

EVALUATION WORKSHEET

SAN DIEGO UNIFIED SCHOOL DISTRICT

Instructions: Use separate form for each objective. Evaluatee completes parts A, B, and C and forwards both copies of forms to evaluator. After review and/or the final decision on objectives, evaluator and evaluatee sign and return one copy to evaluatee (Article 14, Sections 14.3.2, 14.4 and 14.8.6.1). Prior to final evaluation conference, evaluatee completes part D for each objective. Evaluator and evaluatee review and sign worksheets when Summary Evaluation Report is completed. Worksheets will be placed in personnel file either at district or site location.

A. Objectives and Standards:

B. Assessment Techniques:

C. Support Requirements and/or Constraints:

D. Degree of Achievement:
Evaluatee:

D. Degree of Achievement:
Evaluator:

Parts A, B, and C

Part D

Evaluatee's Signature

Date

Evaluatee's Signature

Date

Evaluator's Signature

Date

Evaluator's Signature

Date

I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement. A copy of this Summary Evaluation Report and all attached documents will be placed in your personnel file after ten (10) working days. I may prepare a response and have the response attached to this document.

PERFORMANCE EVALUATION ADDENDUM

San Diego Unified School District

Instructions: This form MUST be completed when elements of Section I and/or Section III of the Summary Evaluation Report contain an "Unsatisfactory" or "Requires Improvement" evaluation. The Addendum should be attached to the evaluatee's and supervisor's copy of the Summary Evaluation Report.

Employee Name

Employee ID Number

Location Name

Describe areas of performance considered unsatisfactory or requiring improvement.

Describe specific assistance provided (include dates).

Describe results of assistance (include dates).

EVALUATOR & SUPERVISOR

Signature

Title

Date

EVALUATEE

I certify that this report has been discussed with me.
I understand my signature does not necessarily indicate agreement. A copy of this Summary Evaluation Report and all attached documents will be placed in your personnel file after ten (10) working days. You prepare may a response and have the response attached to this document.

Signature

Date

REVIEWER

Signature

Title

Date

How to Run the Certificated Evaluations Report

Attachment 5

1 Favorites | Main Menu > Workforce Administration > Workforce Reports > Certificated Evaluations

Certificated Evaluations

Find an Existing Value | Add a New Value 2

Run Control ID: Certificated_Evaluations 3

Add 4

Find an Existing Value | Add a New Value

1. Navigate to: *Workforce Administration > Workforce Reports > Certificated Evaluations*
2. Click the **Add a New Value** tab.
3. Enter a **Run Control ID**. Use your initials, or name the report. The **Run Control ID** can have no spaces.
4. Click the **Add** button.

Certificated Evals


Run Control ID: Certificated_Evaluations | Report Manager | Process Monitor 7 | Run

Run Parameters

5 *Run Date: 09/01/2012 | Enter Sept 1 of the current year (ex: 09/01/2000)

Department: 0261 | Enter Dept ID 6

Save | Return to Search | Notify | Add | Update/Display

5. Enter the **Run Date**. Enter September 1 of the current school year.
6. Enter your **Department**, or click the  to view a list of departments from which to choose.
7. Click the **Run** button.

Process Scheduler Request

User ID: 123424 | Run Control ID: Certificated_Evaluations

Server Name: PSNT 8 | Run Date: 05/20/2013

Recurrence: | Run Time: 12:32:13PM | Reset to Current Date/Time

Time Zone: |

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Certificated Evaluations	SDHR276B	SQR Report	Web	PDF	Distribution

OK 9

8. Select **PSNT** from the drop-down menu for the **Server Name**.
9. Click the **OK** button.

Certificated Evals

Run Control ID: Certificated_Evaluations | Report Manager | Process Monitor 10 | Run

Process Instance: 1171647

Run Parameters

*Run Date: 09/01/2012 | Enter Sept 1 of the current year (ex: 09/01/2000)

Department: 0261 | Enter Dept ID

Save | Return to Search | Notify | Add | Update/Display

10. Note your **Process Instance** number and click the **Process Monitor** link.

Process List | Server List

View Process Request For

User ID: 122165 Type: [] Last [] 1 Days [11] Refresh

Server: [] Name: [] Instance: [] to []

Run Status: [] Distribution Status: [] Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1171647		SQR Report	SDHR276B	122165	05/14/2013 12:45:17PM PDT	Success	Posted	Details

Go back to Certificated Evaluations

Save Notify

Process List | Server List

11. Click the **Refresh** button to update the **Run Status**.

12. When **Run Status** becomes “Success”, and **Distribution Status** becomes “Posted” click the **Details** link.

Process Detail

Process

Instance: 1171647 Type: SQR Report

Name: SDHR276B Description: Certificated Evaluations

Run Status: Success Distribution Status: Posted

Run Update Process

Run Control ID: Certificated_Evaluations

Location: Server

Server: PSNT

Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time Actions

Request Created On: 05/14/2013 12:47:17PM PDT [Parameters](#) Transfer

Run Anytime After: 05/14/2013 12:45:17PM PDT [Message Log](#)

Began Process At: 05/14/2013 12:47:35PM PDT [Batch Timings](#)

Ended Process At: 05/14/2013 12:48:33PM PDT [View Log/Trace](#)

OK Cancel

13. Click the **View Log/Trace** link.

View Log/Trace

Report

Report ID: 786011 Process Instance: 1171647 [Message Log](#)

Name: SDHR276B Process Type: SQR Report

Run Status: Success

Certificated Evaluations

Distribution Details

Distribution Node: PSREPORTS Expiration Date: 05/21/2013

Name	File Size (bytes)	Datetime Created
SDHR276B_1171647.PDF	2,300	05/14/2013 12:48:33.433000PM PDT
SDHR276B_1171647.out	0	05/14/2013 12:48:33.433000PM PDT
SQR_SDHR276B_1171647.log	1,740	05/14/2013 12:48:33.433000PM PDT

Distribute To

Distribution ID Type	Distribution ID
User	122165

Return

14. Click the link that contains the **Process Instance** number, followed by **PDF** that you noted in **Step 10**.

Report ID: SDHR276B

PeopleSoft EMPLOYEE EVALUATIONS

Page No. 1

Run Date: 05/14/2013

Run Time: 12:48:27

Run As Of: 09/01/12

Emp ID	Name	Job Code/Title	Class/Cert	Months Worked	Union	ES Class	Eval Type
Department: 0261 Silver Gate Elementary							
151316	Chris Doe	2226 Teacher-Moderate/Severe	C 10 T	10	01	PER	Bi-Annual
100506	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1107897	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1136408	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1106317	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
148414	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Annual
1109374	Chris Doe	2000 Regular Teacher	C 10 T JS	10	01	PER	Bi-Annual
114998	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
1132396	Chris Doe	2106 Teacher-Mild/Moderate	C 10 T	10	01	PER	Bi-Annual
1150911	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Annual
151652	Chris Doe	2000 Regular Teacher	C 10 T	10	01	LVR	Annual
101520	Chris Doe	2000 Regular Teacher	C 10 T JS	10	01	PER	Bi-Annual
1110463	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
133187	Chris Doe	2106 Teacher-Mild/Moderate	C 10 T	10	01	PER	Bi-Annual
1104598	Chris Doe	2000 Regular Teacher	C 10 T	10	01	PER	Bi-Annual
150259	Chris Doe	2000 Regular Teacher	C 10 T JS	10	01	PER	Annual

15. Your report will open in Adobe Acrobat Reader.

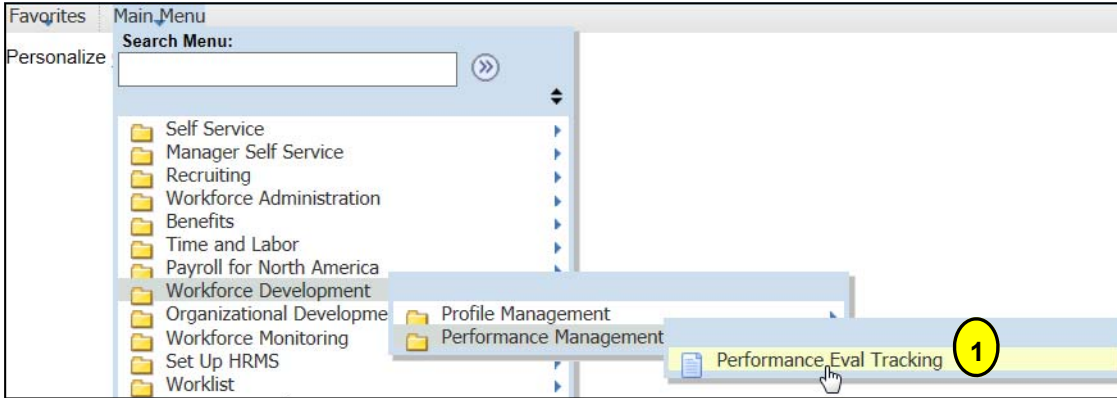
Entering a Performance Evaluation Summary into PeopleSoft

Once a performance evaluation is completed for any salaried employee, classified or certificated, the manager or evaluator enters the outcome of the evaluation into PeopleSoft as shown below.

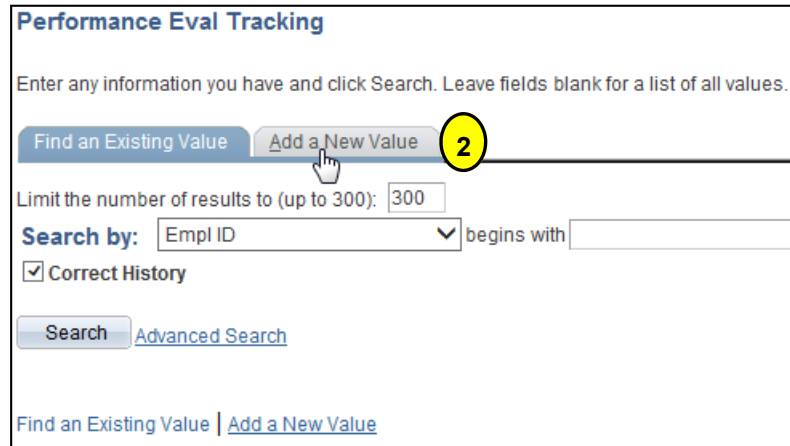
Attachment 6

1. In PeopleSoft HCM navigate to:

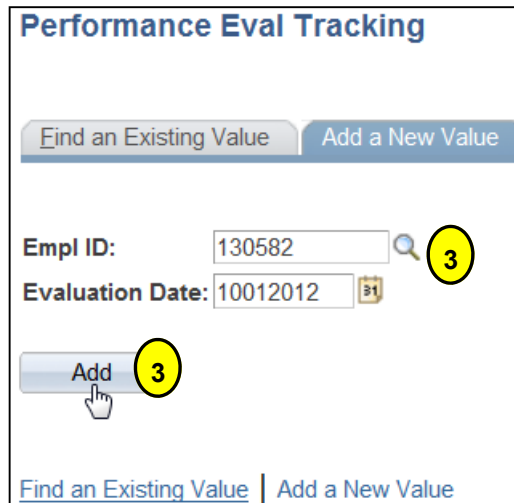
Workforce Development > Performance Management > Performance Eval Tracking



2. Click **Add a New Value**



3. Enter the **Empl ID** of the employee who was evaluated, and the **Evaluation Date** on which the performance evaluation was conducted. Click **Add**.



PeopleSoft HCM

Entering a Performance Evaluation Summary into PeopleSoft

4. The Performance Evaluation Tracking page displays the salaried assignment(s) of the employee at the time the evaluation was conducted. Click the magnifying glass beside the **Performance Evaluation Form** field to select the evaluation form that was used to evaluate the employee.

The screenshot shows the 'Performance Eval Tracking' page for employee Chris Doe (Empl ID 130582) with an evaluation date of 10/01/2012. The 'Employee Assignment(s)' table lists one assignment: Job Code 6450M, Job Title Noon Duty Assistant, FTE 0.225000, Location 0166A, Location Description Kumeyaay Elementary, and Employee Class Probationary Classif. Below this is the 'Evaluation Summary' section, where the '*Performance Evaluation Form' field is currently blank. A magnifying glass icon is positioned to the right of this field, and a yellow circle with the number '4' highlights it.

Select one of the choices shown below:

The 'Look Up' dialog box displays a list of performance evaluation forms to be selected. The options are: CADM (Certificated Administrator), COTH (Non-Classroom Certificated), CTCH (Classroom Teacher), LNON (Classified Non-Sup Non-Para), LPRA (Classified Paraprofessional), and LSUP (Classified Supervisory). A 'Cancel' button is located at the bottom of the list.

5. If the evaluation was unscheduled (classified) or a special evaluation (certificated), select the checkbox. (If not, leave it blank.) Then select the overall performance rating. These fields will change depending on which performance evaluation form was selected in **Step 4** above.

Sample Classified Evaluation Form:

The screenshot shows the 'Evaluation Summary' page with the '*Performance Evaluation Form' field set to 'LNON' (Classified Non-Sup Non-Para). The 'Unscheduled Report' checkbox is checked, and a yellow circle with the number '5' highlights it. Below this, the 'Classified Non-Sup Non-Para' section shows four radio button options for performance ratings: 'Unsatisfactory', 'Requires Improvement', 'Meets Standards', and 'Exceeds Standards'. A yellow circle with the number '5' highlights the 'Unsatisfactory' option. The 'Evaluator Supervisor / Rater' and 'Evaluator Rater Job Code' fields are empty. At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', and 'Correct History'.

Entering a Performance Evaluation Summary into PeopleSoft

Sample Certificated Evaluation Form:

Performance Evaluation Form CTCH Classroom Teacher

Special Eval/Expedited Special Eval: 5

Classroom Teacher

Unsatisfactory Requires Improvement Effective Skip Year

Evaluator Supervisor / Rater

Evaluator Rater Job Code:

Last updated by:

Last Update Date/Time

Save Notify Add Update/Display Correct History

6. In the **Evaluator Supervisor / Rater** field, enter the employee ID of the person who evaluated or rated the employee. To search for the employee ID by name, click the magnifying glass beside the **Evaluator Supervisor/Rater** field, then click **Advanced Lookup** and type the last name of the evaluator. The evaluator's name, job code, and job title as of the Evaluation Date appears.

Evaluator Supervisor / Rater 122165 6 Chris Doe

Evaluator Rater Job Code: 1305 Principal

7. Click **Save**. The employee ID and name of the last person to save the record appears at the bottom right, with the date and time the record was last saved.

Evaluator Supervisor / Rater 122165 Chris Doe

Evaluator Rater Job Code: 1305 Principal

Last updated by: 122165 Chris Doe

Last Update Date/Time 04/17/13 12:48:13PM

Save 7 Notify Add Update/Display Correct History

The entry of the Performance Evaluation Summary is now complete

Performance Eval Tracking

Empl ID 130582 Chris Doe Evaluation Date 10/01/2012

Job Code	Job Title	FTE	Location	Location Description	Employee Class
1 8450M	Noon Duty Assistant		0.225000	0166A Kumeyaay Elementary	Probationary Classif

Evaluation Summary

*Performance Evaluation Form LN0N Classified Non-Sup Non-Para

Unscheduled Report:

Classified Non-Sup Non-Para

Unsatisfactory Requires Improvement Meets Standards Exceeds Standards

Evaluator Supervisor / Rater 122165 Chris Doe

Evaluator Rater Job Code: 1305 Principal

Last updated by: 122165 Chris Doe

Last Update Date/Time 04/17/13 12:48:13PM

Save Notify Add Update/Display Correct History