Direct Access

Quick Reference Guide

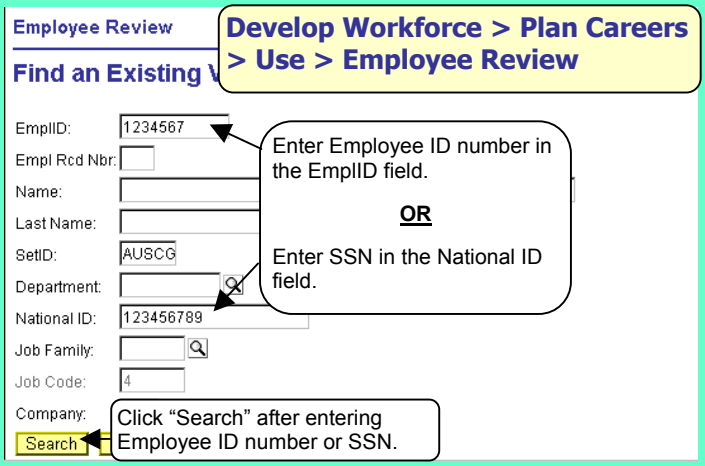
Employee Review

CUSTOMER SUPPORT

Customer Care: 866.PSC.USCG (772.8724)/785.339.2200
Email: PSCCustomerCare@hrsic.uscg.mil
On-line Help: http://cgweb.uscg.mil/g-w/psc/ps
Self-Service Tutorials: http://www.uscg.mil/hq/psc/training/
User Access Form (PSC-7421/2): http://www.uscg.mil/hq/psc/forms

EMPLOYEE REVIEW

- Before you begin, if possible, have member's Employee ID number. If you do not have member's Employee ID number, you may perform a search and select from the list that is displayed as a result of your search criteria. For information on searching, reference the Direct Access On-Line Help at **http://cgweb.uscg.mil/g-w/psc/ps**. *(Select Using PeopleSoft, then select Search Tips).*
- Your view of any menu or page is dependent on your access level (user role) and the security settings associated with that access. Your Operator ID may not have access to all the pages we include in this guide, or we may show a field as editable, but your access is "View Only".
- Command User (CGSSCMD) or Employee Review Only (CGEMPREV) access is required to complete an Employee Review. To request this access, complete form CG PSC-7421/2 User Authorization/Revocation (from PSC's Forms Page at http://www.uscg.mil/hq/psc/forms/). Fax completed form to (785) 339-3772.
- If you change the **Effective** or **To** date, **all** data entered in the Employee Review will be lost.
- The path to access Employee Review is: Develop Workforce > Plan Careers > Use > Employee Review.



- It is not necessary to enter data in all fields. Preferred method is to enter Employee ID number (EmplID field) **or** SSN (National ID field).
- If you do not know the Employee ID or SSN, provide some search criteria, such as member's last name or member's name in the appropriate fields and perform a search.
- Since an employee may have multiple records, reflecting various stages in their career (military, civilian, reservist) or the result may list several members with the same last name and/or first name, **it is important to select the correct record from the result list.**

EMPLOYEE REVIEW *(continuation)*

- **Page defaults to Employee Review tab. Additional tabs include Reviewers, Comments, and Exceptions. This guide includes instruction on all tabs.**
- **You can save your work at anytime during this process.** The review does not have to be completed before you can save it. Frequent saves prevent the loss of data in the event of computer problems. After the review is saved, you can exit the system and return to it later to finish up.
- **Employee Review Tab - Fields which must be completed:**

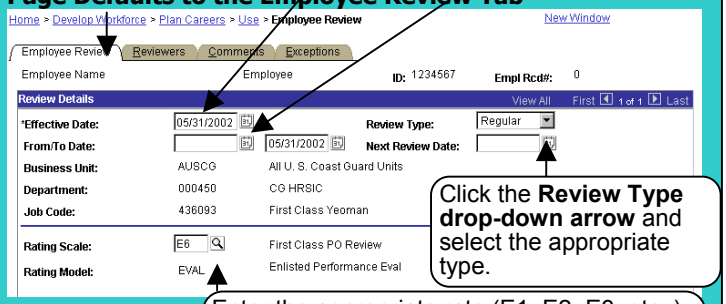
  Effective Date (Enter the period end date)
  To Date (Enter the period end date)
  Review Type
  Rating Scale

  Note: If the Effective or To date is changed after data is entered in other fields, all data entered in the Employee Review will be lost.
- **Employee Review Tab - Fields which may be left blank:**

  From Date
  Next Review Date

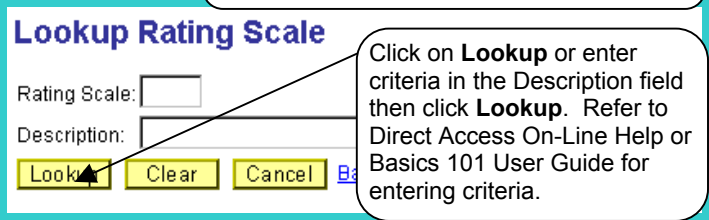
Enter the **period end date** in the **Effective** date field **and** the **To** date field.

Page Defaults to the Employee Review Tab

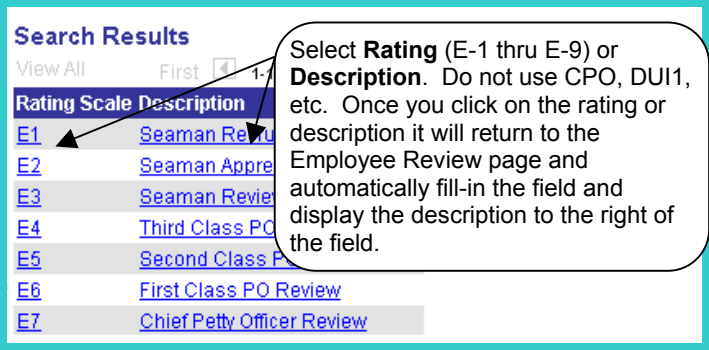


Click the **Review Type drop-down arrow** and select the appropriate type.

Enter the appropriate rate (E1, E2, E3, etc..) or click on the magnifying glass to the right of the Rating Scale field and follow the steps below to select a Rating.



Click on **Lookup** or enter criteria in the Description field then click **Lookup**. Refer to Direct Access On-Line Help or Basics 101 User Guide for entering criteria.

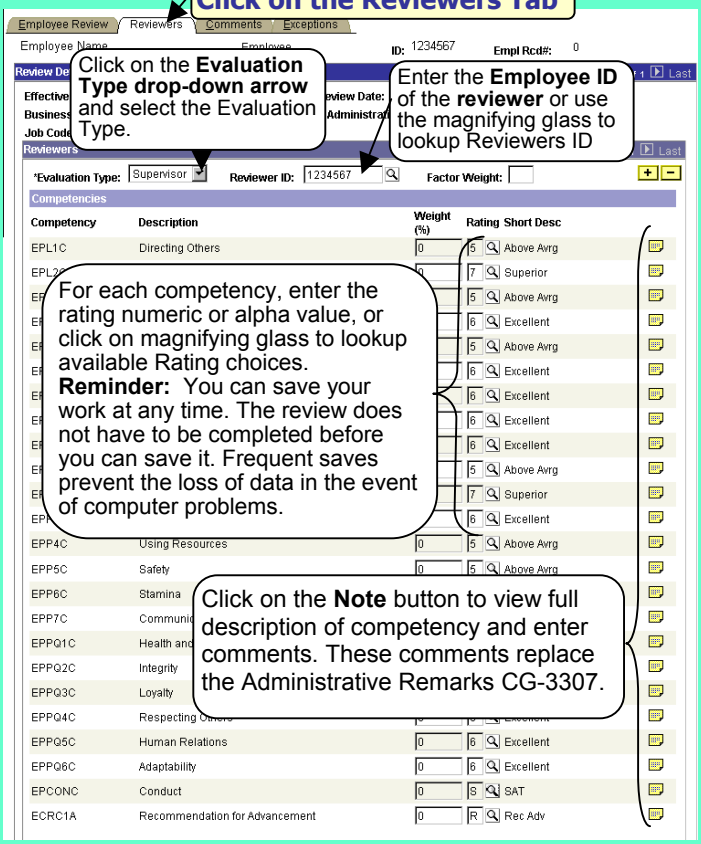


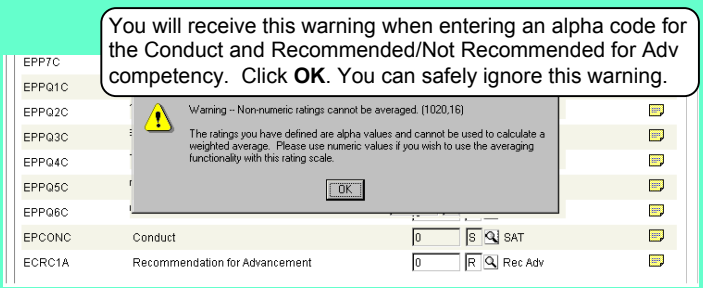
Select **Rating** (E-1 thru E-9) or **Description**. Do not use CPO, DUI1, etc. Once you click on the rating or description it will return to the Employee Review page and automatically fill-in the field and display the description to the right of the field.

EMPLOYEE REVIEW *(continuation)*

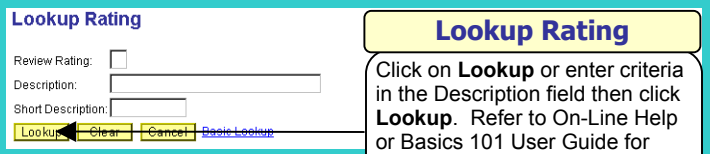
After entering the necessary information on the **Employee Review** page, click the **Reviewers** tab at the top of the page.

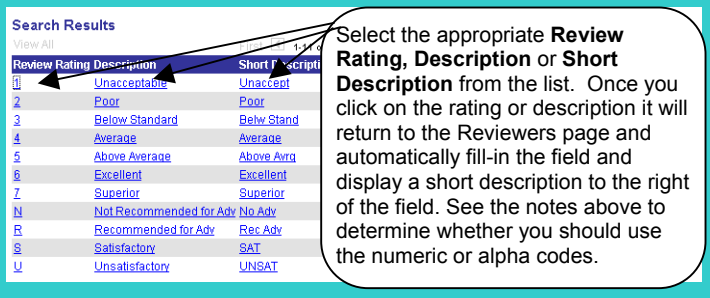
- **Evaluation Type.** Click on the Evaluation Type drop-down arrow and select the appropriate type.
- **Reviewer ID.** Enter or lookup the Employee ID number of the reviewer.
- The competencies (e.g. Directing Others, etc..) listed are based on the rating scale entered on the first page.
- Use the numeric values to rate all competencies except **Conduct** and **Recommendation for Advancement.**
- Use **Satisfactory** or **Unsatisfactory** to rate the **Conduct** competency. *(A message will display indicating the alpha characters will not compute for the rating average, click **OK**.)*
- Use **Recommended for Adv** or **Not Recommended for Adv** to rate the **Recommendation for Advancement** competency. E-6's and above require comments justifying the members future potential for leadership. *(A message will display indicating the alpha characters will not compute for the rating average, click **OK**.)*
- Click on the (Note) button to view the full description of the competency and enter Comments in the Comment section. **These comments replace the Administrative Remarks (CG-3307).**

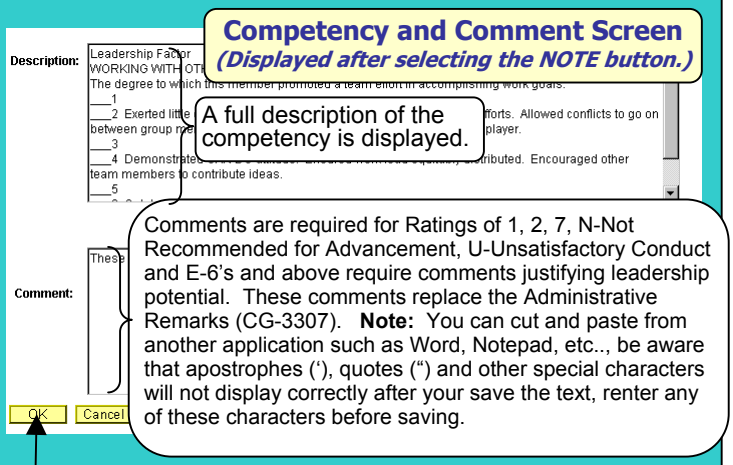




EMPLOYEE REVIEW *(continuation)*



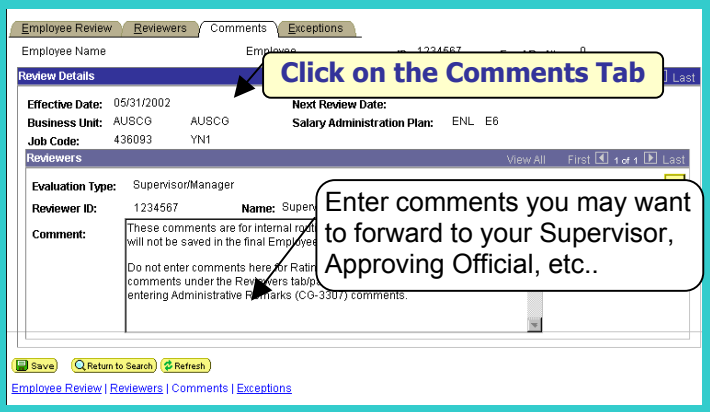




Once comments have been entered, click OK. The system will automatically return to the Reviewers page.

After entering the necessary information on the **Reviewers** page, click the **Comments** tab at the top of the page.

- Comments entered here are for **internal routing use only** and will not be saved in the final Employee Review.
- Do not enter comments here for Ratings of 1, 2, 7, N, U or leadership potential for E-6's and above. Enter those comments under the Reviewers tab. *(See previous instruction on entering comments for ratings of 1, 2, 7, N, U or leadership potential for E-6's and above.)*



EMPLOYEE REVIEW *(continuation)*

After entering the necessary information on the **Comments** page, click the **Exceptions** tab at the top of the page.

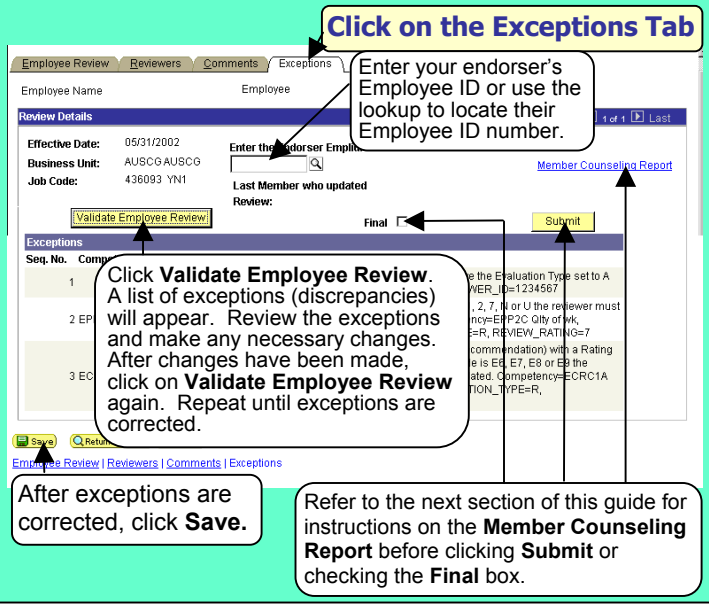
- Enter the Employee ID number of the next person to review this Employee Review.
- Click the **Validate Employee Review** button. Review the exceptions to see if any changes to the Employee Review are required. After changes have been made, click on **Validate Employee Review** again. Repeat until exceptions are corrected. Note: You can safely ignore this warning "**All marks with Rating Model of EVAL must have the Evaluation Type set to A (Approved Official). Evaluation Type=R**," unless you are the Approving Official.
- Press **Save.**
  - **If you <u>are not the final Approving Official</u>:**
    - Press **Submit.** **OR**
    - Print the **Member Counseling Report,** then press **Submit**.

> The **Member Counseling Report** is a printout of the Employee Review with the Reviewer Comments (PG-7's), requiring signature by the counselor and the evaluee. Refer to the instructions in this guide to print the Member Counseling Report.

  - **If <u>you are the final Approving Official</u>, ensure a Member Counseling Report is printed prior to selecting the <u>Final</u> box.** Click the **<u>Final</u>** checkbox and then the **Submit** button.

    Once the Final box is checked, you will not be able to view or change the Employee Review, nor will you be able to print the Member Counseling Report. If you need to recall the Employee Review contact PSC (ADV) via email to **psc-adv@hrsic.uscg.mil** or call (785) 339-3400.

- After clicking **Submit**, the Employee Review is routed to either the Endorser's Worklist, or if final is checked, to PSC (ADV) pending review and forwarding to the members Employee Review Summary (formerly CG-3306). *(For information on accessing your Worklist, refer to the On-Line Help* http://cgweb.uscg.mil/g-w/psc/ps*).* If an Employee Review is submitted multiple times to an endorser, it will display multiple times in the endorser's Worklist; however, only the latest version will display when the endorser accesses any of the multiple links.
- To repeat this function for another Employee, select **Return to Search**.



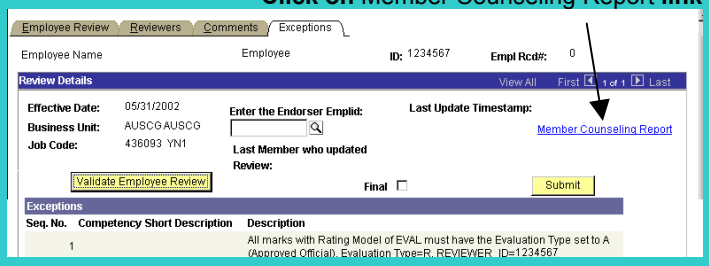
EMPLOYEE REVIEW – MEMBER COUNSELING REPORT *(continuation)*

After an Employee Review is verified by an Approving Official, a **Member Counseling Report** should be printed. This is a printout of the Employee Review with the Reviewer Comments (PG-7's), requiring signature by the counselor and the evaluee.

After entering and saving all necessary information, click on the **Member Counseling Report** link located on the **Exception** page.

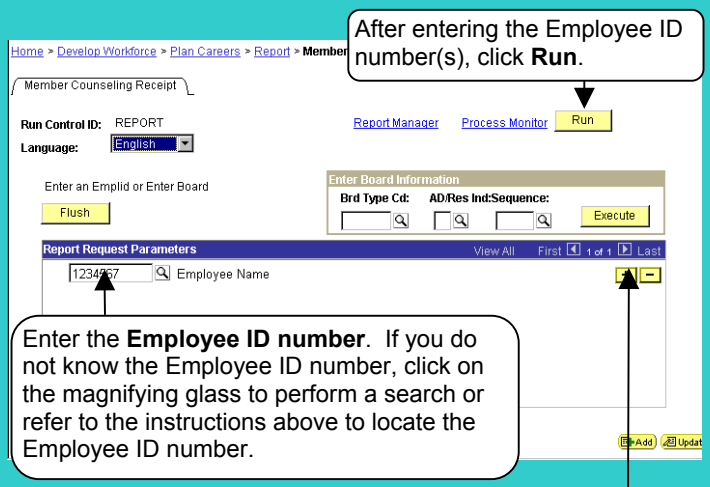
Click on the Exceptions Tab

Click on Member Counseling Report **link**



- After clicking on the **Member Counseling Report link** the **Member Counseling Receipt** page is displayed.
- **Language** defaults to English.
- Enter the Employee ID number of the evaluee in the **Report Requests Parameters** box. If you do not know the Employee ID number you may:
  - Close the window by clicking the **X** in the top right corner and locate the Employee ID number from the **Exceptions** page **ID** field, then re-select the **Member Counseling Report** link. **OR**
  - Click on the magnifying glass to the right of the Employee ID field and perform a search. For information on performing a search, reference the On-Line Help at http://cgweb.uscg.mil/g-w/psc/ps.

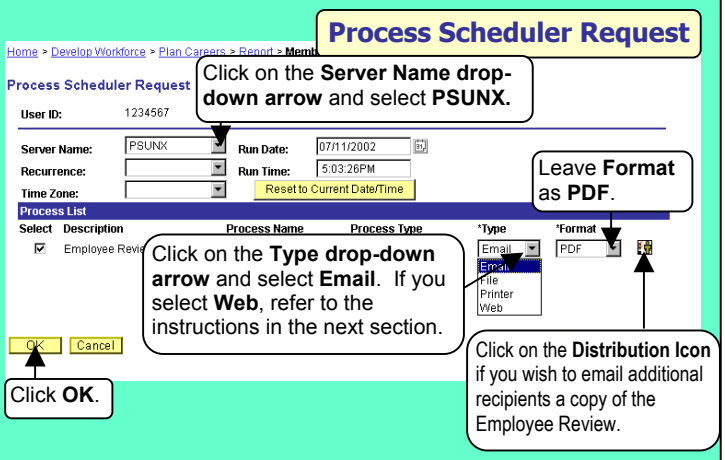
  NOTE: You may generate more than one report by pressing the [+] button to add a new row and enter another Employee ID number. Repeat this step to enter additional Employee ID numbers.
- Click the [Run] button (upper right hand corner of the page) to begin processing.

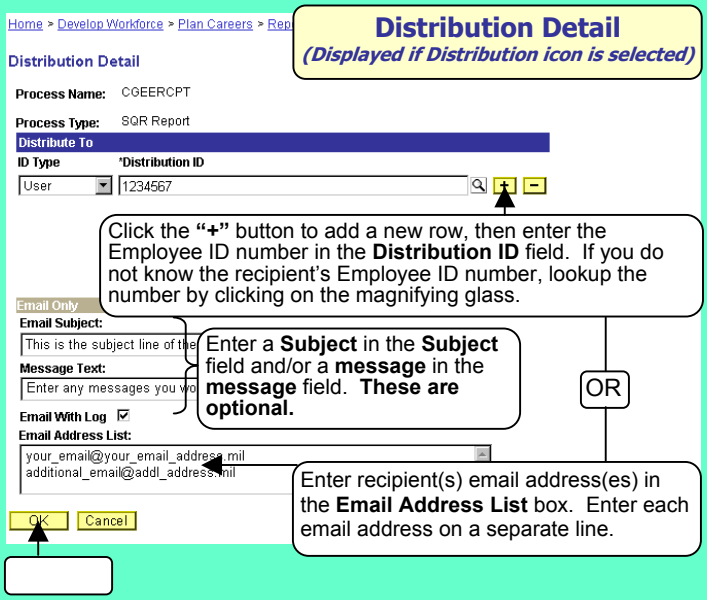


EMPLOYEE REVIEW – MEMBER COUNSELING REPORT *(continuation)*

After clicking **RUN** from the Member Counseling Receipt page, the **Process Scheduler Request** page will appear.

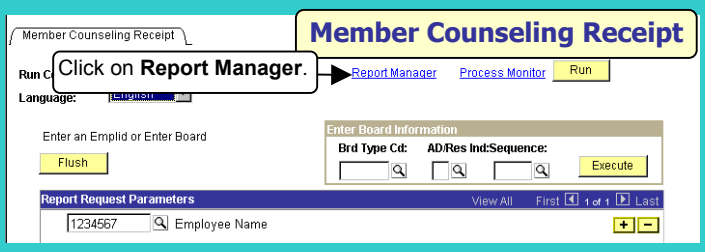
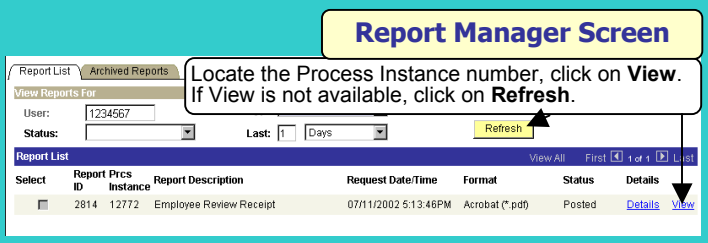
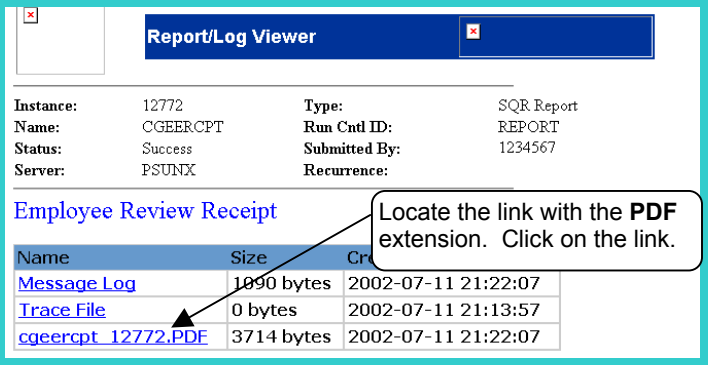
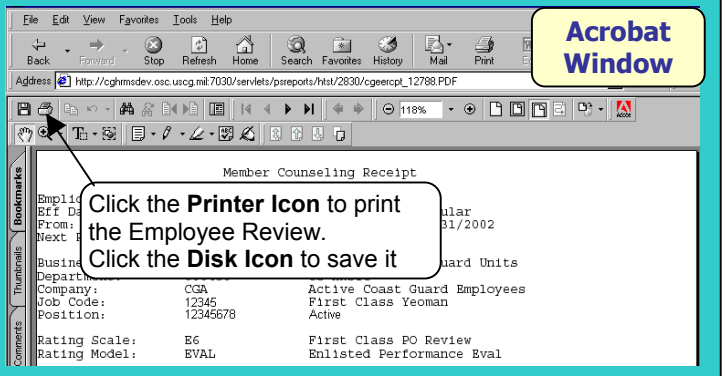
- Click on the **Server Name drop-down arrow** and select **PSUNX**.
- Click on the **Type drop-down arrow** and select **Email**. By selecting **Email** the Member Counseling Report will be sent to you as an attachment to an email message (recommended). The attachment will be in **PDF** (Adobe Acrobat) format. You may leave the type as **Web** if you want to access the Member Counseling Report using the Report Manager (**Web** instructions are in the next section).
- **Format** defaults to **PDF**. Leave as PDF, do not change the format.
- **If you selected Email as the type:**
  - Click on **OK** (bottom left corner of page) and this will generate the email to you. **OR**
  - Click on the Distribution icon to add additional email addresses. This is helpful if you would like to email the Employee Review to additional recipients. Refer to instructions below for using the Distribution icon.





EMPLOYEE REVIEW – MEMBER COUNSELING REPORT *(continuation)*

If you chose **Web** from the Process Scheduler Request screen, you will need to click on **Report Manager** from the **Member Counseling Receipt** page.

- Find the **Process Instance**. You may need to reference the date and time to determine which one is the correct instance.
- Click the **View** link to the right of the instance you want to view. This will cause a new **Internet Explorer** window to open. The **Report/Log Viewer** page will display.

  If the **View** link is not shown, click the Refresh button to update the display. There could be some delay before the Employee Review is ready for viewing.
- When the **Report/Log Viewer** page appears, locate the **link** that has a **PDF** extension. (Link name should read similar to **cgeercpt_xxxxx.pdf**. The **xxxxx** in the link will be replaced with the Process Instance number.) **Click on the link to open the Employee Review form.**
- Click on the **Printer** icon (upper left corner) of the Acrobat window to print the form.