Certificated Evaluations Report

The Certificated Evaluations Report shows the certificated staff at your site who are due for a performance evaluation this school year. The report considers the staff member's original Base Evaluation Date to set the future schedule for when the next evaluation is due. This job aid will show you how to run the Certificated Evaluations Report.

1. Log into PeopleSoft HCM using your six-digit Employee ID number and password.

2. Navigate to the report:

   - Click the **Navbar**. Select **Navigator**.

   - Select **Workforce Administration.**

   - Select **Workforce Reports**.

   - Select **Certificated Evaluations**.
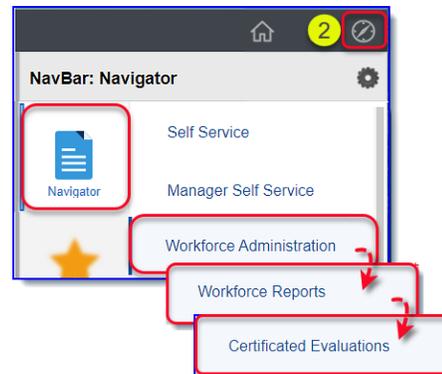
3. Click **Add New Value** tab**.**

4. Enter "**Employee_Evaluations**" in **Run Control ID**. Only one Run Control ID is needed for this report. There should be no spaces in the **Run Control ID**. Use (_) as a separator.

   Important! This same report name is used for the *Classified Evaluations Report.* You do not need to set up another report.

5. Click **Add .**
   Note: You only need to add the report the first time you run it. The next time you run it, select **Search** on the **Find an Existing Value** tab to view previously created Run Control ID's (report names). Click the appropriate link to launch.
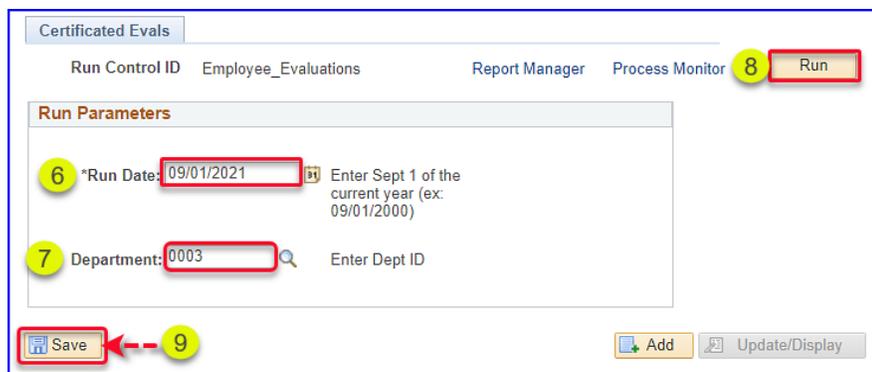
6. Enter September 1 date of current school year in **Run Date**. *For example: 09/01/2021.*

7. Enter four-digit number in **Department**. *For example: 0003.*

8. Click **Run**.

9. Click **Save**.

10. Select **PSNT** from the **Server Name** drop down menu. *Note:* Only required on first time report set up.
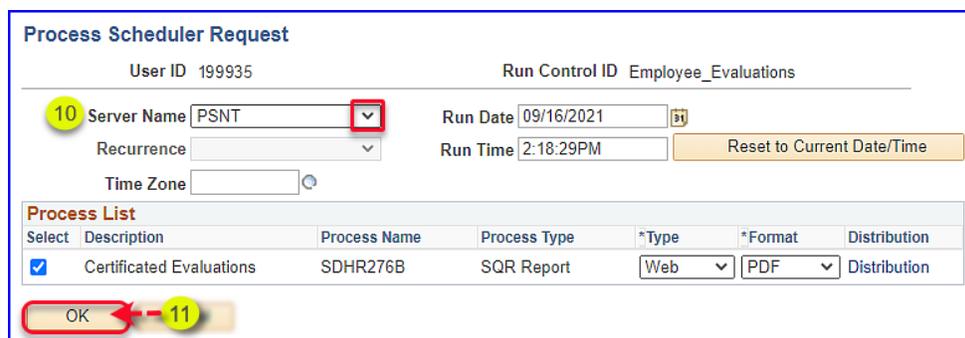
11. Click **OK**.

PeopleSoft - HCM

Certificated Evaluations Report

12. Notate the **Process Instance Number** displayed in the upper right corner of the **Report Page**. Click **Process Monitor**.

Certificated Evals

Run Control ID Employee_Evaluations   Report Manager   Process Monitor   Run

Process Instance:2166973

Run Parameters

*Run Date: 09/01/2021   Enter Sept 1 of the current year (ex: 09/01/2000)

13. Find the **Process Instance Number** in **Process List** section to locate report. The report is ready to view when **Run Status** displays *"Success"* and **Distribution Status** displays *"Posted"*. (If not, click **Refresh** until they change to the ready status).
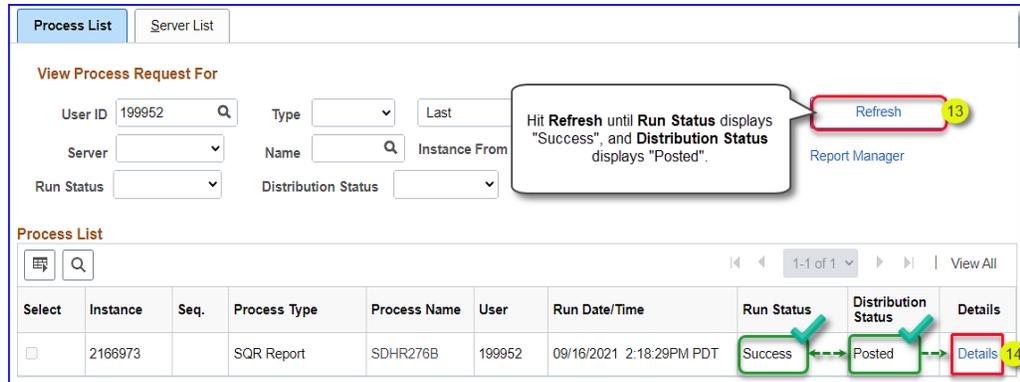
Process List | Server List

View Process Request For

User ID 199952   Type   Last
Server   Name   Instance From
Run Status   Distribution Status

Hit **Refresh** until **Run Status** displays "Success", and **Distribution Status** displays "Posted".   Refresh

Report Manager

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	2166973		SQR Report	SDHR276B	199952	09/16/2021 2:18:29PM PDT	Success	Posted	Details

1-1 of 1   View All

14. Click **Details** link.

15. Click **View Log/ Trace** link.
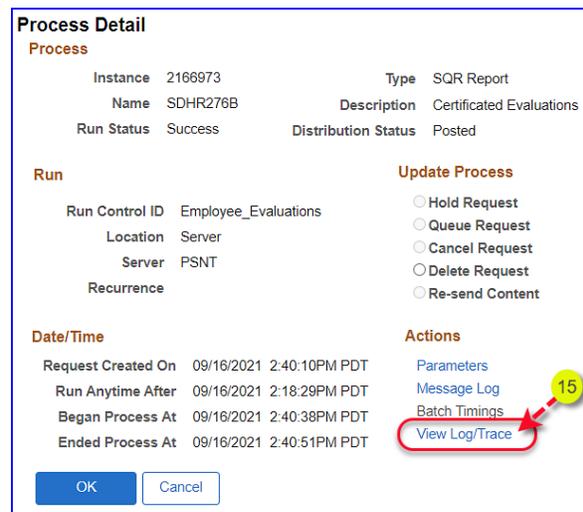
Process Detail

Process

Instance 2166973   Type SQR Report
Name SDHR276B   Description Certificated Evaluations
Run Status Success   Distribution Status Posted

Run

Run Control ID Employee_Evaluations
Location Server
Server PSNT
Recurrence

Update Process

○ Hold Request
○ Queue Request
○ Cancel Request
○ Delete Request
○ Re-send Content

Date/Time

Request Created On 09/16/2021 2:40:10PM PDT
Run Anytime After 09/16/2021 2:18:29PM PDT
Began Process At 09/16/2021 2:40:38PM PDT
Ended Process At 09/16/2021 2:40:51PM PDT

Actions

Parameters
Message Log
Batch Timings
View Log/Trace

OK   Cancel

16. Under **File List** section, select the **.PDF link** containing the **Process Instance Number** shown in *Step 12*.
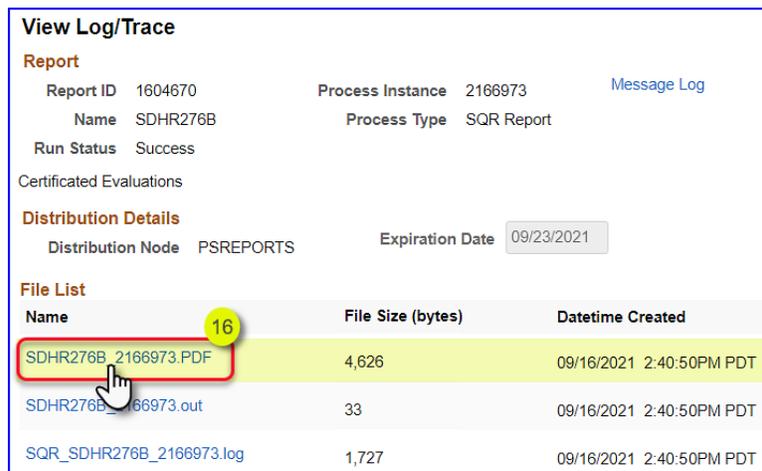
View Log/Trace

Report

Report ID 1604670   Process Instance 2166973   Message Log
Name SDHR276B   Process Type SQR Report
Run Status Success

Certificated Evaluations

Distribution Details

Distribution Node PSREPORTS   Expiration Date 09/23/2021

File List

Name	File Size (bytes)	Datetime Created
SDHR276B_2166973.PDF	4,626	09/16/2021 2:40:50PM PDT
SDHR276B_2166973.out	33	09/16/2021 2:40:50PM PDT
SQR_SDHR276B_2166973.log	1,727	09/16/2021 2:40:50PM PDT

San Diego Unified SCHOOL DISTRICT

PeopleSoft - HCM

Certificated Evaluations Report

17. The report will open in Adobe format in your browser. You may print or download this report.

Report Field Definitions:

- **EmplID** - Employee ID Number

- **Name** - Employee Name
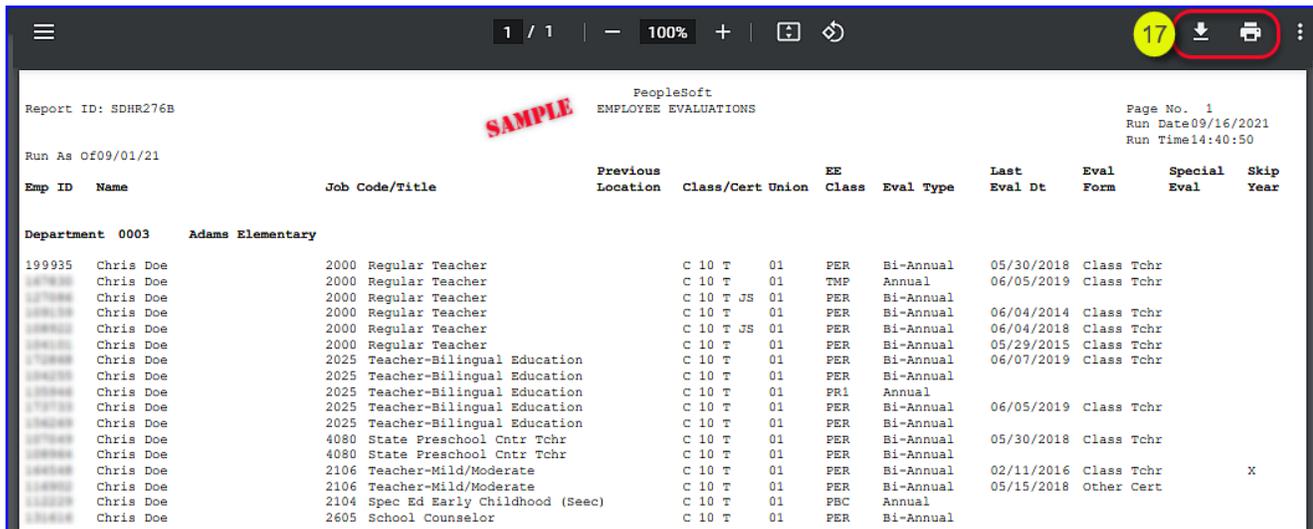
- **Job Code/Title** - Employee's Job Code and Job Title

- **Previous Location** - Employee's location at end of previous school year if different from current location

- **Class/Cert** - Employee's Job Classification, *C* for Certificated, Months Worked, *T* for Traditional or *Y* for Year-Round, *JS* for Job Share (if applicable)

- **Union** - Employee's union affiliation

- **EE Class** - *PER* - Permanent, *PR1* - Probationary 1st year, *PR2* - Probationary 2nd year, *LVR* - Leave Replacement

- **Eval Type -** Annual or Bi-Annual

- **Last Eval Dt -** Employee's last evaluation date, provided that information was entered into the **Performance Eval Tracking** page in PeopleSoft. If the evaluation was not entered into PeopleSoft, the last evaluation date will not show on the report. *Note*: The **Last Eval Dt** column is provided as informational, but the date itself does not reset the staff member's schedule for future evaluations. The evaluation schedule is based upon the employee's Initial (Base) Evaluation Date.

  The **Performance Eval Tracking** page is available from the **HR Manager Dashboard** or can be accessed at *Workforce Development > Performance Management > Performance Eval Tracking.* See the Entering a Performance Evaluation Summary in PeopleSoft job aid.

- **Eval Form -** Evaluation form used for the employee's last evaluation will show provided the evaluation was entered into the **PeopleSoft Performance EvalTracking** page as described above.

- **Special Eval -** If the employee's last evaluation was a special evaluation, it will show provided the evaluation was entered into the **PeopleSoft Performance EvalTracking** page as described above.

- **Skip Year -** If employee's last evaluation was a skip year (the evaluation was due but skipped), it will show provided the evaluation was entered into the **PeopleSoft Performance Eval Tracking** page as described above.