BC Housing

ePerformance for Managers of Union Employees

Course Information

Description

The Talent Management system provides BC Housing with the ability to manage performance evaluations and ratings electronically. The system is very powerful and robust, moving an appraisal along and keeping all parties involved aware of the status of the evaluation.

This course will provide Managers with the skills and understanding to manage the ePerformance module.

Objectives

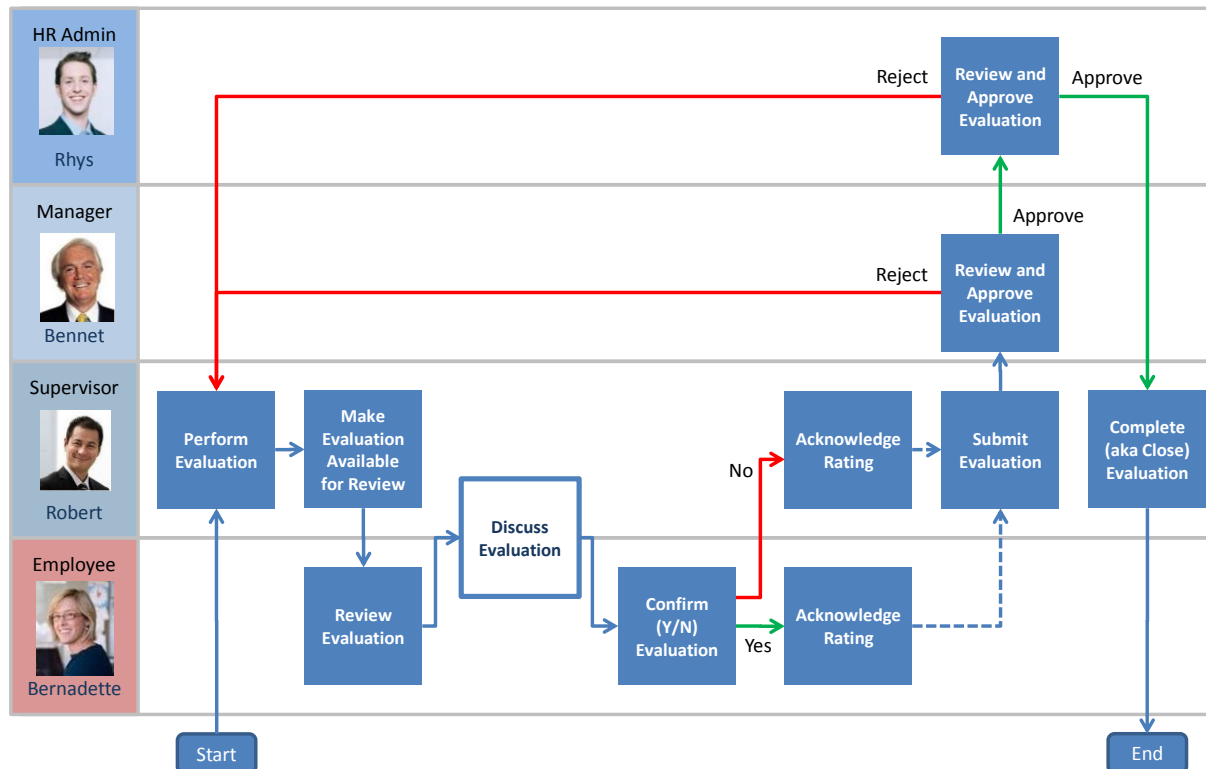Upon successful completion of this course, you should be able to:

1. Create/initiate a performance evaluation.

2. Complete the evaluation and submit to employee.

3. Review employee self-evaluation.

4. Complete the evaluation process to completion.

Contents

The ePerformance Process

ePerformance Review and Approval Process

What is Different from the way you complete your evaluation now?

Many employees will ask what is different from the way they complete an evaluation today. This is a good question. The actual rules and process that is used is very similar to today's evaluation except that most of what you create or review is online instead of on paper.

One initial difference is that you as manager will need to initiate the evaluation document so that you and/or your employee can start to create the performance objectives that you will need to meet over the coming year.

These are called criteria in ePerformance and both parties can contribute to them, however, the manager has final complete rights to the document.

The ePerformance Process

1 - Create Evaluation Document

2 - Complete Evaluation Document Criteria

3 - Mark Evaluation Document Complete

4 - Review Employee Self Evaluation

5 - Complete Manager Evaluation of Employee

6 - Re Open Employee Self Evaluation

7 - Make Manager Evaluation "Available for Review"

8 - Hold Meeting with Employee

9 - Employee Agrees

10 - Manager Marks Evaluation as "Review Held"

11 - Employee Acknowledges

12 - Manager Submits Evaluation for Approval

13 - Once Approved, Mark Evaluation COMPLETED

Connecting with the Talent Management System

Logging in to the PeopleSoft system is similar to logging in to your computer.

To log in to the Talent Management system:

1. Click on the URL on the *HomeNet* screen under *Computer Applications* or double-click the Talent Management icon on your desktop.

2. Type your username and password in the appropriate fields.

3. Select **Sign In** to log in.

This will log you in.

Starting the Evaluation Process

From the Home screen, you have the ability to choose from numerous sections of the Talent Management system.
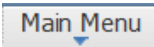
To View the Manager Self Service menu options:

1. Click on the **Main Menu** option.

2. Select **Self Service** from the options list.

Getting to Performance Evaluations

From the Home screen, you have the ability to choose from numerous sections of the Talent Management system. Your personal evaluation is separate from those you create for your employees.
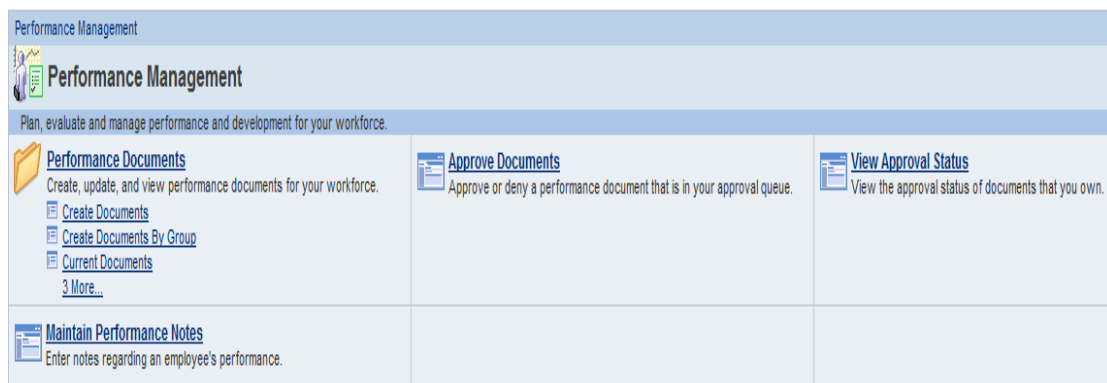
To View the Manager Self Service menu options:

1. Click on the **Main Menu** option Main Menu .

2. Select **Manager Self Service** from the options list.
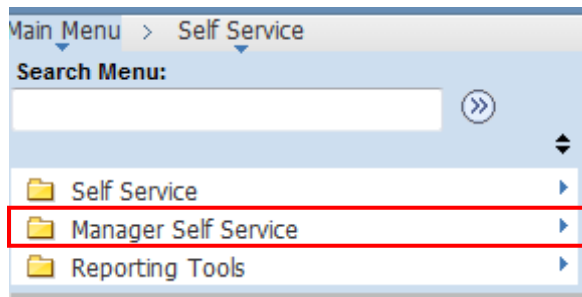
This will display all the menu items under Self Service. You can also hold the mouse over the words Self Service and view and select:

Manager Self Service > **Performance Management**

Creating an Employees Evaluation

1 - Create Evaluation Document

The first step in the valuation process is to create the original document for the employee. Once a full cycle is complete, you will be able to generate a new evaluation from a previous one to reduce workload.

Manager Self Service > **Performance Documents**

Performance Management

Performance Documents

Create, update, and view performance documents for your workforce.

Create Documents
Create performance documents for your direct reports.

Create Documents By Group
Create performance documents for a group of employees.

Current Documents
Update or view your employees' performance documents for the current period.

Historical Documents
View your employees' completed performance documents.

View-Only Documents
View performance documents for direct and indirect reports.

Administrative Tasks
Perform various administrative tasks on your performance documents.
Transfer Document
Reopen Document
Cancel Document
Delete Document

To create a new employee evaluation:

1. Select the **Create Documents** options.

2. The first screen requires you to indicate a date w to display a corresponding list of employees from which you can create an evaluation.

Create Performance Documents

Create new performance documents for one or more of your employees.

▼ Instructions

Follow this 3-step process to create performance documents for each of your direct reports:

1. To pull employee name(s), enter a date when they reported to you and press **Continue**
2. Select the employees you are creating new performance documents
3. Enter the document details and select *Create Documents*.

For assistance, please contact Human Resources.

Enter the as of date

Enter the effective date for determining your employees.   13/04/2011 📅

Continue

3. Once you have indicated a date, click the **Continue** button.

Continue

4. A screen listing your employees displays. This is where you choose which employee you want to create an evaluation for.

5. Select an employee by clicking on the check box next to the employee's name.

6. Click on the **Continue** button to move forward.

7. Enter the *Period,* for which this evaluation is for.

Period:	31/03/2010 🗓	01/04/2011 🗓

8. Now select the *Type of Document*. In most instances, this will be the Annual Performance Evaluation.

Document Type:	▼
Create Documents	**Annual Performance Plan**
	Probationary Review

9. Indicate whether you are using a previous document to create this new one. This will be valuable once a full evaluation cycle is completed.

10. Now click the **Create Documents** button to create a blank document.

Document Creation Details

Period:	31/03/2010 🗓	01/04/2011 🗓
Document Type:	Annual Performance Plan ▼	
Create from Prior Document:	○ Yes ◉ No	

Create Documents

11. The document is created and this is confirmed on the next screen.

Create Performance Documents - Results

Below is a list of employees you selected for Performance Document Creation and the results of the process. Note: in the event of an identified error, you will need to rerun the document creation after the issues have been corrected.

The *Current Documents* hyperlink at the bottom of the page can be used to access individual performance documents. Or you can use the *Create Documents* hyperlink to create another performance document.

Selected Employees

Employee ID	Name	Template	Successful Creation?	Status
49101	Linda Great	Employees (Unionized)	Yes	Document created successfully

Go To:	Create Documents
	Current Documents

Once the document creation is successful, the employee will receive an email indicating that the evaluation has been set up.

From:	tmsdev-DO-NOT-REPLY@bchousing.org	Sent: Thu 14/04/2011 10:23 AM
To:	Glenn Preston	
Cc:		
Subject:	Updated: Appraisal criteria for Tim Johnson's <Unknown>	

Updates have been made on your appraisal criteria for the 2010-03-31 to 2011-04-01 .

Please select the document link to view the changes that were made:

https://tmsweb1dev.bchousing.org:8463/psp/tmsdev/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=1395&EP_REVIEWER_ID=210637&EP_ROLE=E&EP_USER_ROLE=E&TRANS_NAME=BASELINE-ITEMUPDMGR

(Please do not respond to this automatic notification.)

Note: If the Human Resources department initiated the performance document, then both the manager and employee will receive the email notice but if the manager initiates the document, then only the employee receives the message.

Filling In the Evaluation Document Criteria

2 - Complete Evaluation Document Criteria

Now that the document is created, you can start to complete the information on the document. Much of this information is either preset or you can copy and paste from a Word type document.

1. From the Performance Management screen select the **Current Documents** option.

Current Documents
Update or view your employees' performance documents for the current period.

2. A listing of documents available to the manager is displayed. In our example, this one document is available for **Tom Promise**.

Performance Documents					Customize	Find		First 1-2 of 2 Last
Employee	Document Type	Begin Date	End Date	Job Title	Status
LInda Great	Annual Performance Plan	31/03/2010	01/04/2011	Office Assistant II	In Progress

3. To start to complete the document, click on the **Annual Performance Plan**.

Current Performance Documents

Document Details

Linda Great, Office Assistant II
Annual Performance Plan: 31/03/2010 - 01/04/2011

Performance Document Details

Employee:	Linda Great	Job Title:	Office Assistant II	
Document Type:	Annual Performance Plan	Period:	31/03/2010 - 01/04/2011	
Template:	Employees (Unionized)	Document ID:	1399	
Manager:	Brad Pitt	Status:	In Progress	

Document Progress

Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria	O	Not Started	01/04/2011		Start
Review Self Evaluation	O	Not Started	01/04/2011		
Complete Manager Evaluation	O	Not Started	02/03/2011		

Return to Select Documents

The Document Details screen displays the steps required to complete an evaluation including a round circle ◐ that indicates how much of a step is completed.

4. Click on the *Start* link in the **Next Action** column.

Annual Performance Plan

Update Performance Criteria

Linda Great. Office Assistant II
Annual Performance Plan: 31/03/2010 - 01/04/2011

| Save | Complete | | | Return to Document Detail |

Expand All   Collapse All   Expand Sections

▽ **Section 1 - Core Competencies**

Core Competencies will be evaluated by the Employee, Manager or Supervisor and, if applicable, another participant.

Expand   Collapse

▶ Personal Effectiveness

▶ Communication

▶ Results Oriented

▶ Teamwork

▶ Service Oriented

[+] Add Core Competencies

5. The *Update Performance Criteria* screen has a lot of options and sections. We will work through each section separately.

Section 1 – Core Competencies

There are 5 Core Competencies listed in this section. To view them individually you can use the arrow ▶ icon to the left of the competency name to expand the specific competency.

To look at all of the competencies at once, you can click on the *Expand* link above the list of competencies.
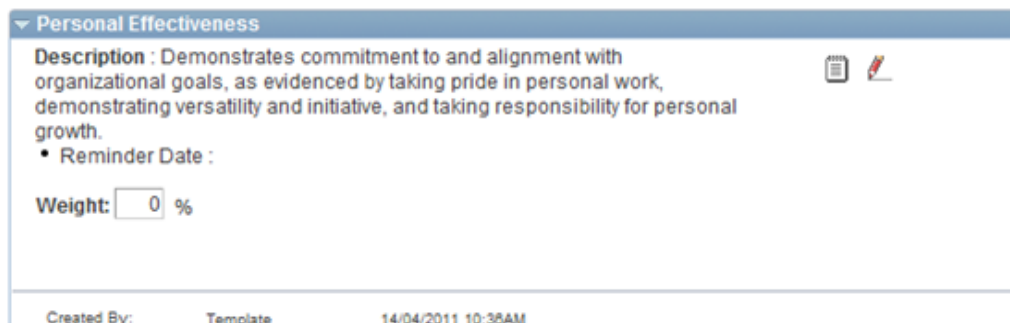
Expand   Collapse

Or to collapse them all at once, use the *Collapse* link.

In addition, there is the ability to add additional competencies by using the *Add Core Competencies* link below the list.

[+] Add Core Competencies

Completing a Core Competency

Let's start by completing one of the core competencies by selecting the arrow beside Personal Effectiveness. The screen expands to display the parameters for this competency.

Competency Icons

There are number of icons showing on this screen that need our attention.

Weight

The first is the weight. This is the percentage that can be assigned to the competency based on it's importance in the overall review. All core competencies must total 100% and then all weights for all performance sections must total 100%.

> *Note: Inserting weights is not mandatory, if you leave them blank, then the system will generate an average for all the competencies. Also, Excluded reviews need to include Core Competencies and Behavioral Competencies while Union employees are evaluated on Performance only.*

Performance Notes

Performance Notes can be created throughout the year by the manager and/or the employee to document accomplishments or other information that could be valuable during the evaluation process.

To review or create a Performance Note, click on the **Performance Notes** icon. This opens the notes screens.

To view a note that exists, click on the link under the Subject column. In this example, that is *Special Project*. You select the subject link, to display the note.

Once you have reviewed the note, select the **Return to Performance Notes** link to go back to that screen or **Return to Performance Document** to go back to the actual document.

To create a new note, select the **Add a New Note** button. This opens a new notes page similar to the one displaying the example note.

Edit Details
Returning to the Performance Document screen, another icon is the **Edit Details** icon. This provides you with the ability to set a reminder date to remind you of when this document / competency needs to be completed.

1. Select the **Calendar** 📅 icon to select a reminder date.

2. Click the **Update** button to complete the change.

growth.
• Reminder Date : 25/04/2011

3. The system now displays the reminder date under the competency description.

Section 2 – Job Competencies

Job Competencies is the second section of the evaluation document.

Again, based on the Manager's Toolkit, you can review the appropriate competencies for this employee and set them up here.

To add a job competency:

1. Click on the **Add Job Competency** link.

2. Complete the **Title**, and **Description** sections, and if necessary, indicate a **Due Date** for this job competency.

3. Once the wording is typed, click on the Spell Checker to ensure there are no spelling mistakes.

4. Click the **Update** button to update the competency.

Section 3 – Performance Objectives

The third section is for Performance Objectives. These would be objectives that were decided upon at the beginning of the year and relate to your employee's performance. Some performance objectives could be measurable items, such as the number of calls completed or the number of applications processed. Others may be more subjective in nature.

To add a new performance objective:

1. Click on the **Add Performance Objective** link at the bottom of the section.

2. Complete the **Title** of the objective.

3. Type a **Description** of what the performance objective is. You can use the Spell check icon on the right to spell check your work.

4. Under the **Status** pull-down menu, select the status of the objective.

5. Complete the **Percent Met**, if you indicated In Progress for the Status. This will give the reviewer an idea of how close to completion this objective is.

6. Finally complete a Reminder and Start and End Dates for the objective. None of these fields are mandatory but can be informative for all reviewing the evaluation.

7. Click on the **Update** button to set the data and return to the previous objectives page.

Section 4 – Learning Section

Another component to the Talent Management system is a Learning Management system, providing the employee with opportunities to learn or enhance their skills set.

Section 5 – Employee Confirmation

The final section provides a space for the employee to confirm or contest the manager's evaluation. The image below shows an expanded view of the confirmation frame. It will remain blank until the review has been confirmed.

Audit History

As with everything else in the Talent Management system, any changes to the performance evaluation is tracked. When you expand the panel, it will show you when the document was created and last modified and by whom.

▼ Audit History		
Created By:	Brad Pitt	14/04/2011 10:36:25AM
Last Modified By:	Brad Pitt	14/04/2011 2:53:35PM

Saving the document

As you continue to work on writing your employee's evaluation, remember to click on the **Save** button to ensure your work is recorded.

Save	Complete		🖨 ✉	Return to Document Detail

Once all areas are complete, click the **Complete** button to finalize the evaluation document.

There is also the ability to **Print** and/or **Email** the document to other interested parties.

Save	Complete		🖨 ✉	Return to Document Detail

Completing the Evaluation Criteria

3 - Mark Evaluation Document Complete

The final step in the criteria completion process is to indicate that this evaluation is complete, and move it forward in the process. Moving forward basically means to send it to the employee and notify HR and the employee that the document is ready for review.

To set the document as complete:

1. Open the document by clicking on the ***Edit*** link under the *Action* column.

Document Progress					
Step		**Status**	**Due Date**	**Action**	**Next Action**
Establish Evaluation Criteria	◑	In Progress	01/04/2011	Edit	Complete
Review Self Evaluation	○	Not Started	01/04/2011		
Complete Manager Evaluation	○	Not Started	02/03/2011		

2. Review to ensure all sections have been filled in (as appropriate).

3. Click on the **Save** button to set any new data.

Linda Great, Office Assistant II
Annual Performance Plan: 31/03/2010 - 01/04/2011

[Save] [Complete]   Return to Document Detail

4. Click the **Complete** button to move the document forward.

Or

If you know all content is there, click the ***Complete*** link, under the *Next Action* column, from the Document Progress screen. This takes you to the Complete button shown above so you can select it and complete the process.

Document Progress					
Step		**Status**	**Due Date**	**Action**	**Next Action**
Establish Evaluation Criteria	◑	In Progress	01/04/2011	Edit	Complete
Review Self Evaluation	○	Not Started	01/04/2011		
Complete Manager Evaluation	○	Not Started	02/03/2011		

One final confirmation to ensure you are really done, click on the **Complete** button on this screen to complete.

Annual Performance Plan
Complete Performance Criteria

When you're satisfied with your entries, select **Complete** to finalize the performance criteria. If necessary, select **Cancel** to return to the document.

[Complete]   [Cancel]

Completed Criteria for Employee Evaluation

Annual Performance Plan

Update Performance Criteria

Linda Great, Office Assistant II

Annual Performance Plan: 31/03/2010 - 01/04/2011

☑ You have successfully saved your criteria.

[Save] [Complete]   🖨 ▭   Return to Document Detail

Expand All   Collapse All   Expand Sections

▾ Section 1 - Core Competencies

Core Competencies will be evaluated by the Employee, Manager or Supervisor and, if applicable, another participant.

Expand   Collapse

▾ **Personal Effectiveness**

Description : Demonstrates commitment to and alignment with organizational goals, as evidenced by taking pride in personal work, demonstrating versatility and initiative, and taking responsibility for personal growth.
- Reminder Date : 25/04/2011

Weight: 50 %

[+] Add Behaviour

| Created By: | Template | 14/04/2011 10:36AM |
| Last Modified By: | Ryan Albright | 14/04/2011 2:01PM |

▾ **Communication**

Description : Communicates openly and with respect by sending clear messages, actively listening, showing empathy, inviting feedback, managing conflicts and adapting personal style.
- Reminder Date :

Weight: 25 %

[+] Add Behaviour

| Created By: | Template | 14/04/2011 10:36AM |

▾ **Results Oriented**

Description : Achieve work objectives by supporting goals and being accountable for outcomes.
- Reminder Date :

Weight: 30 %

[+] Add Behaviour

| Created By: | Template | 14/04/2011 10:36AM |

▾ **Teamwork**

Description : Actively participates in the success of the team by contributing personal strengths, supporting team goals, respecting and valuing the contribution of others.
- Reminder Date :

Weight: 0 %

[+] Add Behaviour

| Created By: | Template | 14/04/2011 10:36AM |

▾ **Service Oriented**

Description : Assesses needs/expectations and delivers services with fairness, equity and respect to internal and external clients alike.
- Reminder Date :

Weight: 0 %

[+] Add Behaviour

| Created By: | Template | 14/04/2011 10:36AM |

[+] Add Core Competencies

Section 2 - Job Competencies

From the list of possible job competencies found in the Manager's Toolkit on the HR site of our intranet, please choose the top 3 that are required for this role. Should you need to add up to two more, please contact Human Resources.

Once built into the performance plan, the individual's ability to demonstrate the competency will be evaluated by the Employee, Manager and, if applicable, another participant.

Expand   Collapse

Responds to enquiries

Description : Responds to enquires quickly and with accurate information.
- Due Date :

| Created By: | Ryan Albright | 26/04/2011 10:00AM |

Answers enquiries within 24 hours of request

Description : Complete responses to customer enquiries within 24 hours.
- Due Date :

| Created By: | Ryan Albright | 26/04/2011 10:02AM |

+ Add Job Competencies

Section 3 - Performance Objectives

Enter the employee's performance objectives and the corresponding weights for the rating period. Performance objectives will be evaluated by the Employee, Manager or Supervisor and, if applicable, another participant

Expand   Collapse

▶ Process Applications

Complete responses to customer enquiries within 24 hours

Description : Complete responses to customer enquiries within 24 hours to ensure our customers receive prompt service and feedback.
- Reminder Date :
- Status: In Progress
- Percent Met: 70
- Start Date :
- Due Date:

Weight: 0 %

| Created By: | Ryan Albright | 26/04/2011 10:03AM |

Responding to email enquiries

Description : Respond to email enquiries within 12 hours of receipt with a positive result or to inform customer it will take longer to review and respond.
- Reminder Date : 16/05/2011
- Status:
- Percent Met: 85
- Start Date :
- Due Date:

Weight: 0 %

| Created By: | Ryan Albright | 26/04/2011 10:06AM |

+ Add Performance Objectives

Section 4 - Learning Section

Learning Section will be evaluated by: Employee, Manager

Learning could not be found for this evaluation period due to technical errors in the learning service

Section 5 - Employee Confirmation

Employee Confirmation will be updated by the employee during the review of the performance appraisal.

Expand   Collapse

▶ Please indicate if you agree or disagree with the appraisal

▶ Audit History

[Save]   [Complete]   🖨 ✉   Return to Document Detail

The system has a double confirmation requirement so a second screen displays asking you to confirm the completion.

Annual Performance Plan

Complete Performance Criteria

When you're satisfied with your entries, select **Complete** to finalize the performance criteria. If necessary, select **Cancel** to return to the document.

[Complete]   [Cancel]

The completed document now moves forward to the employee and if applicable, any other participant that has been designated to evaluate the employee (Excluded only).

Linda Great, Office Assistant II
Annual Performance Plan: 31/03/2010 - 01/04/2011

✔ You have successfully completed the Establish Criteria step.

Review an Employee's Self-evaluation

4 - Review Employee Self Evaluation

Once an employee has completed their self-evaluation, you can then go in and review the evaluation as well as the evaluation of anyone else that has participated.

This step is normally completed prior to you completing your ratings of the employee.

To review the employee's evaluation:

1. Click on the **Document Type** link beside the employee's name from the Performance Documents screen.

| Linda Great | Annual Performance Plan | 17/07/2011 | 17/07/2011 | Office Assistant II | In Progress |

2. The Document Details screen appears.

Document Progress

Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✔ Completed	01/04/2011	View	
Complete Self Evaluation	✔ Completed	01/04/2011	View	
Review Manager Evaluation	◑ Available for Review	02/03/2011	View	

3. Select the **View** link beside the Complete Self Evaluation line. This is the employee's self evaluation.

4. Scroll through the document using the **Expand** and **Collapse** links to open and close sections of the evaluation.

5. Click on the **Return to Document Detail** link to return to the previous screen.

Return to Document Detail

6. Now that you have reviewed the employee's self evaluation, you can now start to complete and rate your evaluation of the employee.

Complete the Performance Evaluation

5 - Complete Manager Evaluation of Employee

Once the criteria are created, you can then start to evaluate the employee.

To start your evaluation of the employee:

1. Click on the **Start** link under the *Next Action* column for Complete Manager Evaluation line.

Document Progress					
Step	Status		Due Date	Action	Next Action
Establish Evaluation Criteria	✔	Completed	17/07/2011	View	
Review Self Evaluation	○	Not Started	17/07/2011		
Complete Manager Evaluation	○	Not Started	17/06/2011		Start

2. The Manager Evaluation document appears.

Annual Performance Plan
Manager Evaluation

Linda Great, Office Assistant II
Annual Performance Plan: 31/03/2010 - 01/04/2011

Author:	Brad Pitt	**Role:**	Manager
Status:	In Progress	**Due Date:**	02/03/2011
Approval:	Not Submitted		

Enter ratings and comments for each section in this evaluation, and select **Save**.

Once you are satisfied with your entries, select **Available for Review** to make the document available to the employee.

Save | Available for Review | 🖨 | ✉ | Return to Document Detail

3. A new button appears, the **Available for Review** button will be used once you have completed your ratings of your employee.

4. The document is now available for you to create your observations and to rate the performance.

5. Again, you can click to **Expand** or **Collapse** the section and/or portions of Section 1.

▽ **Section 1 - Core Competencies**

Enter ratings and comments for each core competency listed below.

Expand   Collapse

View Other Authors

6. You can also view what other evaluator's have written on this employee.

7. Each section now has a **Rating** line, the **Weight** percentage and the ability to write your comments. You can also add additional Behaviours.

8. Select the **Rating** pull-down menu and select the rating that best meets your evaluation.

9. There is also the Rating Description icon that provides you with a detailed description of each of the ratings listed.

10. Place a *Weighting Percentage* by typing the number. Reminder: for Section 1, all the weightings must total 100 or it will not let you save your evaluation.

11. Once all of Section 1 ratings have been completed, you click on the Calculate ▦ icon to receive an average of the ratings.

12. The Core Competencies Summary lists the Rating average and the **Summary Weight**.

13. Again, you have the ability to review the descriptions behind the ratings.

14. Continue to complete your ratings, for example, Section 4 has 3 competencies and you would need to rate each one.

15. In our example, **B – Fully Met** was selected from the list of ratings.

Rating: B - Fully Met

A - Exceeded Expectations
B - Fully Met
C - Partially Met
D - Did Not Meet

16. Continue to complete the various sections, including **Section 5 – Learning Section**. This section is a written section, providing a manager with the opportunity to suggest learning the employee might want to complete to expand their skill set.

▽ **Section 5 - Learning Section**

View Other Authors
    Learning could not be found for this evaluation period due to technical errors in the learning service

Learning Section Summary

Comments:	Employee is encouraged complete a supervisors program through HR Training.
Writing Tools	

17. Remember to click on the **Save** button at the top or bottom, as you continue to create the document.

Save

18. The next two sections are for the employee to make comments on the evaluation and to confirm or refute the evaluation/ratings created by the manager and/or other participants.

19. The final section (Section 8) is for manager's comments prior to the manager and employee meeting to review the evaluation.

▽ **Section 8 - Manager Comments**

Comments:

20. Finally, there is the ability to add any attachments that add to the evaluation or ratings.

Attachments
No Attachments have been added to this document

⊞ Add Attachment

21. Lastly, there is an **Audit History** segment that shows a history of when the document was created and when it was last modified.

▼ Audit History		
Created By:	Brad Pitt	26/04/2011 12:10:21PM
Last Modified By:	Brad Pitt	26/04/2011 3:11:39PM

22. It is time to select the **Calculate All Ratings** button to determine the final rating for this employee evaluation.

Calculate All Ratings
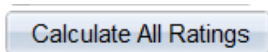
23. If you need to come back to this document later, just click on **Return to Document Detail** link to go back one page.

Return to Document Detail

Re-opening the Employee's Document for Agreement Purposes

6 - Re Open Employee Self Evaluation

It is necessary for the manager to re-open the employee's evaluation document so they can agree or disagree to the manager's performance evaluation and ratings once the two have met.
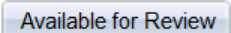
Reopen

This step is a requirement to accommodate our collective agreements, it is a mandatory step.

Available for Review

7 - Make Manager Evaluation "Available for Review"

24. Finally, once all the of details, comments and ratings have been added, and you are ready for your meeting, you click on the **Available for Review** button to make this evaluation document available for the employee to review.

Available for Review

The system will review the document, confirm that all ratings have been completed and then will display this screen.

Annual Performance Plan

Available for Review

To confirm that the employee can view this evaluation, select **OK**.
If necessary, select **Cancel** to return to the document.

The overall rating you have assigned to this document is 3 - Fully Meets.

OK   Cancel

25. Click **OK** to set the evaluation.

Note: This sets the ratings and normally, they are not changed after this point. However, there is a way to re-open the document and make changes to your ratings after you have met with the employee. This process is presented after the normal content.

8 - Hold Meeting with Employee

9 - Employee Agrees

Completing the Performance Evaluation Process

10 - Manager Marks Evaluation as "Review is Held"

Once you have completed your meeting with the employee, there are a number of steps to complete and finalize the employee's evaluation. You will receive an email similar to the one below informing you that your employee has completed their self evaluation.
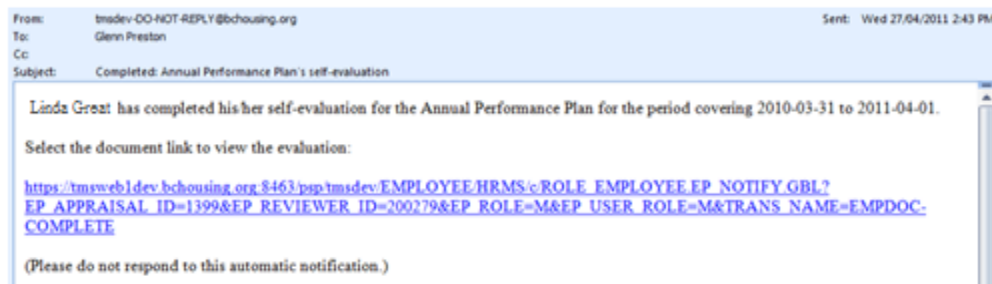
To continue the process:

1. Select the employee from the **Current Documents** list.

2. On the bottom line under Complete Manager Evaluation, click on the **Mark Review Held** link.
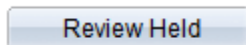

3. As manager, you now have the opportunity to add your comments under **Section 8 – Manager Comments** section.

4. Make sure you then click on the **Save** button to set the comments.

5. Click on the **Review Held** button to set the evaluation.

> Review Held

6. A confirmation screen displays requesting you confirm the review was held. Click the **OK** button to continue.

> **Annual Performance Plan**
>
> **Review Held**
>
> Please select **OK** to confirm that the review was conducted. If necessary, select **Cancel** to return to the document.
>
> OK   Cancel

7. The Next Action state now displays **Acknowledge**.

Document Progress				
Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✔ Completed	01/04/2011	View	
Review Self Evaluation	✔ Completed	01/04/2011	View	
Complete Manager Evaluation	◐ Review Held	02/03/2011	View	Acknowledge

Employee Acknowledgement

11 - Employee Acknowledges

The final step for the employee is to acknowledge that the evaluation process and document has been completed. The employee clicks on a link called **Acknowledge**.

If, in the event the employee is unable or not willing to acknowledge the evaluation, a manager can perform the acknowledgement by clicking on the same link. You will need to substantiate why you are performing the acknowledgement and it will be recorded as part of the Audit History.

Submitting the Evaluation for Approval

12 - Manager Submits Evaluation for Approval

The second from last step for the manager is to submit the evaluation for approval. There is a possibility of one or two levels of approval depending on the person being evaluated.

To submit the evaluation for approval:

1. View the document you want to submit from the documents list.

2. From the Documents Progress screen, click on the **Submit** link under Next Action.

3. This will display the evaluation document in order to submit it for approval.

4. Click on the **Submit for Approval** button. This displays the confirmation screen.

5. Click the **Submit** button to send the document to your manager, next in line.

Notice that the Document Progress screen has changed, and all Next Actions are gone.

Marking the Evaluation Completed

13 - Once Approved, Mark Evaluation COMPLETED

Once you receive an email to state all levels of approvals have been met, the final step is to mark the evaluation as completed.

From the Current Performance Documents screen, select the employee you wish to complete. In our example this will be Linda Great.

Linda Great	Annual Performance Plan	31/03/2010	01/04/2011	Office Assistant II	Acknowledged

1. Click on the *Annual Performance Plan* link.

Document Progress

Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✔	Completed	01/04/2011	View	
Review Self Evaluation	✔	Completed	01/04/2011	View	
Complete Manager Evaluation	◑	Acknowledged	02/03/2011	View	Complete

2. Notice under the third line, **Complete Manager Evaluation**, there is a Complete link under Next Action.

3. Click on the *Complete* link.

Select **Submit for Approval** to route your evaluation to your immediate supervisor. You may put in your final comments on the *Manager Comments* section before you submit..

After you submit the evaluation, open the *View Approval Status* page to monitor the approval status of the evaluation. Once the evaluation has been fully approved, select **Complete** to finalize.

Save	Complete	🖨 ✉	Return to Document Detail

4. Click on the **Complete** button to set the evaluation as completed.

5. As usual, there is a confirm screen displayed.

Annual Performance Plan
Complete Evaluation

You have almost finalized your evaluation.

Select **Complete** to confirm that you would like to mark the evaluation as completed. This corresponds to affixing your signature as the employee's immediate supervisor into this electronic document.

To discontinue and return to the previous page, select **Cancel**.

Manager Document completion instructions goes here.

Complete	Cancel

6. Click the **Complete** button to confirm your choice. You will see a confirmation screen.

Annual Performance Plan
Complete Evaluation Confirmation

The performance evaluation is finalized and marked as "Complete".

OK
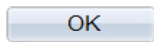
7. Click **OK**.

8. The document Progress screen now shows all three segments of the evaluation process as completed.

Document Progress					
Step		Status	Due Date	Action	Next Action
Establish Evaluation Criteria	✔	Completed	01/04/2011	View	
Review Self Evaluation	✔	Completed	01/04/2011	View	
Complete Manager Evaluation	✔	Completed	02/03/2011	View	

9. You are done!

Senior Manager Approval

If you are a senior manager that will be approving evaluations, you will receive an email message indicating that approval is required/requested.

Clicking on the link will take you to the approvals screen (if you are logged in).

Or the usual route to take is

Manager's Self Service > **Performance Management** > **Approve Documents**

The following screen is displayed when you select the Approve Documents option.

1. Click on the employee name link for the employee evaluation you wish to view and approve. In this example, we selected **Linda Great**.

Approve Transaction

Approve or deny the proposed information for the employee listed below. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button at the bottom of the page.

Linda Great   **Empl ID:** 49101

Performance Document

Doc Type:	Annual Performance Plan
Author:	Brad Pitt
Period Begin Date:	31/03/2010 Period End Date: 01/04/2011
Rating:	3 - Fully Meets

Performance Document Details

Process Detail

Name	Role Name	Process Action	Process Action Date
Brad Pitt	Originator	Submit	06/05/2011

Evaluation Approval Chain

▽ **:Pending**

Evaluation Approval Chain

Pending		Not Routed
Betty Whitehall ePerformance Approving Mgr	→	Eunice Liddy ePerformance HR Administrator

Comment: [   ]

[Approve] [Deny]

To review the evaluation:

1. Click on the **Performance Document Details** link near the top of the screen.

    Performance Document Details

2. Scroll through the document to review, using the **Expand** and **Collapse** links to open up sections not displayed.

3. When you have completed reviewing the evaluation click on the **Return to Performance Document Approval** link to go back to the approvals screen.

    Return to Performance Document Approval

4. You can now either approve the evaluation, deny the evaluation which will return it back to the manager responsible, or make comments in the Comment: text box prior to clicking the button.

5. Click on the **Approve** button. A confirmation screen displays.

Approve Transaction
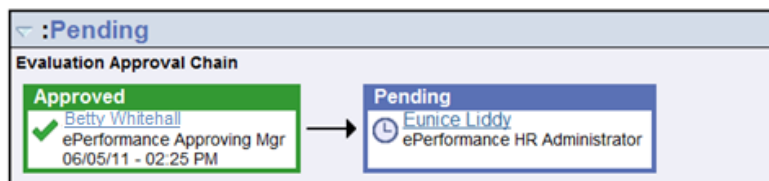
Save Confirmation

✔ The Save was successful.

OK

6. Click **OK** to confirm. The Process Detail screen now indicates that the Manager has approved and the date it was approved.

Process Detail			
Name	Role Name	Process Action	Process Action Date
Brad Pitt	Originator	Submit	06/05/2011
Betty Whitehall	Manager	Approve	06/05/2011

Evaluation Approval Chain

▽ :Pending

Evaluation Approval Chain

Approved	Pending
✔ Betty Whitehall ePerformance Approving Mgr 06/05/11 - 02:25 PM	🕐 Eunice Liddy ePerformance HR Administrator

7. It also indicates the next approver in the process.

Special Approver Circumstances

In certain instances, the immediate manager (the person performing the evaluations/rating) has a supervisor who is themselves a union employee. In these situations, the Approver flows to the next level up, a person who is an Excluded Manager.

For example:

Employee	Union	Self evaluation
Supervisor	Union	Completes evaluation submits for approval
Manager level 1	Union	can review evaluation but does not approve
Manager level 2	Excluded	becomes the Approver

Also note that because the Approver receives notification that the document is complete, the Manager level 1 does not receive any notification. Therefore, it will be important for the supervisor to inform their manager that the document is complete so they can review prior to the document being submitted to the Approver level.