JOSEPH ABRUZZO
CLERK OF THE CIRCUIT COURT & COMPTROLLER
PALM BEACH COUNTY

ePerformance
Leader User Guide

Introductory Performance Review or Introductory Performance Extension

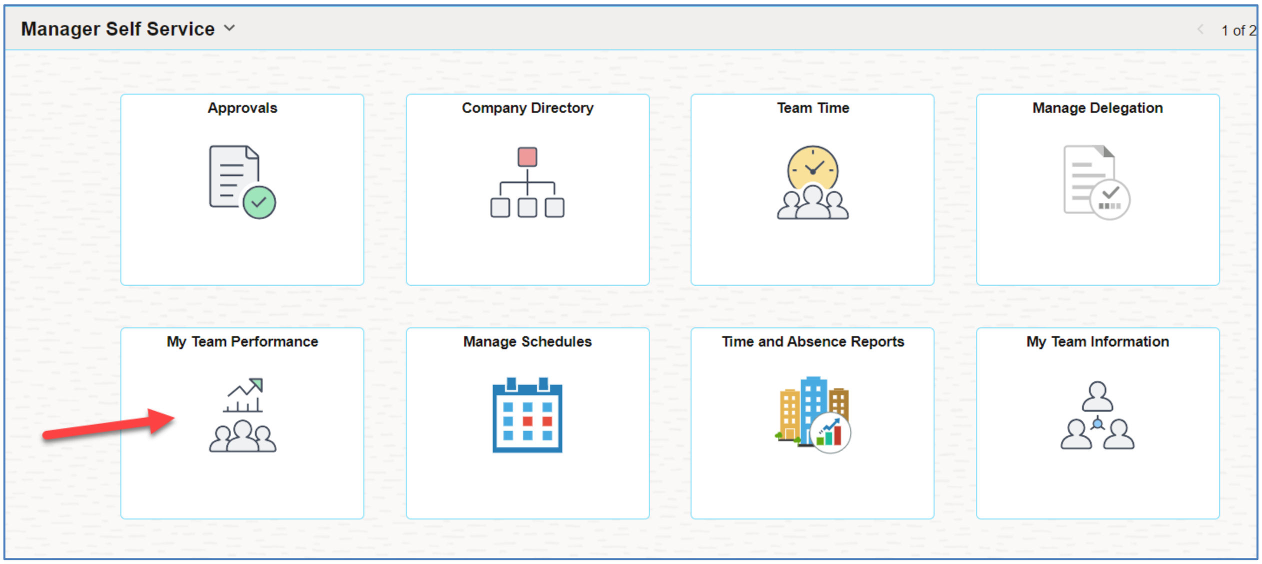
Table of Contents

Contents

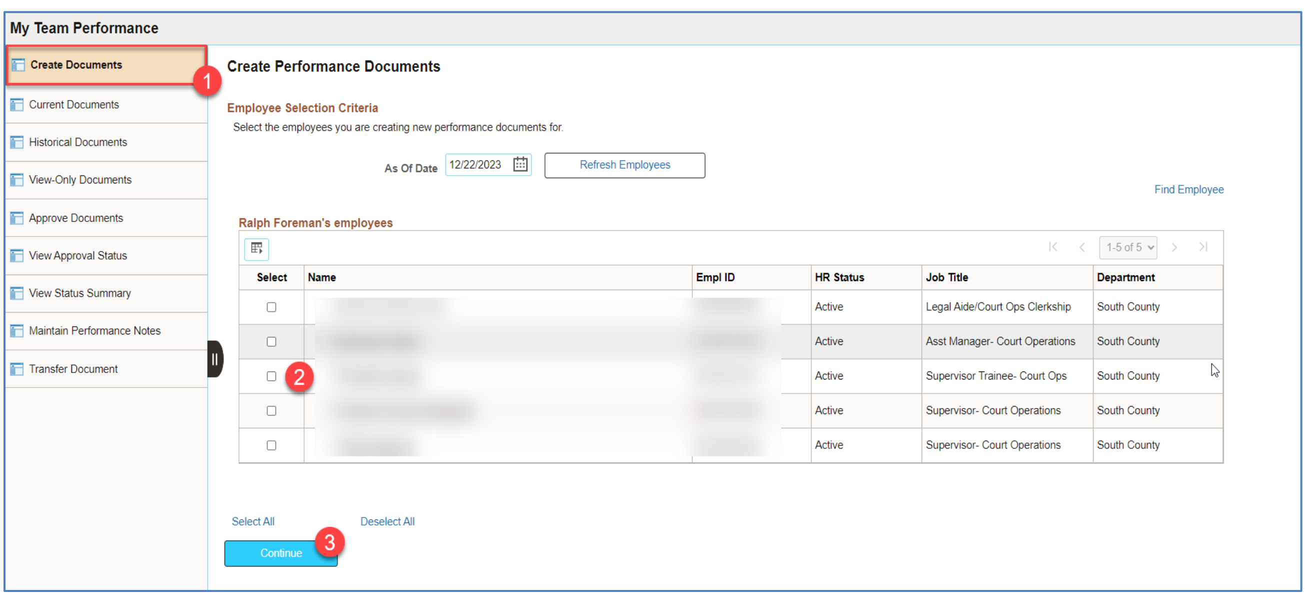
Leaders Guide – Introductory Performance Review or Extension

1. Generate Review or Extension

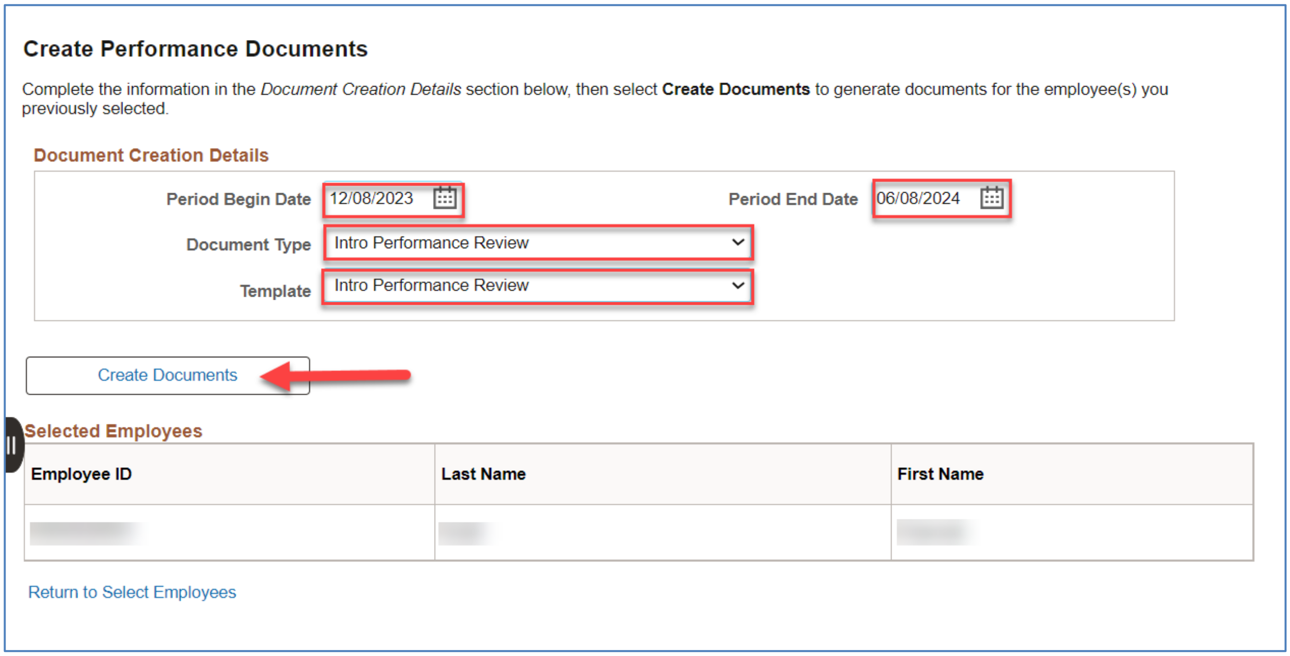
Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



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

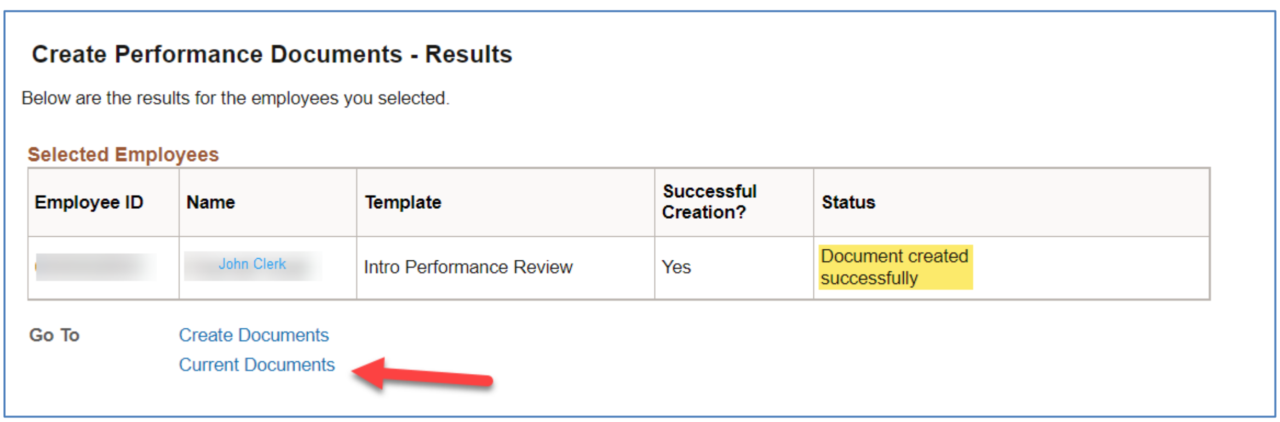
Create Documents

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.

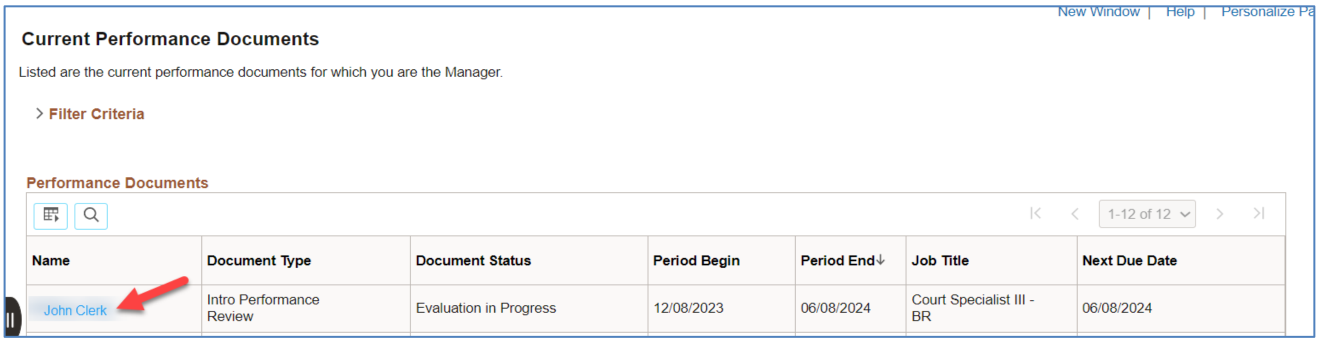
Selected Employees

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

Go To Create Documents
Current Documents

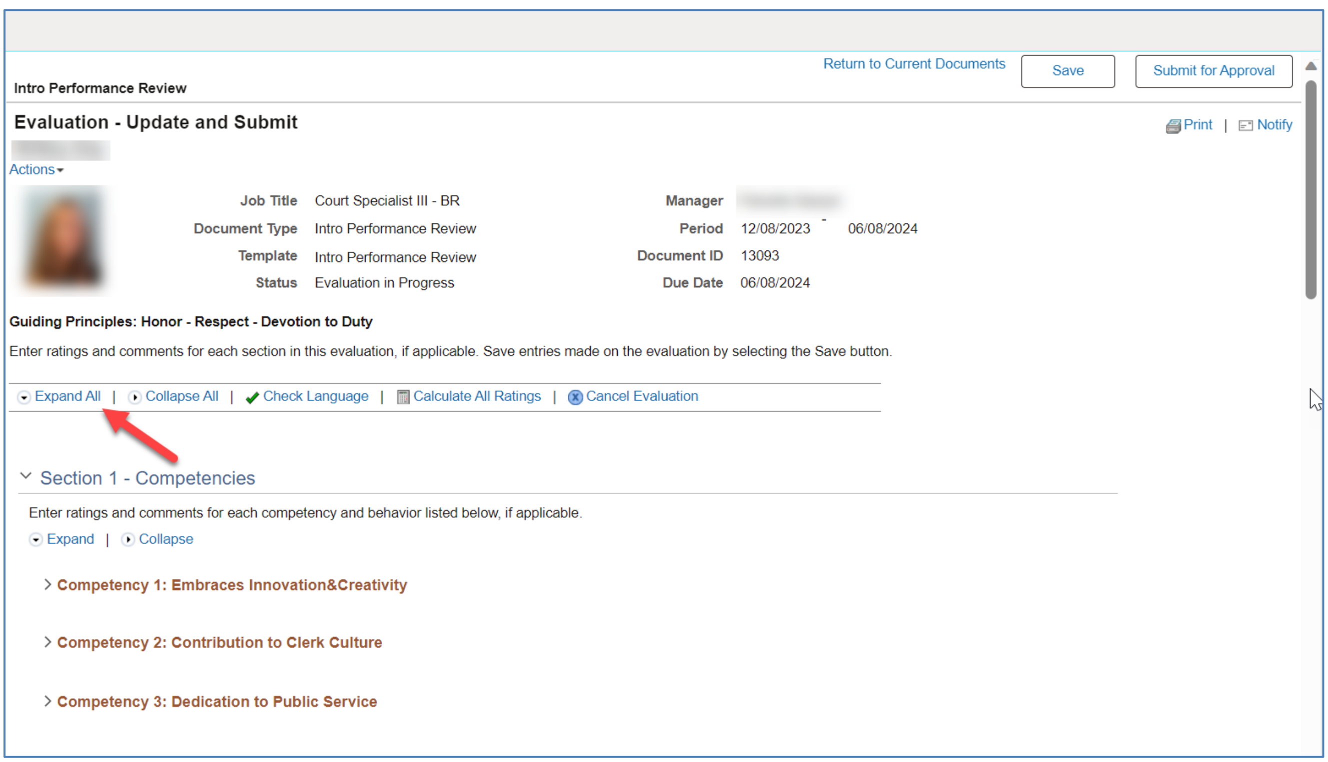
2. Begin Evaluation

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

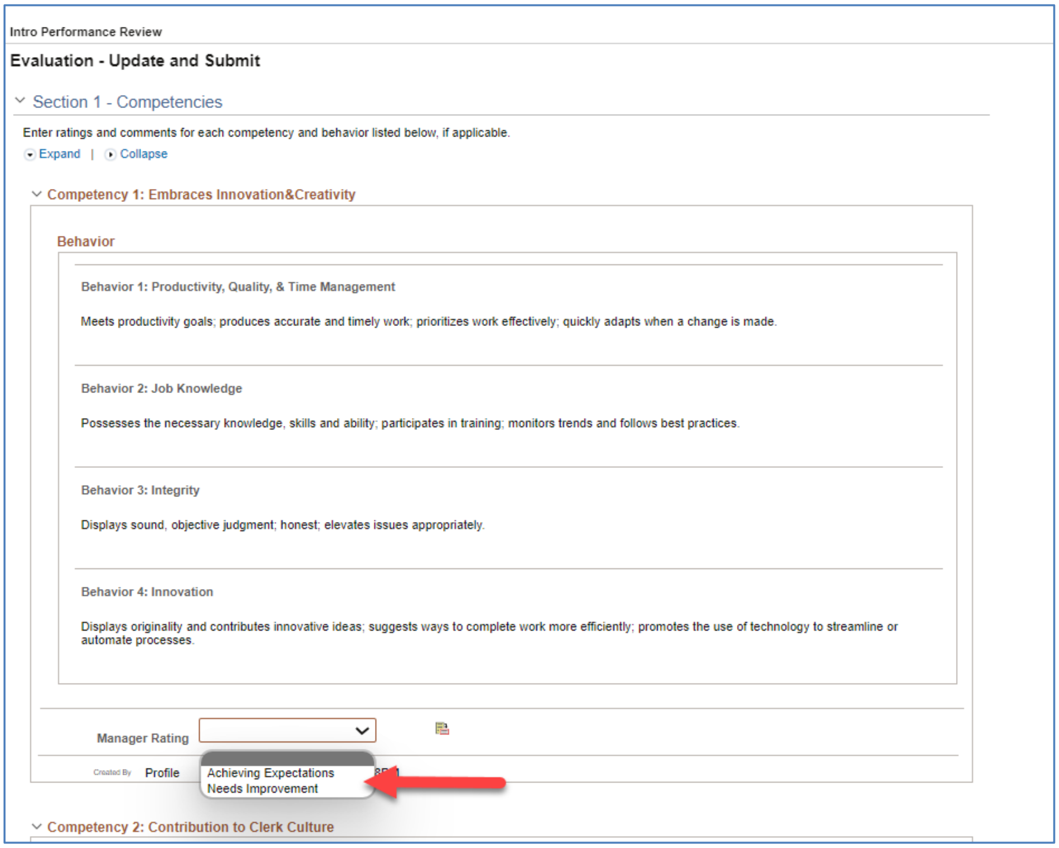


3. Rate Competencies

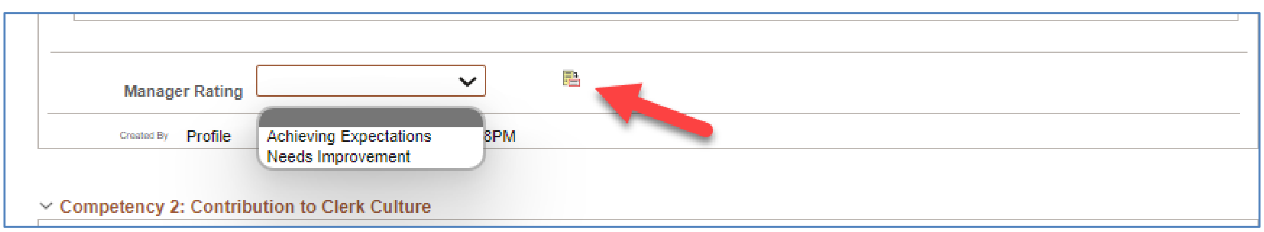
The review is displayed. Click on the **Expand All** button to see all of the individual Competency sections of the review.

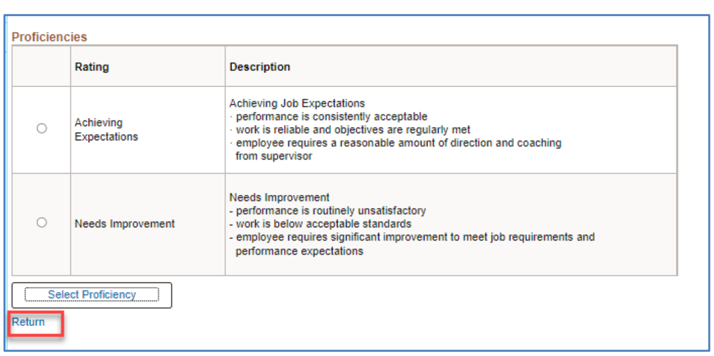


Each Competency has two ratings: **Achieving Expectations** and **Needs Improvement.** Click on the dropdown menu in every section to make a selection.



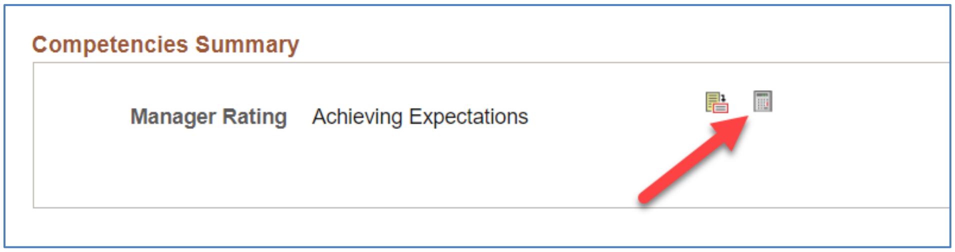
To review the Rating Descriptions click on the yellow **Notepad** icon. Click **Return** to return to the previous page**.**





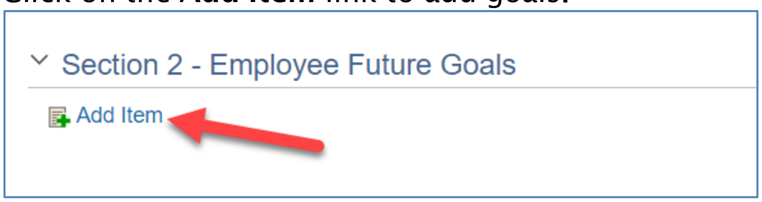
4. Calculate Competencies Summary Rating

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

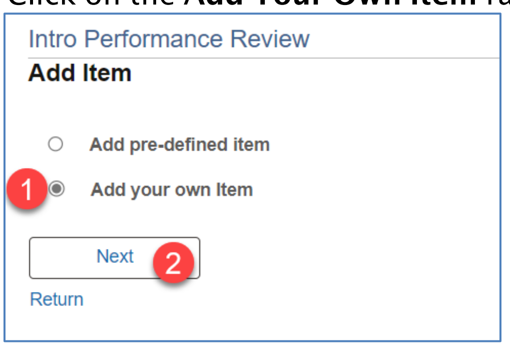


5. Add Employee Future Goals

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

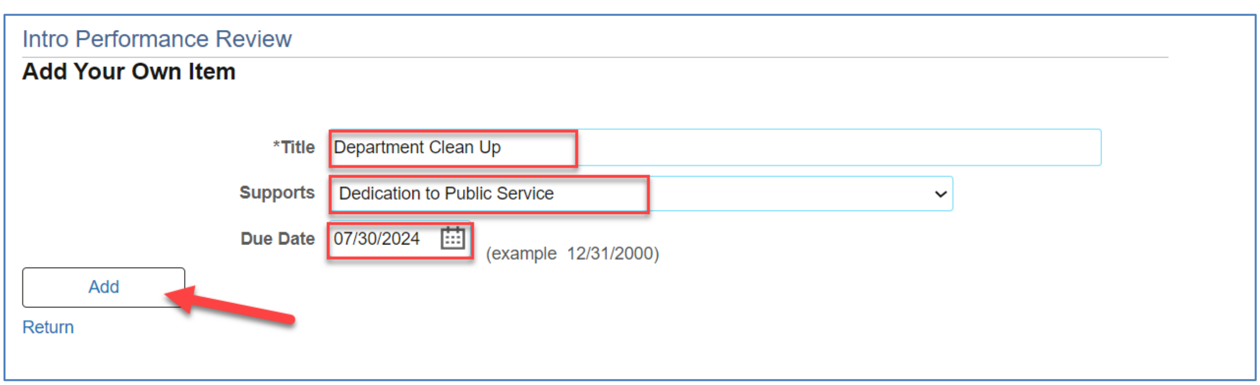


Click on the **Add Your Own Item** radio button. Click on the **Next** button to continue.

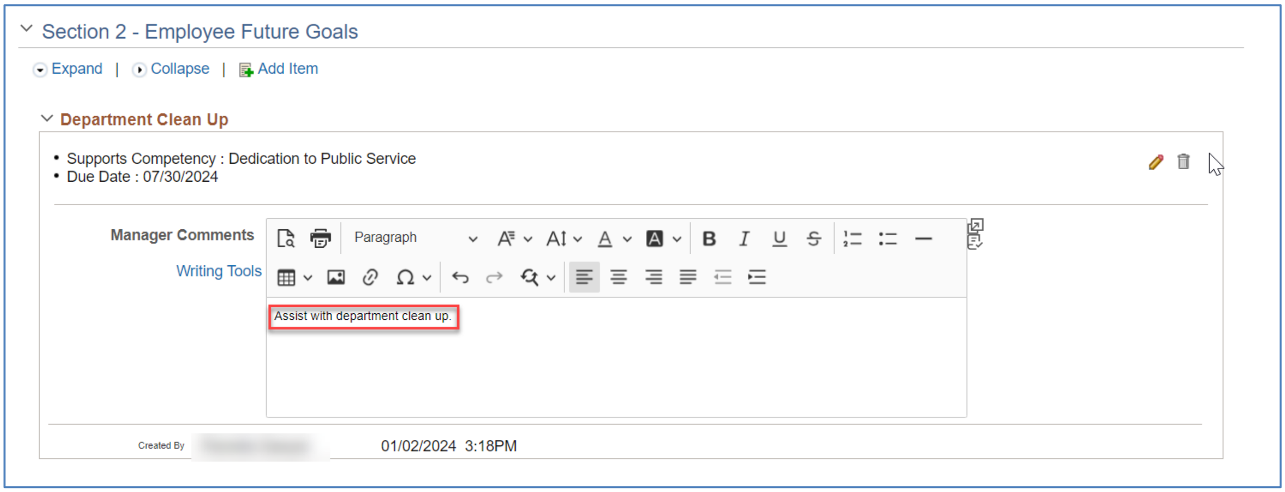


Enter the **Title** of the goal, select the Competency that it **supports** from the dropdown menu, and enter a **Due Date**.

Click the **Add** button to continue.



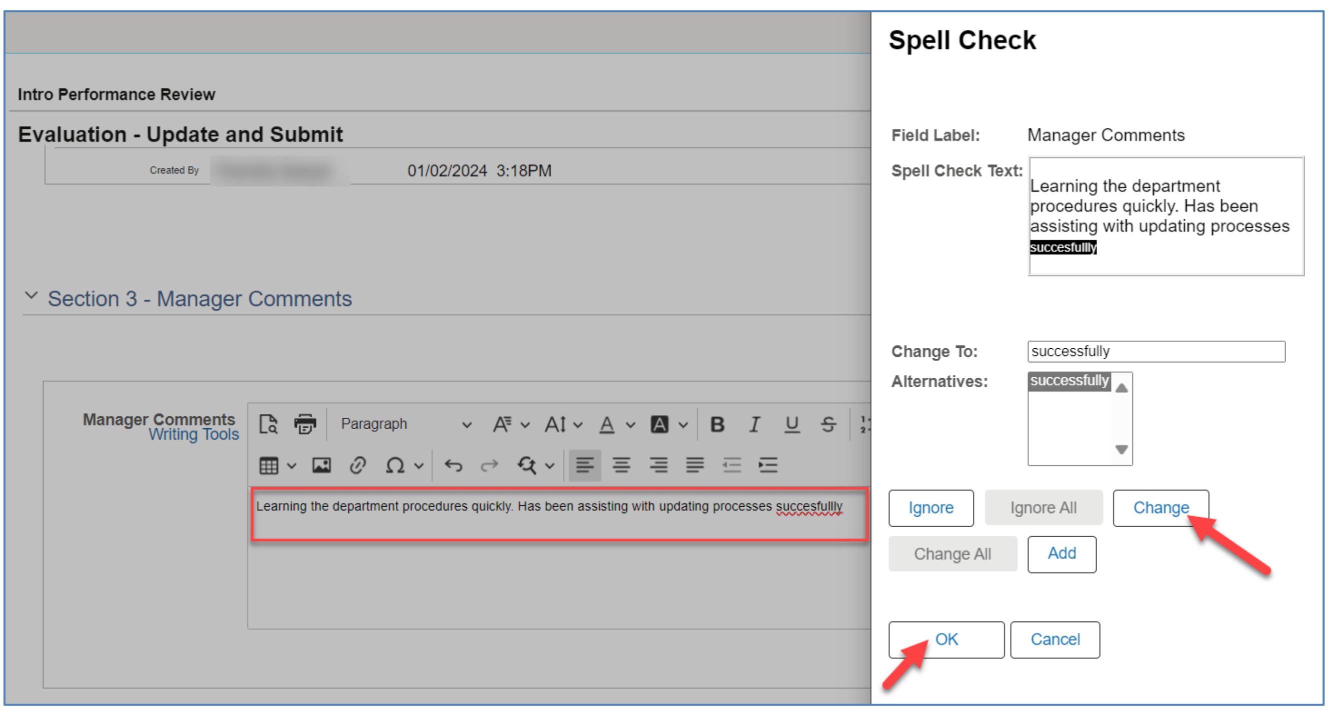
In the **Comments** section, describe the goal using the SMART method (Specific, Measurable, Attainable, Relevant, and Time-bound).



6. Add Manager Comments & Check Language

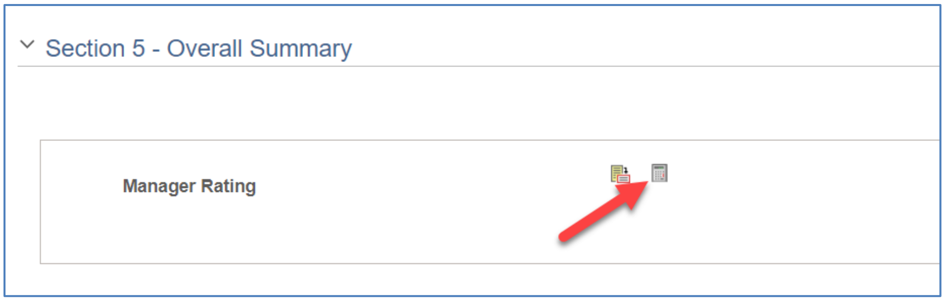
In the **Manager Comments** section, please indicate if the employee has successfully completed their introductory period, as well as any other comments.

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



7. Rate Overall Progress

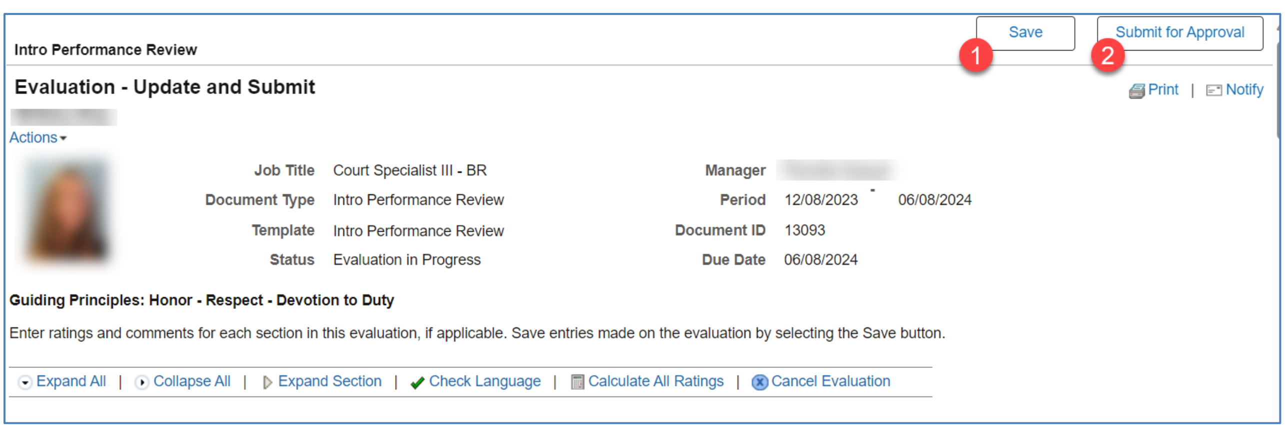
Click the **Calculator** icon to reveal the Overall Rating.



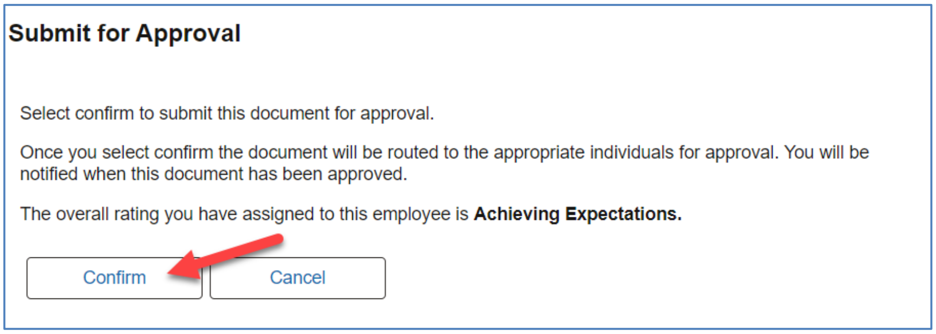
Review the rating to ensure that the appropriate rating is displayed.

8. Save and Submit for Approval

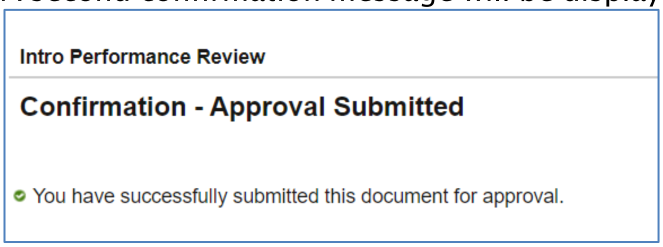
Click the **Save** button, then click the **Submit for Approval** button. This will generate an email to your One-Up Manager informing them that there is a review that requires their approval.



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

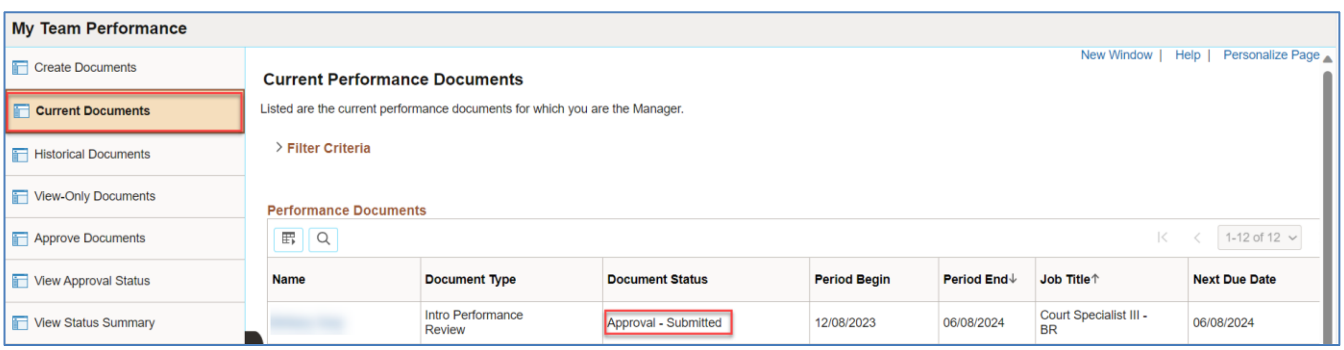


A second confirmation message will be displayed.



9. Review the Document Status

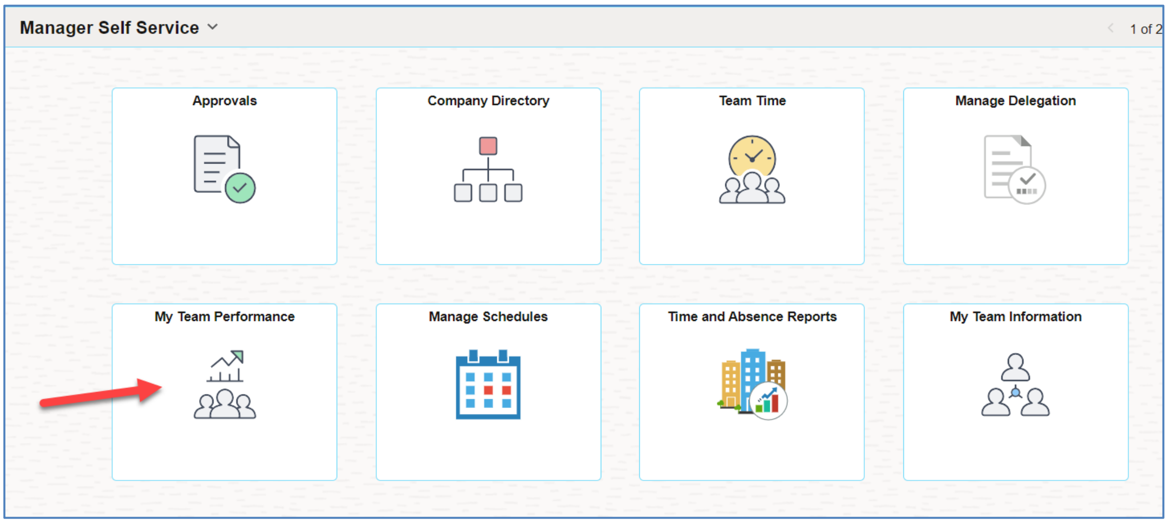
You can review the status of the review at any time by clicking on the Current Documents section. When your manager has approved the review you will receive an email. The status of the review will change from **Approval – Submitted** to **Approval – Approved**.



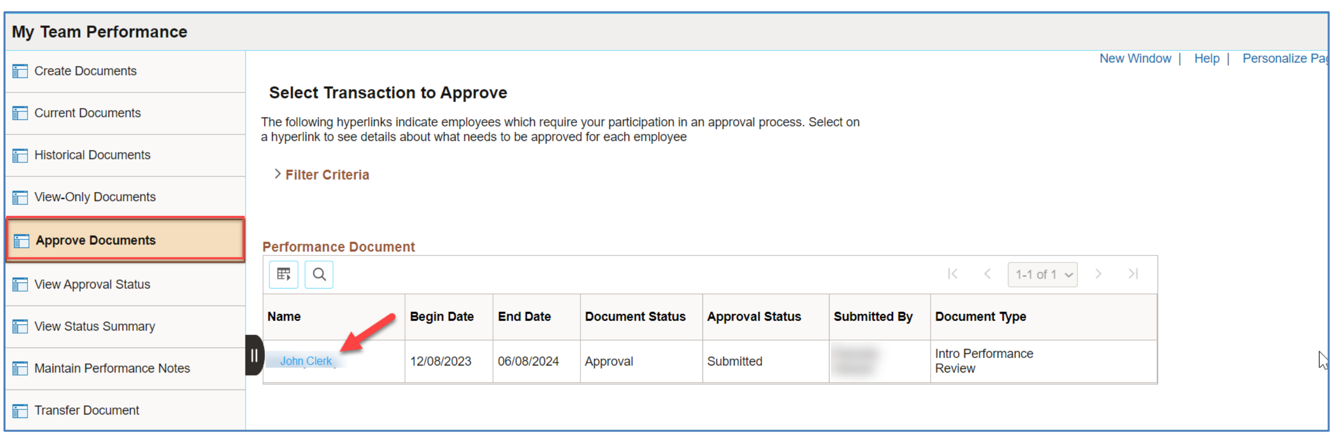
One-Up Approval

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.

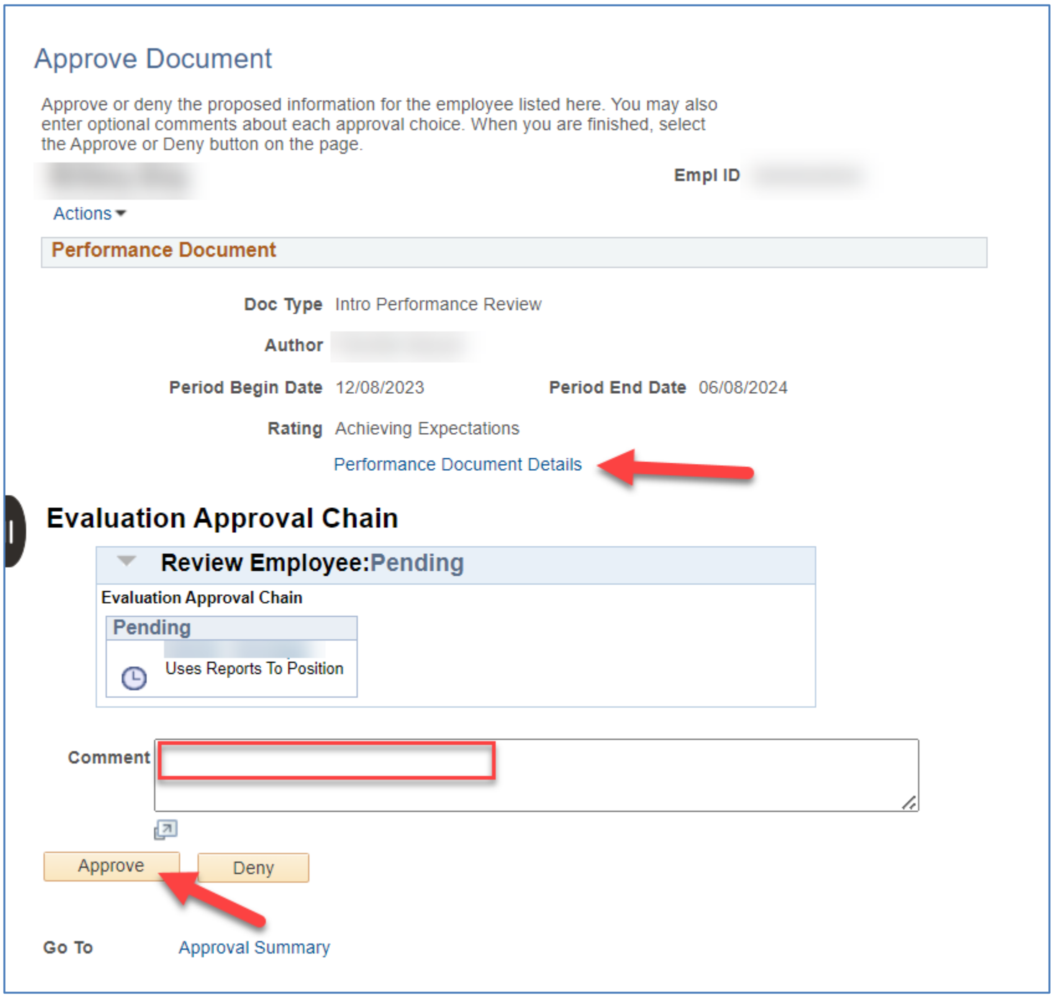


Click on the **Approve Documents** section. Locate the review that you want to approve. Click the employee **Name** link.

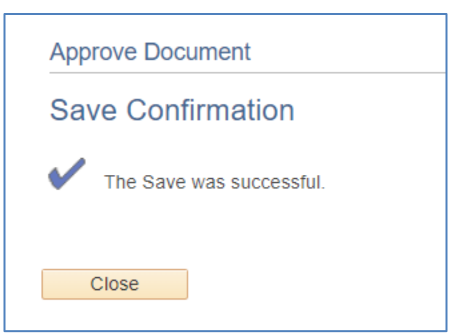


2. Approve or Deny the Performance Document

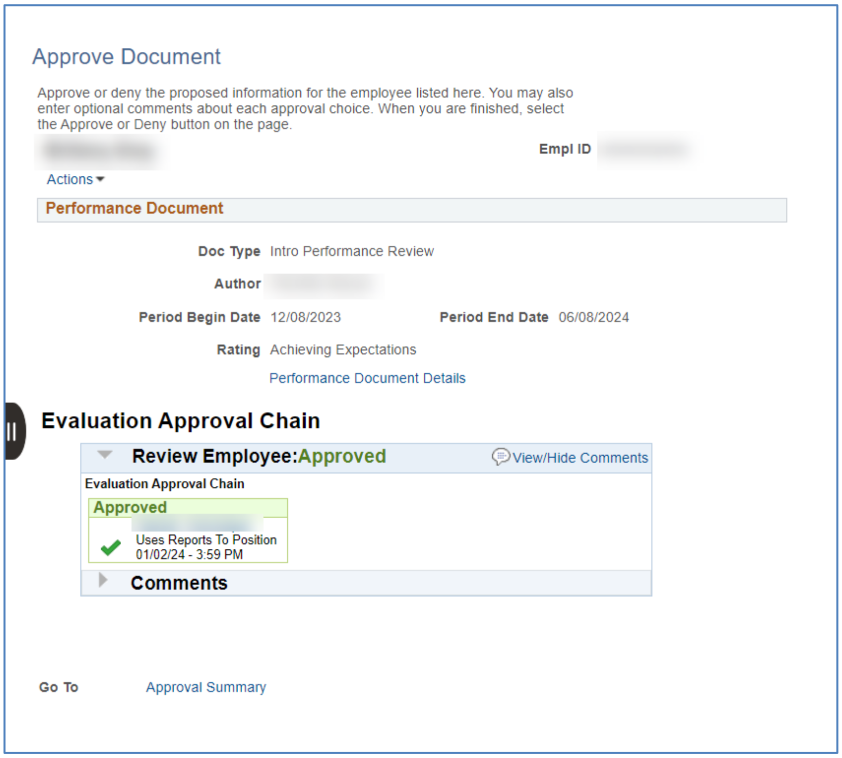
Click on Performance Document Details to open the Introductory Performance Review or Introductory Performance Extension. Enter any comments in the **Comment** box. Then click **Approve** or **Deny**.
Please note that comments added in the Comment box will only be visible to the document's Author and not to the employee.



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



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

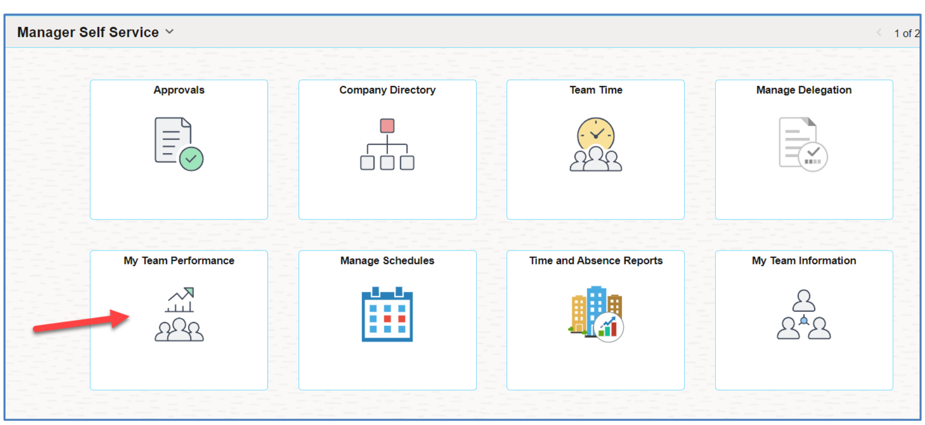


Release Review or Extension

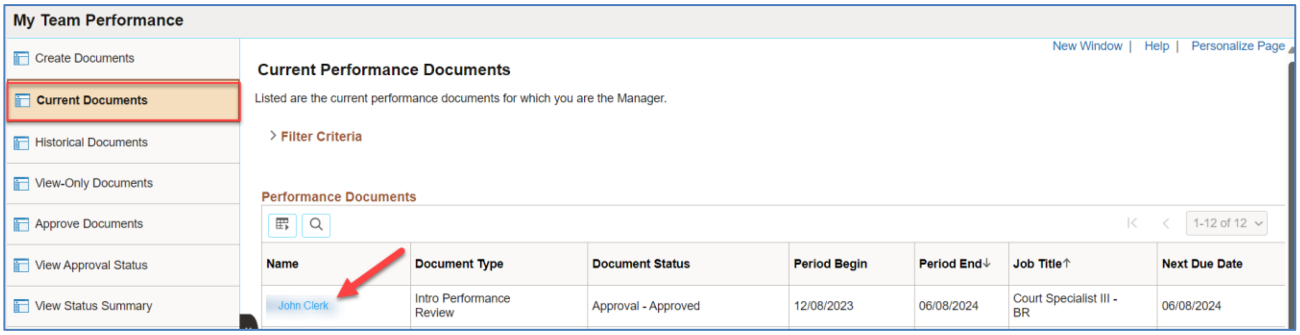
1. Print Review or Extension

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

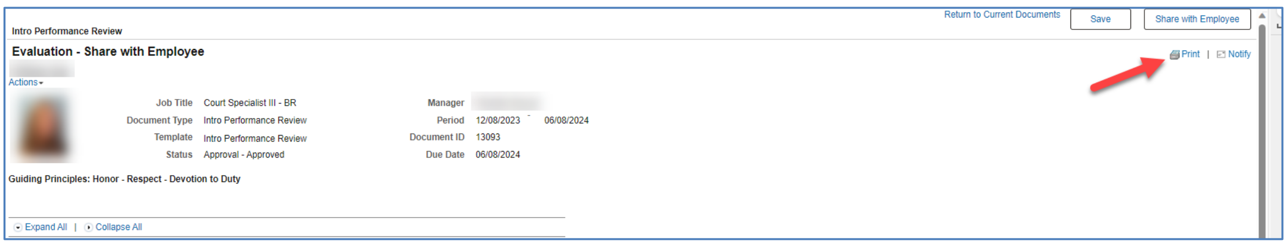
Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



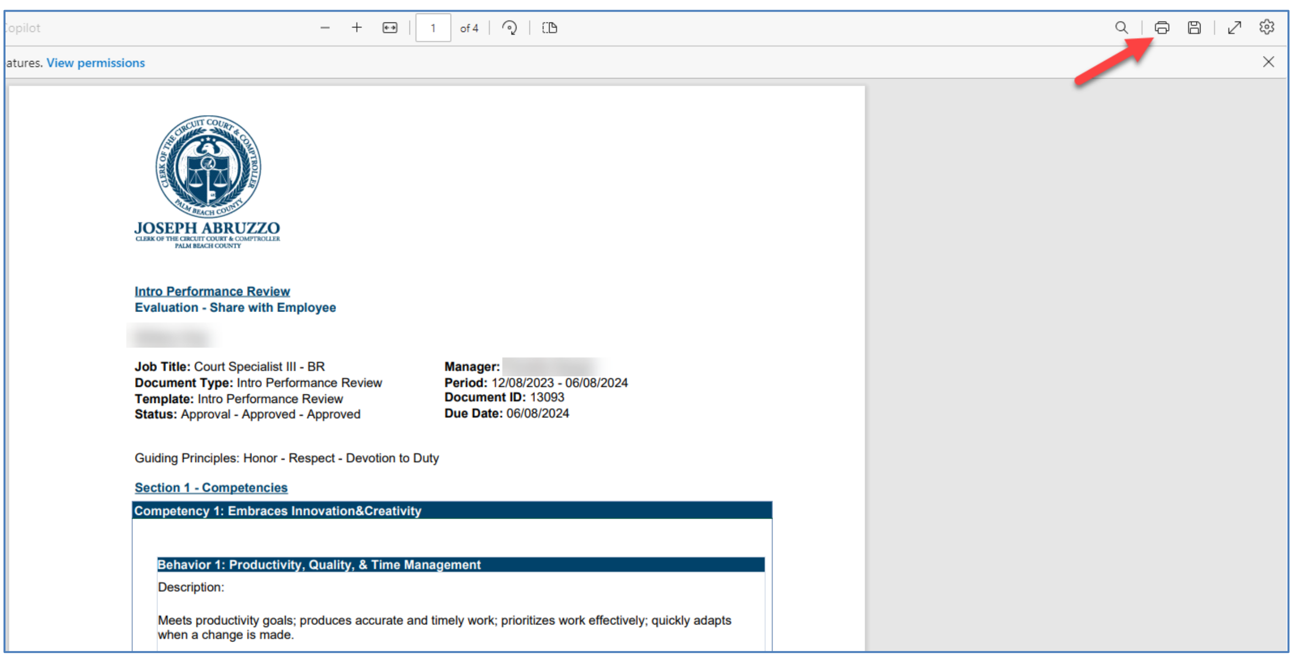
Click on Current Documents. Locate the document that has been approved. The status will be **Approval - Approved**. Click on the **employee's** name.



Click the **Printer** icon.

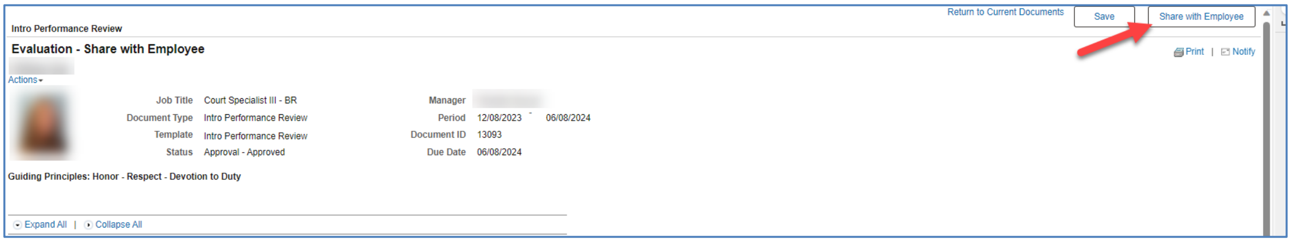


Click on the **Printer** icon again.

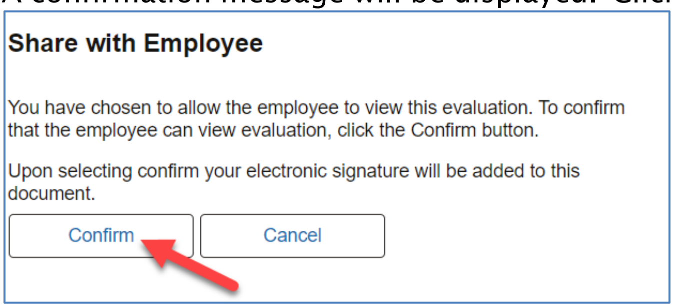


2. Release Review or Extension

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.



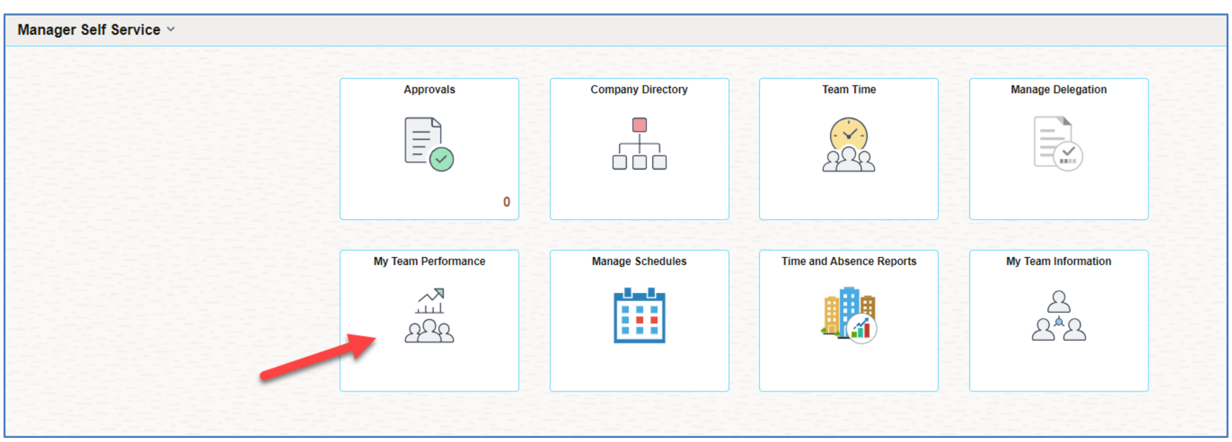
A confirmation message will be displayed. Click the **Confirm** button.



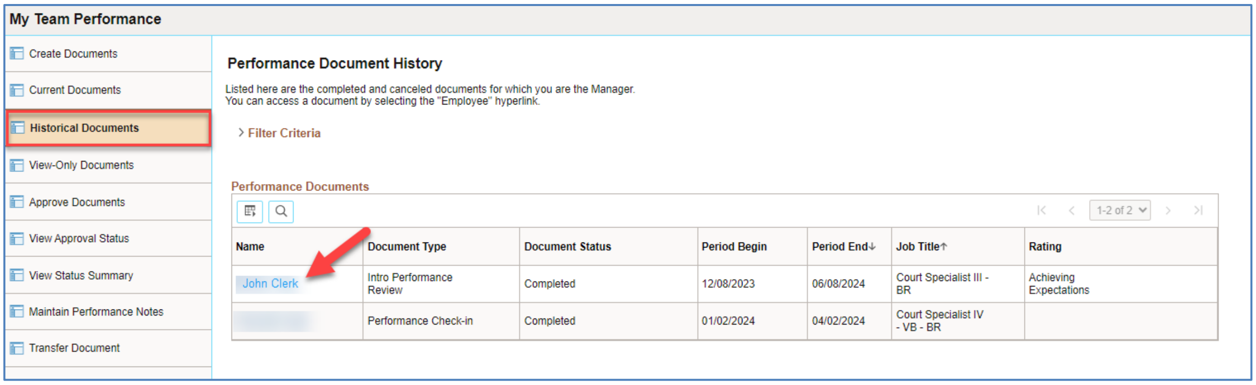
Complete Review or Extension

1. View Employee Comments

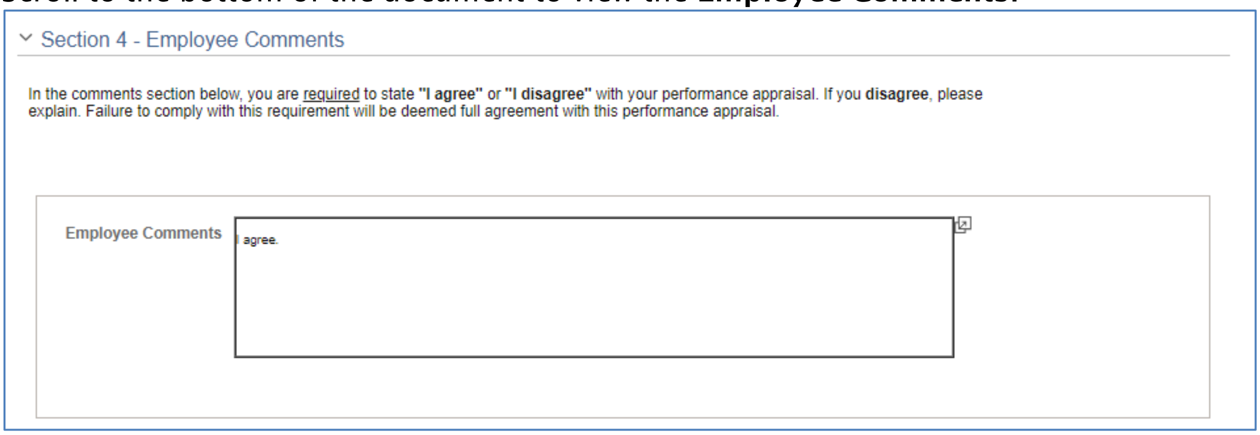
Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



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



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



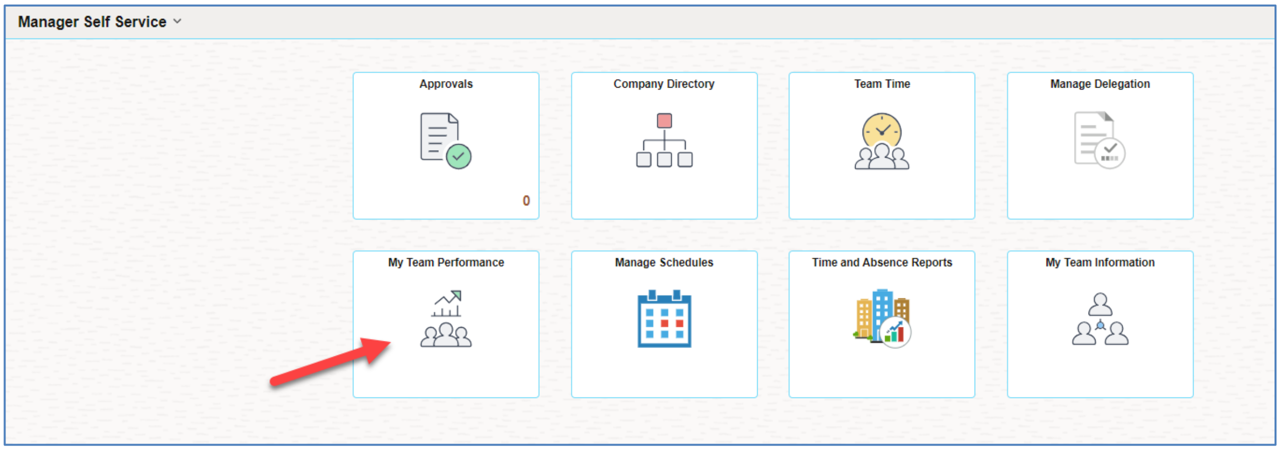
2. Reopen Performance Document

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.

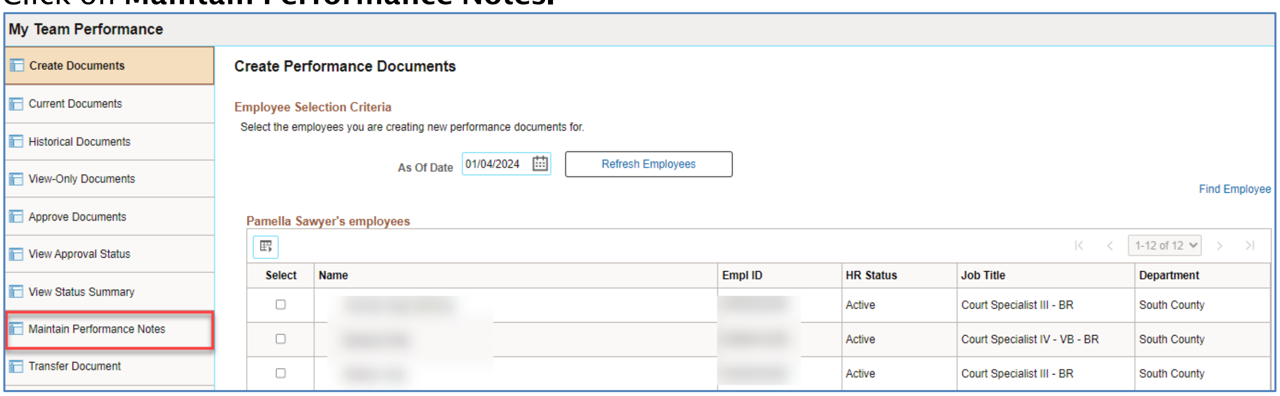
Performance Notes (Optional)

1. Enter Performance Notes

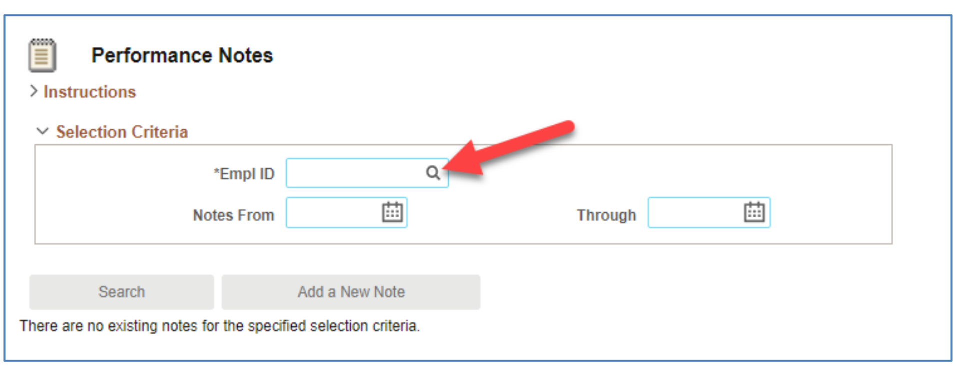
Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



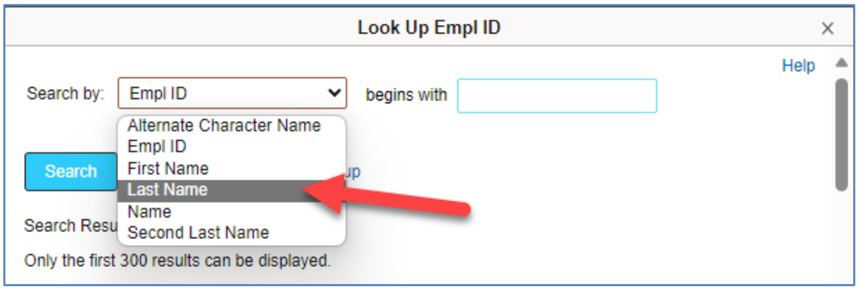
Click on **Maintain Performance Notes.**



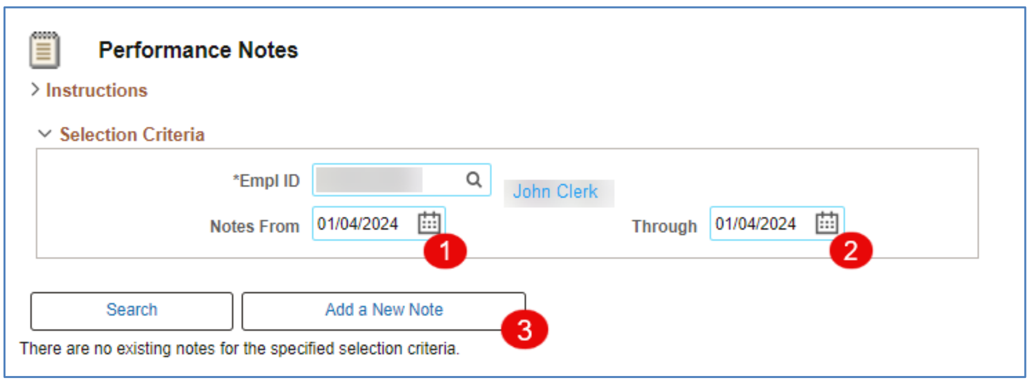
Click on the **Magnifying Glass.**



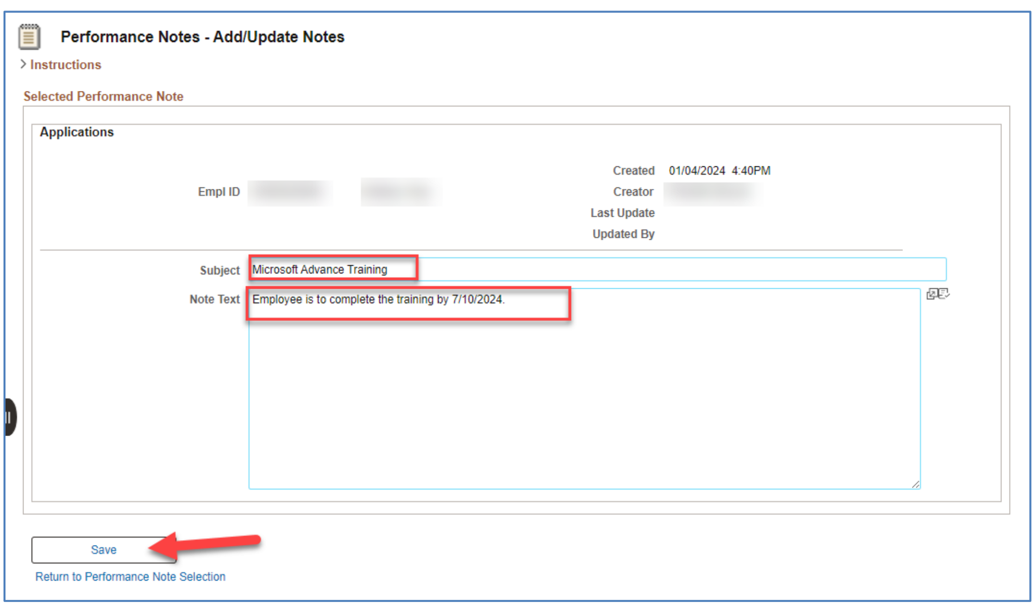
Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click **Search.**



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

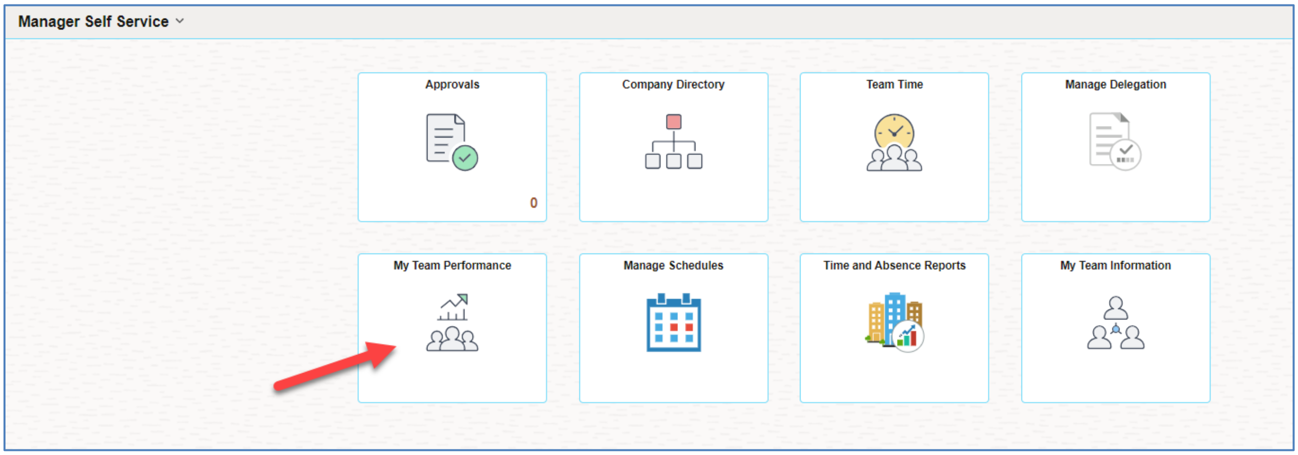


Enter the **Subject** and **Note Text** for the Performance Note. Click **Save**.

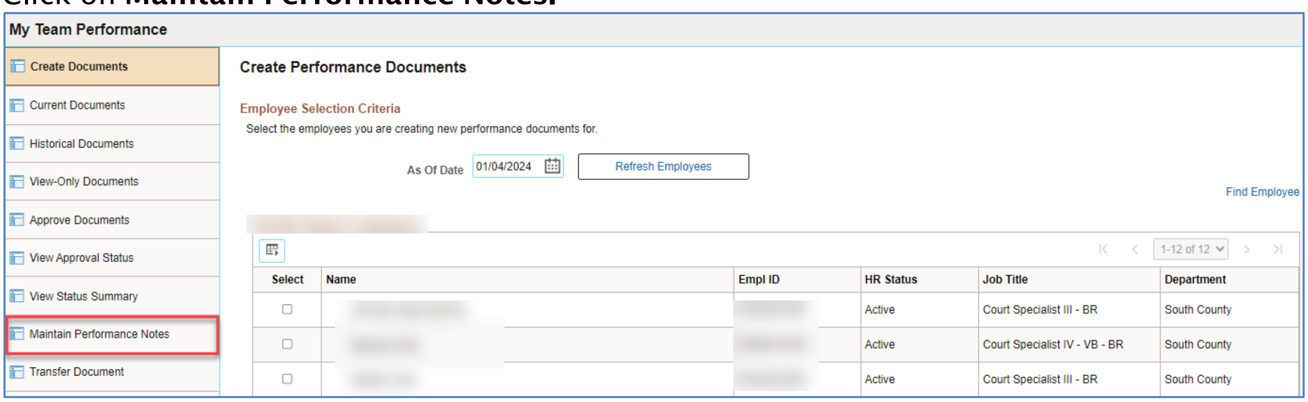


2. Search for Performance Notes

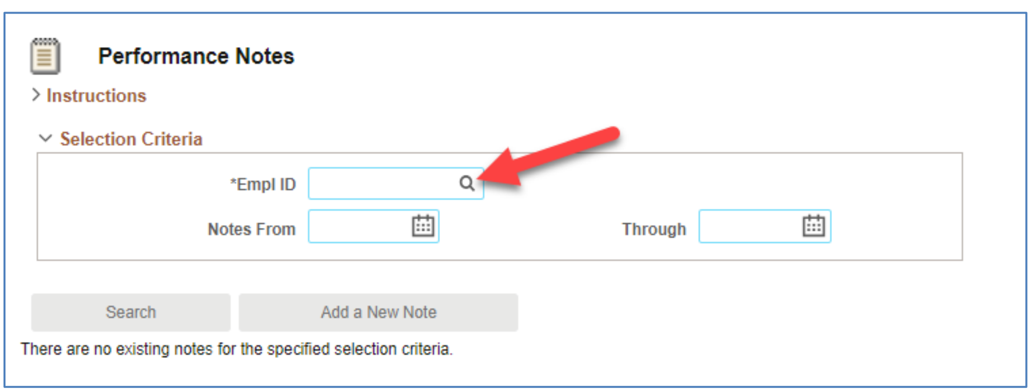
Login to PeopleSoft and go to the Manager Self Service menu. Click the **Team Performance** tile.



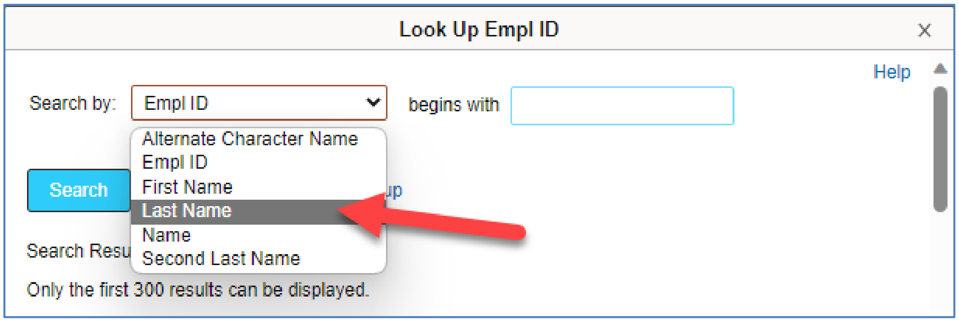
Click on **Maintain Performance Notes.**



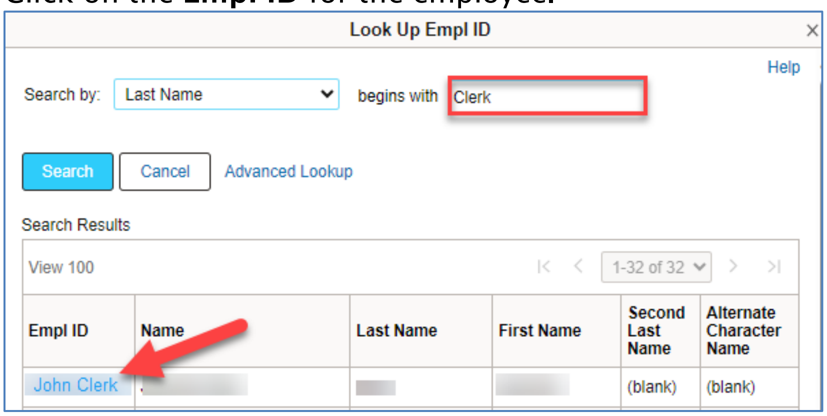
Click on the **Magnifying Glass.**



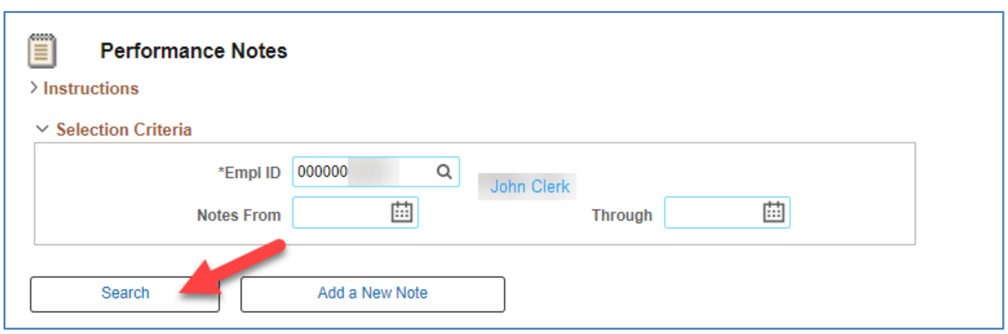
Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click **Search.**



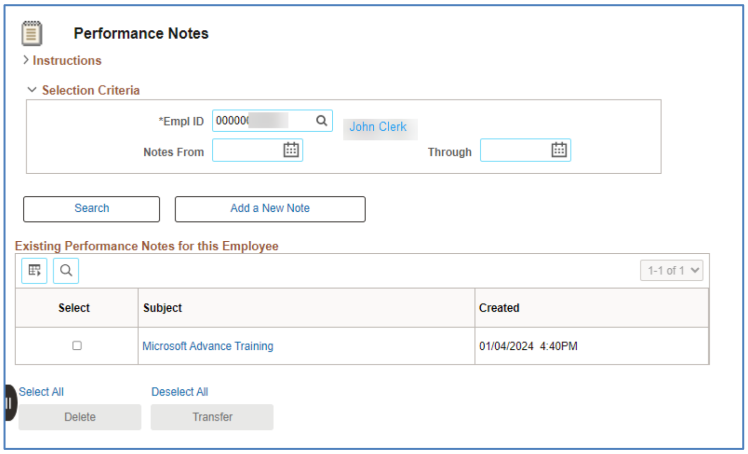
Click on the **Empl ID** for the employee.



Click **Search**.

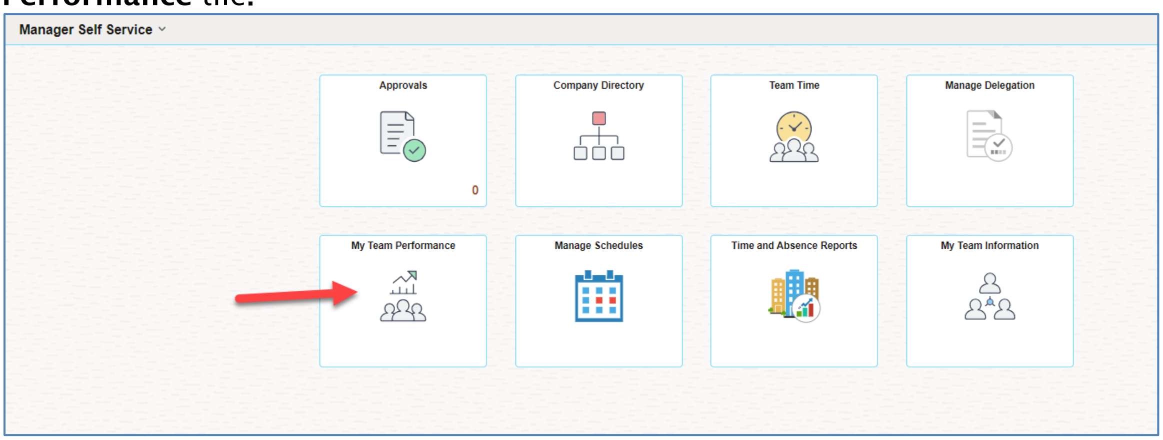


All performance notes for the employee will be displayed. Click on the performance notes **Subject** hyperlink to examine the information.

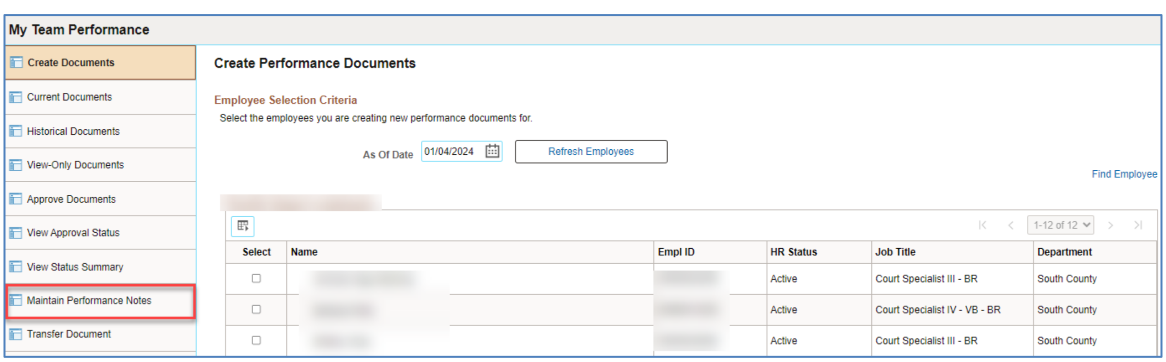


3. Edit Performance Notes

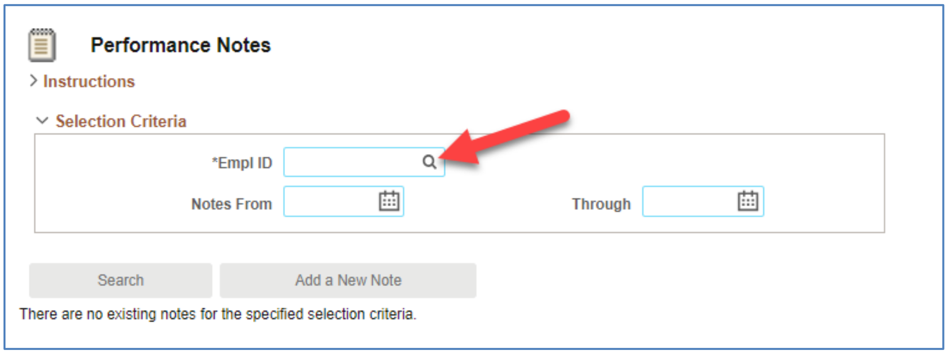
Login to PeopleSoft and go to the Manager Self Service menu. Click the **My Team Performance** tile.



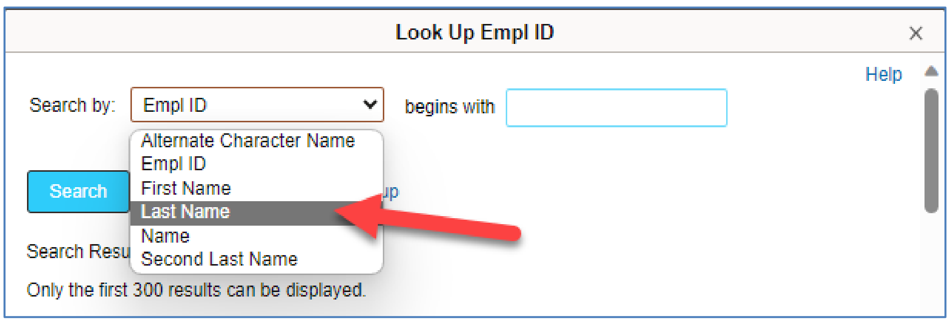
Click on **Maintain Performance Notes.**



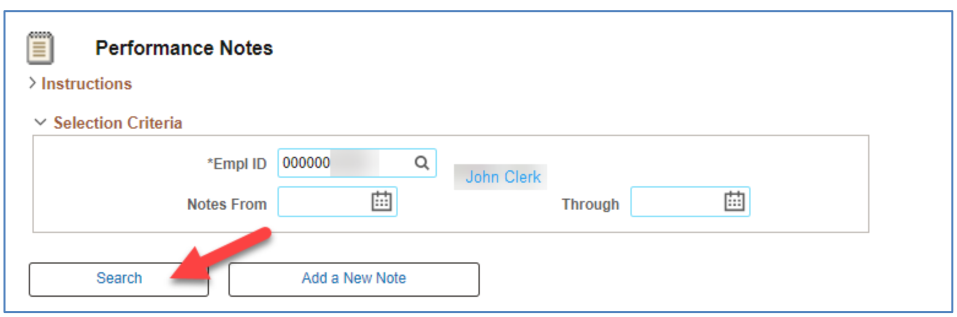
Click on the **Magnifying Glass**.



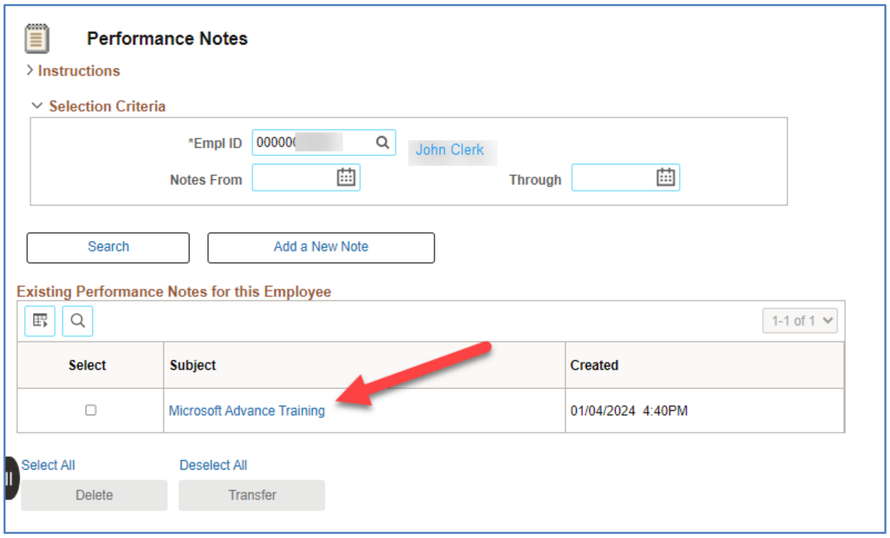
Choose Last Name in the **Search by** dropdown menu. Enter the employee's Last Name and click **Search.**



Click **Search**.



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



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