



CLERK OF THE CIRCUIT COURT & COMPTROLLER
PALM BEACH COUNTY

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PALM BEACH COUNTY

ePerformance Leader User Guide

Introductory Performance Review or Introductory Performance Extension



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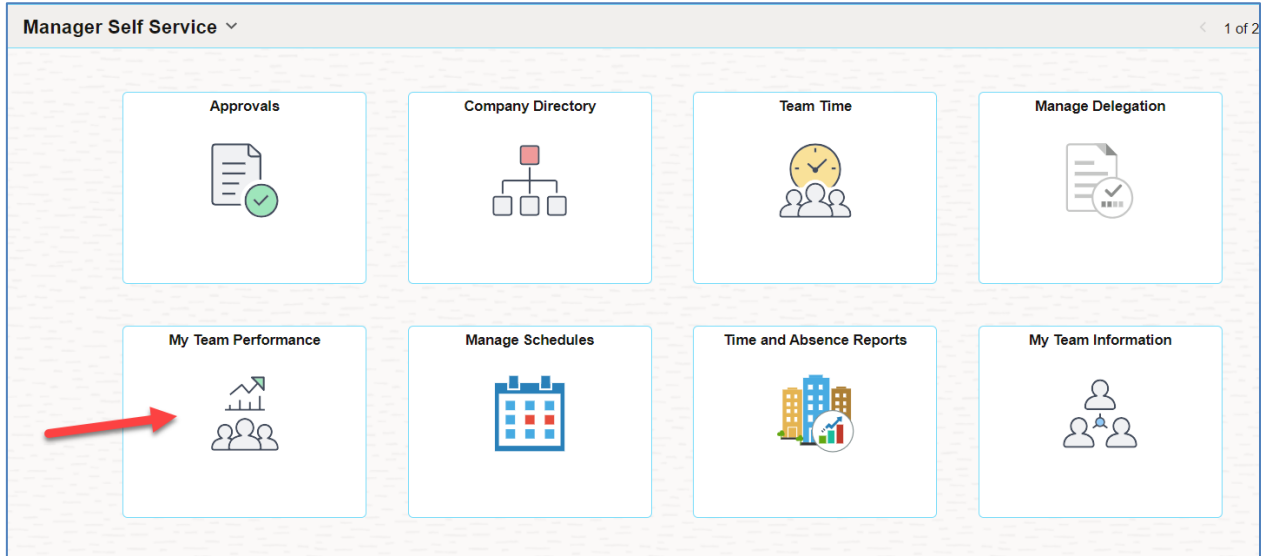
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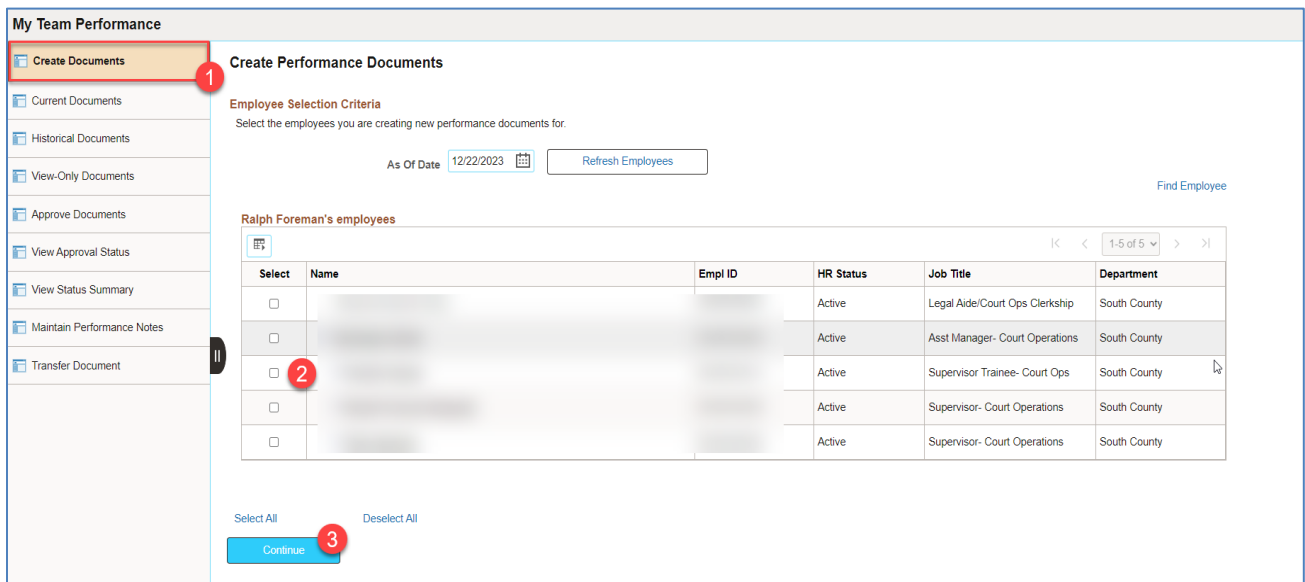
Leaders Guide – Introductory Performance Review or Extension

1. Generate Review or Extension

Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



Select the checkbox next to the employee that you want to create the document for. Click **Continue**.



Enter the data below:

Period Begin Date (normally the Date of Hire)

Period End Date (90 or up to 180 days after the Date of Hire)

Document Type (select **Intro Performance Review** from the dropdown menu)

Template ID (select **Intro Performance Review** from the dropdown menu) Click on Create Documents.

Create Performance Documents

Complete the information in the *Document Creation Details* section below, then select **Create Documents** to generate documents for the employee(s) you previously selected.

Document Creation Details

Period Begin Date	12/08/2023	Period End Date	06/08/2024
Document Type	Intro Performance Review		
Template	Intro Performance Review		

[Create Documents](#)

Selected Employees

Employee ID	Last Name	First Name

[Return to Select Employees](#)

Click on Current Documents

Create Performance Documents - Results

Below are the results for the employees you selected.

Selected Employees

Employee ID	Name	Template	Successful Creation?	Status
	John Clerk	Intro Performance Review	Yes	Document created successfully

Go To [Create Documents](#) [Current Documents](#)

2. Begin Evaluation

Locate the desired document for the employee. Click on the employee's Name.

Current Performance Documents New Window | Help | Personalize PA

Listed are the current performance documents for which you are the Manager.

> Filter Criteria

Performance Documents

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
John Clerk	Intro Performance Review	Evaluation in Progress	12/08/2023	06/08/2024	Court Specialist III - BR	06/08/2024


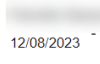
3. Rate Competencies

The review is displayed. Click on the **Expand All** button to see all of the individual Competency sections of the review.

Intro Performance Review Return to Current Documents | Save | Submit for Approval

Evaluation - Update and Submit Print | Notify

Actions

	Job Title: Court Specialist III - BR	Manager: 
Document Type: Intro Performance Review	Period: 12/08/2023 - 06/08/2024	Document ID: 13093
Template: Intro Performance Review	Status: Evaluation in Progress	Due Date: 06/08/2024

Guiding Principles: Honor - Respect - Devotion to Duty

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

| | | |

Section 1 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

|

- > Competency 1: Embraces Innovation&Creativity
- > Competency 2: Contribution to Clerk Culture
- > Competency 3: Dedication to Public Service

Each Competency has two ratings: **Achieving Expectations** and **Needs Improvement**. Click on the dropdown menu in every section to make a selection.

Intro Performance Review

Evaluation - Update and Submit

Section 1 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Expand | Collapse

Competency 1: Embraces Innovation&Creativity


Behavior

Behavior 1: Productivity, Quality, & Time Management
Meets productivity goals; produces accurate and timely work; prioritizes work effectively; quickly adapts when a change is made.

Behavior 2: Job Knowledge
Possesses the necessary knowledge, skills and ability; participates in training; monitors trends and follows best practices.

Behavior 3: Integrity
Displays sound, objective judgment; honest; elevates issues appropriately.


Behavior 4: Innovation
Displays originality and contributes innovative ideas; suggests ways to complete work more efficiently; promotes the use of technology to streamline or automate processes.

Manager Rating 

Created By Profile **Achieving Expectations** 8PM
Needs Improvement

Competency 2: Contribution to Clerk Culture

To review the Rating Descriptions click on the yellow **Notepad** icon. Click **Return** to return to the previous page.

Manager Rating 

Created By Profile **Achieving Expectations** 8PM
Needs Improvement

Competency 2: Contribution to Clerk Culture

Proficiencies

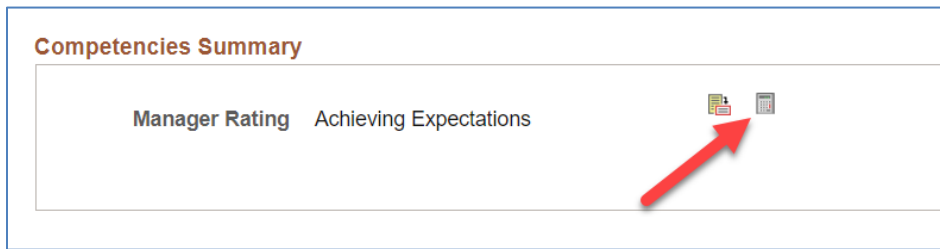
	Rating	Description
<input type="radio"/>	Achieving Expectations	Achieving Job Expectations - performance is consistently acceptable - work is reliable and objectives are regularly met - employee requires a reasonable amount of direction and coaching from supervisor
<input type="radio"/>	Needs Improvement	Needs Improvement - performance is routinely unsatisfactory - work is below acceptable standards - employee requires significant improvement to meet job requirements and performance expectations

Select Proficiency

Return

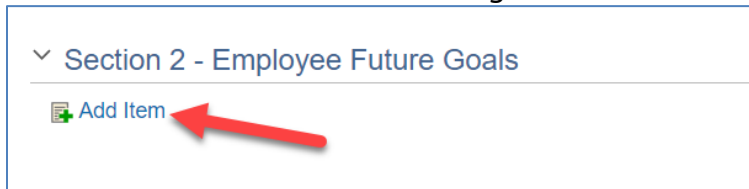
4. Calculate Competencies Summary Rating

Click on the **Calculator** icon to reveal the Summary Rating.

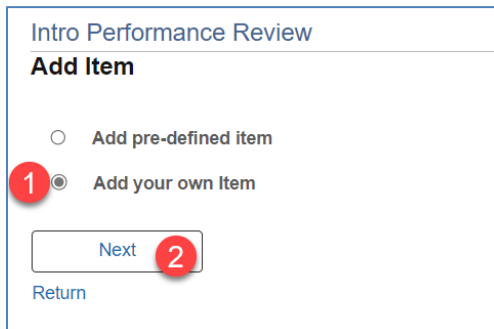


5. Add Employee Future Goals

Click on the **Add Item** link to add goals.

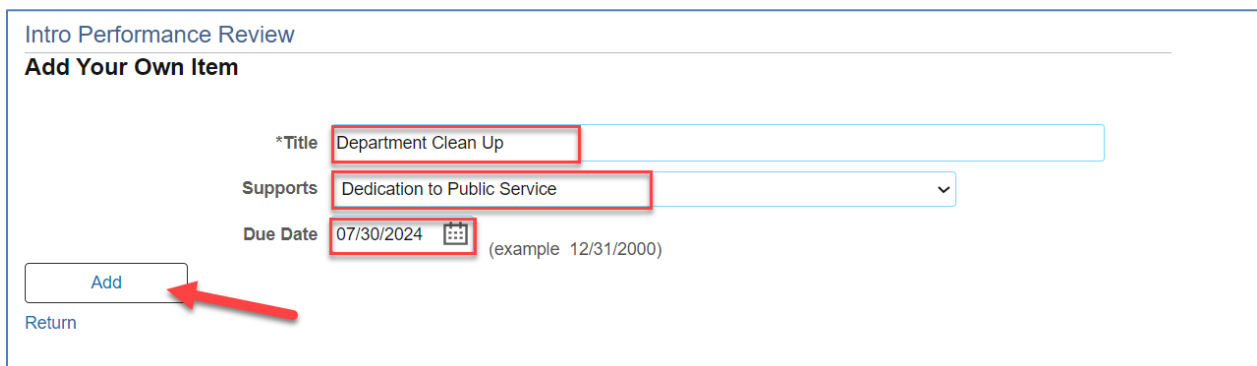


Click on the **Add Your Own Item** radio button. Click on the **Next** button to continue.

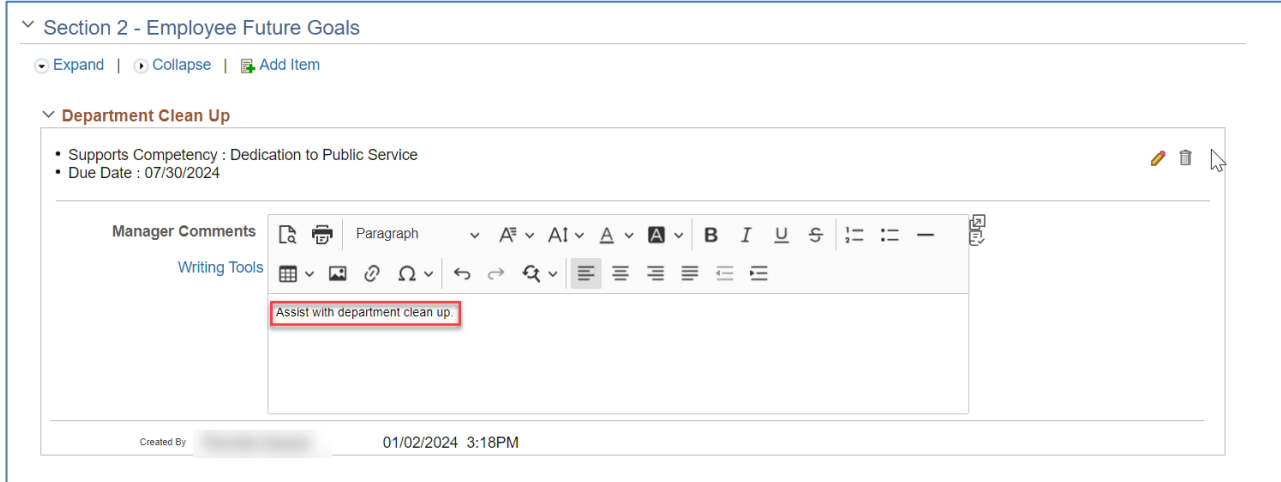


Enter the **Title** of the goal, select the Competency that it **supports** from the dropdown menu, and enter a **Due Date**.

Click the **Add** button to continue.



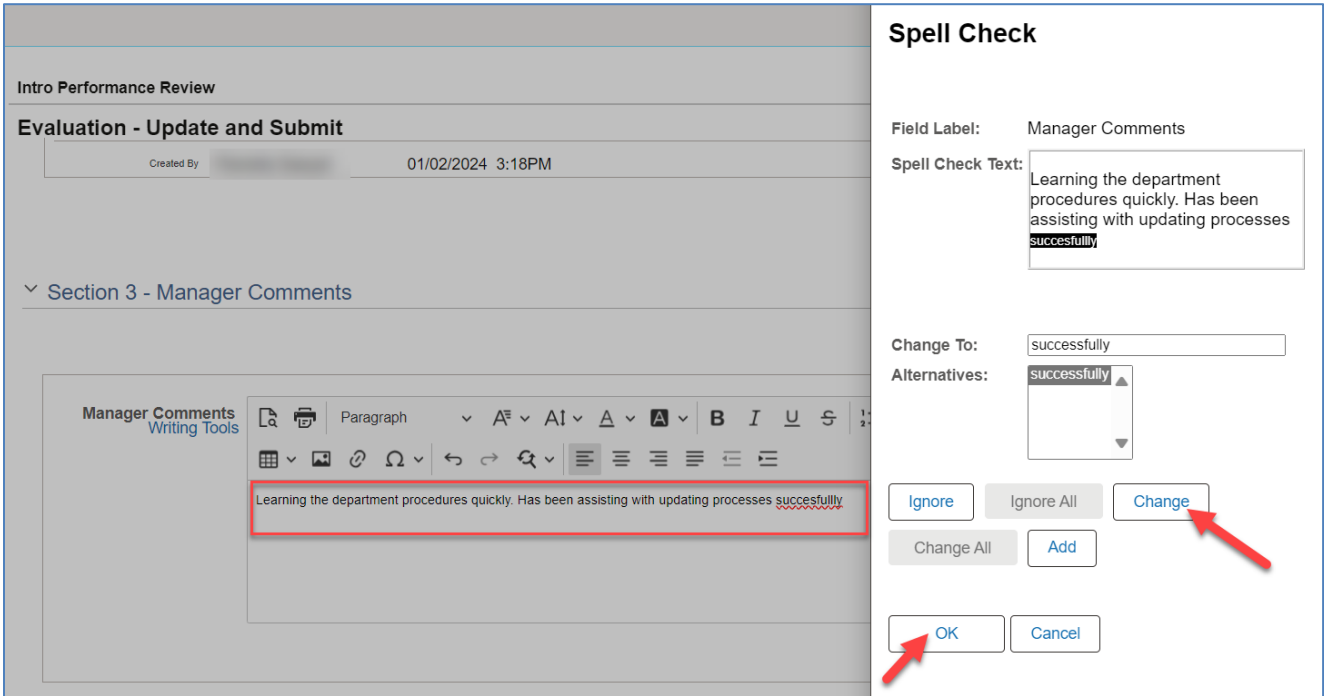
In the **Comments** section, describe the goal using the SMART method (Specific, Measurable, Attainable, Relevant, and Time-bound).



6. Add Manager Comments & Check Language

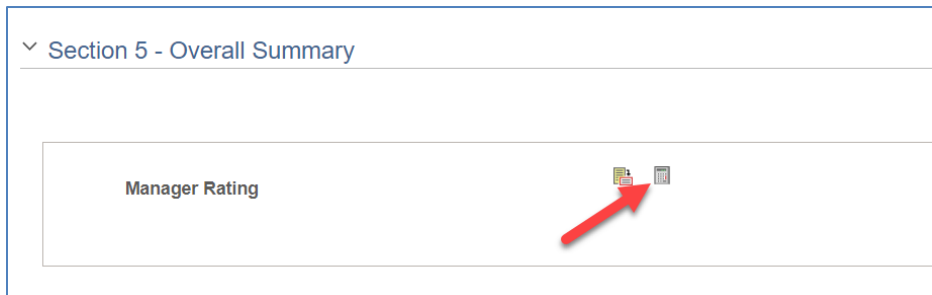
In the **Manager Comments** section, please indicate if the employee has successfully completed their introductory period, as well as any other comments.

Please note that there are editing tools to assist you. Below is an example of the Spell Check tool.




7. Rate Overall Progress

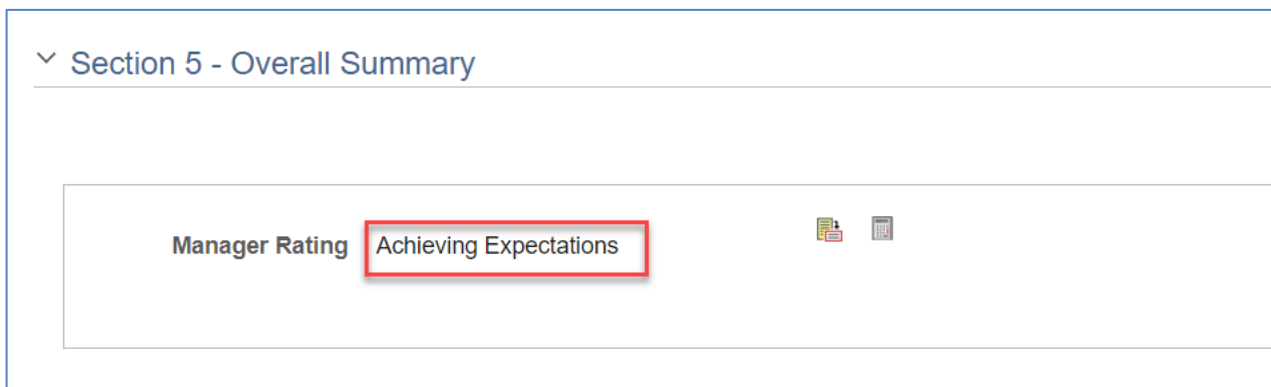
Click the **Calculator** icon to reveal the Overall Rating.




Section 5 - Overall Summary

Manager Rating 

Review the rating to ensure that the appropriate rating is displayed.

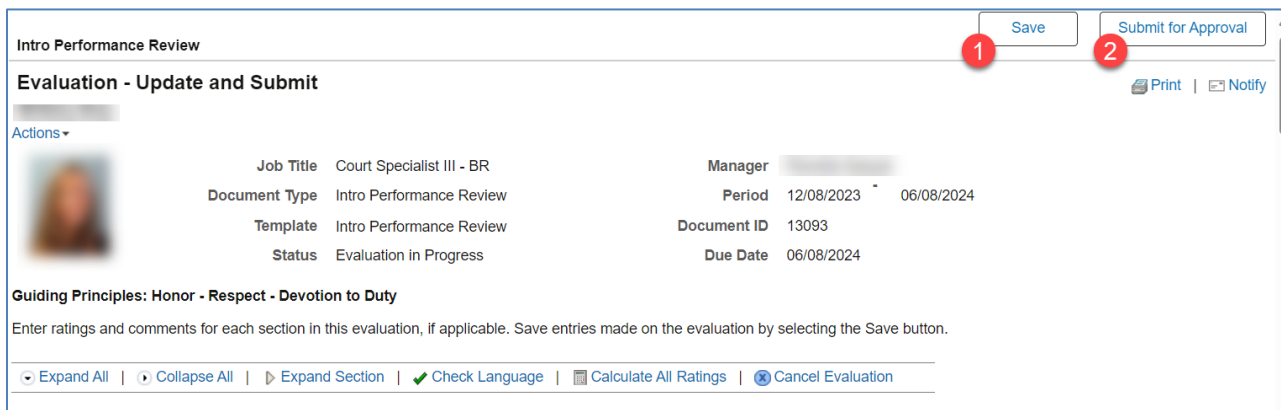


Section 5 - Overall Summary

Manager Rating **Achieving Expectations** 

8. Save and Submit for Approval


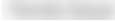
Click the **Save** button, then click the **Submit for Approval** button. This will generate an email to your One-Up Manager informing them that there is a review that requires their approval.



Intro Performance Review Save Submit for Approval

Evaluation - Update and Submit Print Notify

Actions ▾

	Job Title Court Specialist III - BR	Manager 
	Document Type Intro Performance Review	Period 12/08/2023 - 06/08/2024
	Template Intro Performance Review	Document ID 13093
	Status Evaluation in Progress	Due Date 06/08/2024

Guiding Principles: Honor - Respect - Devotion to Duty

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Expand All | Collapse All | Expand Section | Check Language | Calculate All Ratings | Cancel Evaluation

A confirmation message will appear. Click the **Confirm** button to submit the review for approval.

Submit for Approval

Select confirm to submit this document for approval.

Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.

The overall rating you have assigned to this employee is **Achieving Expectations**.

A second confirmation message will be displayed.

Intro Performance Review

Confirmation - Approval Submitted

✔ You have successfully submitted this document for approval.

9. Review the Document Status

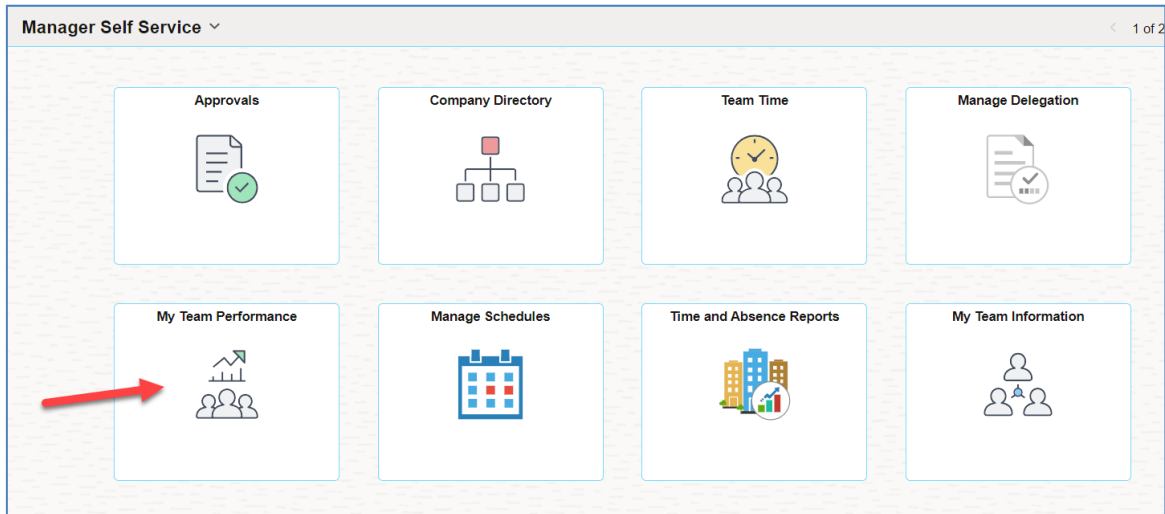
You can review the status of the review at any time by clicking on the Current Documents section. When your manager has approved the review you will receive an email. The status of the review will change from **Approval - Submitted** to **Approval - Approved**.

My Team Performance						
Current Performance Documents						
Performance Documents						
Name	Document Type	Document Status	Period Begin	Period End↓	Job Title↑	Next Due Date
	Intro Performance Review	Approval - Submitted	12/08/2023	06/08/2024	Court Specialist III - BR	06/08/2024

One-Up Approval

1. Access the Review or Extension

Login to PeopleSoft and go to the Manager Self Service menu through ClerkNet or from home using www.mypalmbeachclerk.com. Click the **My Team Performance** tile.



Click on the **Approve Documents** section. Locate the review that you want to approve. Click the employee **Name** link.

The screenshot shows the 'My Team Performance' page. On the left is a navigation menu with 'Approve Documents' highlighted. The main content area is titled 'Select Transaction to Approve' and contains a table of performance documents. A red arrow points to the 'John Clerk' name link in the first row of the table.

Name	Begin Date	End Date	Document Status	Approval Status	Submitted By	Document Type
John Clerk	12/08/2023	06/08/2024	Approval	Submitted		Intro Performance Review

2. Approve or Deny the Performance Document

Click on Performance Document Details to open the Introductory Performance Review or Introductory Performance Extension. Enter any comments in the **Comment** box. Then click **Approve** or **Deny**.

Please note that comments added in the Comment box will only be visible to the document's Author and not to the employee.

Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Empl ID

Actions ▾

Performance Document

Doc Type Intro Performance Review

Author

Period Begin Date 12/08/2023 Period End Date 06/08/2024

Rating Achieving Expectations

[Performance Document Details](#)

Evaluation Approval Chain

Review Employee: Pending

Evaluation Approval Chain

Pending

Uses Reports To Position

Comment

Approve Deny

Go To [Approval Summary](#)

A confirmation message will be displayed. Click **Close**.

Approve Document

Save Confirmation

✓ The Save was successful.

Close

The **Approve Document** page will be displayed.

Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Empl ID [blurred]

Actions ▾

Performance Document

Doc Type Intro Performance Review

Author [blurred]

Period Begin Date 12/08/2023 Period End Date 06/08/2024

Rating Achieving Expectations

[Performance Document Details](#)

Evaluation Approval Chain

Review Employee: **Approved** [View/Hide Comments](#)

Evaluation Approval Chain

Approved

Uses Reports To Position
01/02/24 - 3:59 PM

Comments

Go To [Approval Summary](#)

Release Review or Extension

1. Print Review or Extension

Prior to meeting with the employee, print a copy of the Introductory Review or Introductory Review Extension for them.

Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.

Manager Self Service ▾ 1 of 2

Approvals

Company Directory

Team Time

Manage Delegation

My Team Performance

Manage Schedules

Time and Absence Reports

My Team Information

Click on Current Documents. Locate the document that has been approved. The status will be **Approval - Approved**. Click on the **employee's name**.

The screenshot shows the 'My Team Performance' dashboard. On the left, a sidebar contains navigation options: 'Create Documents', 'Current Documents' (highlighted with a red box), 'Historical Documents', 'View-Only Documents', 'Approve Documents', 'View Approval Status', and 'View Status Summary'. The main area is titled 'Current Performance Documents' and includes a 'Filter Criteria' link. Below is a table of performance documents:

Name	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
John Clerk	Intro Performance Review	Approval - Approved	12/08/2023	06/08/2024	Court Specialist III - BR	06/08/2024

A red arrow points to the name 'John Clerk' in the first row of the table.

Click the **Printer** icon.

The screenshot shows the 'Evaluation - Share with Employee' page. At the top right, there are buttons for 'Return to Current Documents', 'Save', and 'Share with Employee'. Below these is a 'Print' icon with a red arrow pointing to it, and an 'Notify' icon. The main content area displays details for the selected document:

Job Title: Court Specialist III - BR
Document Type: Intro Performance Review
Template: Intro Performance Review
Status: Approval - Approved

Manager: [Redacted]
Period: 12/08/2023 - 06/08/2024
Document ID: 13093
Due Date: 06/08/2024

Guiding Principles: Honor - Respect - Devotion to Duty

Click on the **Printer** icon again.

The screenshot shows a document viewer window titled 'atures. View permissions'. The document content includes the logo of Joseph Abruzzo, Clerk of the Circuit Court & Comptroller, Palm Beach County. The document title is 'Intro Performance Review Evaluation - Share with Employee'. The details are:

Job Title: Court Specialist III - BR
Document Type: Intro Performance Review
Template: Intro Performance Review
Status: Approval - Approved - Approved

Manager: [Redacted]
Period: 12/08/2023 - 06/08/2024
Document ID: 13093
Due Date: 06/08/2024

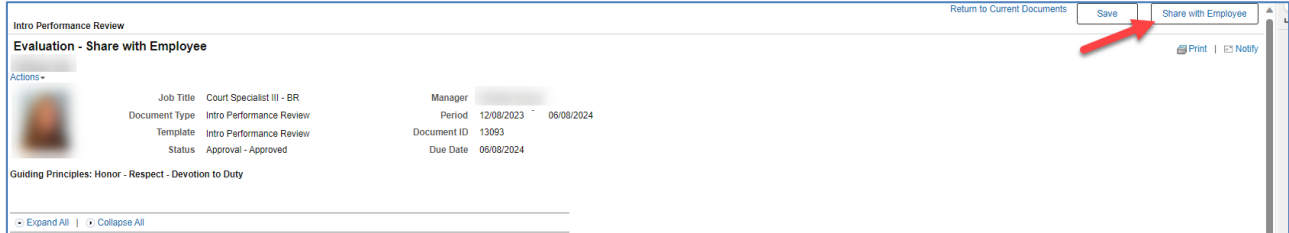
Guiding Principles: Honor - Respect - Devotion to Duty

Section 1 - Competencies
Competency 1: Embraces Innovation&Creativity
Behavior 1: Productivity, Quality, & Time Management
Description:
Meets productivity goals; produces accurate and timely work; prioritizes work effectively; quickly adapts when a change is made.

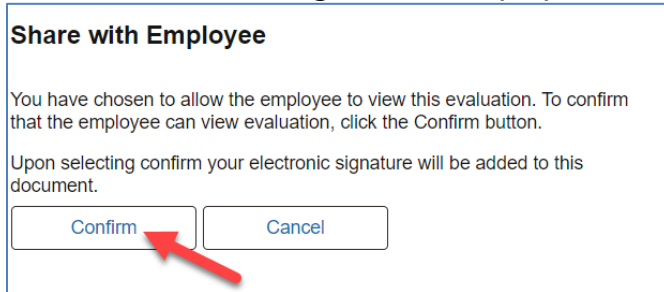
A red arrow points to the printer icon in the top right toolbar of the document viewer.

2. Release Review or Extension

Conduct a one-on-one meeting with the employee. After the meeting, share the review electronically with the employee. Click the **Share with Employee** button.



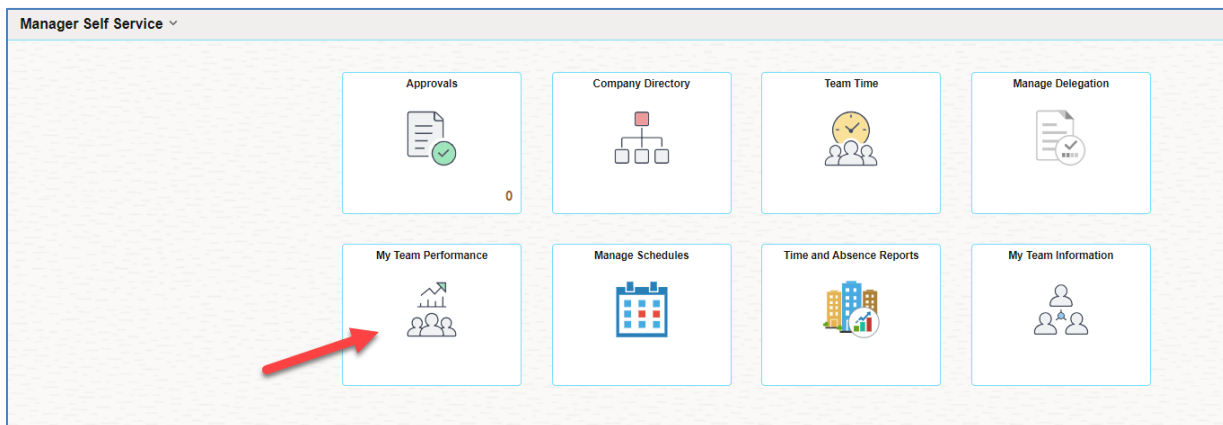
A confirmation message will be displayed. Click the **Confirm** button.



Complete Review or Extension

1. View Employee Comments

Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



Click on **Historical Documents**. Click on the **employee name** of the performance document to review.

My Team Performance

Create Documents
Current Documents
Historical Documents
View-Only Documents
Approve Documents
View Approval Status
View Status Summary
Maintain Performance Notes
Transfer Document

Performance Document History
Listed here are the completed and canceled documents for which you are the Manager. You can access a document by selecting the "Employee" hyperlink.
> Filter Criteria

Performance Documents

Name	Document Type	Document Status	Period Begin	Period End↓	Job Title↑	Rating
John Clerk	Intro Performance Review	Completed	12/08/2023	06/08/2024	Court Specialist III - BR	Achieving Expectations
	Performance Check-in	Completed	01/02/2024	04/02/2024	Court Specialist IV - VB - BR	

Scroll to the bottom of the document to view the **Employee Comments**.

Section 4 - Employee Comments

In the comments section below, you are required to state "I agree" or "I disagree" with your performance appraisal. If you **disagree**, please explain. Failure to comply with this requirement will be deemed full agreement with this performance appraisal.

Employee Comments

I agree.

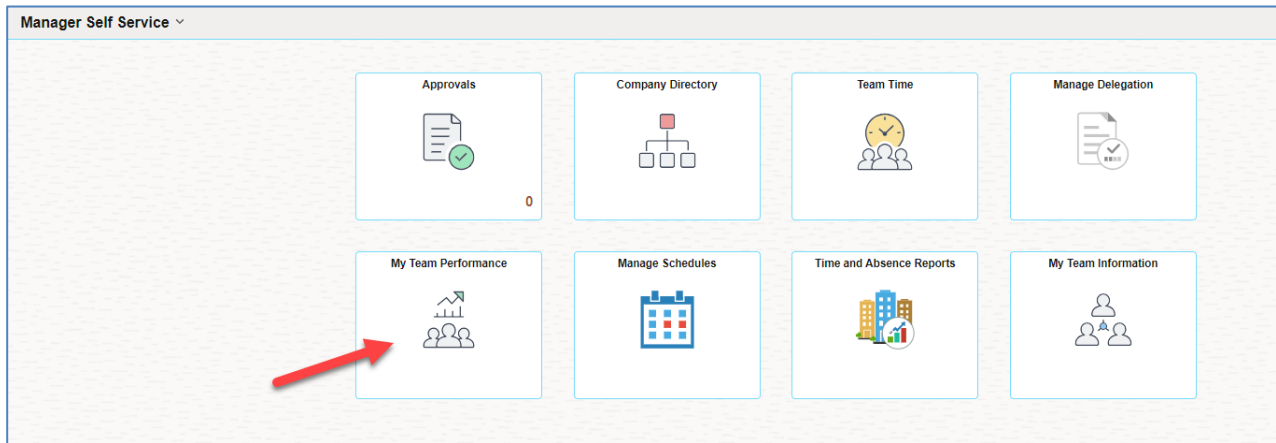
2. Reopen Performance Document

If you need to update your comments or change any of the ratings, please contact HRIS to reopen the performance document. Note that once the performance document is re-opened, the document will need to go through the approval process again.

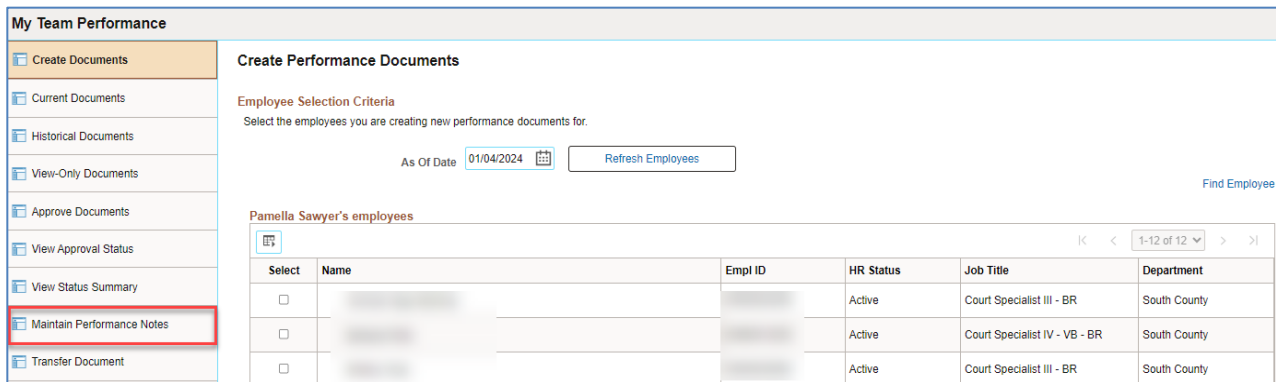
Performance Notes (Optional)

1. Enter Performance Notes

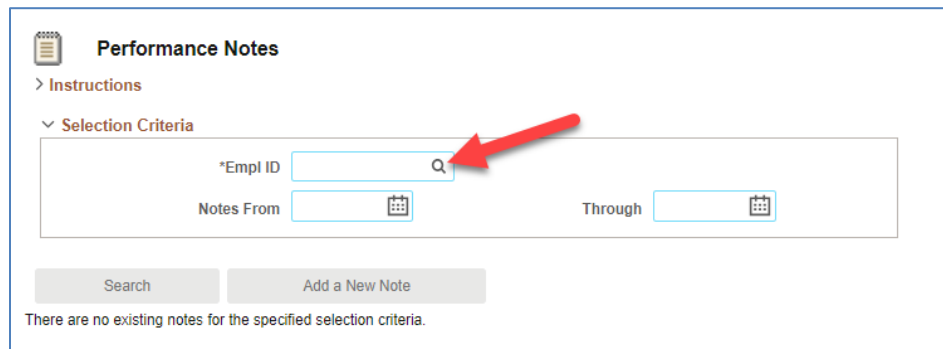
Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



Click on **Maintain Performance Notes**.



Click on the **Magnifying Glass**.



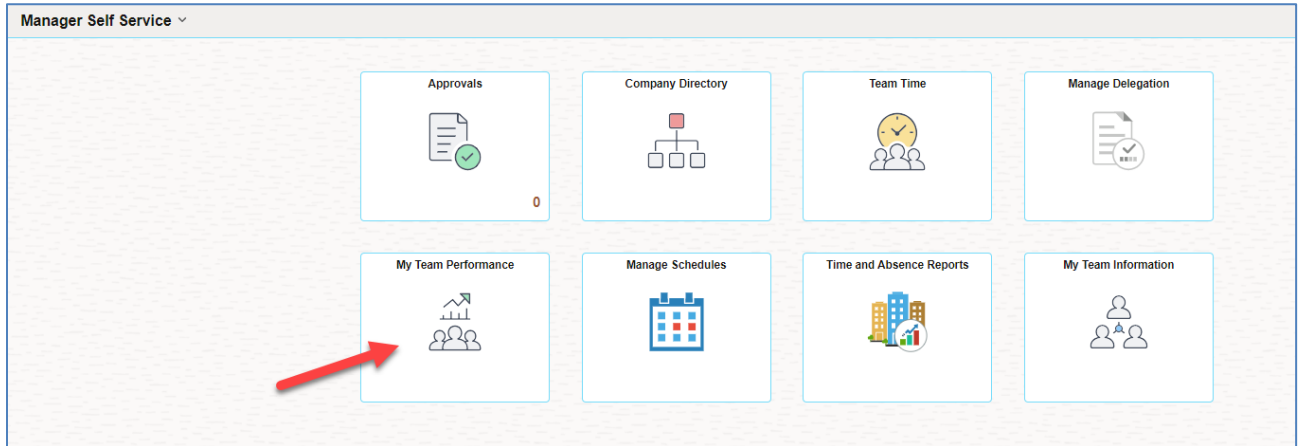
Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click **Search**.

Enter the **Notes From** and **Through** date for the performance note. Click on **Add a New Note**.

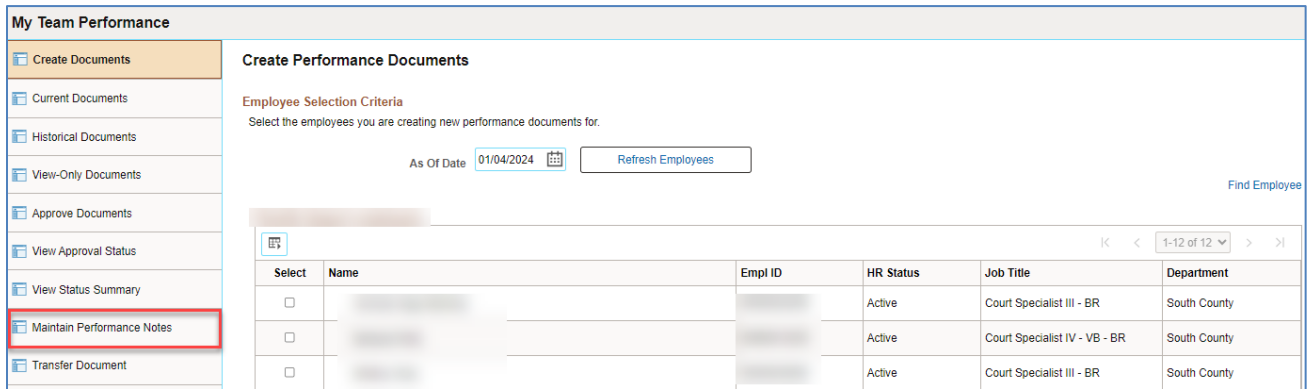
Enter the **Subject** and **Note Text** for the Performance Note. Click **Save**.

2. Search for Performance Notes

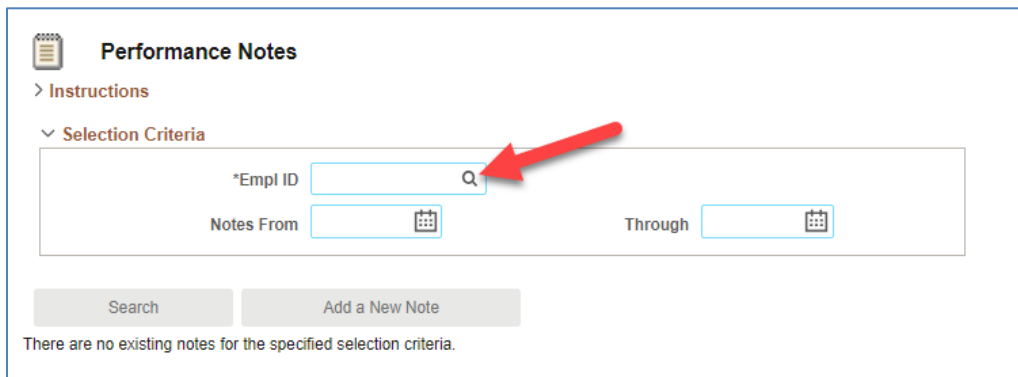
Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



Click on **Maintain Performance Notes**.



Click on the **Magnifying Glass**.



Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click **Search**.

Look Up Empl ID

Search by: Empl ID begins with

Search

Search Results

Only the first 300 results can be displayed.

Click on the **Empl ID** for the employee.

Look Up Empl ID

Search by: Last Name begins with Clerk

Search Cancel Advanced Lookup

Search Results

View 100 1-32 of 32

Empl ID	Name	Last Name	First Name	Second Last Name	Alternate Character Name
John Clerk				(blank)	(blank)

Click **Search**.

Performance Notes

> Instructions

> Selection Criteria

*Empl ID 000000 John Clerk

Notes From Through

Search Add a New Note

All performance notes for the employee will be displayed. Click on the performance notes **Subject** hyperlink to examine the information.

Performance Notes

> Instructions

Selection Criteria

*Empl ID: 00000 [Search] John Clerk

Notes From: [Calendar] Through: [Calendar]

[Search] [Add a New Note]

Existing Performance Notes for this Employee

Select	Subject	Created
<input type="checkbox"/>	Microsoft Advance Training	01/04/2024 4:40PM

Select All Deselect All

Delete Transfer

3. Edit Performance Notes

Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.

Manager Self Service

- Approvals (0)
- Company Directory
- Team Time
- Manage Delegation
- My Team Performance** (indicated by a red arrow)
- Manage Schedules
- Time and Absence Reports
- My Team Information

Click on **Maintain Performance Notes**.

My Team Performance

- Create Documents
- Current Documents
- Historical Documents
- View-Only Documents
- Approve Documents
- View Approval Status
- View Status Summary
- Maintain Performance Notes**
- Transfer Document

Create Performance Documents

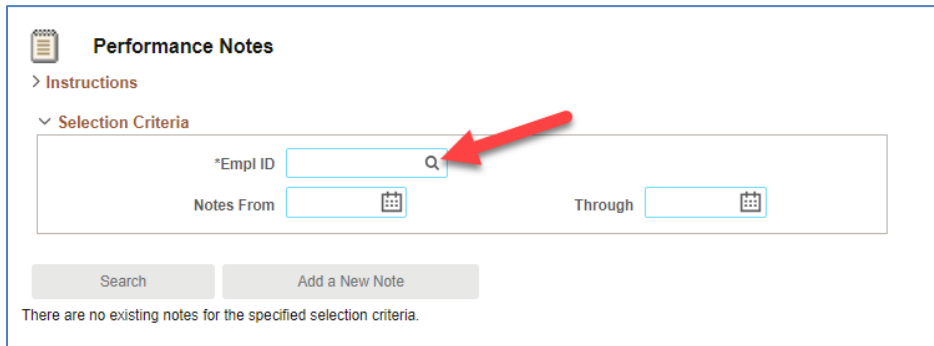
Employee Selection Criteria

Select the employees you are creating new performance documents for.

As Of Date: 01/04/2024 [Calendar] [Refresh Employees] [Find Employee]

Select	Name	Empl ID	HR Status	Job Title	Department
<input type="checkbox"/>	[Redacted]	[Redacted]	Active	Court Specialist III - BR	South County
<input type="checkbox"/>	[Redacted]	[Redacted]	Active	Court Specialist IV - VB - BR	South County
<input type="checkbox"/>	[Redacted]	[Redacted]	Active	Court Specialist III - BR	South County


Click on the **Magnifying Glass**.





Performance Notes

> Instructions

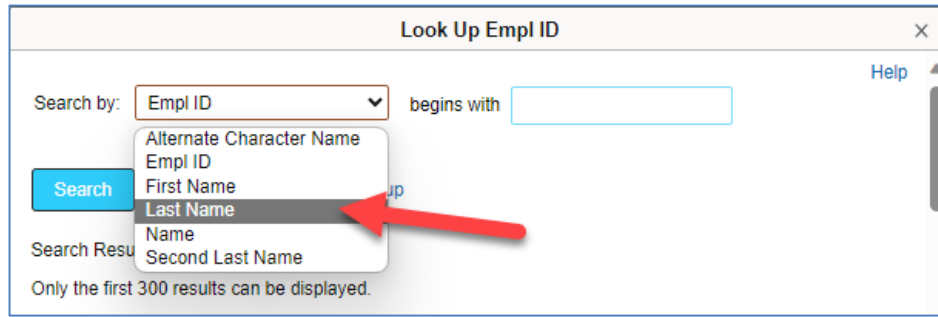
Selection Criteria

*Empl ID 

Notes From  Through 

There are no existing notes for the specified selection criteria.

Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click **Search**.



Look Up Empl ID

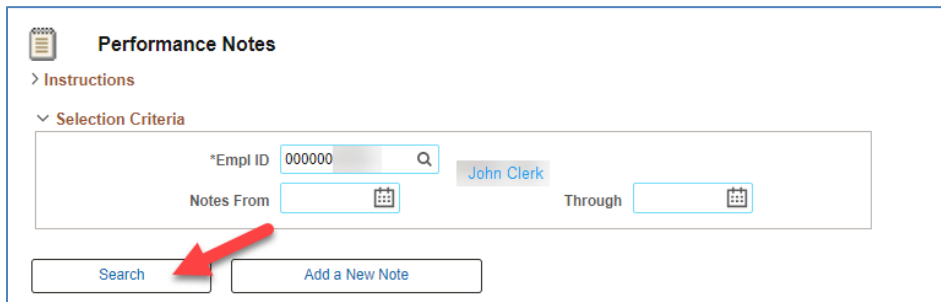
Search by: begins with

- Alternate Character Name
- Empl ID
- First Name
- Last Name**
- Name
- Second Last Name

Search Results

Only the first 300 results can be displayed.


Click **Search**.





Performance Notes

> Instructions

Selection Criteria

*Empl ID 

Notes From  Through 

All performance notes for the employee will be displayed. Click on the performance notes **Subject** hyperlink to examine the information.

Performance Notes

> Instructions

Selection Criteria

*Empl ID 000000 [Q] John Clerk

Notes From [Calendar] Through [Calendar]

Search Add a New Note

Existing Performance Notes for this Employee

Select	Subject	Created
<input type="checkbox"/>	Microsoft Advance Training	01/04/2024 4:40PM

Select All Deselect All

Delete Transfer

Edit the performance note. Click **Save**.

Performance Notes - Add/Update Notes

> Instructions

Selected Performance Note

Applications

Empl ID [Redacted] Created 01/04/2024 4:40PM

Creator [Redacted]

Last Update

Updated By

Subject Microsoft Advance Training

Note Text Employee is to complete the training by 8/4/2024. Training sessions will be held at CCLC 5th Floor.

Save

Return to Performance Note Selection