

Part I: PPE Planning – Getting Started using PeopleSoft

Step	
1	Go to PeopleSoft URL – Production https://kctcshr.kct.mycmsc.com/psp/kcthrprd/?cmd=login
2	<p>Menu for Supervisors: <i>Home > Manager Self Service > Performance Management > Performance Documents > <u>Current Document</u></i></p> <p>Menu for Employees: <i>Home > Self Service > Performance Management > My Performance Documents > <u>Current Document</u></i></p>
3	<p>Click “PPE Planning” document type link to start and edit the document for the employee being reviewed.</p>
Links on Page	
Steps and Tasks	<p>Both employee and supervisor can edit during “Define Criteria” step.</p> <p>Only supervisor can make changes during “Review Document” step.</p> <p>When changes are made, each receives an email from: pscs-kcthrprd@kctcs.edu</p>
4	<p>Copying Previous Year’s Job Description and Goals:</p> <ol style="list-style-type: none"> 1. Click Add Job Responsibility (or Add Goal) link 2. At lower left click: “Copy from Prior Document” link 3. Select “Copy Item from Prior Document” and click Next button. 4. Click the Select button for any previous year’s document. 5. Check job descriptions or goals to be copied. 6. Click the Copy button.
Step 1	
Step 2	
Step 3	
Step 4	
Steps 5 & 6	

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<p>4 (cont) Editing Job Description and Goals: Add responsibilities for the Job description responsibilities from the JAQ or Position Description.</p> <p>Add goals including specific actions needed to accomplish each along with applicable measurements, resources, and due dates.</p>	
<p>5 Weight Competencies: Add percentage weightings to competencies applicable competencies.</p>	<p>Not all competencies must be weighted (some can be 0%), but the sum of all must equal 100%.</p>
<p>6 Complete Performance Criteria. Supervisor clicks the Finalize Criteria button in the upper right of the page to finish defining performance criteria and begin review and signatures.</p>	
<p>7 Review, Sign, and Complete</p> <ol style="list-style-type: none"> Supervisor edits final PPE Planning document. Supervisor then clicks Share with Employee button in the upper right. Supervisor then clicks Request Acknowledgement button in the upper right. Employee then clicks the Acknowledge button in the upper right to sign document. Supervisor then clicks the Complete button in the upper right to sign document. 	
<p>NOTE: This Part I PPE Planning information will be pulled into the Part III PPE Performance Evaluation.</p>	

Steps and Tasks	
Define Criteria	Document created by HR and ready for supervisor or employee to begin entry of job responsibilities, annual goals and weighting of competencies. Criteria completed by supervisor, after which only the supervisor can edit (unless it is "Reopened" by the supervisor).
Review Document	After supervisor has started to prepare the planning document for the employee to review and sign, it can be edited by supervisor while "in-progress", but the document cannot be seen by the employee until made available for review.
Share with Employee	Document can be viewed by employee in preparation for face-to-face discussion with supervisor.
Request Acknowledgement	Face-to-face between employee and supervisor has been completed. Employee can now acknowledge and sign document.
Acknowledge or Pending Acknowledgement	Employee needs to acknowledge document in order to sign it.

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Steps and Tasks

Complete Document

Supervisor needs to complete document in order to sign it.