The Performance Rating row under the new evaluation ID should already be populated with the **Review Date** from the **Competency Evaluation** tab.
25. Click the arrow for the **Proficiency** menu and select the rating. The ratings in PeopleSoft are the equivalent ASU ratings below:
 - **Exceeds Expectations = 3**
 - **Satisfactory = 2**
 - **Unsatisfactory = 1.**
The **Interest Level** menu on the **Competency Rating** tab is not used at this time.
26. Click **Save** at the bottom of screen to save the performance evaluation rating.

NOTE: The **Competency Verification** tab is not used at this time.
27. This completes the process to add a performance evaluation rating for an employee. You can now click on **Return to Search** to enter the next performance evaluation rating.