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SECTION 16
ePerformance

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ePerformance Overview

ePerformance is a self-service evaluation application for managers, employees, and human resources (HR) administrators. ePerformance can be used as a tool for planning, collaborating, communicating, assessing, and monitoring evaluations for two purposes: performance and development.

Performance evaluations typically assess and plan employee performance to meet current job requirements and administer salary treatments; while development evaluations are used to assess and plan employee development needs either because of gaps in skill set that are required for a current job or to meet future requirements.

ePerformance supports the entire planning and evaluation process, from planning and aligning employee performance or development goals with enterprise objectives, through assessing and rewarding employee performance results within the right behaviors.

ePerformance provides the flexibility to establish evaluations for different purposes by setting up document templates that define evaluation processes. With this module, the following can be accomplished:

- Generate evaluations
- Establish evaluation criteria
- Manage multiple participants
- Enter evaluation data, including notes, rating, weights, and comments
- Consolidate feedback from multiple sources into the managers evaluation
- Submit the manager evaluation for review and approval

ePerformance Business Processes

The diagram below illustrates an example of the flow of ePerformance business processes - assuming that the document template implements the established criteria, multi-participant, review, and approval processes.

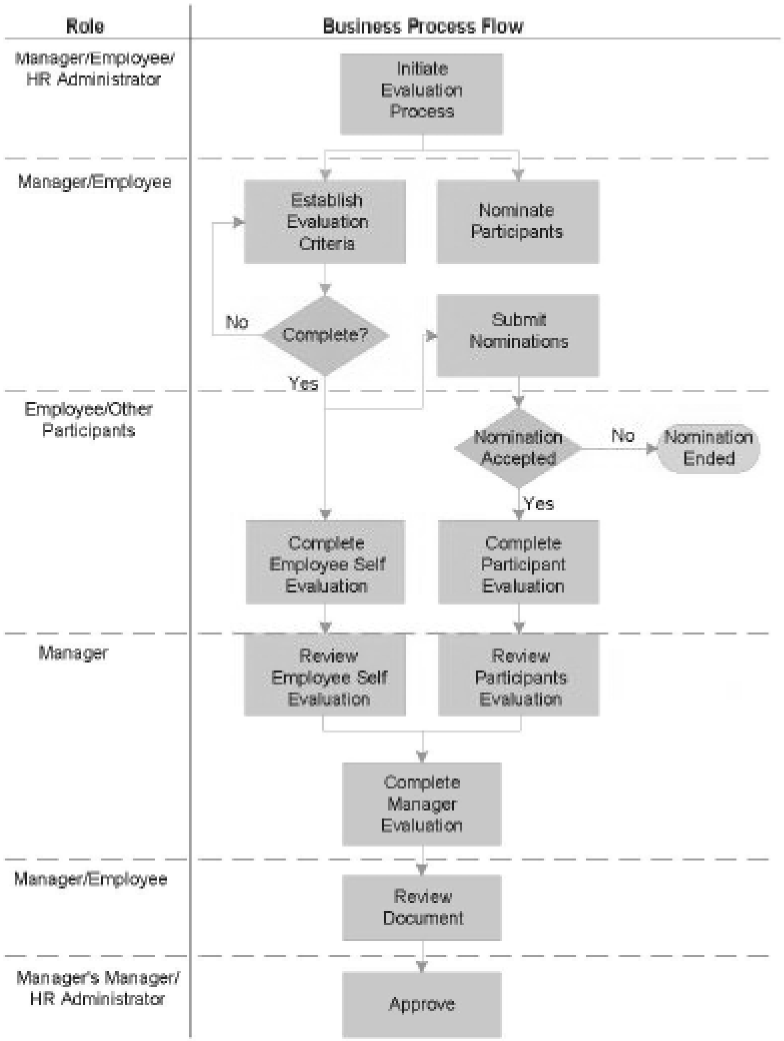


Figure 1: ePerformance Business Process Flow

The ePerformance business process includes the following steps:

1. The manager, employee, or HR administrator initiates the process by creating documents.

   Employees can only create documents for themselves; managers can create documents for employees or groups of employees that report to that manager; HR Administrators can create documents for groups of employees.

2. The employee or manager modifies the document's evaluation criteria and agrees upon the criteria that are established. This is an optional step.

   Criteria modifications include: adding free-form or predefined criteria, modifying the text of document criteria, or removing criteria. For more information, refer to ***Creating/Editing ePerformance Documents as a Manager*** (on page 102).

3. The employee or manager nominates participants to provide additional feedback. This is an optional step.

   For more information, refer to ***Defining General Template Information*** (on page 40).

4. After nominations are complete and the evaluation criteria are finalized, nominations are submitted to nominees by either the employee or manager. This is an optional step.

   When a nominee accepts a nomination, a participant evaluation is created for that nominee.

5. Employees, managers, and (optionally) other participants complete their respective evaluations.

   This step consists of rating evaluation items and entering documents.

   When a Performance document is initially created, it is a Plan. After adding all the performance criteria, it becomes the Appraisal.

6. The manager views average ratings and consolidates feedback into their evaluation.

   During this step, the manager can optionally make use of several tools

   - notes entered pertaining to the evaluation;
   - comments from other evaluators pertaining to the evaluation;
   - development tips based upon competencies and subcompetencies;
   - results writer statements based upon competencies and subcompetencies;
   - average consolidated ratings from other evaluators pertaining to the evaluation; and
   - language checker that checks language for objectionable terms.

Note: Depending on the review and approval process that is defined in the document template, the final two steps may occur in reverse order.

For more information see:

Administrative Processes....................4
Monitoring Evaluations....................4

Administrative Processes

These administrative processes occur on an as-needed basis and are outside of the evaluation processes:

- Transfer evaluations. For more information refer to ***Transferring Documents*** (on page 149).
- Change evaluation status. For more information refer to ***Resetting Document Status*** (on page 153).
- Cancel evaluations. For more information refer to ***Canceling Documents*** (on page 156).
- Delete evaluations. For more information refer to ***Deleting Documents*** (on page 159).
- Enter preliminary ratings. For more information refer to ***Preliminary Ratings*** (on page 162).
- View evaluation contents. For more information refer to ***Viewing Documents*** (on page 163).

Monitoring Evaluations

HR Administrators can monitor the status of evaluations and view a summary of the results with various tools, including the following:

- Missing Documents Report. For more information refer to ***Missing Documents*** (on page 167).
- Late Documents Report. For more information refer to ***Late Documents Report*** (on page 170).
- Performance Summary Report. For more information refer to ***Performance Summary*** (on page 174).
- Status Summary chart.
- Rating Distribution Summary chart.

For more information on viewing documents, refer to ***Inquiry*** (on page 182).

Setting Up ePerformance

This section provides an overview of system settings in ePerformance and discusses how to define system settings.

System settings control certain processing options. These settings can be modified to meet the users needs:

- Generation of documents in languages other than the base language.
- Debug of settings.
- Generation of starting number for document identification (ID).
- Appearance of fields on the pages from which users select documents.
- Generation of email notifications by EmpowHR.

For more information see:

Entering/Modifying System Settings 5
Using Rating Models 8
Using the Content Catalog 8
Using Profile Types 9
Working with Approvals and Reviews 9
Modifying Self-Service Pages and Email Notifications 10

Entering/Modifying System Settings

To Enter/Modify System Settings:

1. Select the ***Setup HRMS*** menu group.
2. Select the ***Install*** menu.
3. Select the ***Product and Country Specific*** menu item.

4. Select the ***ePerformance: General Settings*** component. The General Settings tab is displayed.

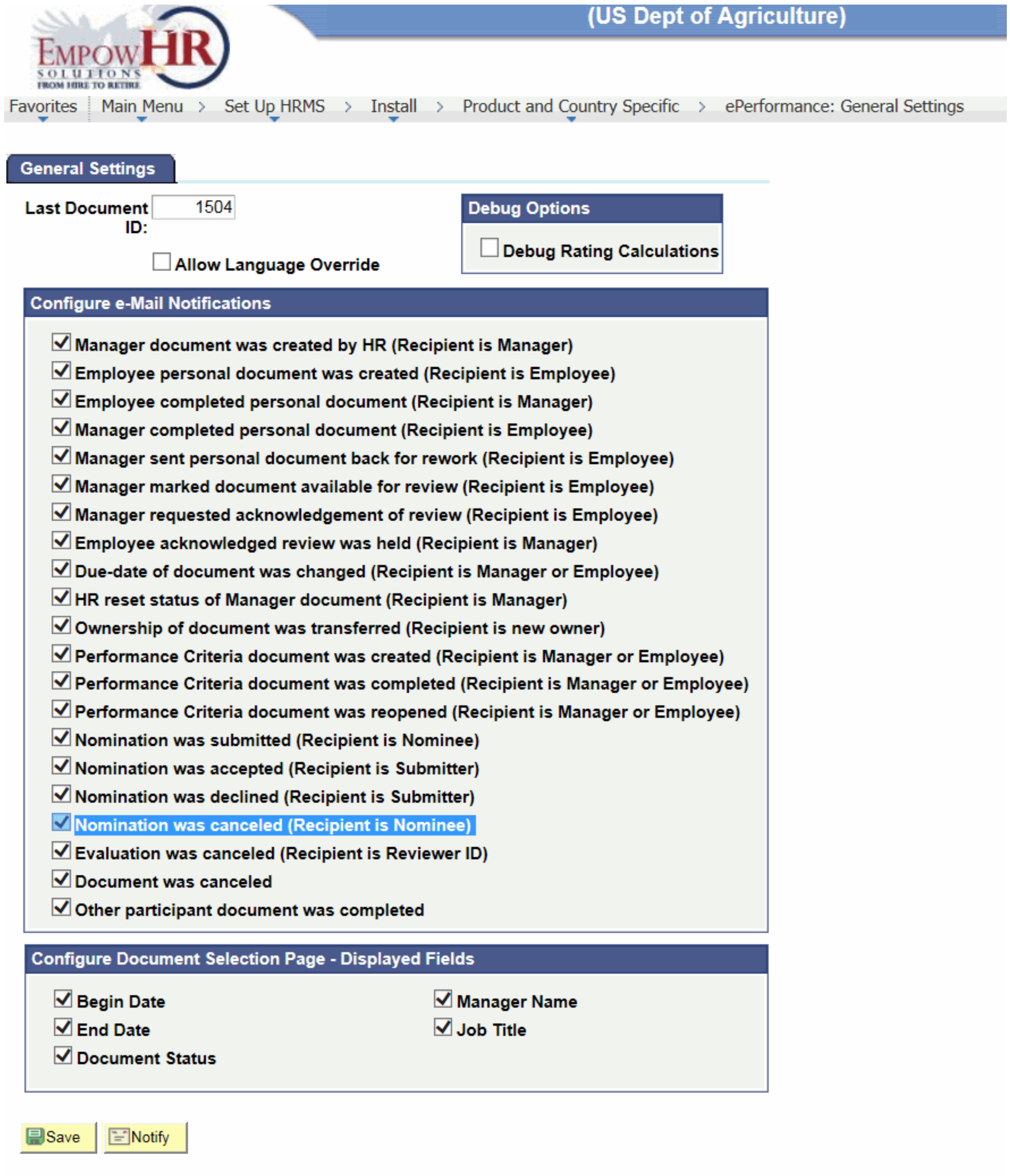


Figure 2: General Settings Tab

5. Complete the fields as follows:

Field	Description/Instruction
Last Document ID	Enter the number from which EmpowHR begins generating document IDs. EmpowHR automatically generates the document ID by adding 1 to

Field	Description/Instruction
	the Last Document ID.
Allow Language Override	Select this box to enable document generation if it is a language other than the user's preferred language. If this check box is clear, EmpowHR generates all documents in the user's preferred language. The base language is defined by using the Manage Install Languages page in EmpowHR.
Debug Options	**Instruction**
Debug Rating Calculations	Select this box to have EmpowHR generate a debug/trace log every time it calculates the ratings in an evaluation. HR ePerformance administrators use the Debug/Trace Results page to review the results of each calculation performed for an evaluation. This helps track down any unexpected results when templates are built and test configuration. Note: Producing the debug/trace log can have a significant impact on system performance. Select this option only if testing is necessary for the ePerformance configuration or debugging a suspect calculation problem.
Configure e-Mail Notifications	Select the check box next to each event type for EmpowHR to automatically generate and send notices.
Configure Document Selection Page - Displayed Fields	**Description**
Begin Date	Appears in the document list when creating documents (if checked). For more information, refer to ***Creating/Editing ePerformance Documents as a Manager*** (on page 102).
Manager Name	Appears in the document list when creating documents (if checked). For more information, refer to ***Creating/Editing ePerformance Documents as a Manager*** (on page 102).
End Date	Appears in the document list when creating documents (if checked). For more information, refer to ***Creating/Editing ePerformance Documents as a Manager*** (on page 102).
Job Title	Appears in the document list when creating documents (if checked). For more information, refer to ***Creating/Editing ePerformance Documents as a Manager*** (on page 102).
Document Status	Appears in the document list when creating documents (if checked). For more information, refer to ***Creating/Editing ePerformance Documents as a Manager*** (on page 102).

Using Rating Models

ePerformance uses rating models to rate an employee's performance or level of proficiency. Rating models define the qualitative values, such as A, B, and C, or 1, 2, and 3, that EmpowHR uses to rate or score an employee's performance.

Rating models are assigned to the sections that make up performance or development documents. Managers, employees, and peers can then select an appropriate rating that best reflects the employee's performance in that area.

Ratings can have expanded descriptions that can be used to further describe the behavior one exhibits when performing at a specific proficiency level. These expanded descriptions display on the performance or development document.

Using the Content Catalog

ePerformance uses content types and content items defined in the content catalog to identify the items by which employees are measured. Content types are used as categories for grouping similar content items. Content items are the specific things to be measured.

Content types are associated with the sections that form the structure of a document template and performance or development document. ePerformance uses content types to define the category of content items that can be added to document templates and performance documents. The following are some of the content types and typically used by ePerformance:

- Requirements
- Major Duties
- Expectations
- Rating Model

Once content types are defined, they can begin to link content items to content types. The following table is an example of how content types and items in the Content Catalog for ePerformance might be set up:

Content Type	Content Items
Major Area of Responsibility (MAR)	Provides Employee Relations Advisory Service (MAR4)
Performance Requirements	How the employee provides Employee Relations Advisory Service.
Expectation	Advises supervisors and managers at all levels on procedures

Content Type	Content Items
	relative to adverse actions, separations, and disqualifications.

Using Profile Types

A profile type is a collection of content items that describe the qualitative attributes of a person. If a profile type is used to describe a person, it is called a person profile.

ePerformance can use profiles in three ways:

- To download content items from a non-person profile into a document template.
- To download content items from a non-person profile into a performance or development document.
- To update or create an employee's person profile.

Working with Approvals and Reviews

ePerformance uses the Approval (PTAF_TXN) component to define its approval processes. There are five approval processes, three of which use the new approval framework. The three are as follows:

Approval Process	Definition
ManagerOnly	One-step approval process that routes the transaction to an approval manager.
ManagerToAdmin	Two-step approval process that routes the transaction to an approving manager and then to the ePerformance HR administrator.
AdminOnly	One-step approval process that routes the transaction to the ePerformance HR administrator. The approval process definition is linked to a document type using the Document Type page. In addition to assigning the approval process definition to a document type, also define when the employee review is to occur within the performance process. The choices are as follows: • Approval. Before EE (Employee Evaluation) Review Held - EmpowHR follows one of the approval processes, and the document is approved before the manager discusses with the employee. • Approval. After EE Review Held - EmpowHR follows one of the approval processes, and the document is approved after the manager discusses it with the employee. • Approval. No EE Review Held - EmpowHR follows one of the approval processes, but the manager does not review the document with the employee.

Approval Process	Definition
	• No Approval. EE Review Held - EmpowHR does not follow an approval process, but the manager must review the document with the employee. • No Approval. No EE Review Held - EmpowHR does not follow an approval process, and the manager does not review the document with the employee.

Modifying Self-Service Pages and Email Notifications

ePerformance provides standard text that appears on the self-service pages and automatically generates email notifications. The text catalog stores these text entries. The text catalog entries can be modified as needed or create new ones to meet business needs.

To Ensure Email and Workflow Notifications Are Working Properly:

1. Activate email using the Worklist System Defaults page.
2. Define the method used to notify the originator using the System Workflow Rules page.
3. Define user notification preferences.
4. Define user's email addresses on the Email Address page.
5. Select **`Email User`** as a routing preference on the Workflow page - User Profile.

For more information see:

ePerformance Text Catalog Settings 10
Notifications 12

ePerformance Text Catalog Settings

ePerformance makes use of the text catalog for storing text that appears on self-service pages, including field labels, button names, links, page instructions, and warnings, as well as, the text subject lines of automated email notifications. Modify the text that appears on a page or in an email message by editing text in the Text Catalog feature.

The Text Catalog is partitioned by the applications that use it, and each partition can store and access its data differently. To access the text catalog items that belong to ePerformance, enter **`HEP`** as the object owner identifier on the Maintain Text Catalog search page.

Sub ID Field

ePerformance partitions its text catalog entries by performance and development.

To Retrieve Text Catalog Entries for Development Documents:

- Enter **D** in the Sub ID Field.
- To retrieve text catalog entries for performance documents, leave the field blank.

Text Catalog Keys

ePerformance designates these four keys for storing and retrieving entries:

Key	Description
Section Type	Select the section type to which the text pertains from the list of section types that are defined on the Section Definition page.
Author Type	Select the evaluator role of the evaluation on which the text appears from the list of role types that were defined on the Roles Types page.
User Role	Select the role to which the text pertains from the list of predefined roles. This key is used to select text depending on the user's system privileges (e.g., update or approve).
Document Status	Select the status to which the text pertains: **Acknowledged**, **Available for Review**, **Canceled**, **Completed**, **in Progress**, **Not Started**, or **Review Held**.

When EmpowHR retrieves text from the catalog, the section type key takes precedence over author type, author type takes precedence over user role, and user role takes precedence over document status.

Note: An empty key functions as a wildcard. Entries with wildcard keys pertain to all possible values for the key.

Text Substitution

Supply the text values for the tokens in an EmpowHR function call at runtime. The values are replaced by parameters in the People Code when the text is rendered on evaluations.

To use this feature, the user must know People Code. If the user wants to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, the user must make corresponding changes to the EmpowHR code that calls the Text Catalog feature retrieval functions, since this copy supplier values to use in place of the tokens.

These are the tokens and the substitution text for each token that are delivered by ePerformance. Insert up to five substitution tokens from the following list:

Token	Substitute Text
%1	Document type from the Document Type table (EP_REVW_TYP_TABL).
%2	Employee named formatted as first name, last name.
%3	Employee ID.
%4	Period begin date for the performance period.
%5	Period end date for the performance period
%6	Due date of the evaluation.
%7	Component link that transfers the user directly into the applicable evaluation.
%8	List of employees for whom an evaluation was successfully created during the background run.
%9	List of employees for whom evaluations were not created.
%10	Form-Create-Msg, which is one of two alternate messages that appear depending on the type of process that is run.

Notifications

The table below lists the delivered text entries that ePerformance includes in the system-generated email notifications and specifies them and to whom notices are sent. Most text entries have two versions, one with the suffix _SBJ for use in email subject lines and a corresponding entry with the suffix _BDY for use in the body of email messages. When a notification is triggered by a status change, or an action request on an evaluation, the body text that is generated contains a link to the evaluation(s). This section is configurable to fit the business needs of the user.

Text Catalog	Recipient	Condition Creating
ADHOC_BASE_SBJ ADHOC_BASE_BDY	Manager or Employee	An adhoc message is sent from the criteria document.
ADHOC_MAIN_SBJ ADHOC_MAIN_BDY	Manager or Employee	An adhoc message is sent from an evaluation.
ADHOC_NOM_SBJ ADHOC_NOM_BDY	Multi-participant Evaluation Candidate	An adhoc message is sent from the Nominate Participants page for an evaluation.
BASE-COMPLETE_SBJ BASE-COMPLETE_BDY	Manager or Employee	An establish criteria document is marked as completed.

Text Catalog	Recipient	Condition Creating
BASE-CREATE_SBJ BASE-CREATE_BDY	Manager or Employee	An establish criteria document is created by either the manager, employee, or ePerformance HR Administrator.
BASE-REOPEN_SBJ BASE-REOPEN_BDY	Manager or Employee	An establish criteria document is reopened by either the manager or employee.
CHG-DUEDATE_SBJ CH-DUEDATE_BDY	Manager, Employee, or Multi-Participant Reviewer	A manager or ePerformance HR administrator changes the due date of an evaluation.
CHG-STATUS_SBJ CHG-STATUS_BDY	Manager, Employee, or Multi-Participant Reviewer	An ePerformance HR administrator or manager resets the status of the evaluation to **`In Progress`**. This can happen if an evaluation prematurely advances to the next stage of the process.
CREATE-MGRDOC-SBJ CREATE-MGRDOC-BDY	Manager	An ePerformance HR administrator has generated documents using the batch process.
CREATE-ROLEDOC-SBJ CREATE-ROLEDOC-BDY	Employee	An ePerformance HR administrator has generated documents using the batch process.
DOC-CANCEL_SBJ DOC-CANCEL_BDY	Manager and Employee	An ePerformance HR administrator or manager cancels the evaluation.
EE-ACKNOWLEDGE_SBJ EE-ACKNOWLEDGE_BDY	Manager	An employee acknowledges that they have reviewed the manager evaluation.
EMPDOC_COMPLT_SBJ EMPDOC_COMPLT_BDY	Manager	An employee marks the employee evaluation as completed.
EVAL_CANCEL_SBJ EVAL_CANCEL_BDY	Manager, Employee or Multi-Participant Reviewer	An ePerformance HR administrator, manager or employee cancels an evaluation.
MGRDOC-COMPLT_SBJ MGRDOC-COMPLT_BDY	Employee	A manager marks the manager evaluation as completed.
NOM-ACCEPT_SBJ NOM-ACCEPT_BDY	Manager or Employee	A nominated employee accepts a nomination for a multi-participant evaluation.

Text Catalog	Recipient	Condition Creating
NOM-CANCEL_SBJ NOM-CANCEL_BDY	Nominee	A nomination for a multi-participant evaluation is canceled.
NOM-DECLINE_SBJ NOM-DECLINE_BDY	Manager or Employee	A nominated employee declines a nomination for a multi-participant evaluation.
NOM-SUBMIT_SBJ NOM-SUBMIT_BDY	Participants	Nominations to participate in multi-participant evaluations are sent to nominees.
OTHDOC-COMPLT_SBJ OTHDOC-COMPLT_BDY	Manager and/or Employee	A participant in a multi-participant evaluation completes their evaluation.
RQST-ACK_SBJ RQST-ACK_BDY	Employee	A manager marks an evaluation as **Review Held**. This message is sent to the employee requesting they formally acknowledge the evaluation.
RQST-REVIEW_SBJ RQST-REVIEW_BDY	Employee	A manager changes the status of a manager evaluation to **Available for Review**.
TRANSFER-MGR_SBJ TRANSFER-MGR_BDY	New Manager	A manager or ePerformance HR administrator transfers an evaluation to a new manager

These notification messages are used in email body text only.

Text Catalog	Recipient	Condition for Creating
MGR-FAIL-LIST_BDY	Manager	An HR administrator creates manager and employee document, but some employee documents are not created. This message lists the employees for whom documents were not created.
DO-NOT-RESPOND_BDY	Manager and Employee	This is used in all notices.

Setting Up Document Templates

Document templates store information that is used to generate specific document instances for use by participants in the evaluation process. Options on the document template define the roles that participate in the review process and the abilities of each role, the steps in the review process, and the items that are evaluated.

The following diagram shows the relationship between the core ePerformance tables, document templates, and generated performance documents.

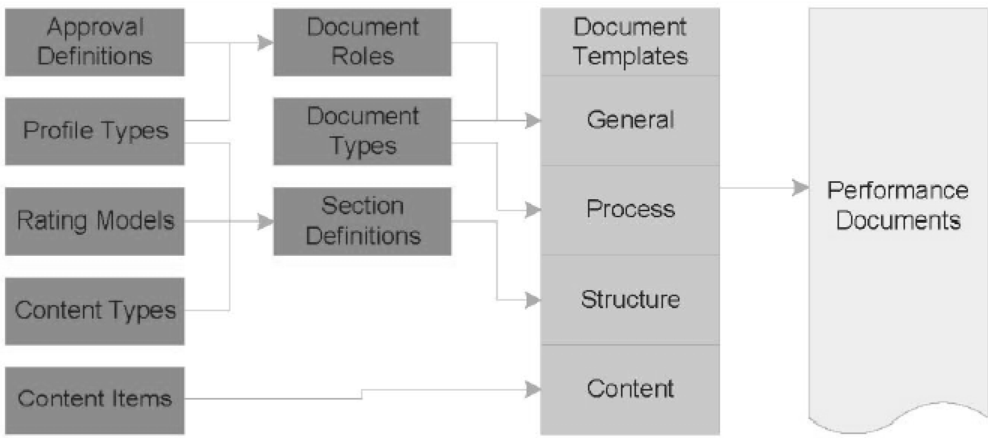


Figure 3: Relationship Between ePerformance Tables

The decisions that are made and the options selected when the templates are defined influence how the evaluation process is conducted in an organization. Organizations often define a high-level template and then successfully clone and modify this template for the appropriate level of the organization. For example, an organization might want a set of expectations and requirements for all employees. Each business unit clones this template with the common expectations and requirement and modifies it to add expectations and requirements that apply only to the business unit.

Before defining templates, consider the following:

- Which features are appropriate for the types of documents that are used in the organization. For example, some organizations use documents to enhance communication between managers and employees, and do not assign ratings; others assign and sign overall ratings; and still others rate each individual items (such as major responsibilities, requirements, or expectations) that is contained in the document.
- Ease of use and reuse when the document templates are designed. Limiting the number of templates that are created for each document type makes it easier to select the correct template when performance documents are generated and simplifies template maintenance.

- Meet the needs of large groups of employees. Job Profiles can be used to include job-specific competencies and responsibilities for all employees in a particular job, job family, position, or salary grade. By doing so, each employee's annual performance document has the same general appearance and instructions, but includes the competencies and responsibilities that are relevant to the particular job.

For more information see:

Defining Document Types 16
Defining Roles 21
Defining Sections 26
Creating Document Templates 39

Defining Document Types

To define document types, use the Document Type (EP_REVIEW_TYPE_TBL) component.

Before document types are created with the plan to use profile types as the content source of performance and development documents, define profiles in the Manage Profile business process.

This section provides an overview of document types and discusses how to set up document types.

Document types identify the types of documents that are valid for an organization, such as Annual, Semi-Annual, Quarterly, Project, and Performance Improvement Plan. They are used to create document templates and provide default values for many fields on the template.

Document types also define whether:

- The document is to be used as the official review for integration with Salary Planning.
- The employee, manager, or both can generate documents.
- The document can be cloned.
- The user or the profile type identifies the document template.
- An approval process is used during the review process.

To Access the Document Types Page:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Document Structure*** menu item.

5. Select the ***Document Types*** component. The Document Types page - Find an Existing Value tab is displayed.

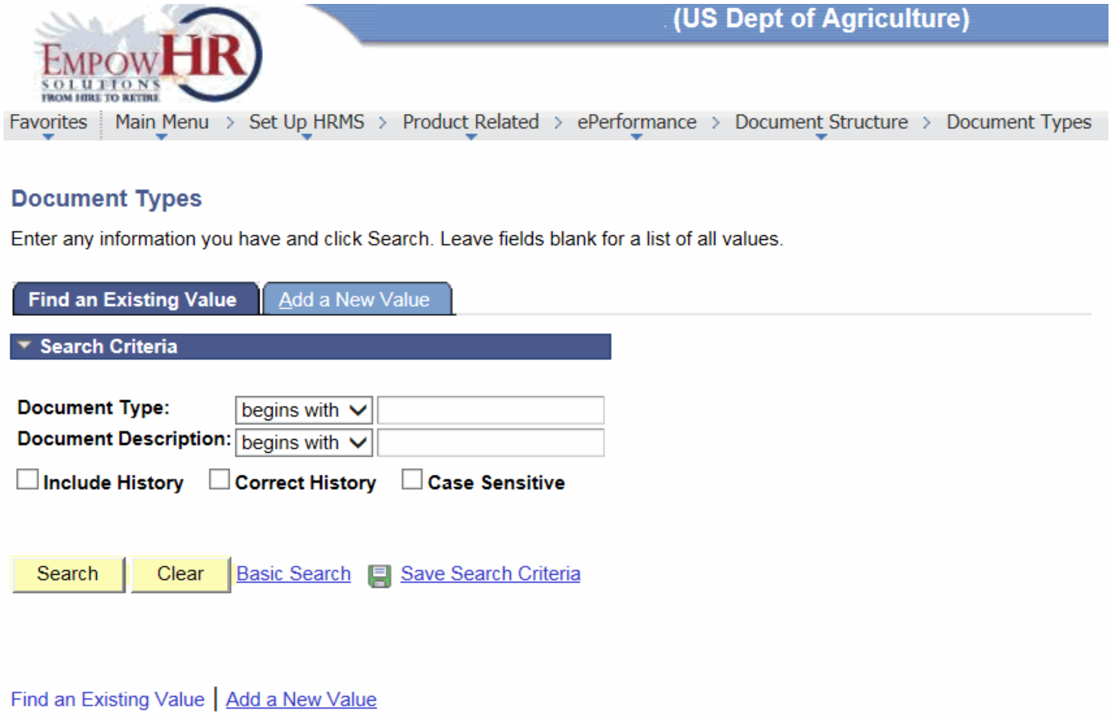


Figure 4: Document Types Page - Find an Existing Value Tab

6. Complete the fields as follows:

Field	Instruction
Document Type	Enter the document type.
Document Description	Enter the document description.
Include History	Check this box if the search criteria contains history.
Correct History	Check this box if the search criteria is being used for history correction.
Case Sensitive	Check this box if the search criteria is case sensitive.

Note: Both fields may be entered to narrow the search.

7. Click **Search**. The Document Types page is displayed.

OR

Click **Cancel** to clear the information entered on the page.

OR

Select the ***Add a New Value*** tab. The Document Types page - Add a New Value tab is displayed.

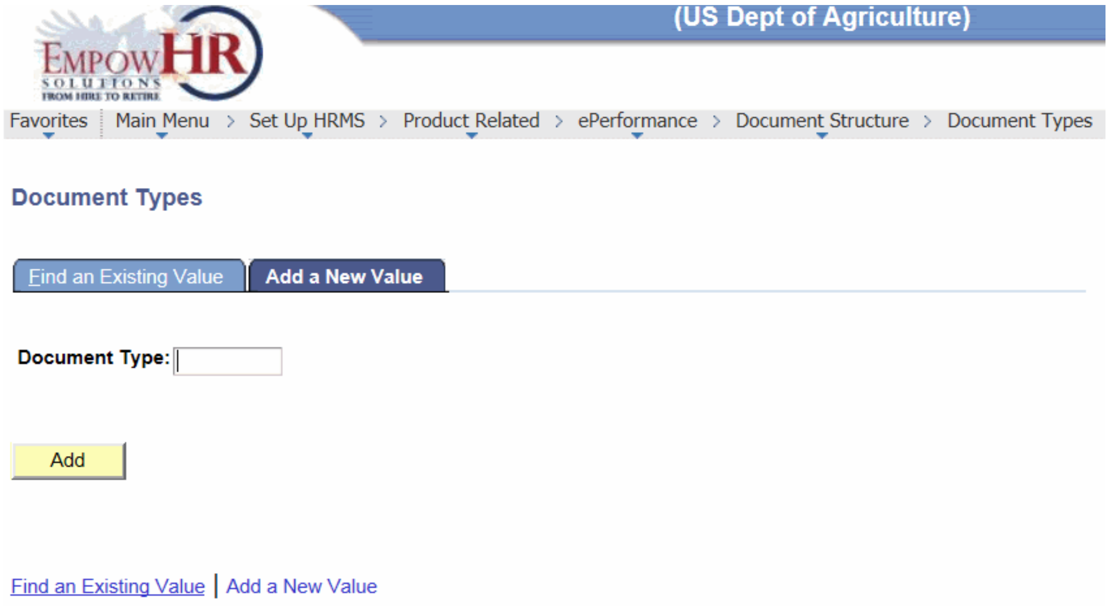


Figure 5: Document Types Page - Add a New Value Tab

8. Complete the field as follows:

Field	Instruction
Document Type	Enter a new document type.

9. Click **Add**. The Document Types page is displayed.

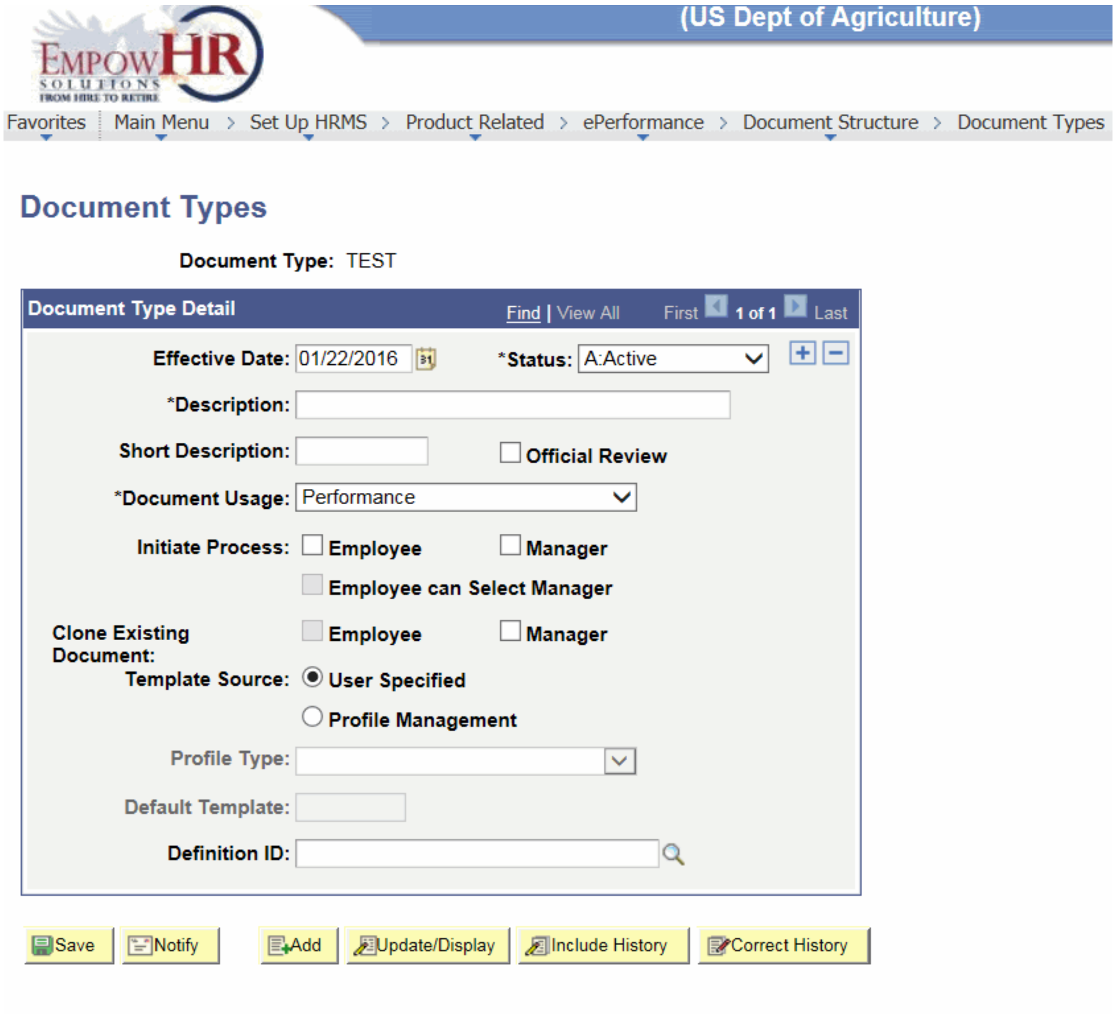


Figure 6: Document Types Page

10. Complete the fields as follows:

Field	**Description/Instruction**
Document Type	Populated from the search criteria entered.
Document Type Detail	**Instruction**
Effective Date	Enter/modify the effective date that the document type detail is effective or select a date from the calendar icon.
***Status**	Required field. Select the status from the drop-down list. Valid values are `Active` and `Inactive`.
***Description**	Required field. Enter the document type detail description.
Short Description	Enter the short description for the description of the document type detail.

Field	Description/Instruction
Official Review	Select this box to designate that documents generated for this document type are used by the Salary Planning by Group process to retrieve rating and review points and, by the Salary Increase Matrix page to retrieve ratings.
***Document Usage**	Required field. Select the applicable document type usage from the drop-down list. Valid values are as follows: `Performance` - Indicates EmpowHR uses this document type for performance planning or evaluation. Performance documents appear on the manager or employee self-service pages under the ***My Performance Documents*** menu or on the Administrator pages under ***Workforce Development>Performance Management>Performance Documents***. `Development` - Indicates EmpowHR uses this document type for employee development (Individual Development Plan (IDP)). Development documents appear in the ***My Development Document*** menu on the Self-Service pages or under the ***Development Documents*** menu on the Administrator pages.
Initiate Process	**Instruction**
Employee	Select this box to indicate if the role or roles can initiate the evaluation process. More than one box may be selected. The value in this field determines if the employee can select the document type when initiating the evaluation process.
Manager	Select this box to indicate if the role or roles can initiate the evaluation process. More than one box may be selected. The value that is in this field determines if the manager can select the document type when initiating the evaluation process.
Employee can Select Manager	Appears only if the Employee check box is selected for the Initiate Process field. Select this check box to enable an employee to select the person who is acting in the manager role during the evaluation process.
Clone Existing Document	**Instruction**
Employee	Select employee check box to indicate which role or roles can clone an existing comment to create a new document. More than one box may be selected. The employee check box is only available if the corresponding check box is selected in the Initiate Process field.
Manager	Select manager check box to indicate which role or roles can clone an existing comment to create a new document. More than one box may be selected. The manger check box is only available if the corresponding check box is selected in the Initiate Process field.
Template Source	**Instruction**
User Specified	Select this option to identify where EmpowHR obtains the document template to be used to generate documents. Indicates that the user initiating the document creation process must identify the template.

Field	Description/Instruction
Profile Management	Select this option to identify where EmpowHR obtains the document template that is to be used to generate documents. Indicates that the template comes from the Manage Profile business process. EmpowHR identifies the template by using the information entered in the Profile Type and the employee's job information.
Profile Type	Available if the Profile Manager option in the Template Source field is selected. Select the profile type used by the Create Documents process to identify the document template. The list contains only nonperson profile types that have an ePerformance template included as a related object in the Profile Association Options group box on the Profile Types Associations page. The valid values are based on the default templates created.
Default Template	Available if the Profile Management option in the Template Source field is selected. Select the template used to generate the documents for this document type when EmpowHR cannot identify a template for the give profile type. Note: Because document types are defined before templates, return to the Document type page after the default template is defined and enter the value for this field.
Definition ID	Select the approval definition for documents of this type. The definition ID determines the chain of approvals a document must go through, if any, when a manager clicks **Submit** on a document. The value that is selected here becomes the default value for the Definition ID field on the Document Types page for templates of the document type. To enter/change select data by clicking the search icon.

11. Click **Save**. At this point, the following options are available:

Step	Description
Click **Notify**	Advances to the Send Notification page.
Click **Add**	Returns to the Document Types page - Add a New Value tab.
Click **Update/Display**	Returns to the Document Types page - Find an Existing Value tab.
Click **Include History**	Returns to the Document Types page - Find an Existing Value tab with Include History checked.
Click **Correct History**	Returns to the Document Types page - Find an Existing Value tab with Correct History checked.

Defining Roles

To define roles, use the Document Roles (EP_ROLE_TBL) component.

This section provides an overview and discusses how to set up roles that provide for multi-participant feedback.

ePerformance enables the user to include feedback from participants other than the employee and employee's manager, (e.g., peers or customers). To implement multi-participant feedback processes, first define the roles that can participate in the process. After the roles are defined, add them to a document template definition that is used in the multi-participant process.

For more information see:

Setting Up Roles..22

Setting Up Roles

ePerformance delivers the manager and employee roles as system data. Other roles are available and can be configured.

Manager or employee roles cannot be modified, inactivated, or deleted. They are required.

To Access the Document Role Page:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Document Structure*** menu item.

5. Select the ***Document Roles*** component. The Roles page - Find an Existing Value tab is displayed.

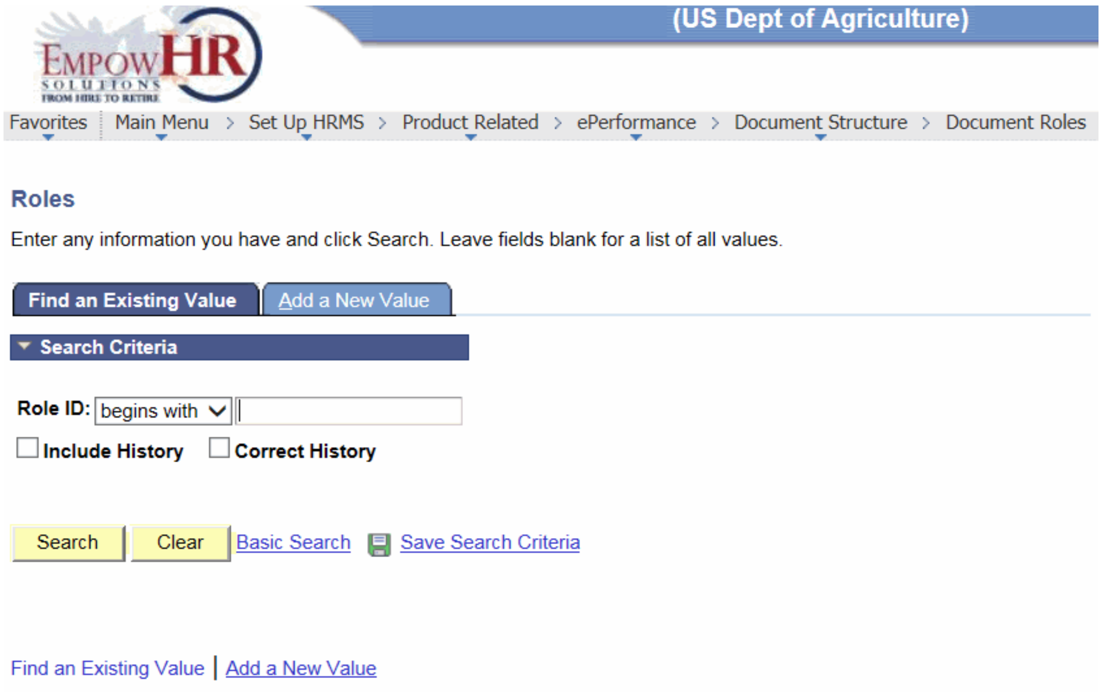


Figure 7: Roles Page - Find an Existing Value Tab

6. Complete the fields as follows:

Field	Instruction
Role ID	Enter the role ID (name).
Include History	Check this box if the search criteria contains history.
Correct History	Check this box if the search criteria is being used for history correction.

7. Click **Search**. The Role page is displayed.

OR

Click **Clear** to clear the information entered on the page.

OR

Select the ***Add a New Value*** tab. The Roles page - Add a New Value tab is displayed.

Figure 8: Roles Page - Add a New Value Tab

8. Complete the field as follows:

Field	**Instruction**
Role ID	Enter the role ID (name).

9. Click **Add**. The Role page is displayed.

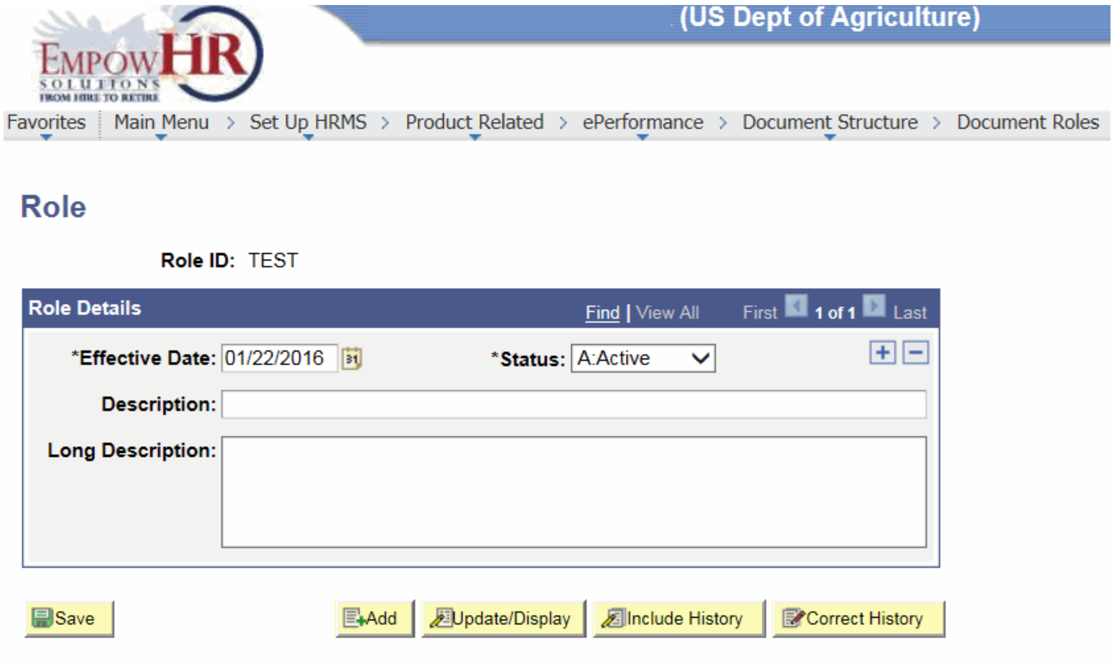


Figure 9: Role Page

10. Complete the fields as follows:

Field	Description/Instruction
Role ID	Populated with the role name found/entered on the search/add criteria page.
Role Details	**Instruction**
***Effective Date**	Required field. Enter the effective date of the role or select a date from the calendar icon.
***Status**	Required field. Defaults to **`Active`**. To change, select data from the drop-down list. Valid values are **`Active`** and **`Inactive`**.
Description	Enter the description of the role.
Long Description	Enter the long description of the role (what the role consists of).

11. Click **Save**. At this point, the following options are available:

Step	Description
Click **Add**	Returns to the Roles Page - Add a New Value tab.
Click **Update/Display**	Returns to the Roles Page - Find an Existing Value tab.
Click **Include History**	Returns to the Roles Page - Find an Existing Value tab with Include

Step	Description
	History checked.
Click **Correct History**	Returns to the Roles Page - Find an Existing Value tab Correct History checked.

Defining Sections

To create document sections, use the ***Section Definition*** (EP_SECTION_DEFN) component.

Sections are another building block for document templates. They form the structure of a performance or development document. For example, the organization may want its performance evaluations to include:

- Major duties
- Performance requirements
- Expectations
- Mission statement of the organization
- Department initiative for meeting the mission statement
- Employee goals
- Employee competencies, responsibilities, or learning
- Employee comment section
- Manager and/or reviewer comment section
- Signatures section

Each of these are separate section definitions that can be added to the document template. The following illustrates an example of the relationship between sections, templates, and generated documents.

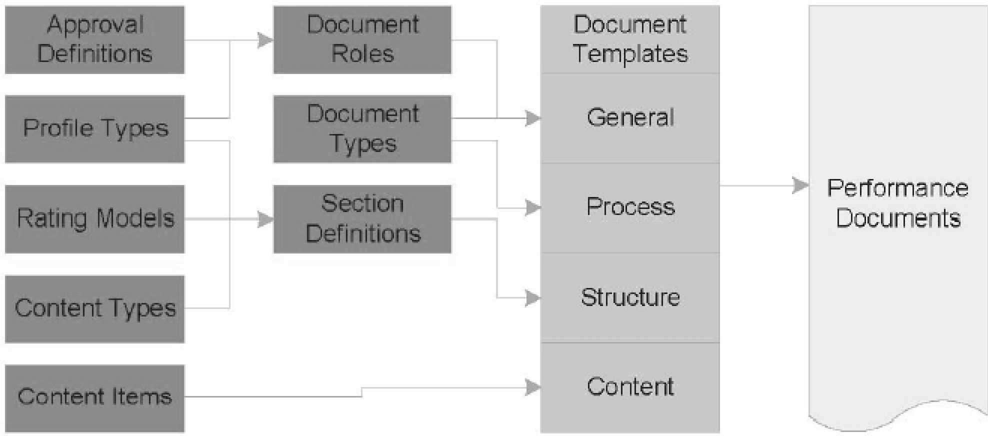


Figure 10: Relationship between ePerformance Tables

When defining sections, specify the following:

- Whether the section is rated or weighted
- Which calculation method is used to determine employee ratings
- Which rating modes are used to rate employees
- What special processing applies to that section (if any)
- What category of content types are associated with the section
- What information to include in the document

ePerformance delivers a wide range of section definitions and can be configured to meet business needs. The following are the delivered and configured section definitions:

- Performance Requirements
- Major Duties
- Expectations
- Competency
- Employee (employee comments)
- Goals
- Ini (initiatives)
- Learning
- Manager (manager comments)

- Reviewer (reviewer comments)
- Mission
- Resp (responsibility)
- Sign (signature)
- Summary (overall summary)

Before creating section definitions, complete the following:

- Define rating models
- Define content types
- Define profile types (optional)

The detailed information is used later to populate the fields on the Structure page - Template Definition tab for the specified section. The description entered here is used to identify the section the user wants to add on the Template Definition page.

To Access the Section Definition Page:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Document Structure*** menu item.

5. Select the ***Section Definition*** component. The Section Definition page - Find an Existing Value tab is displayed.

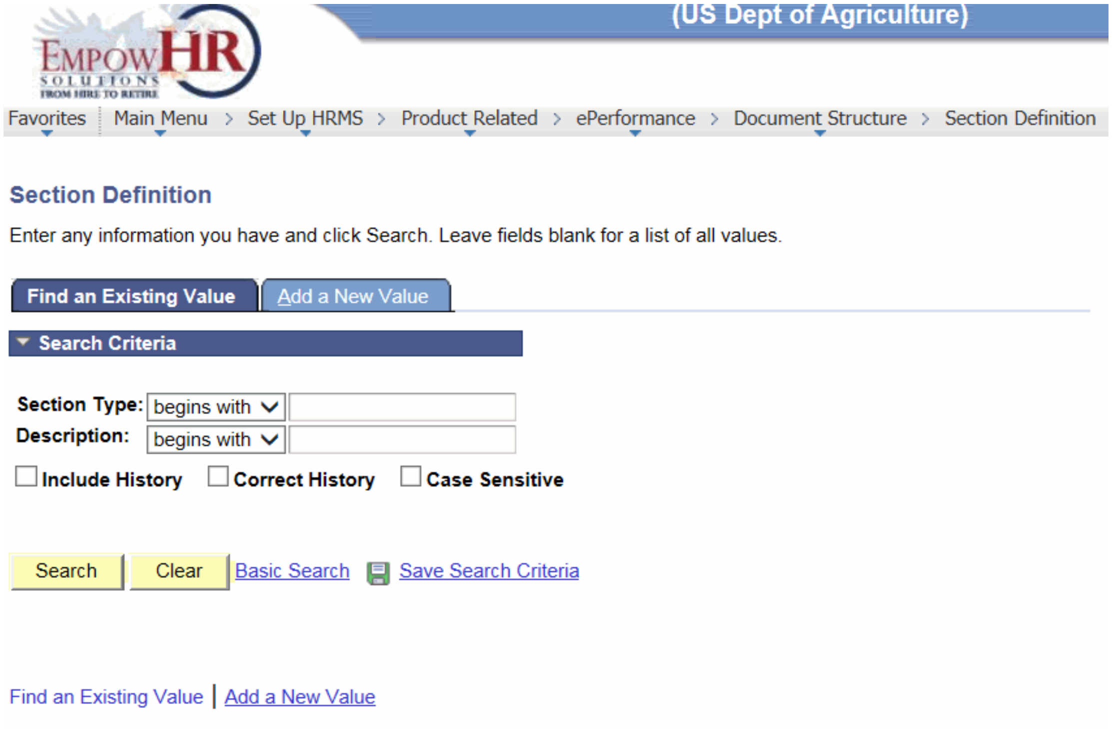


Figure 11: Section Definition Page - Find an Existing Value Tab

6. Complete the fields as follows:

Field	Instruction
Section Type	Enter the section type.
Description	Enter the description of the section definition.
Include History	Check this box if the search criteria contains history.
Correct History	Check this box if the search criteria is being used for history correction.
Case Sensitive	Check this box if the search criteria is case sensitive.

Note: Both fields may be entered to narrow the search.

7. Click **Search**. The Section Definition page is displayed.

OR

Click **Clear** to clear the information entered on the page.

OR

Select the ***Add a New Value*** tab. The Section Definition page - Add a New Value tab is displayed.

Figure 12: Section Definition Page - Add a New Value Tab

8. Complete the field as follows:

Field	Instruction
Section Type	Enter the name for the section.

9. Click **Add**. The Section Definition page is displayed.

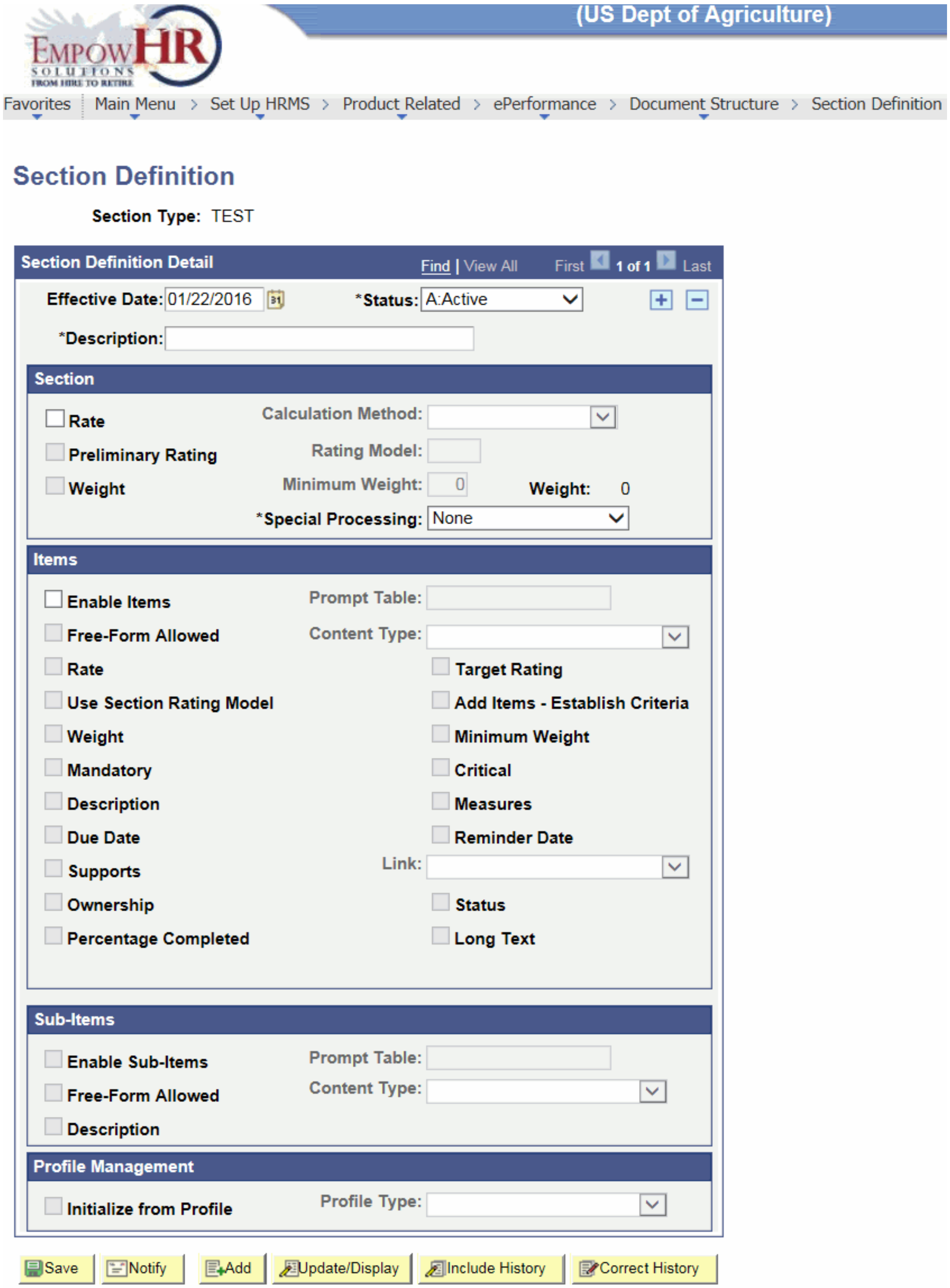


Figure 13: Section Definition Page

10. Complete the fields as follows:

Field	Description/Instruction
Section Type	Populated with the section type found/entered on the Search/Add Criteria page.
Section Definition Detail	**Instruction**
Effective Date	Enter the effective date of the role or select a date from the calendar icon.
***Status**	Required field. Defaults to **Active**. To change, select data from the drop-down list. Valid values are **Active** and **Inactive**.
***Description**	Required field. Enter the description of the section.
Section	**Instruction**
Rate	Available if **Learning**, **None**, or **Overall Summary** is selected in the Special Processing field. Select this check box to enable a rating assignment for the section, either by a system calculation or manually. A Rating field appears in the section summary of a document.
Calculation Method	Available if the Rate check box is selected and the Special Processing field is set to **Learning**, **None**, or **Overall Section**. Select the calculation method used for the section. Valid values are **Average**, **Summation**, and **Review Band**.
Preliminary Rating	Available if the Rate check box is selected and the Special Processing field is set to **Overall Section**. Select this check box to enable a manager to enter a preliminary rating for the performance document.
Rating Model	Available if the Rate check box is selected and the Special Processing field is set to **Learning**, **None**, or **Overall Section**. Enter the rating model or select data by clicking the search icon.
Weight	Available if the Rate check box is selected and the Special Processing field is set to **Learning** or **None**. Select this check box to enable the section to have a weighting relative to the other sections in the document. A Weight Section field appears in the section summary. The user cannot weight sections of a performance document when a Calculation Method of **Summation** or **Review Band** for the Overall Summary section is selected and elect to have EmpowHR calculate performance ratings. (Enters calculation instructions through the Template Definition component.)

Field	Description/Instruction
Minimum Weight	Available if the Weight check box is selected. Enter the minimum weight for the section. This field is used when ratings are calculated to ensure that the section weight cannot fall below a minimum value.
Weight	Available if the Weight check box is selected. Enter the default weight for a section.
***Special Processing**	Required field. Determines the type of information that is entered in this section and how EmpowHR processes the information. Select data from the drop-down list. Valid values are as follows: **Employee Comments** - Used by employees to enter and edit comments on the manager's performance evaluation when the evaluation status is **Available for Review**, **Review Held**, or **Acknowledged**. This type of special processing allows the employee to enter their comments regarding the manager's assessment of the employee's performance on the Manager Evaluation. When selected, all fields on this page become unavailable. **Learning** - Used by employee and managers to add or view learning information from Learning Management. Only the Rate and Weight check boxes are available. **Manager Comments** - Used by managers to enter comments, in response to the employee's comments, on the performance evaluation when the evaluation status is **In Progress**, **Available for Review**, **Review Held**, or **Acknowledged**. When selected, all fields on this page become unavailable. **None** - No special processing options apply, select **None**. Most likely, the user selects this option when creating a section for a mission statement, initiatives, goals and objectives, competencies, or responsibilities. **Overall Summary** - Contains the overall rating for the document. A document template can include only one section that is set to **Overall Summary**. When selected, all fields on this page except the Rate Section and Summary fields become unavailable. **Signatures** - A predefined signature section appears on the printed version of the evaluation. This section consists of two signature rows: the first for the employee, the second for the manager. Each row includes a signature line and a date. To change the format of the signature lines in this section, modify the Text Catalog feature. When selected, all fields on the page except the Summary field become unavailable. Note: The Text Catalog entry for defining the signature format is APPR_MAINI_INST2 for evaluations and APPR_BASE_SEC_DESC for Established Criteria document. The section type context key for both equals SIGN

Note: The fields in this group box are available if the Special Processing field is set to **`None`**. The fields in this page region determine if the section on the document can contain content items such as mission statements, initiatives, goals or objectives, competencies, responsibilities, or free-form items. A section must contain all items of the same content type. Items are evaluated or tracked depending on the rules specified. Typically, Employee Comments, Manager Comments, Overall Summary, and Signatures sections do not include content items.

Field	Instruction
Enable Items	Available if the Special Processing field is set to **`None`**. Select this checkbox if the section can contain items. When this check box is selected, the other fields in this page region are enabled.
Prompt Table	Available if the Enable Items check box is selected and applies for only content items. Select the name of the table that holds the content items that the user wants included in the section. Select data by clicking the search icon.
Free-Form Allowed	Available if the Enable Items check box is selected. Select to enable users to add free-form items to this section of a document or template. For example, managers might use this feature to add a list of courses that an employee should take. EmpowHR assigns a unique identifier to each free-form item that is added. These items are not stored for reuse.
Content Type	Available if the Enable Items check box is selected. Select the content type from which content items (job attributes) are pulled when defining the criteria used to evaluate employees' performance on the Content page - Template Definition tab. Valid options are any content types defined in the content catalog in the Manage Profiles business process. Select data from the drop-down list.
Rate	Available if the Enable Items check box is selected. Select this check box to enable a rating assignment for the section, either by a system calculation or manually. The Rating Model field appears on the Content page - Template Definition tab, and a Rating field appears in the section summary on the performance document.
Target Rating	Available if the Rate check box is selected. Select this check box to indicate that content items can have a target proficiency rating assigned on the Content page - Template Definition tab. The target proficiency rating displays on the performance document for the content items.
Use Section Rating Model	Available if the Enable Items check box is selected and a rating model is entered in the Rating Model field in the Section group box. Select this check box to have the rating model for all items and subitems on the document template default to the section rating model.

Field	Instruction
Add Items - Establish Criteria	Available if the Enable Items check box is selected. Select this check box to enable a manager, employee, or peer to add items or subitems for the section on the Establish Criteria document. Note: The specific roles and whether they can add items or subitems to their evaluations are defined in the Section Role grid when this section in a document template is included.
Weight	Available if the Rate check box is selected. Select this check box to enable the item in the section to have a weighting relative to the other items in the section. A Weight Section field appears in the section summary. The user cannot weight sections of a performance document when a calculation method of Summation or Review Band for the Overall Summary section is selected and elects to have EmpowHR calculate the performance rating. (Enter calculation instruction through the Template Definition component.)
Minimum Weight	Select this check box if items can have a minimum weighting. Minimum weights are entered on the Structure page - Template Definition tab. During the evaluation process, managers can click an update link on the evaluation to edit the minimum weight.
Mandatory	Available if the Enable Items check box is selected. Select this check box if the document author cannot edit or delete items. This applies to all items, regardless of whether they are defined on the template or job profile.
Critical	Available if the Enable Items check box is selected. Select this check box to indicate that times can have a critical indicator.
Description	Available if the Enable Items check box is selected. Select this check box to have the description that is defined for the item appear on the document. For example, if the section pertains to responsibilities and this check box is selected, the document includes the description that is defined on the Items Detail page - Content Items tab.
Measures	Available if the Enable Items check box is selected and is designed for use by free-form items. Select this check box to display the Measurement field on the Content page - Template Definition tab. Measurements describe the standards against which performance is compared.

Field	Instruction
Due Date	Available if the Enable Items check box is selected. Select this check box to have items include a due date on the document. For example, managers might enter a due date by which an employee must become proficient in a certain competency or attain a particular goal. During the evaluation process, managers can update the due date.
Reminder Date	Available if the Enable Items check box is selected. During the evaluation process, managers can click an update link on the evaluation to edit the reminder date.
Supports	Available if the Enable Items check box is selected. Select this check box to enable the association of items in this section with items in a different section of the same review. This field works in conjunction with the Link field.
Link	Available if the Supports check box is selected. This enables the user to indicate that the current section supports another section, similar to cascading objectives. This association displays as informational information on the performance document.
Ownership	Available if the Enable Items check box is selected. Select this check box to have items contain an Owner field that indicates who is responsible for the item: the employee or the manager. The flag is informational only; it does not cause any special processing to occur. During the evaluation process, managers can click the update link on the evaluation to edit the Owner field.
Status	Available if the Enable Items check box is selected. Select this check box to have items in the section of a document include a field that identifies the status of the item. The possible statuses are **`Complete`**, **`In Progress`**, and **`N/A (Not Applicable)`**.
Percentage Completed	Available if the Enable Items check box is selected. Select this check box if on a document it can include a field for entry of the percentage complete. Employees and managers can use this field for entry of the percentage complete. Employees and manager can use this field to indicate progress towards certain goals.
Long Text	Check this box if applicable.

Note: Fields in this group box are available if the Enable Items check box in the Items group box is selected.

Field	Instruction
Enable Sub-Items	Select this check box to indicate the section can contain subitems. Although subitems are typically subcompetencies, this is not a requirement. For example, the user might create free-form subitems for responsibilities.

Field	Instruction
Prompt Table	Select the name of the table that holds the subitems that are included in the section. Select data by clicking the search icon.
Free-Form Allowed	Available if the Enable Sub-items check box is selected. Select this check box to add free-form (non-coded) subitems to this section.
Content Type	Available if the Enable Sub-items check box is selected. Select the content type from which content items to be selected. The content types available for selection are those that have been set up as a child of the content type selected in the Content Type field of the Items Section. Select data from the drop-down list. Valid values are `Competency`, and `Sub-Competency`.
Description	Select this check box to have the description for the subitem appear on the evaluation. During the evaluation process, managers can click an update link on the evaluation to edit the description for the subitem.

Note: This group box is used to identify whether the user wants to download criteria from a nonperson profile.

Field	Instruction
Initialize from Profile	Available only when the Special Processing field is set to `None`. Select this check box if the user wants the competencies or responsibilities that are associated with a profile type automatically loaded from the profile into the template or document.
Profile Type	Available if the Initialize from Profile check box is selected. These profile types are defined in the Manager Profiles business process with a Profile equal to `Person`. Select the profile type or select data from the drop-down list.

11. Click **Save**. At this point, the following options are available:

Step	Description
Click **Add**	Returns to the Roles Page - Add a New Value tab.
Click **Update/Display**	Returns to the Roles Page - Find an Existing Value tab.
Click **Include History**	Returns to the Roles Page - Find an Existing Value tab with Include History checked.
Click **Correct History**	Returns to the Roles Page - Find an Existing Value tab Correct History checked.

For more information see:

Ratings and Weighting 38
Calculation Methods 38
Special Processing 39

Ratings and Weighting

Some sections may be rated, such as employee responsibilities or competencies. Other sections, such as Major Duties (mission statements), may be what the user would want to use in the rating. The user may want to weigh the sections that are rated higher than others. Weighting a section or item in the section enables the user to place more or less importance on the section or item.

Calculation Methods

If your organization rates employee performance, EmpowHR can calculate the employee's performance rating or manually enter the ratings. ePerformance delivers three different calculation methods. Calculation methods are configurable to meet the business need.

Calculation Method	Description
Average	To use this method, the rating models associated with the section and its items must define numeric ratings that correspond to the rating descriptions. EmpowHR uses the numeric ratings to calculate a weighted average if weights exist; otherwise, it calculates a straight average. It then converts this average back to a performance document rating, again using the rating model.
Summation	To use this method, the rating models that are associated with the section and its items must define review points. The rating model for the section must also define point ranges (from points and to points). EmpowHR converts this total into the corresponding review rating for the section by using the point range on the rating model. Weights are ignored. Item ratings are not used in the summation method.
Review Band	This method is similar to the Summation method, but is only available for the Overall Summary section of a document. To use this method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). During the calculation process, EmpowHR computes the total review points across all sections and converts this total into the equivalent rating on the document band.

Special Processing

Special processing determines a sections use and the fields that are enabled in the Section, Item, and Sub-Items group boxes on the Section Definition page.

ePerformance provides the following type of special processing.

If Special Processing Is	Then the Section
Employee Comments	Cannot be rated nor weighted. Cannot have items nor subitems.
Learning	Can be rated and weighted. Cannot have items nor subitems.
Manager Comments	Cannot be rated nor weighted. Cannot have items nor subitems.
None	Can be rated and weighted. Can have items nor subitems.
Overall Summary	Can be rated and weighted. Cannot have items nor subitems.
Signatures	Cannot be rated nor weighted. Cannot have items nor subitems.

Creating Document Templates

To create document templates, use the Template Definition (EP_TMPL_DEFN) component.

This section discusses how to:

- Define general template information.
- Define document processes.
- Define document structure.
- Add criteria to sections.
- Loan content from profiles.
- Clone Templates.

Before the document templates are created, complete the following tasks:

- Set up the content catalog.

- Define job profiles (optional).
- Set up rating models.
- Define document types.
- Define document roles.
- Define section definitions.

Note: The template cannot be created without a document type, and a template must contain at least one section with a manager role selected.

For more information see:

Defining General Template Information..40
Cloning Template Definitions 68

Defining General Template Information

The information that is specified on this page controls the sections that are available on other pages of the component.

Document templates are defined using four tabs. Below are the steps to complete the four tabs.

To Set Up Template Information:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Document Structure*** menu item.

5. Select the ***Template Definition*** component. The Template Definition page - Find an Existing Value tab is displayed.

Figure 14: Template Definition Page - Find an Existing Value Tab

6. Complete the fields as follows:

Field	Instruction
Document Type	Select the document type.
Document Template ID	Enter the document template ID that corresponds to the document type.
Effective Date	Enter the effective date for the template definition.
Description	Enter the description of the document type.
Case Sensitive	Click this field if the search criteria is case sensitive.

Note: All fields may be entered to narrow the search.

7. Click **Search**. The Template Definition page - General tab is displayed.

OR

Click **Clear** to clear the information entered on the page.

OR

Select the ***Add a New Value*** tab. The Template Definition page - Add a New Value tab is displayed.

Figure 15: Template Definition Page - Add a New Value Tab

8. Complete the fields as follows:

Field	Instruction
Document Type	Enter the document type.
Document Template ID	Enter the document template ID that corresponds to the document type.
Effective Date	Enter the effective date for the template definition or select a date from the calendar icon.

9. Click **Add**. The Template Definition page - General tab is displayed.

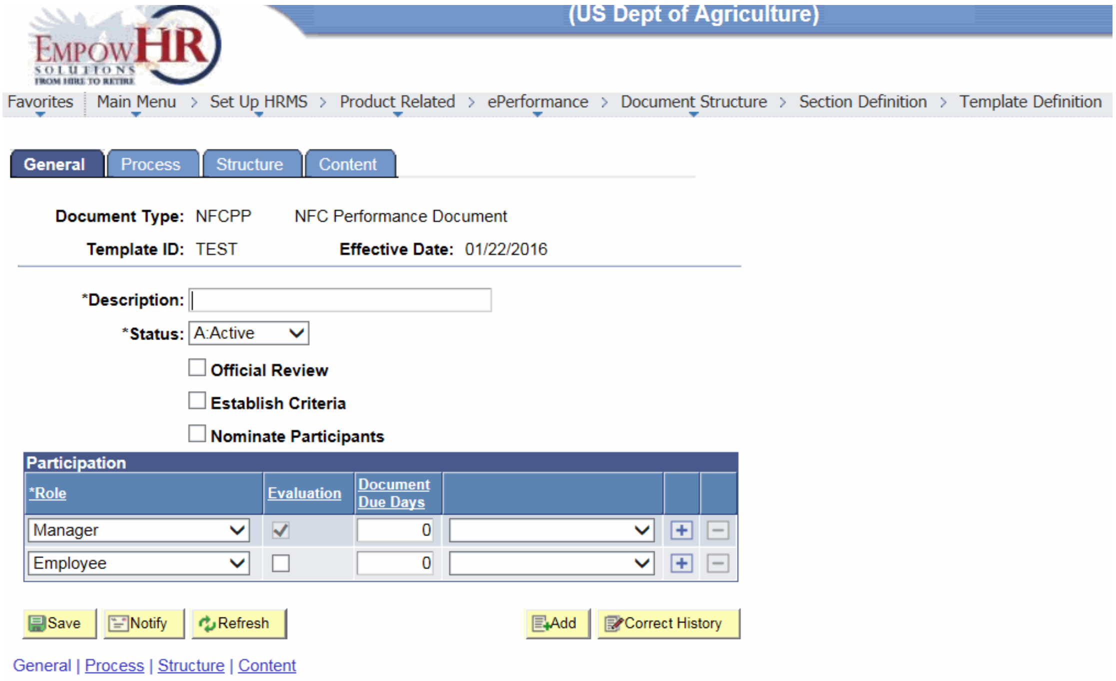


Figure 16: Template Definition Page - General Tab

The General tab defines processing options, establishes criteria and nominates participants, and defines what roles participants can be in the performance or development process. The user can also designate that documents using this template are recognized by EmpowHR as the official review.

10. Complete the fields as follows:

Field	Description/Instruction
Document Type	Populated based upon the search criteria entered.
Template ID	Populated based upon the search criteria entered.
Effective Date	Populated based upon the search criteria entered.
***Description**	Required field. Enter a description of the document template. This description appears as a selection field when evaluations are created from the template; therefore, each template with a document type should have a unique description.
***Status**	Required field. Status of the document template. Select data from the drop-down list. Valid values are **`Active`** and **`Inactive`**.

Field	Description/Instruction
Official Review	Select this check box to designate that the overall rating from the manager’s documents generated with this template is to be used to update salary planning information. If the employee has more that one official document, these processes use the results of the document with the latest period end date. The default value from the Document Type page appears here, but can be changed. By selecting Official Review, the user indicates that the overall rating from the manager’s document generated with this template is to be used to update salary planning information.
Establish Criteria	Select this box to enable the Establish Criteria step. When this check box is selected, the Establish Criteria group box appears on the Template Definition page - Process tab and is a step on the Document Detail page. The default value from the Document Type page appears here, but can be changed. By selecting Establish Criteria, the step in the business process is activated. Establish Evaluation Criteria appears as the first step to be completed on the Current Performance Documents page - Document Details tab. EmpowHR also creates the Performance Criteria - Draft document, which allows the manager and/or employee to update and possibly add items to the performance critical document.
Nominate Participants	Select this check box to enable the Nominate Participants and Review Participant Feedback group boxes on the Performance Documents page - Process tab. By checking Nominate Participants, the business process, Nominate Participants, Track Nominations, and Review Participant Evaluations are activated and appear as steps on the Document Details page. EmpowHR also creates documents for each person that accepts the nomination.
Participation	**Instruction**
***Role**	Required field. Select one or more roles that can participate in evaluation that are generated using this document. The Manager and Employee roles always appear in this list. Additional roles can be added which are defined on the Roles page.
Evaluation	Select this check box to define whether an evaluation is created for the role. The check box for the manager roles is always selected and cannot be altered.

Field	Description/Instruction
Document Due Days	Enter the number of days that the document is due before or after the period end date. Documents always pertain to a specific period of time, defined by the period begin and period end dates. These dates are established when the document is created. The document due date appears on the Employee Performance page that managers can use to monitor pending performance documents. The due date is also used to generate the Late Reviews report and to run the Create Summary Data process. Managers can use the Change Due Dates page to change the due date of the employee's document. HR administrators can use the same page to modify the due date of the manager's document. The field next to the due days determines if 60 days is after the period end date or before the period end date. Select data from the drop-down list. Valid values are **`Before Period End Date`** and **`After Period End Date`**.

11. Select the ***Process*** tab. The Template Definition page - Process tab is displayed.

Note: The Template Definition page - Process tab will display differently based upon the selections made on the Template Definition page - General tab.

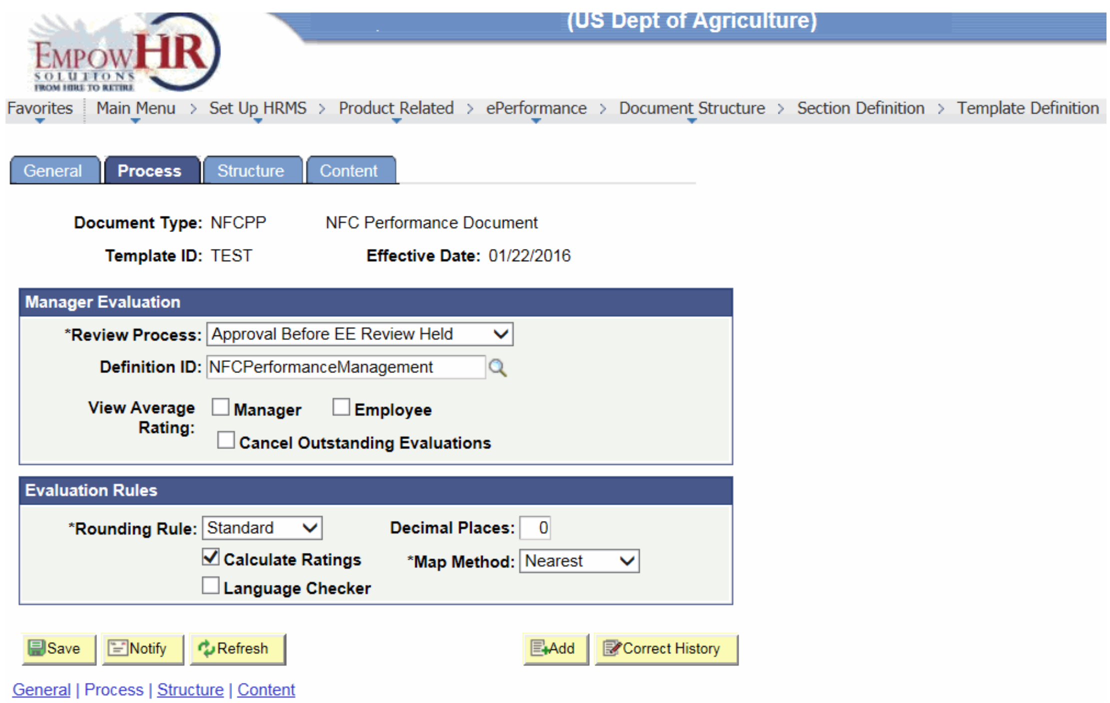


Figure 17: Template Definition Page - Process Tab

The Template Definition page - Process tab displays the processes required for the document based on the choices made on the Template Definition page - General tab. Select the actions that each role (or roles) can perform for each process, and specify whether the ratings that are entered by persons having that role are anonymous.

The information that is specified in the document process determines the functions that employees, managers, and other participants can perform in each step of the review process.

Specify approval rules for the manager's document and overall document processing rules on this page.

12. Complete the fields as follows:

Field	Description
Document Type	Populated based upon the search criteria entered.
Template ID	Populated based upon the search criteria entered.
Effective Date	Populated based upon the search criteria entered.

This section is used to set up the rules for the Establish Criteria process. It appears only if the Established Criteria check box is selected on the Template Definition page - General tab. The rules defined here determine the information that is displayed on the Current Performance Documents page - Document Details tab.

Establish Criteria	Instruction
Updated By/Employee	Select this check box to indicate the role that can update the criteria on documents.
Updated By/Manager	Select this check box to indicate the role that can update the criteria on documents.
Completed By	Select a role from the drop-down list that can complete or finalize the established criteria document. Valid values are **`Manager`** and **`Employee`**.
Due Date	Enter the number of days before or after the period end date when the establish criteria document is due.
Days	Select the days criteria from the drop-down list. Valid values are **`After Period End Date`** and **`Before Period End Date`**.

This section is used to set up the rules for the Nominate Participants process. It appears only if the Nominate Participants check box is selected on the General page. The rules defined here determines the information that is displayed on the Current Performance Documents page - Document Details tab.

Nominate Participants	Instruction

Nominate Participants	Instruction
Updated By/Employee	Select this check box to indicate the role that can nominate participants for a review.
Updated By/Manager	Select this check box to indicate the role that can nominate participants for a review.
Submitted By	Select the role that can submit the nominations to nominees. Only select a role that can update participants. Select data from the drop-down list. Valid values are **`Employee`** and **`Manager`**.
Tracked By/Employee	Select this check box to indicate the roles that can track nominations that are submitted. If this check box is selected, that the Track Nomination step appears in the Current Performance Documents page - Document Details tab. This enables the user to view the submitted nominations and track whether or not they have been accepted. If the user has access to this step, then they can also cancel the nominations that have not been accepted.
Tracked By/Manager	Select this check box to indicate the roles that can track nominations that are submitted. If this check box is selected, the Track Nomination step appears in the Current Performance Documents page - Document Details tab. This enables the user to view the submitted nominations and track whether or not they have been accepted. If the user has access to this step, then the user can also cancel the nominations that have not been accepted.
Due Date	Enter the number of days before or after the period end date when the nominations must be completed. This date appears on the Current Performance Documents page - Document Details tab.
Days	Select data from the drop-down list. Valid values are **`After Period End Date`** and **`Before Period End Date`**.

The Role grid contains one entry for each participant role other than the manager and employee who is defined on the Template Definition page - General tab.

Anonymity	Description/Instruction
Role	Populated from Template Definition page - General tab.
Minimum Required	Enter the minimum number of participants of this type that are required to participate in a review. For example, if the review requires at least three peers, the user must nominate at least three peers and they must accept the nominations before the review can proceed.
Maximum Allowed	Enter the maximum number of participants of this type that can participate in a review. For example, if the review maximum for peers is three, the user cannot submit nominations to four peers.
Anonymity for Employee	Select this check box to indicate that the employee is not able to see the names of the participants for this role when tracking nominees.

Anonymity	Description/Instruction
Anonymity for Manager	Select this check box to indicate that the manager is not able to see the names of the participants for this role when tracking nominees.

This section is used to setup the rules for the Review Participants Evaluations step. It appears only if the Nominated Participant check box is selected on the Template Definition page - General tab.

Review Participant Evaluations	
Accessed By/Employee	Select this check box to indicate the roles that can access participant feedback from the Document Details - Current Performance Documents - Current Performance Documents page.
Accessed By/Manager	Select this check box to indicate the roles that can access participant feedback from the Document Details - Current Performance Documents page.
Viewed By/Employee	Select this check box to be able to view completed evaluations from the participants. Only select a role that can access participant feedback.
Viewed By/Manager	Select this check box to be able to view completed evaluations from the participants. Only select a role that can access participant feedback.

The Role grid contains one entry for each participant role that is defined on the Template Definition page - General tab.

Role	Instruction
Anonymity for Employee	Select this check box to indicate that the employee is not able to see the names of the participants for this role when tracking nominees.
Anonymity for Manager	Select this check box to indicate that the manager is not able to see the names of the participants for this role when tracking nominees.

The Manager Evaluation region contains information for the managerial evaluation process.

Manager Evaluation	Instruction
***Review Process**	Required field. Identifies the process for reviewing a document with the employee, and when this review takes place relative to a formal approval of the document. It also controls when **Submit**, **Complete**, **Available for Review**, and **Review Held** are available to the manager. Select data from the drop-down list. Valid values are as follows: `Approval After Review Held` - If the document approval occurs after the manager reviews the completed document with the employee. `Approval Before Review Held` - If the approval must occur

Manager Evaluation	Instruction
	before the manager reviews the completed document with the employee. **Approval No Review Held** - If an approval process is required, but the manager does not need to review the document with the employee. **No Approval No Review Held** - If neither an approval process nor a review of the complete document is required. **No Approval Review Held** - If the manager reviews the completed comment with the employee, but no approval process applies.
Definition ID	Select the approval definition that determines the chain of approvals a document must go through when the manager clicks **Submit** on the performance document. The default values selected on the Document Type page appear here, but can be changed. This field applies only if the Review Process field is set to **Approval After Review Held**, **Approval Before Review Held**, or **Approval No Review Held**. Valid values are as follows: **Manager Only** - One-step approval process that routes the transaction to an approving manager. **Manager To Admin** - Two-step process that routes the transaction to an approving manager and then to the ePerformance Administrator. **Admin Only** - One-step approval process that routes the transaction to the ePerformance Administrator.
View Average Rating/Manager	Select this check box to view a graphical representation of the ratings on the document (for the manager).
View Average Rating/Employee	Select this check box to view a graphical representation of the ratings on the document (for the employee).
View Average Rating/Cancel Outstanding Evaluations	Select this check box to automatically cancel evaluations that are not completed and nominations that are not accepted when the managers evaluation moves to the **In Progress** status. This option prevents late evaluations from coming in and altering the average ratings.

The fields in this section define rules for calculating rating that apply to the document as a whole.

Evaluation Rules	Instruction
***Rounding Rule**	Required field. Specify how EmpowHR should round calculated ratings whenever using the Average calculation method. Select data from the drop-down list. Valid values are **Down**, **Standard**, and **Up**. With standard rounding, EmpowHR rounds up on 5 and rounds down on 4. (For example, 2.5 rounds to 3, while 2.4 rounds to 2.) This works in combination with the number of decimal places displayed. (For one decimal place, 2.45 rounds to 2.5, while 2.44 rounds to 2.4.)
Decimal Places	If the rounding rule is selected, enter the number of decimal places for

Evaluation Rules	Instruction
	rounding. No more than two decimal places are allowed.
Calculate Ratings	Select this check box to indicate that EmpowHR automatically performs all roll-up calculations to calculate an overall summary rating. This feature is the default and causes a **Calculate** button to appear on the evaluations. To have evaluators manually enter all ratings, clear this box.
***Map Method**	Required field. Click the down arrow to select the applicable method.
Language Checker	Select this check box to enable the use of the Language Checker tool when entering comments. Click the button on the document to have the system check for inappropriate language in the comments and results text boxes on the evaluation.

13. Select the ***Structure*** tab. The Template Definition page - Structure tab is displayed.

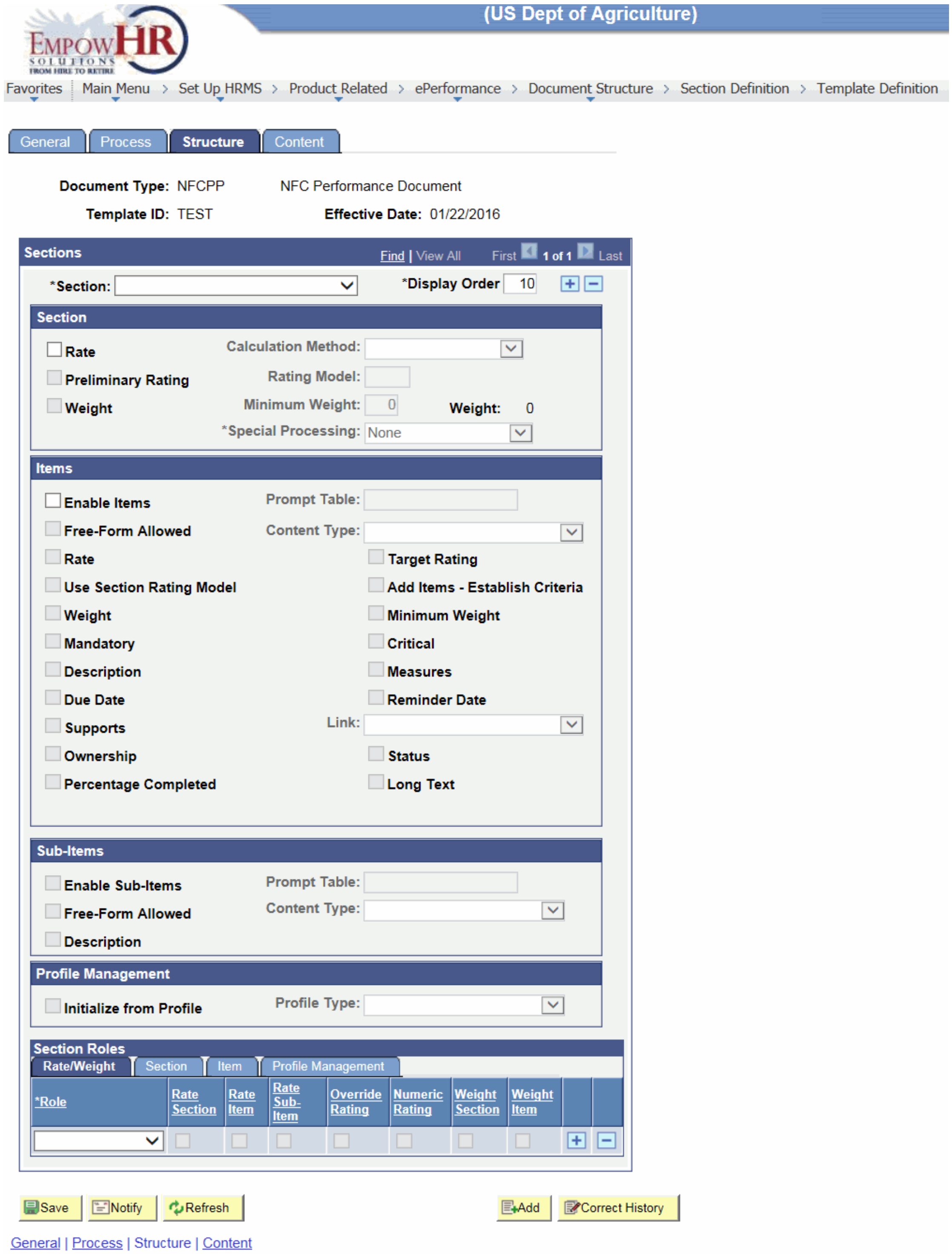


Figure 18: Template Definition Page - Structure Tab - Section Roles Region - Rate//Weight Tab

The Structure tab defines document structure, defines the sections that are included on documents, and adds appropriate sections to the template. The Structure tab allows the section settings to be overridden and defines the way each role interacts with the document section. If one or more sections are selected to be included in the document, the section definition is copied into the document template and can override any of the section settings.

For each section that is included in the document, specify how the document roles interact with that section; the actions that can be performed; the contact that is visible; and the writing tools that can be used to enter ratings and comments.

Multiple sections can be added that require ratings. These sections can be any content type defined in the Manager Profile business process such as goals, objectives, and competencies sections. Sections can also be defined to pull content from nonperson profiles created in the Manage Profile business process.

Each section may have different calculation methods. Because sections can be added that have different calculation methods, the following table illustrates how the calculation methods the other sections of the document can use and whether the calculation method permits section weighting:

Calculation Method for Overall Summary Section	Calculation Methods Allowed for Other Sections	Section Weighting Allowed?	Rating Calculations
Review Band	Average and Summation The review points must be added in addition to numeric ratings for these sections. EmpowHR converts section ratings to review points to determine the overall rating.	No	Only available for Overall Summary sections. To use this method, the rating model that is associated with the Overall Summary section must include a performance document band and define review points as well as point ranges (from points and to points). EmpowHR uses the points in its calculations and: Calculates the overall points by following the same steps as the summation method. Converts the overall points into the appropriate review band according to the rules defined on the Rating Model page.
Average	Average	Yes	To determine item ratings, enter the item rating. If subitems exist, EmpowHR calculates the item rating by taking the average of the subitem. To determine section ratings for sections other than Overall Summary, EmpowHR verifies if there are items that are rated. If there are no other rated items, enter the section rating. If there are rated

Calculation Method for Overall Summary Section	Calculation Methods Allowed for Other Sections	Section Weighting Allowed?	Rating Calculations
			items, the EmpowHR determines if any of the items are weighted. If there are weighted items - EmpowHR calculates the rating as a weighted average of all of the item ratings in the section, taking individual item weights into account. Unrated items and items that are not weighted are ignored. To determine overall ratings, the system verifies that there are other sections that are rated. If there are no other rated sections, enter the section rating. If there are rated sections, it determines if the sections are weighted. If there are: weighted sections - EmpowHR calculates the rating as a weighted average of all of the section ratings in the document, taking individual section weights into account. Unrated items and items that are not weighted are ignored. No weighted sections - EmpowHR calculates the simple average of all rated items. Unrated items are ignored.
Summation	Average and Summation The review points must be defined in addition to numeric ratings for these sections. EmpowHR converts section ratings to review points to determine the overall rating.	No	To determine section ratings for sections other than the Overall Summary section, EmpowHR determines the rating and corresponding review points for each item in the section. Only items with review points are considered. It sums the points to determine the total points for the section. To determine overall ratings, determine the calculation method for the other sections. If the section rating is calculated using the: average method - EmpowHR converts the section rating to the appropriate number of review points entered for that section, using the rating model associated with the section. Summation method - The total review points for the section are used as the section points. The points from each section are summed and converted to a document rating using the from and

Calculation Method for Overall Summary Section	Calculation Methods Allowed for Other Sections	Section Weighting Allowed?	Rating Calculations
			to point range on the rating model that is used for the Overall Summary section.

14. Complete the fields as follows:

Field	Description/Instruction
Document Type	Populated based upon the search criteria entered.
Template ID	Populated based upon the search criteria entered.
Effective Date	Populated based upon the search criteria entered.
Sections	**Instruction**
***Section**	Required field. Select a section to include in the documents that are generated from this template. The sections available for selection are those that were previously defined using the Section Definition page. When the section is selected, the information defined for that section becomes the default information for this section on the Structure tab. Override any default value. Note: There is only one Overall Summary section on each template.
***Display Order**	Required field. Enter a unique sequence number to specify the relative order in which this section appears in the document. The default value for the first section is `10`. EmpowHR increments the value for the subsequent sections by 10. (For example, the user overrides a sequence number to 25, the system assigns 35 as the next sequence number.) Note: If the sequence numbers are entered out of order, EmpowHR automatically reorders them when the user exits the ***Template Definition*** component and reopens it. Note: To complete the Section section refer to the completion instructions for the ***Defining Sections*** (on page 26).
Section Roles Section - Rate/Weight tab	**Instruction**
***Role**	Required field. Select the role. Valid values are **`Employee`** and **`Manager`**.
Rate Section	Available if **`Rate`** is selected for the section.

Field	Description/Instruction
	Select this check box to enable the author to assign a section rating.
Rate Item	Available if `Rate` is selected in the the Items page region for the section. Select this check box to enable the author to rate items in the section.
Rate Sub-Item	Available if `Rate` is selected in the Items page region for the section. Select this check box to enable the author to rate subitems in this section.
Override Rating	Available when the Calculate Ratings check box is selected on the Template Definition page. Select this check box to have an **Override Rating** button appear next to the **Calculate** button on the evaluation. The author can click this button to notify the calculated rating.

Note: Do not use this feature with the Summation Calculation Method.

Field	Instruction
Numeric Rating	This option is available if Rate is selected for this section. Select this check box to have the evaluation display both the rating and the numeric equivalent points of the rating that is defined on the Rating Model Definition page.
Weight Section	This option is available if Weight Section is selected for the section. Select this check box to enable the author to assign a section weighting.
Weight Item	This option is available if Weight Section is selected for the section. Select this check box to enable the author to weight items in this section.

To Complete the Remaining Tabs of the Section Roles Region:

1. Select the ***Section*** tab. The Template Definition page - Structure tab - Section Roles region - Section tab is displayed.

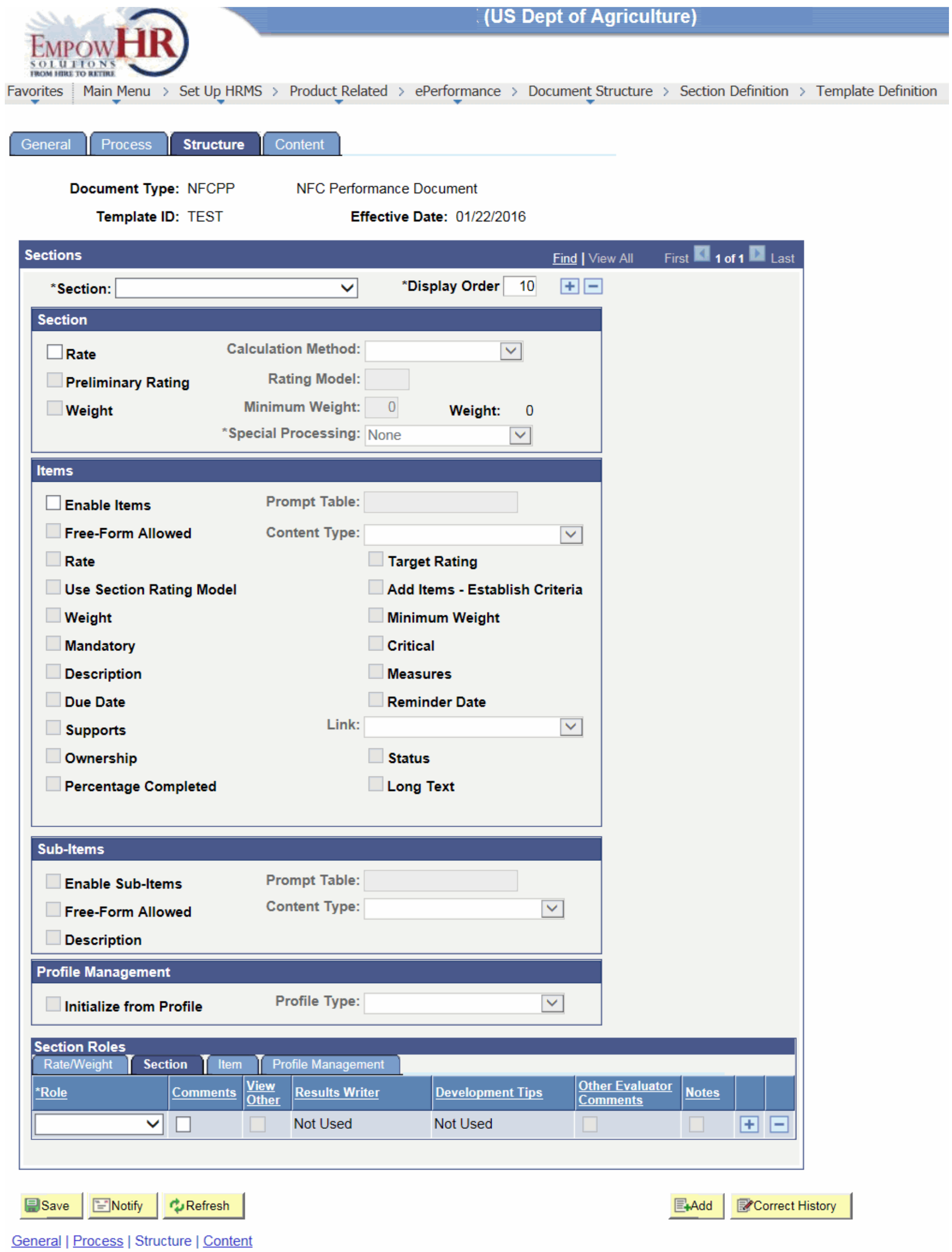


Figure 19: Template Definition Page - Structure Tab - Section Roles Region - Section Tab

2. Complete the fields as follows:

Field	Instruction
***Role**	Required field. Select the role type from the drop-down list. Valid values are **`Manager`**, **`Employee`**, and **`Peer`**.
Comments	Select this checkbox to have the section contain an area for users to add a free-form description of the employee's performance on the section. If this checkbox is not selected for a role, the other selections for the role are not available.
View Other	Select this check box to enable the role to view the sections from other completed evaluations that are part of this document. This option is available to managers only.
Results Writer	Available only if the Comments check box is selected for the role. Results Writer suggestions are predefined statements that describe the employees proficiency level for the associated item. The Results Writer tool is designed primarily for competency and sub-competency sections of an evaluation; however, this feature can be enabled for other sections of an evaluation as well. Select data from the drop-down list to have text suggestions from the Results Writer tool appear on the Suggested Results page when the Writing Tools link is selected on an evaluation. Valid values are as follows: **`Competency`** - Lists the Results Writer statements that are associated with competencies. Associates statements with subcompetencies on the Results Writer page - Sub-Competency Proficiencies tab. **`Sub-Competency`** - Lists the Results Writer statements that are associated with subcompetencies. Associates statements with subcompetencies on the Results Writer page - Sub-Competency Proficiencies tab. **`Not Used`** - If the Results Writer statements should not appear on the Suggested Results page.
Development Tips	Available only if the Comments check box is selected for the role. Development tips are predefined statements that suggest how employees can improve proficiency at the associated item and are designed primarily for competency and sub-competency sections of an evaluation. However, this feature can be enabled for other sections of an evaluation as well. Select data from the drop-down list to have text suggestions from the Development Tips to appear on the Suggested Results page when the Writing Tools link is selected on an evaluation. Valid values are as follows: **`Competency`** - Lists development tips that are associated with competencies. Associates development tips with competencies on the Development Tips page - Competency Proficiencies tab. **`Sub-Competency`** - Lists development tips that are associated with subcompetencies. Associates development tips with competencies on

Field	Instruction
	the Sub-Competency Development Tips page. `Not Used` - If the user does not want development tips to appear on the Suggested Results page.
Other Evaluator Comments	Available only if the Comments check box is selected and the role is a manager. Select this check box to have comments that were entered by other evaluators appear on the Suggested Results page for the role. Only comments from completed evaluations that were entered for the same summary section appear on the list.
Notes	Available only if the Comments check box is selected for the role. Select this check box to have performance notes entered by the employee or manager during the Established Criteria step appear on the Suggested Results page. Only notes entered for the same section item by the same person appear on the list.

3. Select the ***Item*** tab. The Template Definition page - Structure tab - Section Roles region - Item tab is displayed.

Figure 20: Template Definition Page - Structure Tab - Section Roles Region - Item Tab

4. Complete the fields as follows:

Field	Instruction
***Role**	Required field. Select the role type from the drop-down list. Valid values are **`Manager`**, **`Employee`**, and **`Peer`**.
Add	Select this check box to enable the role to add items to this section.
Update	Select this check box to enable the role to update items in this section on the documents that are generated for the role.
Comments	Select this check box to have items in the section contain an area for authors to add a free-form description of the employee's performance on the item. If this check box is selected, the Results Writer, Development Tips, Other Evaluator Comments, and Notes check boxes are enabled for the role. The use of these fields is analogous to the same fields under the Section tab - Section Roles region - Structure tab - Template Definition page.
***Results Writer**	Required field. Available only if the Comments check box is selected for the role. Results Writer suggestions are predefined statements that describe the employee's proficiency level for the associated item. The Results Writer tool is designed primarily for competency and sub-competency sections of an evaluation; however, this feature can be enabled for other sections of an evaluation as well. Select data from the drop-down list to have text suggestions from the Results Writer to appear on the Suggested Results page when the Writing Tools link is selected on an evaluation. Valid values are as follows: **`Competency`** - Lists the Results Writer statements that are associated with competencies. Associates statements with subcompetencies on the Results Writer page - Sub-Competency Proficiencies tab. **`Sub-Competency`** - Lists the Results Writer statements that are associated with sub-competencies. Associates statements with sub-competencies on the Results Writer page - Sub-Competency Proficiencies tab. **`Not Used`** - If the Results Writer statements should not appear on the Suggested Results page.
***Development Tips**	Required field. Available only if the Comments check box is selected for the role. Development tips are predefined statements that suggest how employees can improve proficiency at the associated item and are designed primarily for Competency and Sub-competency sections of an evaluation. However, this feature can be enabled for other sections of an evaluation as well. Select data from the drop-down list to have text suggestions from the Development Tips to appear on the Suggested Results page when the Writing Tools link is selected on an evaluation. Valid values are as follows: **`Competency`** - Lists development tips that are associated with

Field	Instruction
	competencies. Associate development tips with competencies on the Development Tips page - Competency Proficiencies tab. `Sub-Competency` - Lists development tips that are associated with subcompetencies. Associates development tips with competencies on the Sub-Competency Development Tips page. `Not Used` - If development tips should not appear on the Suggested Results page.
Other Evaluator Comments	Available only if the Comments check box is selected and the role is a manager. Select this check box to have comments that were entered by other evaluators appear on the Suggested Results page for the role. Only comments from completed evaluations that were entered for the same summary section appear on the list.
Notes	Available only if the Comments check box is selected for the role. Select this check box to have performance notes entered by the employee or manager during the Established Criteria step appear on the Suggested Results page. Only notes entered for the same section item by the same person appear on the list.

5. Select the ***Profile Management*** tab. The Template Definition page - Structure tab - Section Roles region - Profile Management tab is displayed.

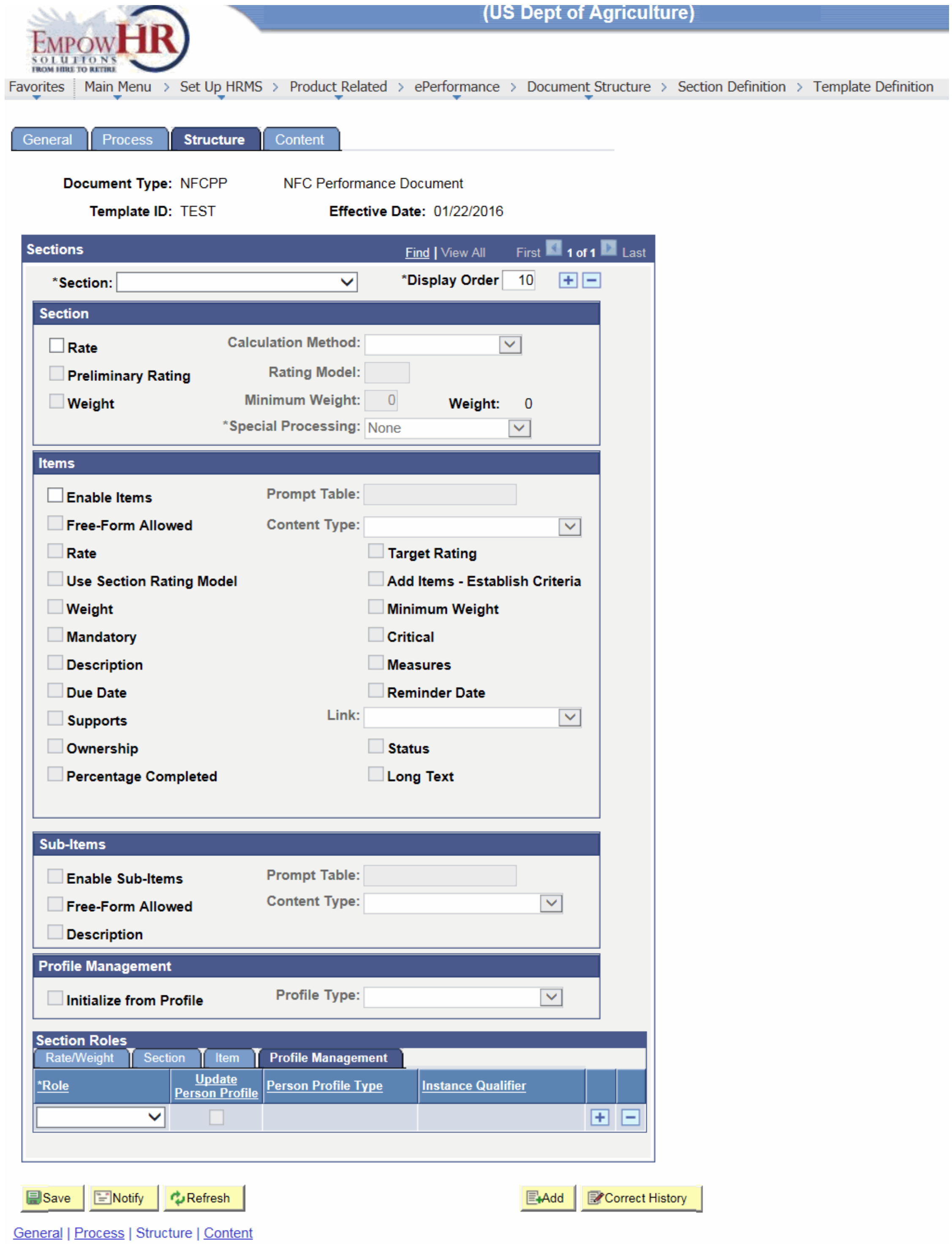


Figure 21: Template Definition Page - Structure Tab - Section Roles Region - Profile Management Tab

6. Complete the fields as follows:

Field	Instruction
***Role**	Required field. Select the role type from the drop-down list. Valid values are **`Manager`**, **`Employee`**, and **`Peer`**.
Update Person Profile	Available if the section items have the Rate check box selected and if a content type is entered in the Content Type field in the Items group box on the Template Definition page - Structure tab. Select this check box for EmpowHR to update the employee's profile in the Manage Profiles business process with this document.
Person Profile Type	Available if the Update Person Profile check box is selected. Select the profile type from the drop-down list. These profile types are defined in the Manage Profiles business process with an Identity Option equal to **`Person`**. Valid values are **`Person`**, **`Integration from ePerformance`**, and **`Person (Learning)`**.
Instance Qualifier	Select an instance qualifier from the drop-down list that distinguishes this evaluation from other evaluations in the Manage Profiles business process. ePerformance delivers an instance qualifier to be identified. Valid values are **`Supervisor/Manager`**, **`Self Evaluation`**, and **`Other`**.

To Continue Completing the Template Definition Page - Section Items Region - Structure Tab:

The fields in this group box are available only if the Enable Items check box is selected on the Template Definition page - Structure tab. Items automatically appear here when the ***Load Content From Profile*** link is selected.

To Complete the Content Tab on the Template Definition Page:

1. Select the ***Content*** tab. The Template Definition page - Content tab is displayed.

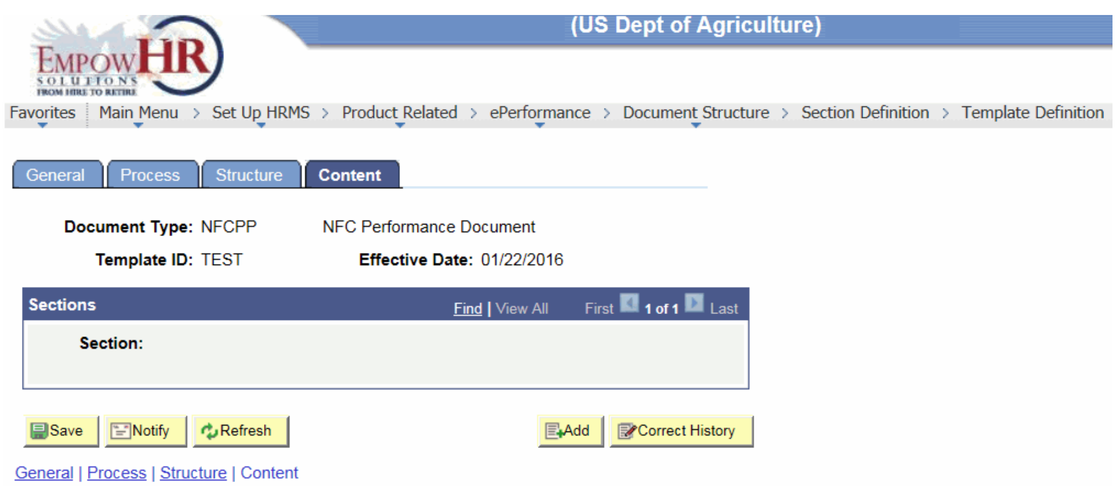


Figure 22: Template Definition Page - Content Tab

The Content tab allows the adding of criteria to sections, defines the specific job attributes or content items by which an employee is to be measured. Only those sections that were included on the Template Definition page - Structure tab are available on the Content page.

Criteria on the Content tab is obtained from three sources:

- Content Catalog

Items and subitems from the Content Items Detail (JPM_CAT_ITEMS) table.

Note: The user can define unique coded categories of performance criteria. To do so, use the Application Designer to create tables that store the items for the new criteria type. The tables that are created are then referenced as prompt tables in document template and evaluations. Include the fields in the table that are defined: EP_ITEM_ID (key), EP_TITLE, EFFDT (optional key), EFF_STATUS (optional), EP_DESCR254 (optional).

- Free-Form Items

Free-form items are criteria that are not stored in the database. Free-form items enable the user to fine tune evaluations to an individual employee or a small group of employees. Add free-form criteria to the templates to create performance documents. It also enables managers, employees, or both to add free-form assessment items after the performance document is generated.

- Download from the Non-person profile

Items and subitems can be added from a nonperson profile defined in the Manage Profiles business process. EmpowHR uses the specified profile type to identify content and automatically adds it to the Template Definition page - Content tab.

The criteria defined on the Template Definition page - Content tab is automatically pulled into the document that is generated using the specified template.

Only the sections entered on the Template Definition page - Structure tab are available on this page. To add more sections, go to the Template Definition page - Structure tab.

2. Click the ***Load Content From Profile*** link to display the Load Content From Profile page. The items selected will automatically appear on the Section Items page region of the Template Definition page - Content tab.

Load content from profiles - Profiles can be used to load criteria into sections.

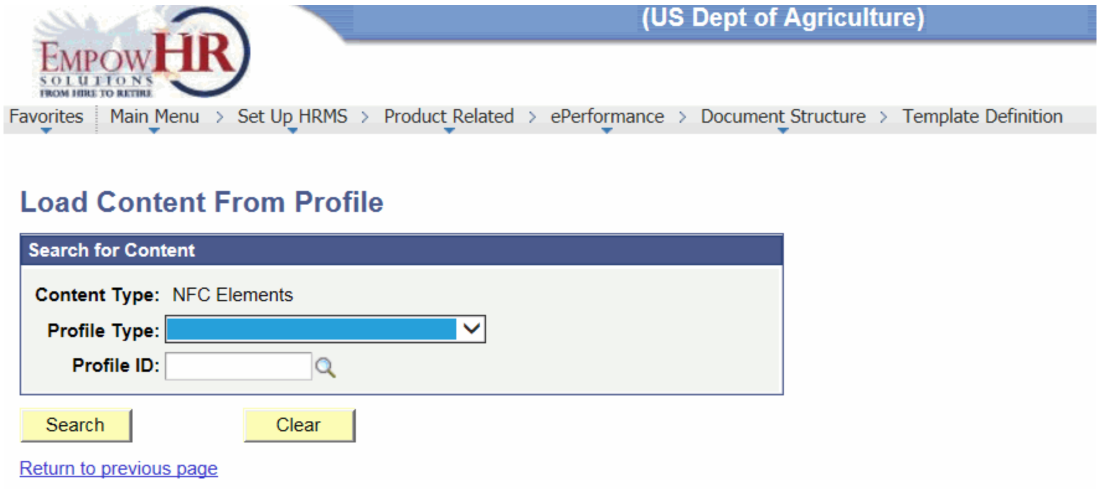


Figure 23: Load Content From Profile Page

3. Complete the fields as follows:

Search for Content	Description/Instruction
Content Type	Populated from the Template Definition page - Structure tab.
Profile Type	Select data from the drop-down list. Valid values vary based on the profile types created.
Profile ID	Select data by clicking the search icon.

4. Click **Search**. A list of Select Items is displayed.

OR

Click **Clear** to clear the selection.

At this point, the following options are available:

Step	Description
Click **Select All**	Selects all the Item IDs listed.
Click **Deselect All**	Deselects all the Item IDs selected.
Click **Add Item**	Corrects a historical record.

Note: Remember these items become part of the template. It is best to only have common items that fit all employees.

5. Continue to complete the Content tab:

Field	Description/Instruction
Document Type	Populated based upon the search criteria entered.
Template ID	Populated based upon the search criteria entered.
Effective Date	Populated based upon the search criteria entered.
***Section**	Required field. Populated with the information entered on the Template Definition page - Structure tab.
Item ID	Select an item from the Content Item Detail table or select data by clicking the search icon. Only content items can be selected that are linked to the Content Type field on the Template Definition page - Structure tab. This field does not apply to free-form items.
Title	Enter the title for a free-form item. Only enter items for free-form items. Otherwise, EmpowHR displays the text that was entered in the Description field on the Template Definition page - Content tab.
Description	Available only if the Description check box is selected in the Items group box on the Template Definition page - Structure tab. Enter the description for a free-form item that is being added. Only enter descriptions for free-form items. Otherwise, EmpowHR displays the text that was entered in the ePerformance Description field on the Template Definition page - Content tab.
Measurement	Displays if the Measures check box is selected on the Template Definition page - Structure tab. Enter text that clearly and objectively describes the standard by which this item is measured. This text appears on the performance or development document.
Rating Model	Appears if the Rate check box is selected on the Template Definition page - Structure tab. Select data by clicking the search icon. If the user selects the Use Section Rating Model check box in the Items group box on the Template Definition page - Structure tab, EmpowHR displays the rating modes that is entered in the Rating Model field in the Section group box on the Template Definition page - Structure tab.
Target Rating	Appears if the Target Rating check box is selected on the Template Definition page - Structure tab. Select the rating from the drop-down list at which the employee should be performing for this section item.

Field	Description/Instruction
Weight	Appears if the Weight check box is selected on the Template Definition page - Structure tab. Enter the percentage amount that this section contributes to the overall weight.
Minimum Weight	Appears if the Minimum Weight check box is selected on the Template Definition page - Structure tab. Enter the minimum percentage amount that the user wants this item to contribute to the overall weight.
Supports	Appears if the Support check box is selected on the Template Definition page - Structure tab. Select one of the section items from the drop-down list that is associated with the linked section.
Due Date	Appears if the Due Date check box is selected on the Template Definition page - Structure tab. This can be used to track the progress of an item and whether it is was completed on time. Enter a date or select a date from the calendar icon.
Reminder Date	Appears if the Reminder Date check box is selected on the Template Definition page - Structure tab. This date is used only for informational purposes. Enter a date or select a date from the calendar icon.
Owned By	Appears if the Ownership check box is selected on the Template Definition page - Structure tab. Select data from the drop-down list. Valid values are **`Employee`** and **`Manager`**. These values are who is responsible for the completion of this item.
Mandatory	Appears if the Mandatory check box is selected on the Template Definition page - Structure tab. Select this check box to prevent anyone from editing or deleting this item on the document. Note: This section overrides the value in the Mandatory field on the job profile. If the user specifies that an item on the job profile is mandatory and does not select this check box, the item is mandatory on the document.
Critical	Appears if the Critical check box is selected on the Template Definition page - Structure tab. Select this check box to have the word Critical appear in the detail area of the item on the document.

6. Click **Save**. At this point, the following options are available:

Step	Description
Click **Notify**	Sends a notification.
Click **Add**	Returns to the Template Definition page - Adds a New Value tab.
Click **Update/Display**	Returns to the Template Definition page - Find an Existing Value tab.
Click **Refresh**	Refreshes the page.
Click **Correct History**	Returns to the Template Definition page - Find an Existing Value tab with Correct History checked.
Click **Next in List**	Proceeds to the next available tab.
Click **Previous in List**	Goes back to the previous tab. This option is not available if on the Template Definition page - General tab.
Click **Return to Search**	Returns to the Template Definition page - Find an Existing Value tab.

Cloning Template Definitions

This option allows the cloning of a template.

To Clone Template Definitions:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Document Structure*** menu item.

5. Select the ***Clone Template Definition*** component. The Clone Template Definition page - Find an Existing Value tab is displayed.

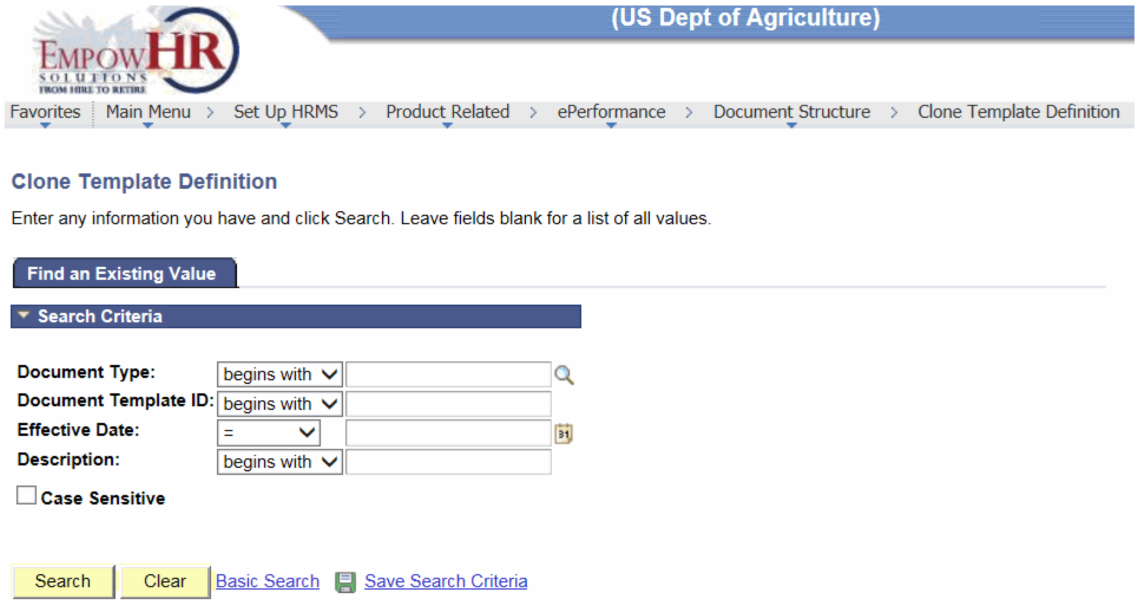


Figure 24: Clone Template Definition Page - Find an Existing Value Tab

6. Complete the fields as follows:

Field	Instruction
Document Type	Enter the document type that should be cloned or select data by clicking the search icon.
Document Template ID	Enter up to eight alphanumeric characters for the new template ID and document type combination that should be cloned.
Effective Date	Enter the effective data for the new template or select a date from the calendar icon.
Description	Enter the applicable description
Case Sensitive	Click this field if the search criteria is case sensitive.

7. Click **Search**. The Clone Template Definition page is displayed.

OR

Click **Clear** to clear the information entered.

Note: All fields may be entered to narrow the search.

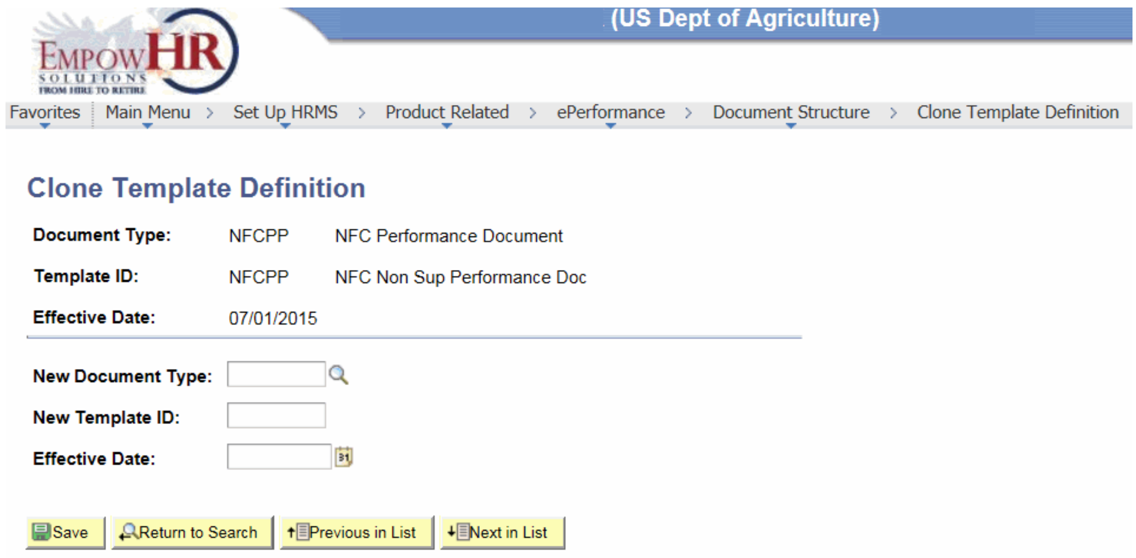


Figure 25: Clone Template Definition Page

8. Complete the fields as follows:

Field	Description/Instruction
Document Type	Populated based upon the search criteria entered.
Template ID	Populated based upon the search criteria entered.
Effective Date	Populated based upon the search criteria entered.
New Document Type	Enter the new document type or select data by clicking the search icon.
New Template ID	Enter the document template ID that corresponds to the document type.
Effective Date	Enter the effective date for the template definition or select a date from the calendar icon.

9. Click **Save**. The ***Template Definition*** component opens the new template that can be updated. For more information, refer to ***Defining General Template Information*** (on page 40).

Understanding Advisor Tools

There are common elements in the Advisor Tools. The following is a list of these common elements and definitions:

Common Elements	Definition
Language Checker	Evaluators use the Language Checker tool during the evaluation process to identify words or phrases in a performance document that an organization deems objectionable and to view suggested alternatives. EmpowHR checks all Comments text boxes for inappropriate content. The user can manually define content for the Language Checker tool or can import data from a third-party vendor. Note: To enable the Language Checker tool, select the Language Checker check box on the Template Definition page - General tab.
Results Writer	Evaluators use the Results Writer tool to select predefined statements that describe an employee's level of proficiency in a particular competency or subcompetency. Managers can use this tool by clicking a ***Writing Tool*** link that appears in the comments box at the item or section level on the evaluation. For example: Bob's initiative is very impressive. He does not wait to be told what to do. His energy sets an example for the rest of the team. When the user defines competencies and subcompetencies, the user can use the Results Writer page of the Competency and SubCompetency components to enter the statement from which managers can select when using the writing tools. This information can be imported from third-party suppliers.
Development Tips	Development tips suggest ways for employees to improve, develop, or use a competency or subcompetency based on their current rating level. ePerformance displays the appropriate set of tips when the Writing tools link is selected on the evaluation.

For more information see:

Language Checker Tool 71
Development Tips and Results Writer Tools...79

Language Checker Tool

To define content for the Language Checker tool, use the Language Checker Suggestions (EP_CHK_SUG_TBL) and Language Checker Word (EP_CHK_WRD_TBL) components. They are both available under the ***Advisor Tools*** menu item.

For more information see:

Defining Objectionable Words and Phrases 72
Defining Suggested Wording...75

Defining Objectionable Words and Phrases

This option defines the objectionable words and phrases and links them to suggested wordings.

To Access the Language Checker Word Page:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Advisor Tools*** menu item.
5. Select the ***Language Checker Words*** component. The Language Checker Words page - Find an Existing Value tab is displayed.

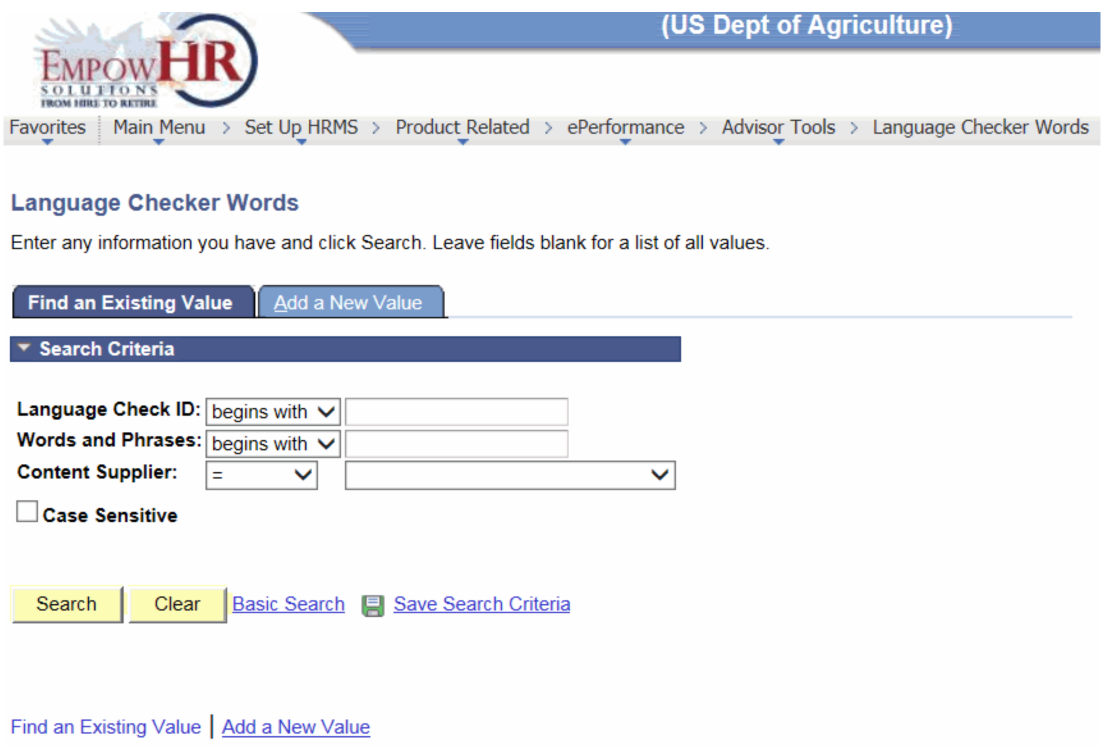


Figure 26: Langauge Checker Words Page - Find an Existing Value Tab

Note: All fields may be entered to narrow the search.

6. Complete the fields as follows:

Field	Instruction
Language Check ID	Enter the applicable information.
Words and Phrases	Enter the applicable information.
Content Supplier	Select the applicable information from the drop-down list. Valid values are **`Customer Defined`**, **`DDI`**, **`Lominger`**, and **`PDI`**.
Case Sensitive	Check this box if the search criteria is case sensitive.

7. Click **Search**. The Language Checker Word page is displayed.

OR

Click **Clear** to clear the information entered on the page.

OR

Select the ***Add a New Value*** tab. The Language Checker Words page - Add a New Value tab is displayed.

Figure 27: Language Checker Words Page - Add a New Value Tab

8. Complete the field as follows:

Field	Instruction
Language Check ID	Enter a new language check ID.

9. Click **Add**. The Language Checker Word page is displayed.

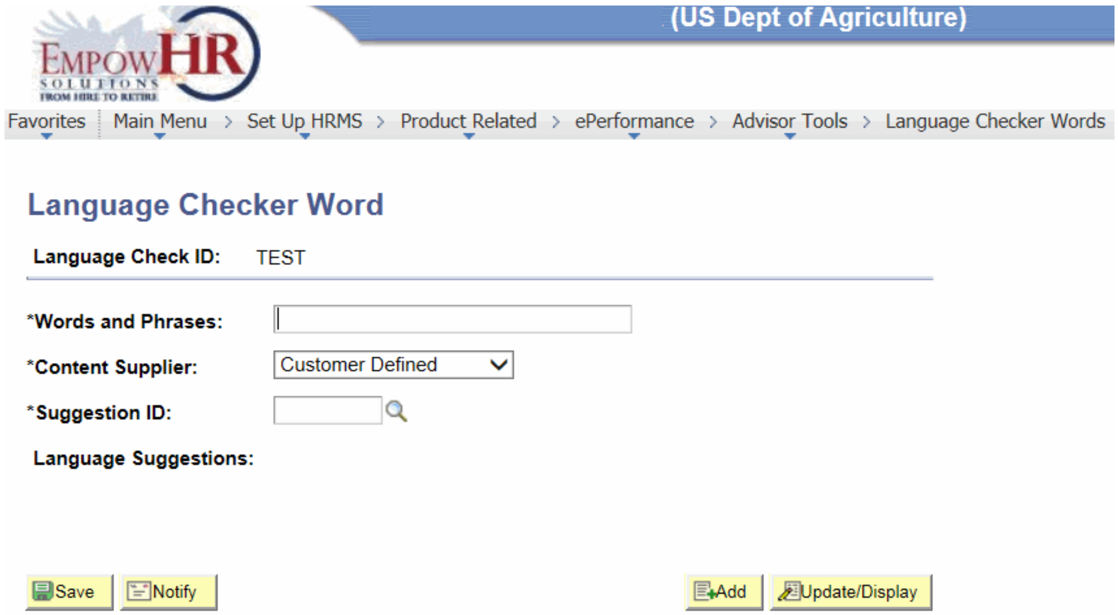


Figure 28: Language Checker Word Page

Field	Description/Instruction
Language Check ID	Populated from the search/add criteria is entered.
***Words and Phrases**	Required field. Enter the word or phrase that is deemed inappropriate in a performance document. Case is not important - the Language Checker tool is not case-sensitive. When invoked, the Language Checker tools follow these search rules: If entering a single word here, the Language Checker Tool searches for whole words that match. If entering multiple words, the Language Checker Tool looks for phrases with an exact match.
***Content Supplier**	Required field. Defaults to **Customer Defined**. To change, select data from the drop-down list. Valid values are **Customer Defined**, **DDI**, **Lominger**, and **PDI**.
***Suggestion ID**	Required field. Enter the ID for the suggested words or phrases that managers can use instead of the words or phrases entered on this page. Define language suggestions and ID on the Language Checker Suggestions page.
Language Suggestions	Displays language suggestions that are associated with the suggestion ID.

10. Click **Save**. At this point, the following options are available:

Step	Description
Click **Notify**	Sends a notification.
Click **Add**	Returns to the Language Checker Words page - Adds a New Value tab.
Click **Update/Display**	Returns to the Language Checker Words page - Find an Existing Value tab.
Click **Return to Search**	Returns to the Language Checker Words page - Find an Existing Value tab.

Defining Suggested Wording

This section defines suggested wordings.

To Access the Language Checker Suggestion Page:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Advisor Tools*** menu item.

5. Select the ***Language Checker Suggestions*** component. The Language Checker Suggestions page - Find an Existing Value tab is displayed.

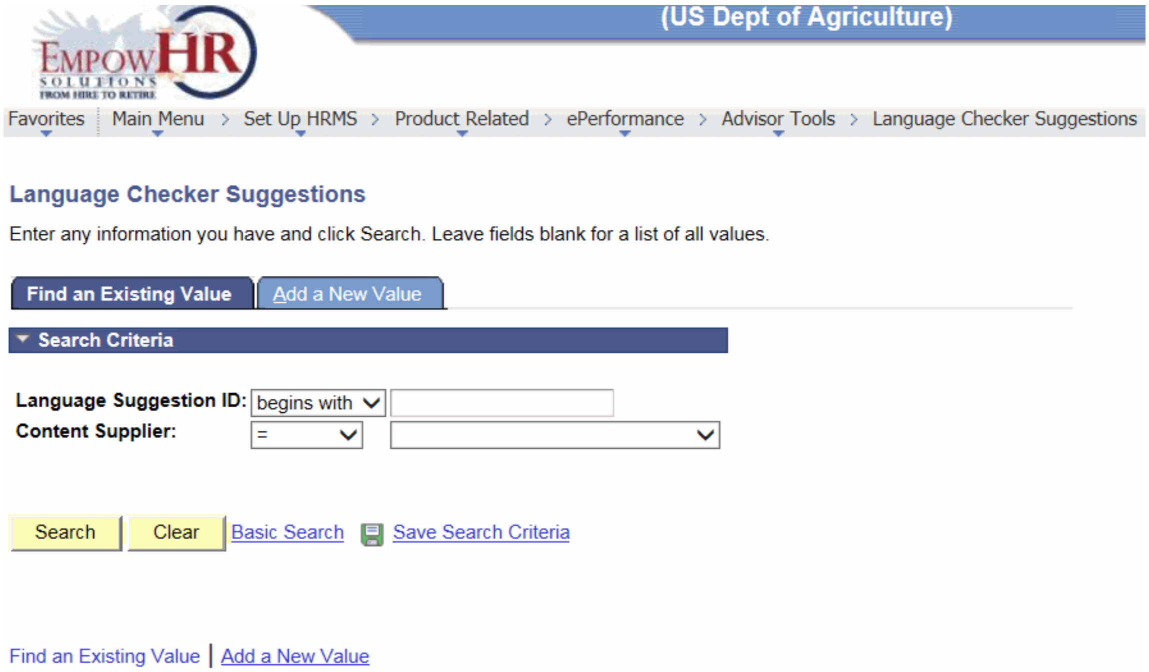


Figure 29: Language Checker Suggestions Page - Find an Existing Value Tab

Note: All fields may be entered to narrow the search.

6. Complete the fields as follows:

Field	Instruction
Language Suggestion ID	Enter the applicable information.
Content Supplier	Select the applicable information from the drop-down list. Valid values are `Customer Defined`, `DDI`, `Lominger`, and `PDI`.

7. Click **Search**. The Language Checker Suggestion page is displayed.

OR

Click **Clear** to clear the information entered on the page.

OR

Select the ***Add a New Value*** tab. The Language Checker Suggestions page - Add a New Value tab is displayed.

Figure 30: Language Checker Suggestions Page - Add a New Value Tab

8. Complete the field as follows:

Field	Instruction
Language Suggestion ID	Enter a new language suggestion ID.

9. Click **Add**. The Language Checker Suggestion page is displayed.

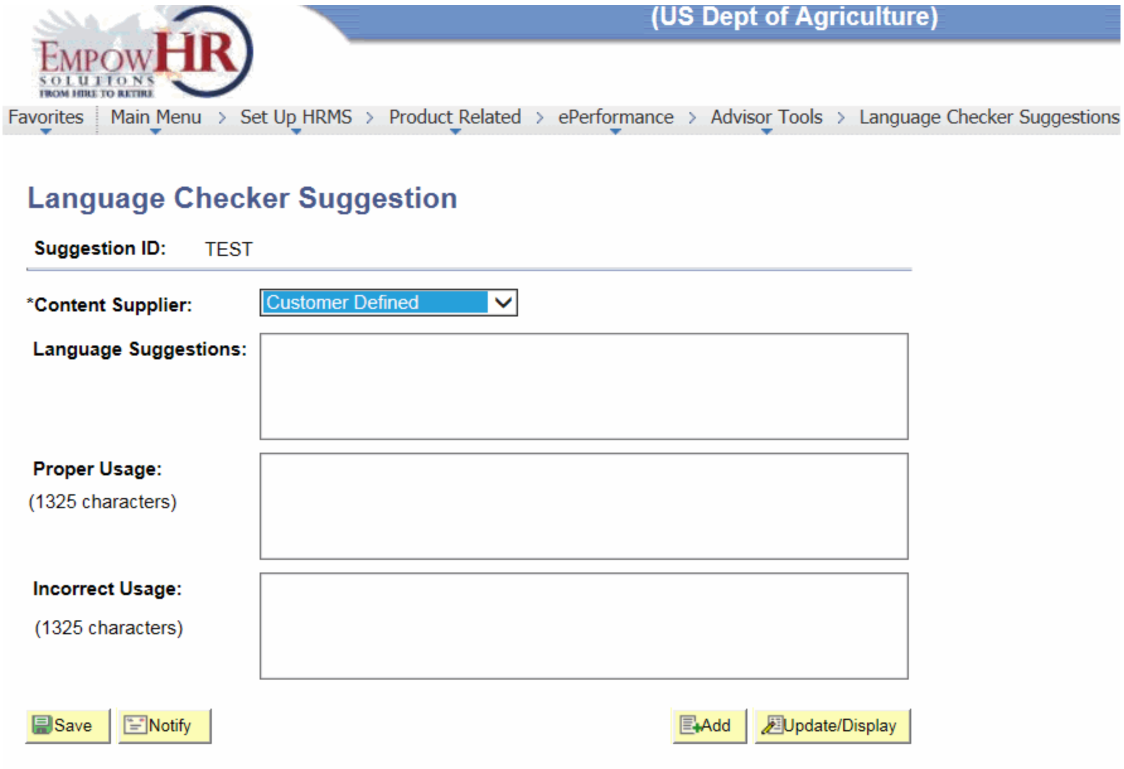


Figure 31: Language Checker Suggestion Page

10. Complete the fields as follows:

Field	Description/Instruction
Suggestion ID	Populated from the search/add criteria entered.
***Content Supplier**	Required field. Defaults to **`Customer Defined`**. To change, select data from the drop-down list. Valid values are **`Customer Defined`**, **`DDI`**, **`Lominger`**, and **`PDI`**.
Language Suggestions	Enter the language for words and phrases or list the reasons why the manager should not use certain words and phrases.
Proper Usage	Enter examples of the proper usage of words or phrases.
Incorrect Usage	Enter examples of the incorrect usage of words or phrases.

11. Click **Save**. At this point, the following options are available:

Step	Description
Click **Notify**	Advances to the Send Notification page.

Step	Description
Click **Add**	Returns to the Language Checker Suggestions page - Adds a New Value tab.
Click **Update/Display**	Returns to the Language Checker Suggestions page - Find an Existing Value tab.
Click **Return to Search**	Returns to the Language Checker Suggestions page - Find an Existing Value tab.

Development Tips and Results Writer Tools

To define content for the Development Tips and Results Writer Tools, use the Define Development Tips (EP_DEV_TIP_TBL_EP) and the Results Writer (EP_COMP_WRT_TBL) components.

Text entries for the Results Writer and Development Tips tools are related to competencies and their proficiency level, and subcompetencies and their proficiency level. The user must set up this information before defining text for these tools.

- Rating models
- Competencies and subcompetencies
- Competency and sub-competency proficiency levels

If multiple business units and setIDs are implemented in EmpowHR, the information used and created determines how the business unit and setID functionality is set up for the user ID.

For more information see:

Template Setup for Results Writer and Development Tips Use 79
Search Collections for Results Writer and Development Tips 80
Defining Development Tips 81
Linking Development Tips to Competencies and SubCompetencies...................84
Defining Results Writer Text for Competencies...87

Template Setup for Results Writer and Development Tips Use

Text can be defined for these tools at either the competency or subcompetency level and then set up the document template to access this test. The template rules control the level of text, by competency or subcompetency, that EmpowHR searches to find text suggestions for a section or item. The user must set up the template rules to correspond to the level at which the text is defined. For example, if the user defines text or brings in text from a third party at the sub-competency level, then set the Results Writer and Development Tips template switches to SubCompetency for the tool to locate text.

The combination of the level at which text is defined, the level at which the tool is enabled on the document template, and the ratings that are entered, determine the suggested results that appear when the user clicks the ***Writing Tools*** link on a evaluation.

This table displays the results for the possible combinations of link level, text level and ratings entered.

Writing Tools Link Appears at Level	Text Defined at Level	Ratings Entry Required	What Appears in Suggested Results
Item	Competency	The item rated. If using subitems (behaviors), the item rating was calculated.	Competency text for the item and rating.
Item	SubCompetency	At least one subitem for the item is rated.	Sub-competency text for the item, subitem, and rating.
Section	Competency	At least one item in the section is rated. If the item has subitems, the item rating was calculated.	Competency text for the item and rating. The Results Writer tool returns one or more entries for every rated item in the Section. The Development tips tool returns one or more entries for every rated item in the section.
Section	SubCompetency	At least one subitem for an item in the section is rated.	Sub-competency text for the item, subitem, and rating the Results Writer tool returns one or more entries for every rated subitem in the section. The Development Tips tool returns one or more entries for every rated subitem in the section.

Search Collections for Results Writer and Development Tips

Anytime an addition or deletion to Results Writer or Developments Tips item is made, rebuild the search index to reflect the new state of the collection of items. The Writing Tools use this search index to locate text when either the Results Writer or Development Tips tool is enabled for a section or item.

Defining Development Tips

This section defines development tips and allows the display and modification of development tips imported from third party suppliers.

To Complete the Defining Development Tip Page:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Advisor Tools*** menu item.
5. Select the ***Define Development Tips*** component. The Define Development Tips page - Find an Existing Value tab is displayed.

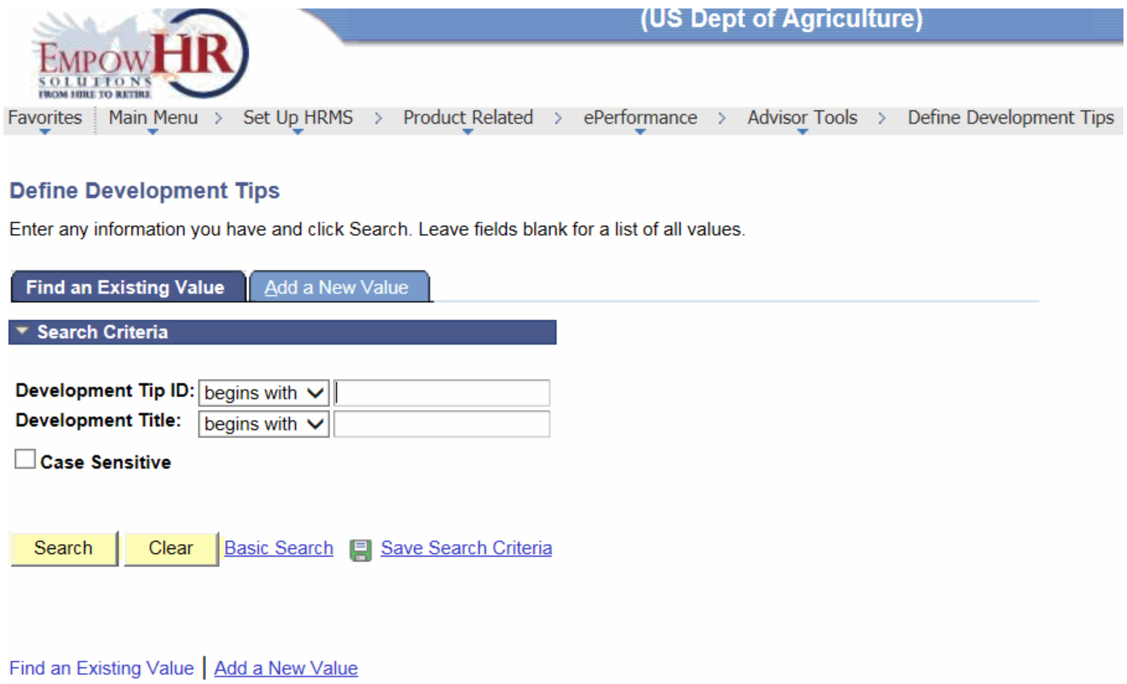


Figure 32: Define Development Tips Page - Find an Existing Value Tab

Note: All fields may be entered to narrow the search.

6. Complete the fields as follows:

Field	Instruction
Development Tip ID	Enter the applicable information.
Development Title	Enter the applicable information.

Field	Instruction
Case Sensitive	Check this box if the search criteria is case sensitive.

7. Click **Search**. The Development Tip page is displayed.

   OR

   Click **Clear** to clear the information entered on the page.

   OR

   Select the ***Add a New Value*** tab. The Define Development Tips page - Add a New Value tab is displayed.

Figure 33: Define Development Tips Page - Add a New Value Tab

8. Complete the field as follows:

Field	Instruction
Development Tip ID	Enter a new development tip ID.

9. Click **Add**. The Development Tip page is displayed.

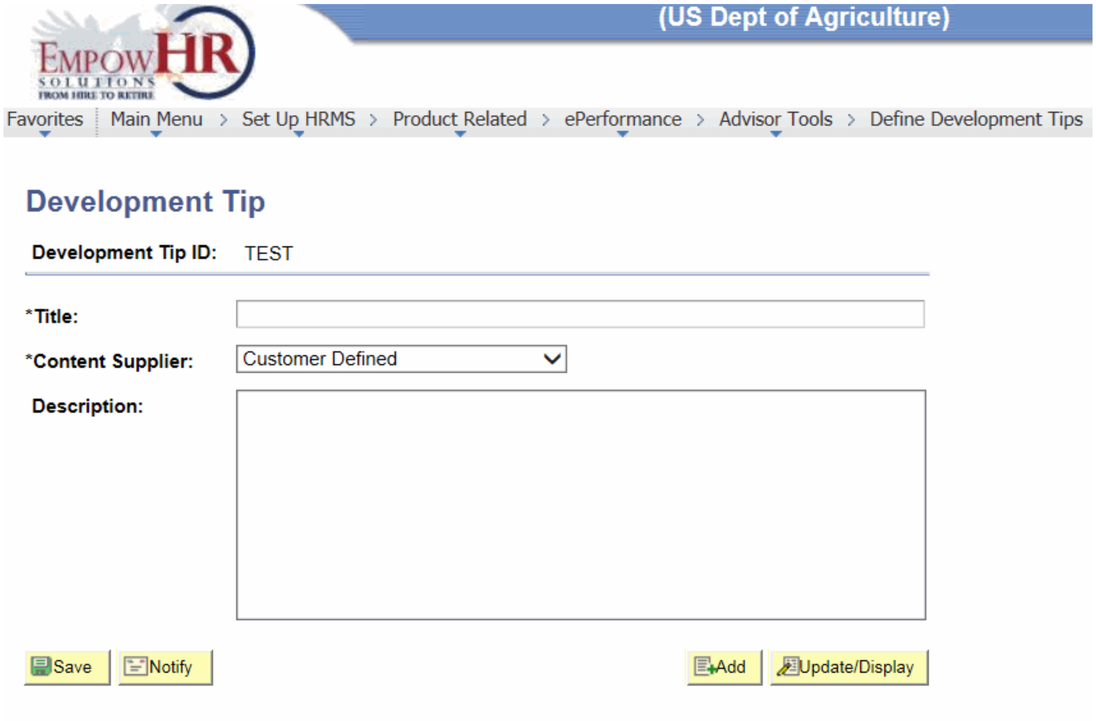


Figure 34: Development Tip Page

10. Complete the fields as follows:

Field	Description/Instruction
Development Tip ID	Populated with the search/add criteria entered.
***Title**	Required field. Enter the title of the development tip.
***Content Supplier**	Required field. Select the content supplier for the development tip. Defaults to **`Customer Defined`** for entry of development tips. To change, select data from the drop-down list.
Description	Enter the narrative description for the title.

11. Click **Save**. At this point, the following options are available.

Step	Description
Click **Notify**	Advances to the Send Notification page.
Click **Add**	Returns to the Define Development Tips page - Add a New Value tab.
Click **Update/Display**	Returns to the Define Development Tips page - Find an Existing Value tab.

Linking Development Tips to Competencies and SubCompetencies

To link development tips to competencies and subcompetencies, use the ***Link Development Tips*** component.

This section discusses how to link development tips to competencies and subcompetencies.

To Access the Linking Development Tips Pages:

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Advisor Tools*** menu item.
5. Select the ***Link Development Tips*** component. The Link Development Tips page - Find an Existing Value tab is displayed.

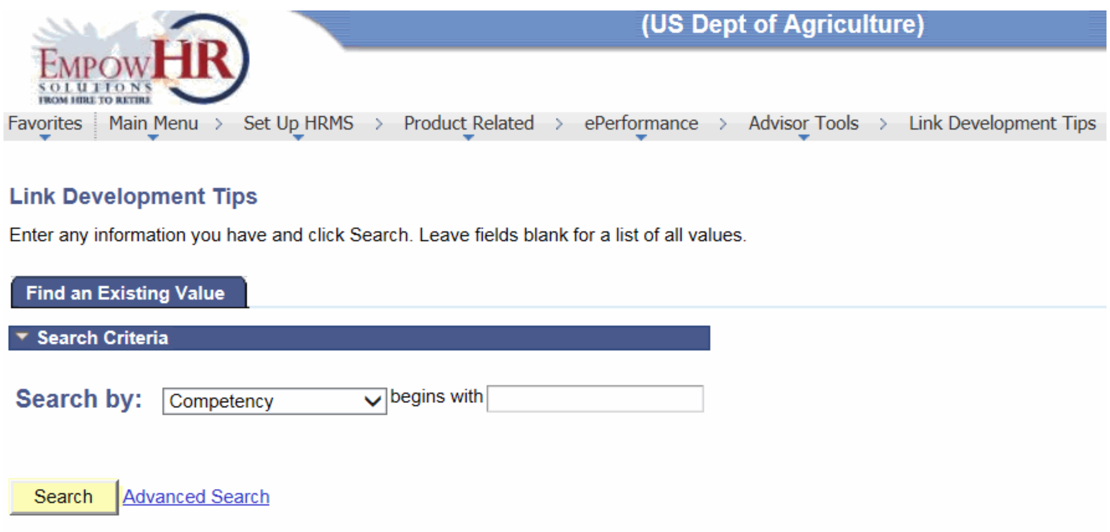


Figure 35: Link Development Tips Page - Find an Existing Value Tab

6. Complete the fields as follows:

Field	Instruction
Search by	Select data from the drop-down list. Valid values are **Competency**, **Competency Category**, **Description**, and **Short Description**.
begins with	Enter the criteria that corresponds with the value selected in the Search By field.

7. Click **Search**. The Link Development Tips page - Competency tab is displayed.

   This option links one or more development tips to a competency.

Figure 36: Link Development Tips Page - Competency Tab

8. Complete the fields as follows:

Field	Description
Competency	Populated based upon the search criteria entered.
Proficiency Description	**Description**
Review Rating	Populated from the ***Results Writer*** component. Review ratings describe an employee's level of proficiency for a competency. For each review rating that is associated with the competency, define the suggested text that managers can use when they invoke the Development Tips tool.

9. Select the ***Sub-Competencies*** tab. The Link Development Tips page - Sub-Competencies tab is displayed.

Figure 37: Link Development Tips Page - Sub-Competencies Tab

This tab links one or more development tips to a subcompetency.

Note: The Sub-Competencies page - Link Development Tips tab acts in a similar fashion to the Link Development Tips page - Competency tab and is not documented separately.

Note: When accessing the Sub-Competencies page, the first Subcompetencies that are associated with the competency appear. Page forward or use ***View All*** to access other Subcompetencies.

Note: If this page is grayed out, the Sub-Competency page message will display on the page.

---

10. Click **Save**. At this point, the following options are available:

Step	Description
Click **Notify**	Advances to the Send Notification page.
Click **Add**	Returns to the Link Development Tips page - Add a New Value tab.
Click **Next in List**	Advances to the next in the list.
Click **Previous in List**	Returns to the next in the list.
Click **Return to Search**	Returns to the Link Development Tips page - Find an Existing Value tab.

Defining Results Writer Text for Competencies

This section defines Results Writer statements for each level of proficiency associated with a competency.

To Access the Results Writer Page.

1. Select the ***Set Up HRMS*** menu.
2. Select the ***Product Related*** menu group.
3. Select the ***ePerformance*** menu item.
4. Select the ***Advisor Tools*** menu item.
5. Select the ***Results Writer*** component. The Results Writer page - Find an Existing Value tab is displayed.

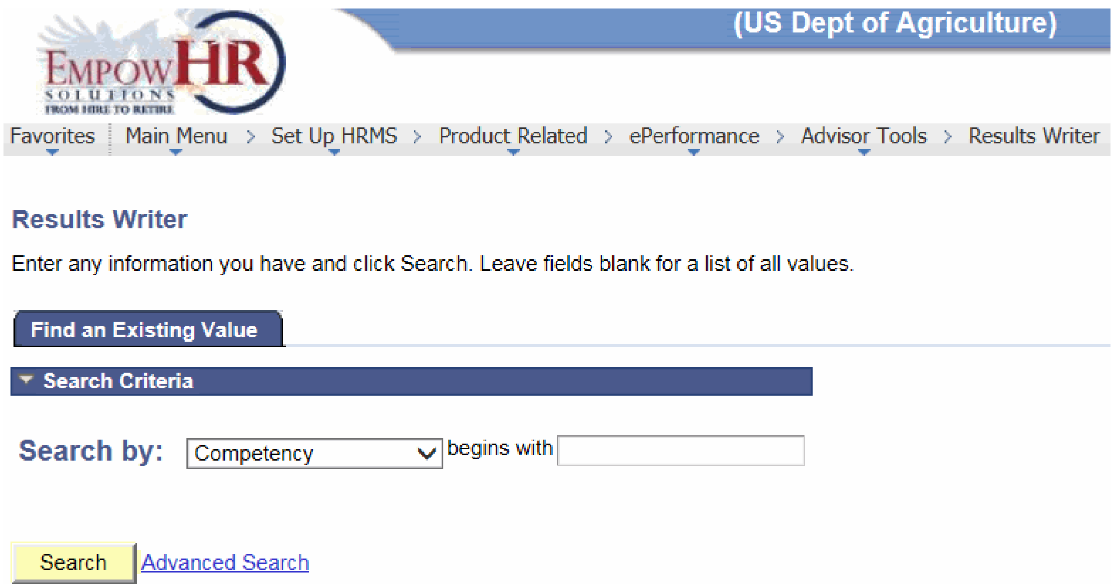


Figure 38: Results Writer Page - Find an Existing Value Tab

6. Complete the fields as follows:

Field	Instruction
Search by	Select date from the drop-down list. Valid values are **`Competency`**, **`Competency Category`**, **`Description`**, and **`Short Description`**.
begins with	Enter the criteria that corresponds with the value selected in the Search By field.

7. Click **Search**. The Results Writer page - Competency tab is displayed.

Figure 39: Results Writer Page - Competency Tab

8. Complete the fields as follows:

Field	Description/Instruction
Competency	Populated from the search criteria entered.
Proficiency Description	**Instruction**
Review Rating	Review ratings describe an employee's level of proficiency for a competency. For each review rating that is associated with the competency, define the suggested text that managers can use when they invoke the Results Writer tool. Create one or more text entries for each rating.
Results Writer Detail	**Instruction**
Seq Nbr	Enter a number (sequence number) that determines the order in which managers see the statements when they use the Results Writer tool for this competency.
Results Writer	Enter one or more sentences to describe the selected proficiency level.

Field	Description/Instruction
	Insert the following characters to personalize the text based on the employee's name and gender. %1 = Employee's First Name %2 = He or She %3 = His or Her %4 = Him or Her %5 = Himself or Herself

9. Select the ***Sub-Competencies*** tab. The Results Writer page - Sub-Competency tab is displayed. This tab defines Results Writer statements for each level of proficiency associated with a subcompetency.

Figure 40: Results Writer Page - Sub-Competencies Tab

Note: The Sub-Competencies page - Results Writer tab is similar in appearance and use to the Competency page - Results Writer tab and is not documented separately.

Note: When accessing the Sub-Competencies page, the first subcompetencies that are associated with the competency appear. Page forward or use ***View All*** to access other SubCompetencies.

Note: If this page is grayed out, the Sub-Competency page message will display on the page.

10. Click **Save**. At this point, the following options are available:

Step	Description
Click **Notify**	Advances to the Send Notification page.
Click **Add**	Returns to the Results Writer page - Add a New Value tab.
Click **Next in List**	Advances to the next in the list.
Click **Previous in List**	Returns to the previous in the list.
Click **Return to Search**	Returns to the Results Writer page - Find an Existing Value tab.

Generating Documents

Document generation initiates the evaluation process. The process for generating a document varies depending on the role that is generating the document, and culminates in the creation of a criteria document for each participant identified in the Section Roles group box on the Template Definition page - Structure tab.

The roles for each individual are as follows:

- Manager/Reviewer - Initiates and modifies performance documents for employees, reviews employee comments, and adds comments on performance documents.
- Employee - Views and provides comments on their own performance documents.
- HR Personnel - Views the performance plans and has the ability to edit and run reports for missing or late plans.

The Performance module has four main elements:

- Manager Self Service
- Employee Self Service
- Manage Performance
- Workflow

The following diagram is an example of the document generation process:

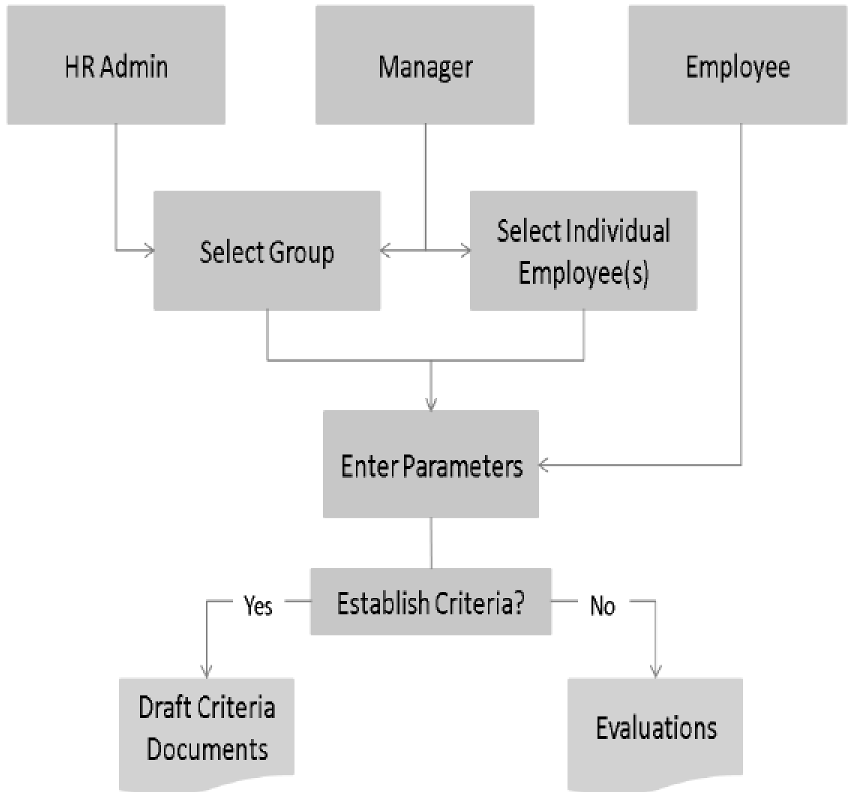


Figure 41: Document Generation Process

Each of the these roles can generate documents in different ways:

- HR Administrators schedule a backgroup process and select one or more employee groups.
- Managers can select one employee group that reports to them, select one or more employees from the group, or just select one or more employees that reports to them.
- Employees can only generate documents for themselves.

After the individuals are identified, the process initiator must select the parameters for the document. These include the Document Type, Document Template, and Evaluation Period that are covered. The language code might be required, depending on the installation settings. For employee-initiated documents, if the employee has more than one job, the job title is required. The employee might also need to select a manager/mentor for the evaluation, if specified for the document type.

Once the parameters have been entered, EmpowHR verifies the rules associated with the document type and document template.

- Can the employee select their manager?
- Can the document be created by cloning another document?

- Is the document template to be entered by the user or determined by EmpowHR?
- Is Establish Criteria enabled?
- Is Nominate Participants enabled?

Based on the rules established by the document type and document template, EmpowHR creates an internal baseline document that populates the Current Performance Document page - Document Details tab with the appropriate steps associated with the evaluation process.

For more information see:

Cloning Documents..93
Document Content..93
Initializing from Profiles...94
Generating Documents as Human Resources Administrator................................94
Viewing Document Creation Results as an HR Administrator 99

Cloning Documents

To facilitate document creation, ePerformance enables managers and employees to clone an existing document. This can be helpful when documents are extensively modified or the same changes apply to multiple employees.

To activate the cloning feature, select the Manager, Employee, or both check boxes on the Document Type page. This displays the Clone from Document field on the Create Performance Document and Create Development Document pages.

When managers clone a document, select a document (of a direct report) to use as the source. When employees clone a document, select one of their own document(s) to use as the source. EmpowHR uses the structure of the document, not the rating information, as the basis for the new document.

Document Content

The criteria or content items included in a document are determined by the associated template. New items and free-form items can be added to the Criteria document, if the Add check box is selected for the user role on the Item tab on the Structure page - Template Definition tab. Free-form items also require the selection of the Free-Form Allowed check box.

Initializing from Profiles

When ***Generate Documents and Initialize from the Profile*** is selected on the Template Definition page - Structure tab, EmpowHR verifies that there are items to add to the document based on the nonperson profiles associated with the employee's job information.

If ***Initialized from Profile*** is selected, EmpowHR:

- Identifies the profile type entered in the Profile Type in the Profile Management group box on the Template Definition page - Structure tab.
- Identifies all Profile IDs associated with the profile type.
- Identifies all the profile identity options and keys associated with the Profile IDs.
- Orders those profile-identify options according to the sequence defined on the Configuration page - Profile Identity Options tab.
- Identifies the employee job information record.
- Looks at the first profile identity option in the sequenced list and see if there is a data for that item in the employee's job information record that matches the key.
    - If there is a match, add the associated content items from the profile ID to the document.
    - If there is no match, select ***Nest Profile Identity*** on the sequenced list.
    - If it is the end of sequenced list, stop.
- Defines Templates.
- Identifies the template source on the Document Type page.
- Defines group IDs.
- Generates documents for a group or employees; HR administrators or managers must specify the ID of the group that pertains to the employees they want to process.
- Sets up notifications on the Template Definition page - General tab.

Generating Documents as Human Resources Administrator

HR administrators schedule a background process and select one or more employee groups for which to generate documents. The HR Administrator role accesses this menu.

To Create a Document (as an HR Administrator):

1. Select the ***Workforce Development*** menu.
2. Select the ***Performance Management*** menu group.

3. Select the ***Performance Documents*** menu item.

4. Select the ***Create Documents*** component. The Create Documents page - Find an Existing Value tab is displayed.

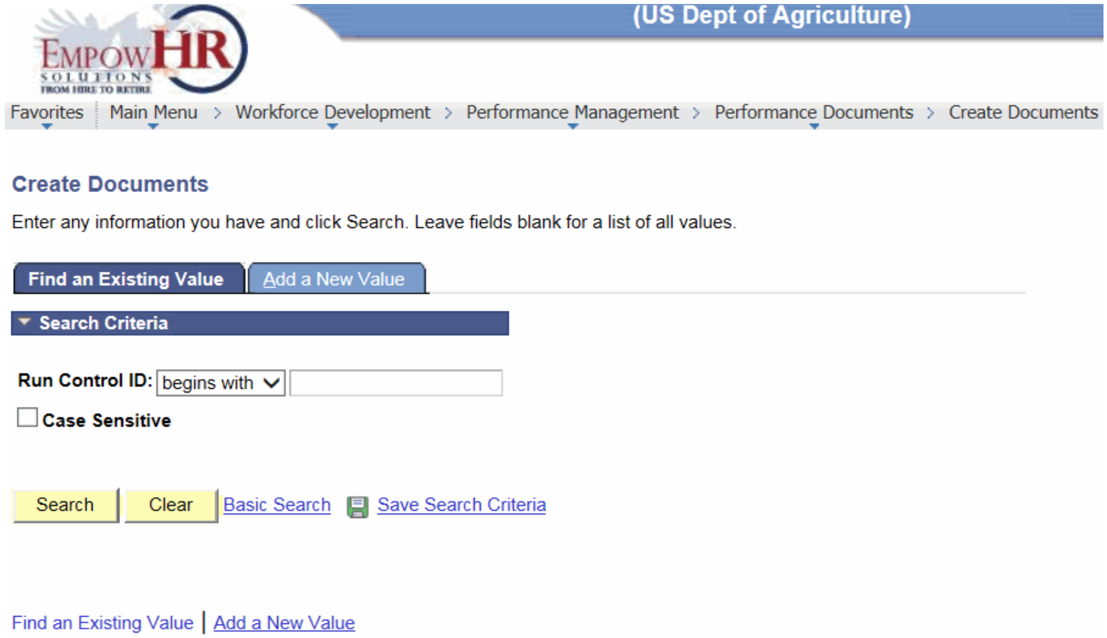


Figure 42: Create Documents Page - Find an Existing Value Tab

5. Complete the fields as follows:

Field	Instruction
Run Control ID	Enter the existing run control ID.
Case Sensitive	Check this box if the search criteria is case sensitive.

6. Click **Search**. The Create Documents tab is displayed.

   OR

   Click **Clear** and search for another value.

OR

7. Select the ***Add a New Value*** tab. The Create Documents page - Add a New Value tab is displayed.

Figure 43: Create Documents Page - Add a New Value Tab

8. Complete the field as follows:

Field	Instruction
Run Control ID	Enter a new run control ID.

9. Click **Add**. The Create Documents tab is displayed.

Figure 44: Create Documents Tab

10. Complete the fields as follows:

Field	**Description/Instruction**
Run Control ID	Populated based upon the search criteria entered.
Run Request Parameters	**Instruction**
Period Begin Date	Enter the beginning date of the period of time that the document covers or select a date from the calendar icon.
Period End Date	Enter the ending data of the period of time that the document covers or select a date from the calendar icon.
Document Type	Select the applicable document type from the drop-down list.
Template ID	Select the template ID to generate the documents. This field is only available if the template source on the Document Types page is User Defined for this document type.
Manager Selection Method	Specify a method for select manager IDs. When the mass document creation process is launched, EmpowHR determines the manager of each employee it processes using data defined in HR. EmpowHR needs this information to route email messages to managers informing them that review forms are available, and to associate a manager ID with each document, so that the manager can act as the author of the manager document and the owner of the evaluation process. Select data from the drop-down list. Valid values are:

Field	Description/Instruction
	By Department Manager - Retrieves a manager based on the Department of the employee, using the Manager ID field on the Department Profile page. **By Group ID** - Retrieves the manager from the Manager ID field on the Group Profile page. **By Reports To Position** - Retrieves the manager of the employee's position that is specified in the Position Data component. **By Supervisor ID** - Retrieves the manager based on the Supervisor ID field on the Job Data page - Job Information tab. **By Part Posn Mgmt Dept Mgr ID** - Searches for a Reports To relationship between managers and employees, and then uses the By Department Manager ID selection method if a Reports To ID is found. **By Part Posn Mgmt Supervisor ID** - Searches for a Reports To relationship between managers and employees, and then uses the By Supervisor ID selection method if a Reports To ID is found.
Employee Groups to Process	**Description/Instruction**
***Group ID**	Required field. Specify the employee groups for which documents should be generated. Select data by clicking the search icon.
As Of Date	Enter the date or select a date from the calendar icon. This date is to generate the group that is used in the document creation process. The current date is the default. Note: The mass creation process always regenerates the selected groups before it creates employee documents.
Description	Populated with the description of the Group ID selected.
Language Code	Select a language code to generate documents in a different language than the base language of the database. This field is available only when the Allow Review Language Override check box is selected on the ePerformance Installation table.

11. Click **Save**. At this point, the following options are available:

Step	Description
Click **Notify**	Advances to the Send Notification page.
Click **Add**	Returns to the Create Documents page - Add a New Value tab.
Click **Update/Display**	Returns to the Create Documents page - Find an Existing Value tab
Click **Return to Search**	Returns to the Create Documents page - Find an Existing Value tab

Step	Description
Click **Report Manager**	Formats a report. For more information refer to EmpowHR, Section 14, Reporting.
Click **Process Monitor**	Allows users to specify the location where a process or job will run and the format used for the output. For more information refer to EmpowHR, Section 14, Reporting.
Click **Run**	Allows users to specify the location where a process or job will run and the format used for the output. For more information refer to EmpowHR, Section 14, Reporting.

Viewing Document Creation Results as an HR Administrator

This option allows the viewing of documents that were created by the background process.

To View a Document That Was Created:

1. Select the ***Workforce Development*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***View Document Creation Results*** component. The View Document Creation Results page - Find an Existing Value tab is displayed.

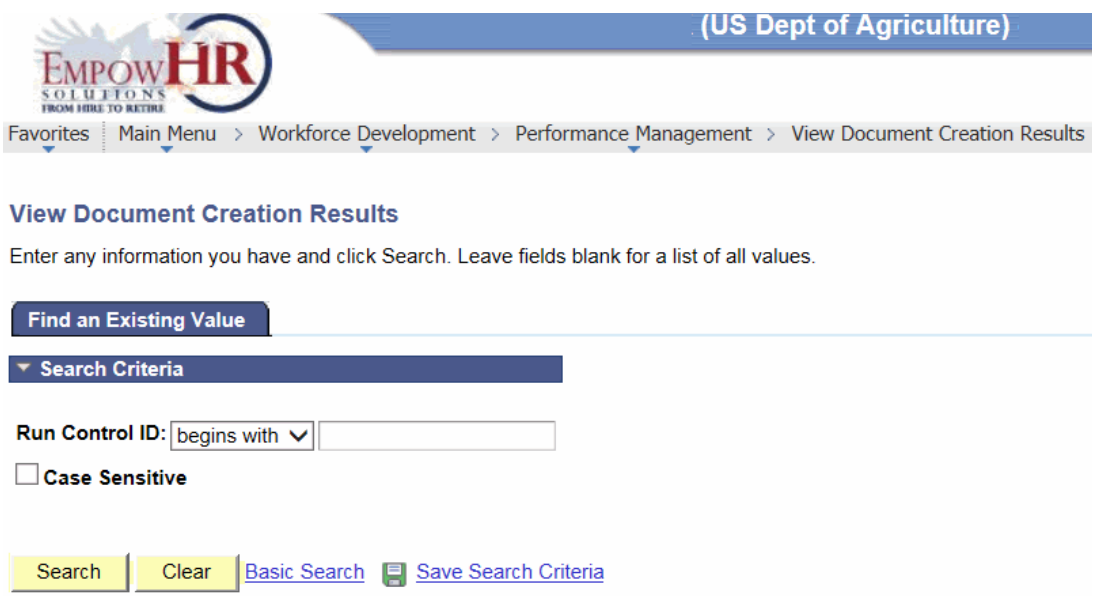


Figure 45: View Document Creation Results Page - Find an Existing Value Tab

4. Complete the fields as follows:

Field	Instruction
Run Control ID	Enter the existing run control ID.
Case Sensitive	Check this box if the search criteria is case sensitive.

5. Click **Search**. The results are displayed. This page presents results from the selected run of the Created Summary Data process.

   OR

   Click **Clear** and search for another value.

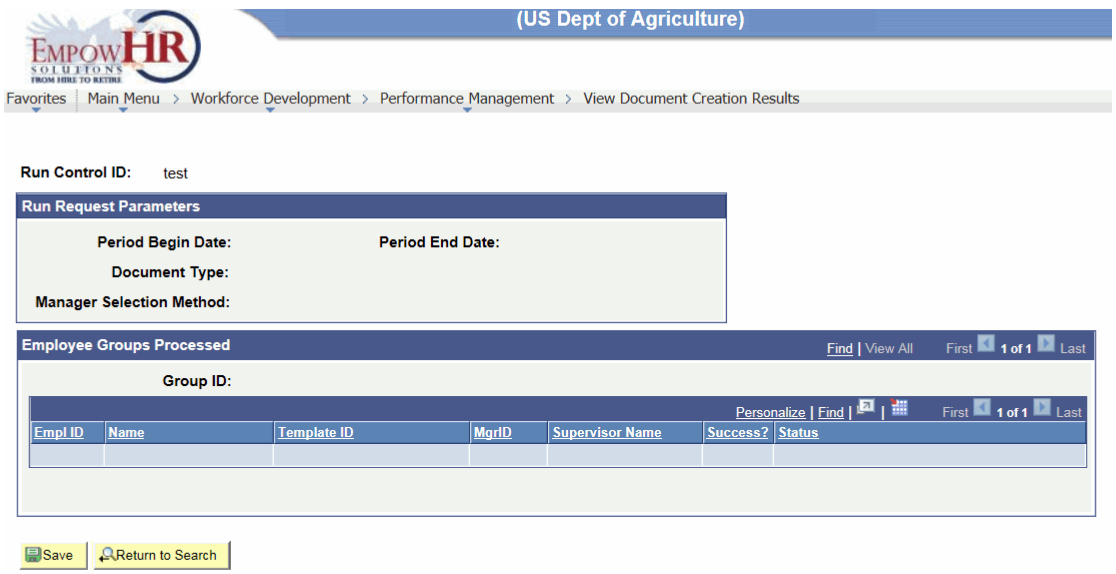


Figure 46: View Document Creation Results Page

6. Complete the fields as follows:

Field	Description/Instruction
Run Control ID	Populated with the search criteria entered.
Run Request Parameters	**Description**
Period Begin Date	Populated with the begin date when the document was created.
Period End Date	Populated with the end date when the document was created.
Document Type	Populated with the document type selected when the document was created.
Manager Selection Method	Populated with the manager selection method selected with the document was created.
Employee Groups	**Description**

Field	Description/Instruction
Processed	
Group ID	Populated with the group ID and description selected when the document was created.
EmplID	Populated with the employee ID. The list of employees had documents created in the group ID.
Name	Name of the employee that corresponds to the EmplID.
Template ID	Populated from the template selected when the template was created.
MgrID	Populated with the manager ID of the employee.
Supervisor Name	Populated with the manager's name that corresponds to the Manager ID.
Success?	Displays a **`Y (Yes)`** if the employee’s document was created successfully. Otherwise, this field displays **`N (No)`**.
Status	Displays the status of the document.

7. Click **Save**.

   OR

   Click **Return to Search** to return to the View Document Creation Results page - Find an Existing Value tab.

Manager Self Service (MSS) Performance Management

A performance document is a written document that identifies the employee's critical elements and performance standards by which he/she will be rated. Only the rating official and/or employee can initiate a new performance document for a new appraisal period. A performance document must be in place for a minimum appraisal period (minimum 90 calendar days), normally, no longer than 15 months for a rating period to be conducted.

In the manager role, the manager can generate documents for direct reports by either:

- Selecting a group and then selecting one or more employees within the group.
- Selecting one or more employees directly.

Regardless of which option is chosen, select the As of Date for determining which employees report to you as a manager. Then select the employees for whom documents should be generated. Finally, select the document template from which to generate the individual documents and enter the dates of the evaluation period that is covered.

Either performance or development documents can be generated. The process is identical, except for the page names and the navigation path by which the document generation pages are accessed.

This section provides an overview of document generation for direct reports and discusses how to generate documents.

For more information see:

Creating/Editing ePerformance Documents as a Manager 102

Creating/Editing ePerformance Documents as a Manager

The ***Create Performance Documents*** option is used to facilitate the management of the performance evaluation process. This option allows several different roles to participate in the feedback process between managers, employees, and HR personnel.

The Manager can also create a new performance document, view existing performance documents, enter comments, and evaluate employees.

The Performance Document allows the manager to add new or pre-defined values for each section of the document.

Note: Instructions for creating a performance document are located at the top of each page in EmpowHR.

To Create a Performance Document:

1. Select the ***Manager Self Service*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Performance Documents*** menu item to access performance documents as a manager.

   OR

   Select the ***Development Documents*** menu item to access development documents as a manager.

4. Select the ***Create Documents*** component. This component allows the manager to create a document for one employee at a time. The Create Performance Documents page is displayed.

   OR

   Select the ***Create Documents By Group*** component. This component allows the manager to create a document for a group of employees. The Create Performance by Group page is displayed.

Figure 47: Create Performance Documents Page (Manager Self Service for a group)

5. Complete the field as follows:

Enter the Effective Date	Instruction
Effective Date	Enter the date used to find the employees that report to the manager. A manager will only be able to process those employees that report to them as of this date.

6. Click **Continue**. The Create Performance Document page is displayed.

OR

If a document is being created for a group, access the ***Create Documents By Group*** component. The Create Performance Documents pages are displayed.

Figure 48: Create Performance Documents (after clicking Continue)

7. Complete the fields as follows:

Field	Description/Instruction
Instructions **Select Employees**	**Description**
Reports To:	Populated with the manager's name.
As Of	Populated from Create Performance Documents page 1.
Select Employees	**Description/Instruction**
Select	Check to select employee(s) from the list.
Name	Names of the employees that report to the manager and vacant positions with the position number.
Empl ID	Employee IDs that correspond to the names of the employee. If the position is vacant, the Empl ID is blank.
HR Status	Status of the employee. If the position is vacant, the HR status is blank.
Jobcode Description	Narrative description of the Job Code. If the position is vacant, the Job Code Description is blank.
Department	Narrative description of the Department where the employee is located within the Agency. If the position is vacant, the Department is blank.

8. Select one employee or a group of employees.

9. Click **Continue**. The Create Performance Documents (for an employee) is displayed.

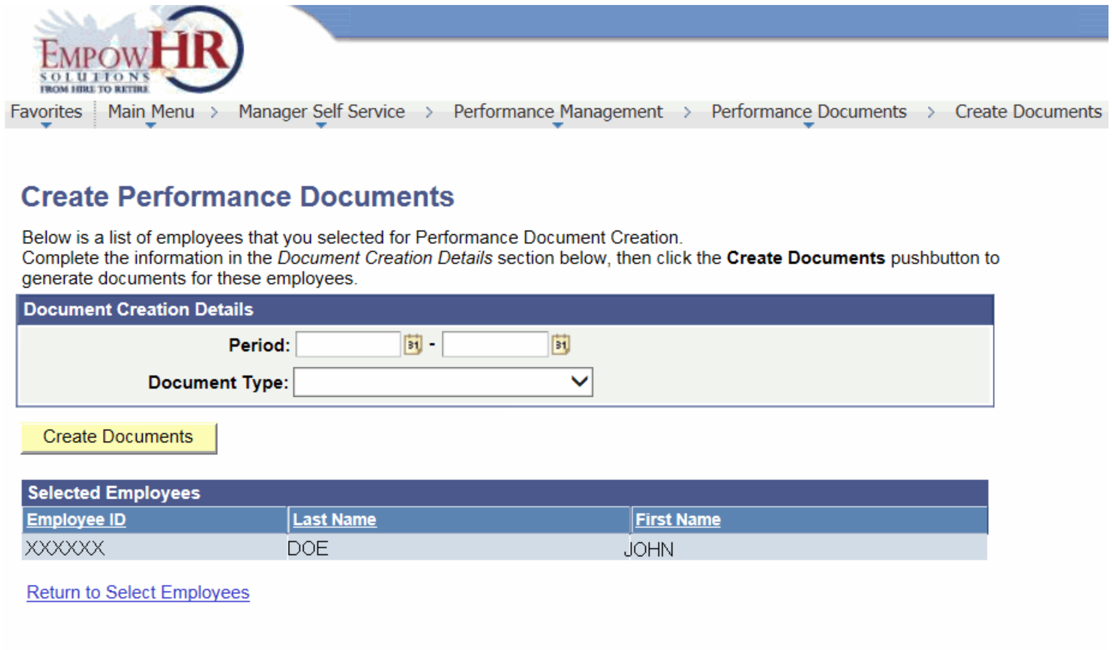


Figure 49: Create Performance Document (after selecting an employee)

To Create Performance Documents:

This page reflects the employee(s) that were selected from the Create Performance Documents (for an employee).

1. Complete the fields as follows:

Document Creation Details	**Instruction**
Period	Enter the date from and to of the performance period or select dates from the calendar icon.
Document Type	Select the type of document from the drop-down list. The values listed are populated from the Document Type template and can vary for each Agency.

2. Click **Create Documents**. The Create Performance Documents page (from Prior Document page) is displayed.

   OR

   Click ***Return to Selected Employees***. The Create Performance Documents page is displayed.

3. Complete the additional fields as follows:

Field	Instruction
Create from Prior Document	Defaults to `No`. Valid values are `Yes` (create from a prior document and `No` (do not create from a prior document).
Template	Select the applicable template from the drop-down list.

4. Click **Create Documents**. The Create Performance Documents - Results page is displayed. After selecting the employee(s) and the Document Type, a list of employee(s) that have Performance Documents that are ready for editing is displayed. Employee(s) with errors will need to be rerun after correcting the source of the error.

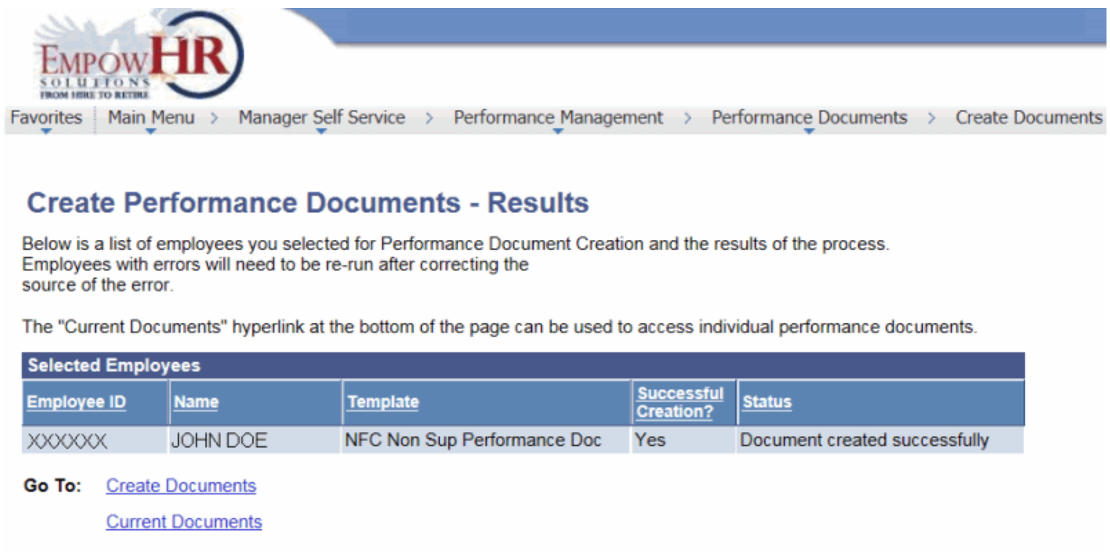


Figure 50: Create Performance Documents - Results Page

The fields on this page are as follows:

Selected Employees	Description
Employee ID	Populated with the employee's ID.
Name	Populated with the name of the employee. The name and employee ID are unique to each employee.
Template	Populated from the Create from Prior Document page.
Successful Creation?	Reflects whether the Performance Document was successfully created.
Status	Reflects the status of the Performance Document.

5. Click the ***Create Documents*** link to create a new Performance Document. The Create Performance Document page is displayed.

OR

Click the ***Current Documents*** link to view the newly created Document(s). The Current Performance Documents page is displayed.

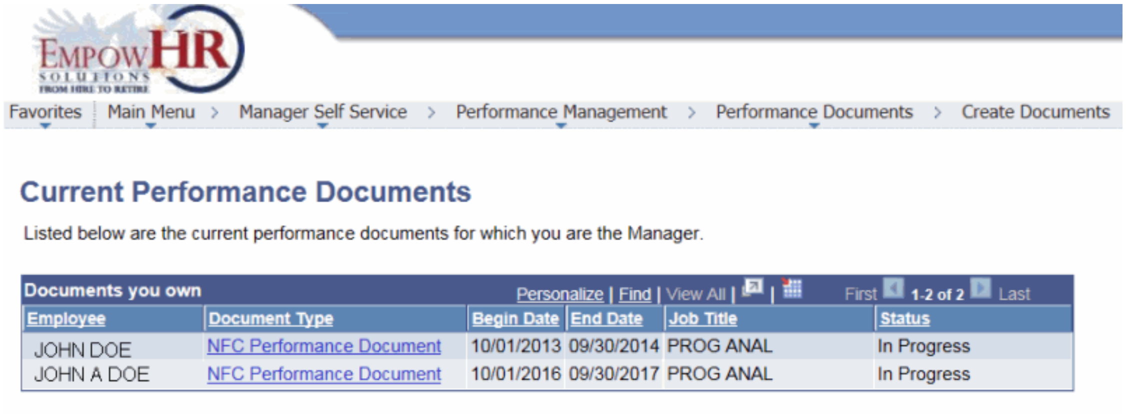


Figure 51: Current Performance Documents Page

The fields on this page are as follows:

Documents you own	Description
Employee	Populated with the name of the employee.
Document Type	Populated with the document type selected on the Create Performance Documents page.
Begin Date	Populated with the begin date entered on the Create Performance Documents page.
End Date	Populated with the end date entered on the Create Performance Documents page.
Job Title	Populated with the job title of the employee.
Status	Populated with the status of the current documents for each employee.

6. Click the ***Document Type*** link to view or edit the detail of the document. The Current Performance Documents - Document Details page is displayed. This page is used to track a Performance Document's progress. The Name of the Employee, Job Title, Type of Document, and the Begin and End Date of the Performance Document are populated at the top of the window.

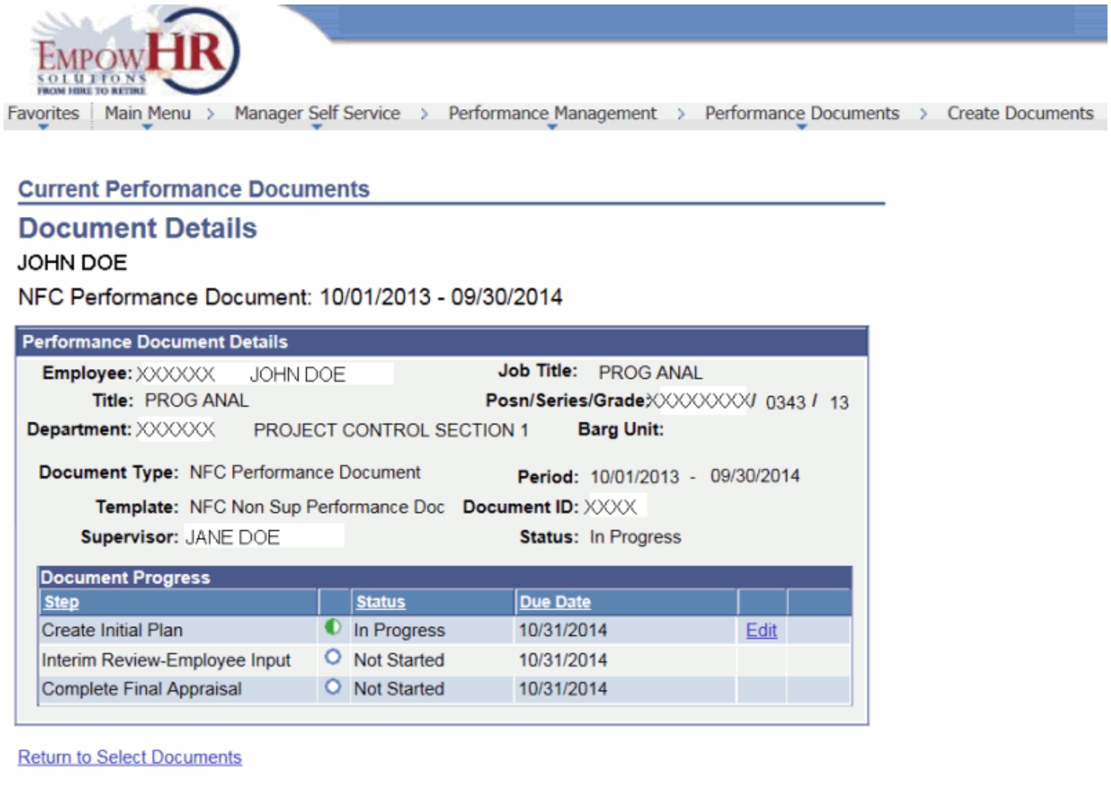


Figure 52: Current Performance Documents - Document Details Page

The fields on this page are as follows:

Performance Document Details	Description
Employee	Populated with the employee ID and the name of the employee.
Job Title	Populated with the job title of the employee.
Title	Populated with the title of the employee.
Posn/Series/Grade	Populated with the position number, job series, and grade of the employee.
Department	Populated with the Department code where the employee's job is located.
Barg Unit	Populated with the four-position numeric Union Bargaining Unit.

Document Type	Populated with the document type selected on the Create Performance Documents page.
Period	Populated with the beginning and ending date entered on the Create Performance Documents page.
Template	Populated from the Create from Prior Document page.
Document ID	Populated with the document ID number.
Supervisor	Populated with the name of the Manager for the employee.
Status	Populated with the status of the performance document.
Document Progress	**Description**
Step	Displays the life cycle of the Performance Document. An example is shown below:

Step	**Definition**
Create Plan	A current Performance Plan.
Employee Input	Employee's chance to enter comments on their own performance.
Complete Appraisal	Manager and/or Participant enters comments, rates the employee, and employee enters comments and approves/denies rating. This is equivalent to an Appraisal.

Status	Displays the status of each step in the process. Next to each status is a radio button that will be checked when each step is completed.
Due Date	Displays the due date for each step in the process.

7. Click the ***Edit*** link to add criteria to the corresponding Step. The Sections that were set up for the selected Template will display. The Performance Document - Performance Criteria - Draft page displays the details of the employee and the Performance Document. For more information regarding Status and links associated with the Status, refer to Document Statuses During Review.

   At this point, the following options are available: These options are also at the bottom of the page for ease of use.

Step	Description
Click **Save**	Saves the information.
Click **Complete**	Finalizes the criteria.
Click **Add Attachment**	Allows the user to Add Attachment to a Performance Document. The Add Attachment page is displayed.
Click **Cancel**	Cancels and return to the previous page.

Step	Description
Click **Return to Document Detail**	Returns to the Document Detail page.
Click **Ready for Review**	Allows for the review of the document by the employee.
Click the printer icon	Allows the viewing of the printable evaluation.
Click the notify icon	Sends a notification to the employee.

Attachment(s)

You can click **Browse** on the Performance Document in order to add (upload) an attachment(s) to the document.

Section 1 - Plan Definitions

Section 1 - Plan Definitions contains descriptions of what the Performance Documents will include.

Section 2 - Strategic Goals

Section 2 - Strategic Goals contains the goals of the Performance Plan. Strategic goals is a management-approved expression of the performance, threshold(s), or expectation(s) that must be met to be appraised at a particular level of performance. A strategic goal may include, but is not limited to, quality, cost-efficiency, timeliness, and manner of performance.

Section 3 - Targets

Section 3 – Targets may include, but is not limited to, quality, cost-efficiency, timeliness, and manner of performance. If the Plan exists, then this section is populated for review/edit. If the Plan is new, then complete the target goals for the Plan.

Pre-defined/Add Your Own Item(s):

Click the **+** to add additional targets. Select this radio button to select a pre-defined item. If a pre-defined item is not available, the Pre-defined Item page is displayed.

Section 4 - Priorities

Section 4 - Priorities is used for a description of the priority for the unit. If the Plan exists, this section is populated for review/edit. If the Plan is new, complete the unit priorities for the Plan.

Section 5 - Major Area of Responsibility

Section 5 - Major Area of Responsibility contains the responsibilities of the employee, the performance requirements, and the expectations of the employee. This section also allows the Manager to add the weight (criticality) of the responsibility. This section will be evaluated by the Employee and the Manager.

Below is a description of the types of responsibility and performance requirement.

- Major Duties - A critical element is a work assignment or responsibilities of such importance, that unacceptable performance in the element would result in a determination that the employee's overall performance is unacceptable.
- Performance Requirement - The performance standard is a management approved expression of the performance, threshold(s), or expectation(s) that must be met to be appraised at a particular leave or performance.
- Expectations - An expectation may include, but is not limited to, quality, cost-efficiency, timeliness, and manner of performance.

You must enter the percent (%) of weight that applies to the Major Area of Responsibility.

You must also click the **Red Pencil** next to each Major Area of Responsibility to edit and/or add the information.

At this point, the following options are available:

Step	Description
Click **Save**	Saves the the information.
Click **Complete**	Finalizes the criteria.
Click **Add Attachment**	Allows the user to add attachment to a Performance Document. The Add Attachment page is displayed.
Click **Cancel**	Cancels and returns to the previous page.
Click **Return to Document Detail**	Returns to the Document Detail page.
Click **Ready for Review**	Allows for the review of the document.

To Finalize the Criteria:

1. Click **Complete** to finalize the criteria. A Complete Performance Criteria popup appears to confirm the information on the Performance Document is finalized. The Document Detail page - Complete Status tab displays the status as completed.

OR

Click **Cancel** to return to the Document Details page - Complete Status tab without any action.

Employee Self Service (ESS) Performance Management

This section discusses how to generate/edit documents as an employee. The selection of the document type determines the page that is displayed.

Note: This option is only available to Agencies configured for employee entry.

To Generate/Edit Documents as an Employee:

1. Select the ***Employee Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***My Performance Documents*** menu item.

   OR

   Select the ***Development Documents*** menu item.
4. Select the ***Create Documents*** component.
5. Complete the fields on the Create Performance Documents page.
6. Click **Create Documents** to create the document.

To Change the Supervisor:

1. Click the ***Select A Different Supervisor*** link to change the name and choose a different supervisor.
2. Complete the fields.
3. Click the ***Start*** link next to the applicable Status. For more information regarding Status, refer to Document Statuses During Review and Approval. The Sections that were setup for the selected Template will display. The Performance Document - Performance Criteria - Draft page displays the details of the employee. This page displays the Plan Definitions in Section.

   At this point, the following options are available: These options are also at the bottom of the page for ease of use.

Step	Description
Click **Save**	Saves the the information.
Click **Add Attachment**	Allows the user to add attachment to a Performance Document. The Add Attachment page is displayed.

Step	Description
Click **Cancel**	Cancels and returns to the previous page.
Click the ***Return to Document Detail*** link	Returns to the Complete Status - Document Detail page.
Click **Reviewed/Discussed**	Allows for the review of the document.

To Add an Attachment:

1. On the document, click **Add Attachment**.
2. Click **Browse**.
3. Locate the document.
4. Click **Upload** to attach a document or file.

   OR

   Click **Cancel** to return to the previous page.

Section 1 - Plan Definitions

Section 1 - Plan Definitions contains descriptions of what the Performance Documents will include.

Section 2 - Strategic Goals

Section 2 - Strategic Goals contains the goals of the Performance Plan. Strategic Goals is a management-approved expression of the performance, threshold(s), or expectation(s) that must be met to be appraised at a particular level of performance. A strategic goal may include, but is not limited to, quality, cost-efficiency, timeliness, and manner of performance.

Section 3 - Targets

Section 3 - Targets may include, but is not limited to, quality, cost-efficiency, timeliness, and manner of performance.

To Add Pre-defined/Add Your Own Item(s):

1. Click the **+** to add additional targets. The Add An Item - Performance Document page is displayed.
2. Complete the fields.

3. Click **Search**. The Pre-Defined Results page is displayed. Select the applicable titles.

   OR

   Click **Clear** to clear the entry.

4. Click **Save**. The pre-defined item is added to the document.
5. Complete the fields.
6. Click **Update**. The added item will appear on the document.

   OR

   Click the ***Return To Performance Criteria*** link to return to the document.

Section 4 - Priorities

Section 4 - Priorities contains priorities of the unit.

Section 5 - Major Area of Responsibility:

Section 5 - Major Area of Responsibility contains the major area of responsibilities of the employee, the performance requirements, and the expectations of the employee. This section also allows the Manager to add the weight (criticality) of the responsibility. This section will be evaluated by the Employee and the Manager.

Below is a description of the types of responsibility and performance requirement.

Types of Responsibility	Performance Requirements
Major Duties	A critical element is a work assignment or responsibilities of such importance, that unacceptable performance in the element would result in a determination that the employee’s overall performance is unacceptable.
Performance Requirement	The performance standard is a management approved expression of the performance, threshold(s), or expectation(s) that must be met to be appraised at a particular level of performance.
Expectations	An expectation may include, but is not limited to, quality, cost-efficiency, timeliness, and manner of performance.

Section Summary

The Section Summary list documents created and their statuses.

At this point, the following options are available:

Step	Description

Step	Description
Click **Save**	Saves the information.
Click **Complete**	Finalizes the criteria.
Click **Add Attachment**	Allows the user to add attachment to a Performance Document. The Add Attachment page is displayed.
Click **Cancel**	Cancels and returns to the previous page.
Click **Return to Document Detail**	Returns to the Performance Documents page - Document Details tab.
Click **Ready for Review**	Allows for the review of the document.

Modifying Evaluation Criteria

This section provides an overview of evaluation criteria modifications and discusses how to modify criteria.

The draft criteria document that is generated from the document template contains the evaluation criteria and item wording that are specified on the document template. The Establish Criteria step enables a manager, an employee, or both to tailor the document templates evaluation criteria for the employee prior to generating evaluations for the employee.

Depending on the role's capabilities on the document template, evaluators can make the following modifications to the criteria document:

- Add items such as goals, responsibilities, competencies, or user defined content items to a section. Add free-form items or select pre-defined items from a prompt table. Free-form subitems can be added or pre-defined subitems can be selected that are already in the Establish Criteria document.
- Criteria cannot be deleted if it is identified as mandatory on the template.
- Criteria detail that can be edited during the Establish Criteria step depends on whether or not the items are defined as mandatory and whether or not the items are coded, as shown in the table below:

If the Item Is	Editable Fields for Coded Items	Editable fields for Not Coded (Free-Form) Items
Mandatory	Status Percent Complete Target Rating	Status Percent Complete Target Rating
Not Mandatory	Supports Critical Ownership Due Date Reminder Date Status Percent Complete Target Rating	Title Description Measurement Supports Critical Ownership Due Date Reminder Date Status Percent Complete Target Rating

When the document criteria is satisfactory, the designer completes the document. Individual Evaluations can be generated by role from a completed criteria document. The document can also be reopened for further modifications.

Either a manager or an employee can add performance notes during the Establish Criteria step. These notes are linked to the section and item to which they apply. Later in the process, the person that entered a note can access the note to review, update, or include it in their section or item comments.

Before evaluation criteria can be modified, The HR Administrator must complete the following tasks:

- Activate the establish criteria process. Select the Establish Criteria check box on the Template Definition page - General tab.
- Define the rules for the establish criteria process. Complete the fields in the Establish Criteria group box on the Template Definition page - Process tab.
- Activate the ability to add items to the <document type> - Criteria - Draft Document. Select the Add Items - Establish Criteria check box on the Template Definition page - Structure tab.
- Activate the ability to add items to the <document type> - Criteria - Draft Document for each specific role. Select the Add check box in the Item tab on the Structure Region tab - Template Definition page.

The following are used to modify Evaluation Criteria:

Note: The navigation paths and page documentation in this section refer to modifying sections of an evaluation document. All sections on a development document work similarly and use the same page formats. The information could be different depending on the template setup.

1. Select the ***Manager Self Service*** menu.

   OR

   Select the ***Employee Self Service*** menu.

2. Select the ***Performance Management*** menu group. This menu group is accessed by the Manager or Employee.

3. Select the ***Performance Documents*** menu item or the ***Development Documents*** to access performance/development documents as a manager.

   OR

   Select the ***My Performance Documents*** or ***Development Documents*** menu item to access performance/development documents an employee.

4. Select the ***Current Documents*** component. This component allows the manager/employee to view/modify current documents. The Performance Documents (current) List page (ESS) as an employee and Current Performance Documents List page (MSS) as a manager. Development Documents Current List page has the same page views and options.

To Modify a Current Performance Document (ESS):

1. Select the applicable document type by clicking the ***Document Type*** link. The Current Performance Documents - Document Details page is displayed.

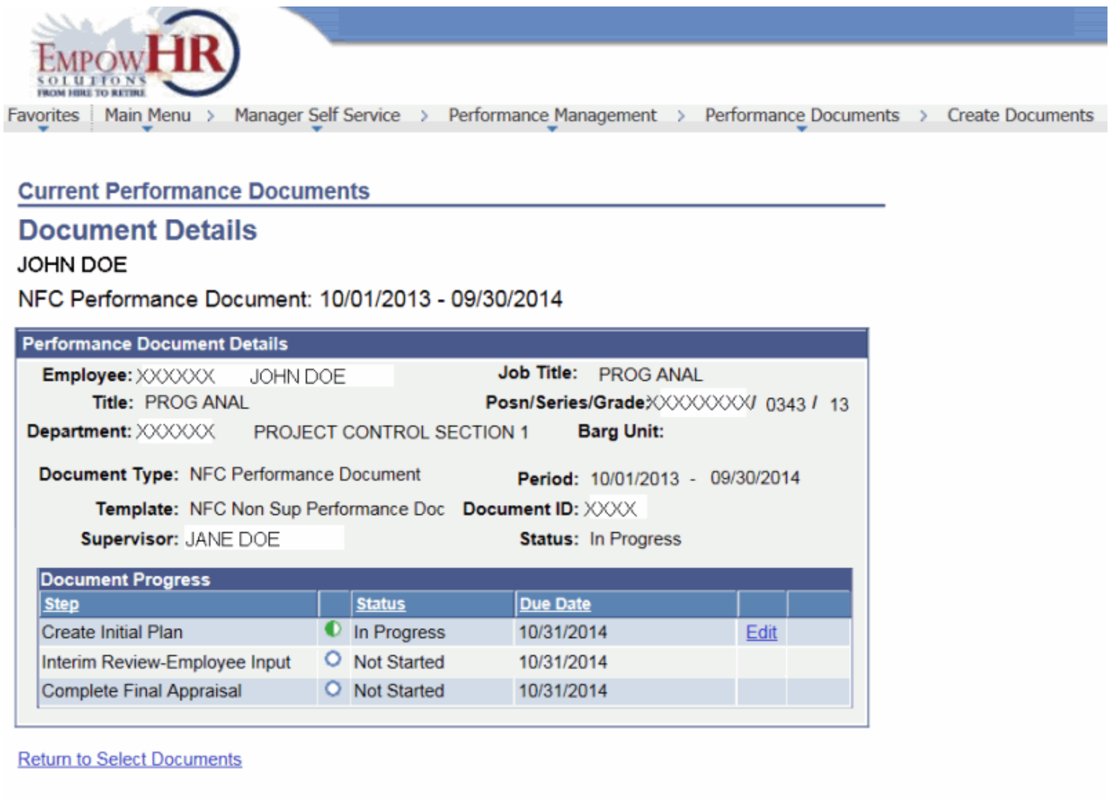


Figure 53: Current Performance Documents - Document Details Page

At this point, the following options are available:

Step	Description
Click **Edit**	Edits a document. The Draft page - Document Details tab is displayed. For more information regarding the completion of the Document Details page, refer to ESS Performance Management or MSS Performance Management.
Click **View**	Views a completed document.
Click **Complete**	Completes a step in the process. The Current Performance Document page - (ESS) Employee Evaluation tab is displayed.
Click **Save**	Saves the Performance or Document Criteria - Draft document.

Step	Description
Click **Cancel**	Cancels the changes and returns to the Document Details page.
Click **Reopen**	Reopens a criteria document that was previously completed. This button displays only if the establish criteria process is completed. Note: After a role evaluation is created or a pending nomination is accepted, the criteria document cannot be reopened. This button no longer appears on the document, unless all pending nominations have been canceled and all evaluations have been deleted.

2. Click **Complete**. The document status will be marked Complete.

   OR

   Click **Cancel**. The Current Performance Document page (ESS) - Employee Evaluation tab is displayed.

To Modify a Current Performance Document (MSS):

1. Select the applicable document type by clicking the ***Document Type*** link. The Current Performance Documents page (MSS) page - Document Details tab is displayed.

Note: The navigation and completion instructions for (MSS) Current Documents are the same as the navigation and completion instruction for (ESS) Current Documents.

For more information see:

Viewing Document Statuses 122
Viewing Document Progress Details 123

Viewing Document Statuses

To View the Status of a Document:

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***View Approval Status*** component. The View Approval Status Summary page is displayed. This is a view only page.

Viewing Document Progress Details

To View Current Document Details

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Documents*** menu group.
3. Select the ***Current Documents*** component. The Current Performance Documents page is displayed.

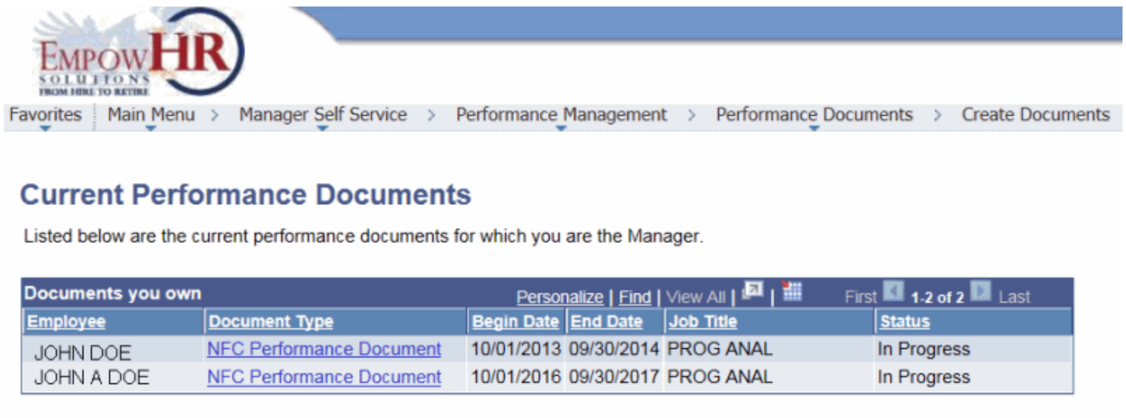


Figure 54: Current Performance Documents Page

4. Select the applicable document. The Current Performance Documents - Document Details page is displayed. The information that appears on this page is controlled by a combination of the document template, the role that accesses the page, and the status of each step.

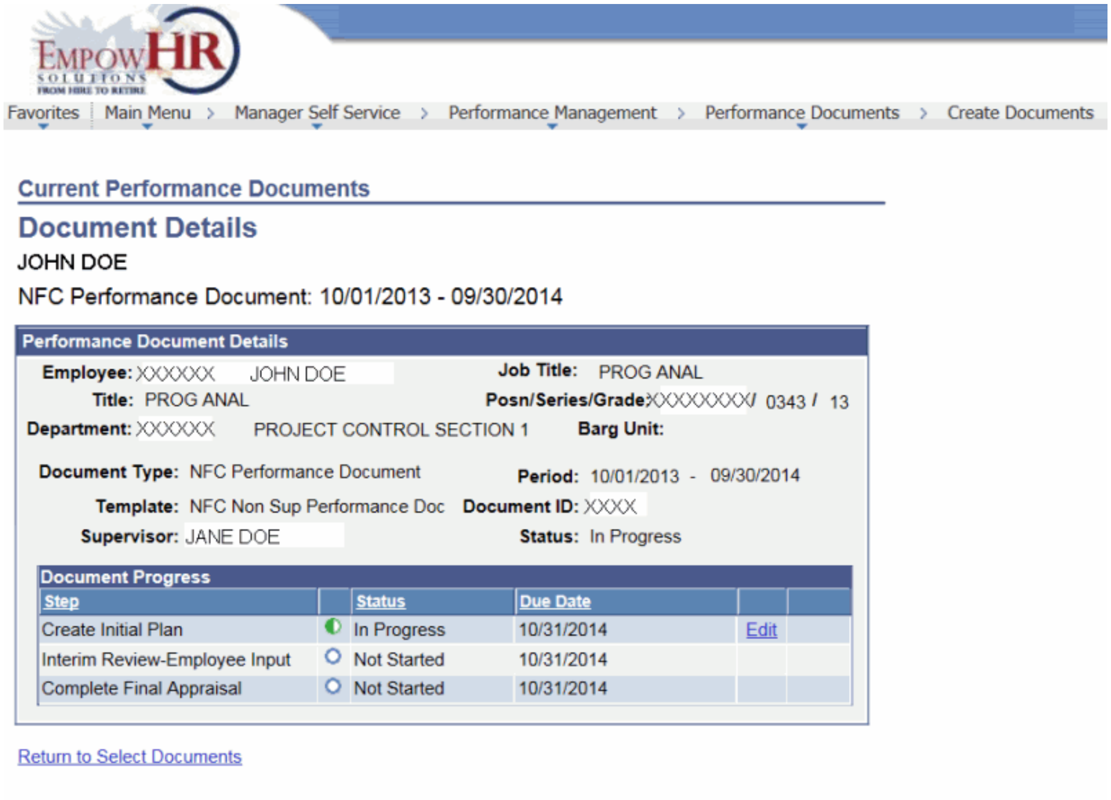


Figure 55: Current Performance Documents - Document Details Page

Note: The information at the top of the page is the employee's name and title in addition to the document details and time frame covered.

5. The following fields are populated and are view only:

Performance Document Details	Description
Employee	Populated with the employee’s first and last name.
Job Title	Populated with the employee’s job title.
Title	Populated with the literal of the employee's job title.
Posn/Series/Grade	Populated with the employee's position number, series, and grade.
Document Type	Populated with the type of document selected and should be the same document type at the top of the page.
Period	Populated with the period selected and should be the same period at the

Performance Document Details	Description
	top of the page.
Template	Populated with the template name
Document ID	Populated with the document ID number.
Supervisor	Populated with the manager's name that has accessed this performance document.
Status	Populated and displays the status of the document.
Document Progress	**Description**
Step	Appears only if the Establish Criteria check box is selected on the Template Definition page - General tab.
Status	Populated with the applicable status of the document.
Due Date	Populated with the due date of the document.

The table below displays the possible actions for the Establish Criteria step and the conditions under which each step is enabled. The document template is set up on the Establish Criteria region of the Template Definition page - Process tab.

Action	Step Status	Document Template Setup
Start	`Not Started`	The Updated By check box is selected for the role.
Edit	`In Progress`	The Updated By check box is selected for the role.
Complete	`In Progress`	The role is selected in Completed By Field.
View Criteria	`Complete`	This link appears to all roles that are defined on the document template.

The table below displays the possible actions and the coordinating role for the action.

Action	Step Status	Role
Start	`Not Started`	Employee
Edit	`In Progress`	Employee
View	`Complete`	Employee Manager

Complete Manager Evaluation

The actions for this step depend upon the review option selected.

Additional actions for the manager evaluation are available if the document template specifies a review process that required review or approval. These are **Mark Available**, **Review Held**, **Acknowledge**, **Submit**, and **Complete**.

Note: For the purpose of publishing performance results, the definition of **Complete** depends on the performance process that is selected on the Template Definition page - General tab when creating templates. Documents that require approval are considered complete when the approval status is **Approved**, and the document status is **Complete**.

Action	Step Status	Role
Start	**Not Started**	Manager
Edit	**In Progress**	Manager
View	**Complete**	Employee Manager

Selecting Documents

This section explains how to access the following documents as a manager, employee, and an HR administrator. The navigation for selecting documents is dependant on the individual's Role.

For more information see:

Select Current Performance Documents..127
Select Current Development Documents 129

Select Current Performance Documents

The information that appears on a page depends on the path with which the page is accessed. Below is an example of Manager Self Service page - Current Performance Documents tab.

This grid lists all documents with statuses that are not **`Complete`** or **`Canceled`** as a manager. **`Completed`** documents are listed on the Historical Documents page.

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***Performance Documents*** menu item to access performance documents as a manager.
4. Select the ***Current Documents*** component. This component allows the manager to view/modify a document for one employee at a time. The Current Performance Documents page is displayed.

OR

Select the ***Current Documents by Group*** component. This component allows the manager to view/modify a document for a group of employees. The Current Documents by Group page is displayed.

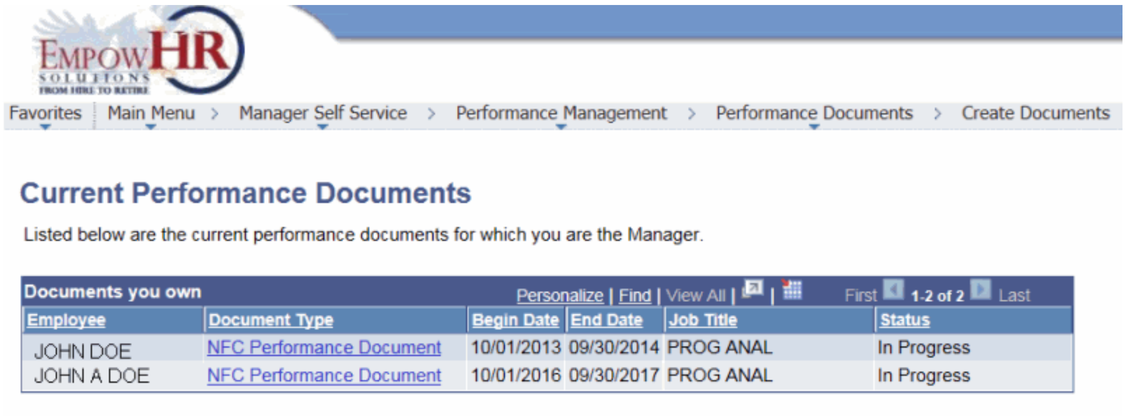


Figure 56: Current Performance Documents Page

The fields on this page are as follows:

Documents you own	Description
Employee	Populated with the name of the employee.
Document Type	Populated with the document type selected on the Create Performance page.
Begin Date	Populated with the begin date entered on the Create Performance page.
End Date	Populated with the end date entered on the Create Performance page.
Job Title	Populated with the job title of the employee.
Status	Status of the current documents for each employee.

5. Select the applicable ***Document Type*** link to view or edit the detail of the document. The Current Performance Documents - Document Details page (for an individual employee) is displayed. This page is used to track a Performance Document's progress. The name of the Employee, Job Title, Type of Document, and the Begin and End Date of the Performance Document are populated at the top of the window.

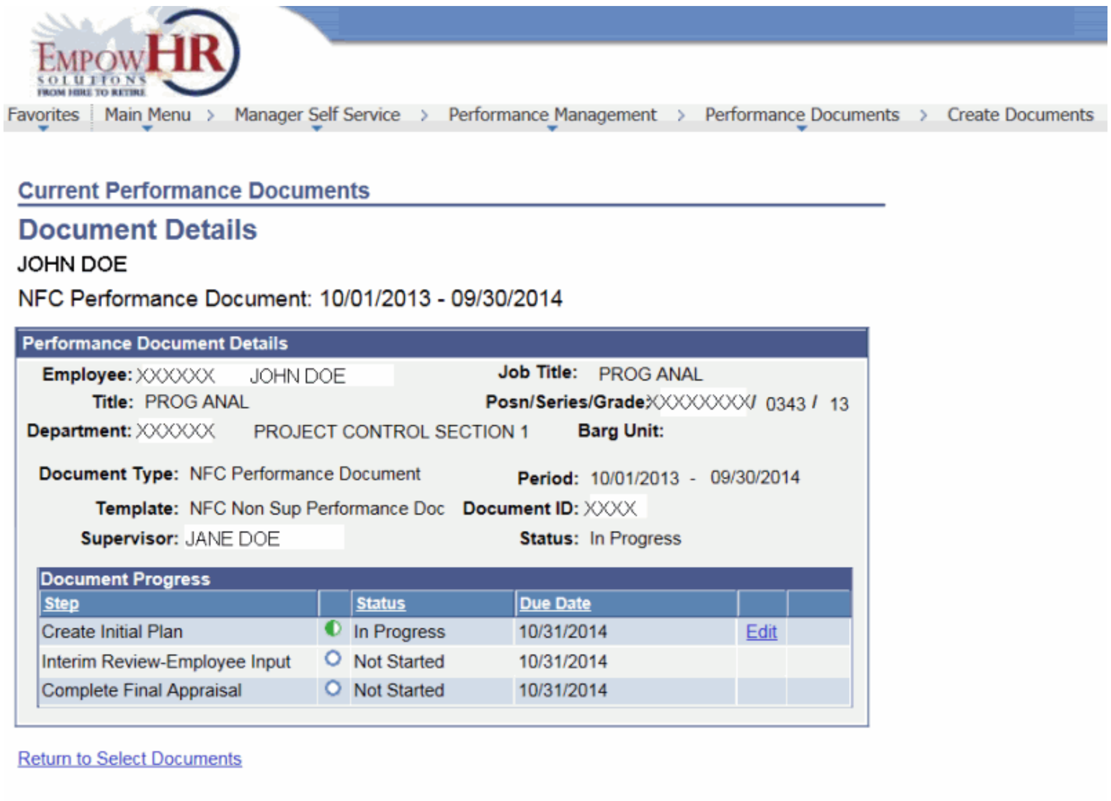


Figure 57: Current Performance Documents - Document Details Page

If this page is accessed through the Employee Self Service menu, the only documents that appear are current documents for that employee. The Employee Name column does not appear, but a column on the grid lists the manager of the employee for the document.

Select Current Development Documents

The information that appears on the page depends on the path with which the page is accessed.

1. Select the ***Manager Self Service*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Development Documents*** menu item to access performance documents as a manager.

4. Select the ***Current Documents*** component. This component allows the manager to view/modify a document for one employee at a time. The Current Development Documents page (MSS) is displayed.

5. Click the ***Document Type*** link to view/modify the Current Development Document Details page is displayed.

6. Click the ***Edit*** link to modify or view the development document. The LOC Individual Development Plan page - Development Criteria -Draft - Development Document tab is displayed.

7. Click the + to add IDP Goals. The LOC Individual Development Plan page - Add an Item - Development Document tab is displayed. For more information, refer to Add a Pre-Defined Item or Add Your Own Item.

   If this page is accessed through the Employee Self-Service menu, the only documents that appear are current documents. The Employee Name column does not appear, but a column on the grid lists the manager of the employee for the document.

Recording Preliminary Ratings

ePerformance is designed to support the complete performance and development process from planning to evaluation. An Agency can implement the complete process or just portions of it. This section focuses on the part of the process where participants evaluate the employee's performance or development needs against the evaluation criteria.

The capability to enter preliminary ratings for employees is available to managers only. These ratings are entered before the official rating data is entered in the manager's evaluation, and they are not entered on the evaluation. They are entered on the Preliminary Ratings page. This enables the manager to enter preliminary ratings at any time after the document is created, including the Establish Criteria and Nomination steps.

Only the documents that are **`In Progress`** are displayed on the Preliminary Ratings page.

Preliminary ratings are used to generate the Ratings Distribution Summary report, which enables managers and HR administrators to compare preliminary ratings with desired and actual rating distributions. Employees cannot see preliminary ratings.

To enable the entry of preliminary ratings, the Preliminary Rating check box is selected for the Overall Summary section on the document template.

To Enter Preliminary Ratings:

1. Select the ***Manager Self Service*** menu.
2. Select ***Performance Management***.
3. Select the ***Performance Documents*** menu item.
4. Select the ***Administrative Tasks*** menu item.
5. Select the ***Enter Preliminary Rating*** component. The Enter Preliminary Ratings page is displayed.
6. On the Enter Preliminary Ratings page, select one or more employees for whom to enter preliminary ratings.
7. Click **Continue**. The Enter Preliminary Ratings - Preliminary Ratings page is displayed.

   OR

   Click the ***Select All*** link to select all employees on the list.

   OR

   Click the ***Deselect All*** link to deselect the employees previously selected.

8. Complete the fields as follows:

Performance Documents	Description/Instruction
Employee	Populated with the employee selected.
Document Type	Populated with the document type for the employee selected.
Begin Date	Populated with the beginning date of the document.
End Date	Populated with the ending date of the document.
Job Title	Populated with the employee's job title.
Preliminary Rating	Enter a preliminary rating for the selected employee. The list of ratings from which is selected is defined by the rating model that is associated with the Overall Summary section of the document. Select data from the drop-down list.

9. Click **Save**. The Enter Preliminary Ratings - Save Confirmation page is displayed.

10. On the Enter Preliminary Ratings -Save Confirmation page, click **OK**. The Enter Preliminary Ratings (results) page (MSS) is displayed.

Recording Performance Notes

Regular and open communication between supervisors and employees is vitally important, particularly in a two-tier performance appraisal system where all elements are critical elements.

The review is a joint discussion between the rating official and the employee regarding the employee's progress toward achieving the performance standards. It does not involve the issuance of a rating of record. Reviews are conducted at least once during a full appraisal period. Normally, these required reviews would be accomplished during the midpoint of the appraisal period. Notes may be entered by the rating official and/or employee. The rating official must finalize the plan before a review can be added.

The rating official is encouraged to make written notes concerning the employee's performance at the time of the review. The purpose of the notes is to provide a more formal identification of the employee's performance in relation to the performance document. Employees are also encouraged to provide written comments on the form at this time.

Managers can start or edit a review for their employee(s). When the manager clicks **Progress Review**, a list of their employees is displayed. The manager has the option to either start a new review or update an existing review. The ***Performance Reviewer*** component has two tabs, the ***Progress Review*** and the ***Elements and Standards***. On the Progress Review, the manager can save the review. The employee will be notified via a workflow and the review is ready for the employee's viewing and comment. For more information regarding Performance and Workflow, refer to EmpowHR, Section 8, Employee Self Service.

Existing Progress Reviews are used by managers to document/conduct multiple mid-year reviews. To accomplish this, open an existing progress review and add more comments. When they save, the date and signature are captured in the comments field in chronological order to show multiple progress reviews.

Managers and employees can record notes about an employee's performance and accomplishments in two ways:

- During the Establish Criteria step, the ***Add Note*** link appears on a section or item during the Establish Criteria process if it is enabled on the document template. Notes that are added during this step are directly linked to the section and item to which they apply.
- At any time, by navigating to the Performance Notes page, employees can create records of events, activities, and accomplishments that they can later use to complete their performance evaluations. Similarly, managers can record details of an employee's performance for use when they complete the employee's evaluation. These notes are dated, and are available only to the author of a note. In other words, the manager cannot view notes that the employee enters and vice versa.

Note: There is not a separate page for development notes. The Performance Notes page is used to record any comments, and these notes are available for inclusion in either performance or development documents. The Performance Notes page is located under the Performance

Management menu item and do not fall under the Performance Document or Development Document components.

To Access Notes:

The My Performance Notes page or the Performance Notes page works similarly, except that the My Performance Notes page enables employees to search for and enter notes on their own performance and the Performance Notes page enables managers to search for and enter notes on other employees. Below is an example of My Performance Notes.

1. Select the ***Manager Self Service*** menu to maintain notes as manager.

   OR

   Select the ***Employee Self Service*** menu to add notes as an employee.

2. Select the ***Performance Management*** menu item.

3. Select the ***Maintain Performance Notes*** component. The Performance Notes page is displayed.

   OR

   Select ***Performance Notes*** component. The My Performance Notes page is displayed.

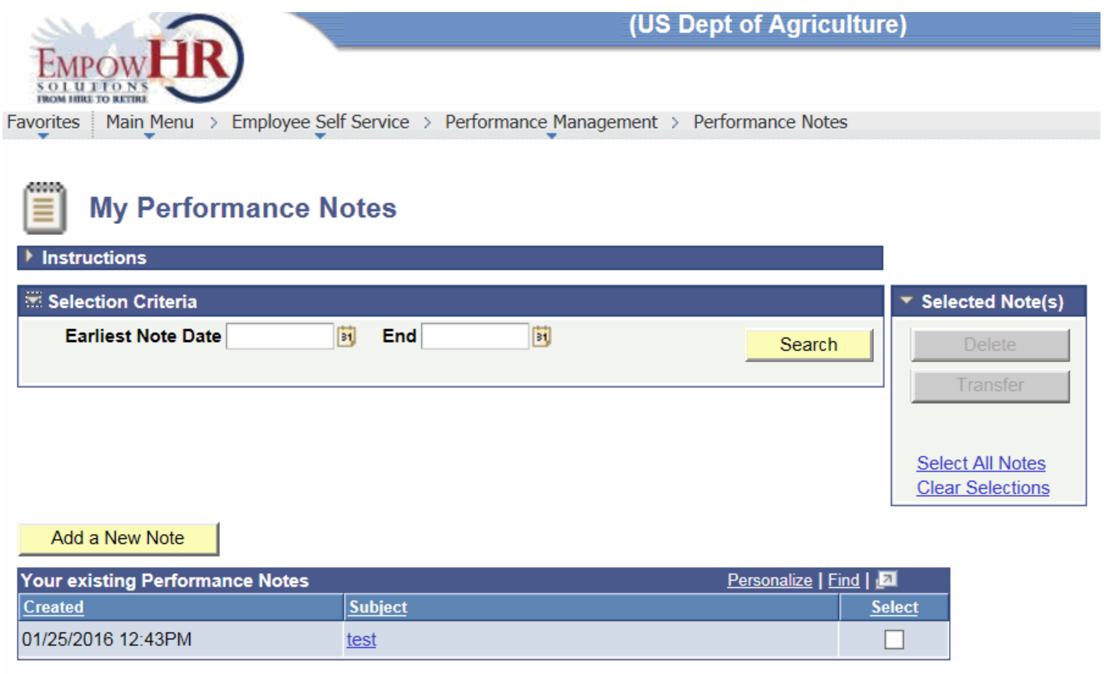


Figure 58: My Performance Notes Page

To Complete Performance Notes as a Manager:

1. Complete the fields as follows:

Instructions Selection Criteria	Description/Instruction
***ID**	Required field. Enter the employee ID of the subject employee or select data by clicking the search icon. The ID field appears only on the manger version of this page, since employees can only view their own notes.
Earliest Note Date	Enter a date or select a date from the calendar icon. If no date is entered, all notes for the employee regardless of date entered appear in the Existing Performance Notes for the Employee grid.
End	Enter the end date or select a date from the calendar icon. If no date is entered, all notes for the employee regardless of date entered appear in the Existing Performance Notes for the Employee grid.

At this point, the following options are available:

Step	Description
Click **Search**	Views a list of performance notes that meet the search criteria.
Click **Add a New Note**	Accesses the Performance Notes New Note page where a new note can be created.
Click **Select All Notes**	Views or modifies the details of the note, or select one or more notes to delete or transfer.
Click **Clear Selections**	Clears the selected item.
Click **Delete**	Removes the note(s) from EmpowHR. Select one or more listed notes to delete.
Click **Transfer**	Transfers the note(s) from EmpowHR. Select one or more listed notes to transfer.

To Complete My Performance Notes as an Employee:

1. Complete the fields as follows:

Field	Description/Instruction
Earliest Note Date	Enter a date or select a date from the calendar icon. If no date is entered, all notes for the employee regardless of date entered appear in the Existing Performance Notes for the Employee grid.
End	Enter the end date or select a date from the calendar icon. If no date is entered, all notes for the employee regardless of date entered appear in the Existing Performance Notes for the Employee grid.

At this point, the following options are available:

Step	Description
Click **Search**	Views a list of performance notes that meet the search criteria.
Click **Add a New Note**	Accesses the Performance Notes Detail page, where a new note can be created.
Click **Select All Notes**	Views or modifies the details of the note, or select one or more notes to delete or transfer.
Click **Clear Selections**	Clears the selected item.
Click **Delete**	Removes the note(s) from EmpowHR. Select one or more listed notes to delete.
Click **Transfer**	Transfers the note(s) from EmpowHR. Select one or more listed notes to transfer.

2. Click **Add a New Note**. The Performance Notes - New Note page is displayed. This page is the same for a manager or an employee.

Figure 59: Performance Notes - New Note Page

3. Complete the fields as follows:

Instructions Applications Selected Performance Note	**Description/Instruction**
ID	Populated with the user ID.
Created	Populated with the date and time the performance notes were created.
Creator	Populated with the name of the individual that created the performance note.
Last Update	Populated with the date the performance notes were updated.
by	Populated with the name of the individual that updated the performance note.
Subject	The subject of the performance note. Enter the subject narrative.
Note Text	The performance note. Enter the applicable performance note.

At this point, the following options are available:

Step	Description
Click **Save**	Saves the notes.
Click **Undo Changes**	Clears the notes that were entered.
Click **Performance Note Selection**	Returns to the Performance Notes page.

Ratings and Comments

The performance document template setup enables the configuration of evaluations for each role (employee, manager, and multi-participant) to only include section, item, and features that are appropriate for the role to evaluate. (For example, on a project review, goals, initiatives, competencies, and comments might be included on all sections.) However, some documents might include only the Competencies and Overall Summary sections on multi-participant evaluations.

To evaluate an employee's performance, a participant can enter and update ratings and comments as permitted by the template at any time during the performance period. This evaluation information is visible to employees and managers only after the evaluations are completed.

Ratings are entered at either the section, item, or subitem level. If the document is set up to automatically calculate rating, ratings from lower levels are averaged and rolled up to the higher levels. The manager rating (calculated or manually entered) on the manager's evaluation is used by writing tools to select appropriate text.

Managers can view other authors to view comments and ratings from evaluators in other roles.

Note: A manager can include comments that other evaluators entered on a section or item only if the manager also has comments enabled for the same section and item.

Advisor Tools

Depending on the capabilities granted to the participant's role on the document template, any evaluation participant might have access to the Development Tips or Results Writer tools. These tools provide suggestions for incorporating into comments. Actual usage of these tools most often occurs when the manager role consolidates feedback and finalizes evaluations.

Writing Tools

The ***Writing Tool*** link accesses the Suggested Results page which contains text suggestions that assist evaluators in writing comments. These suggestions can come from any of several different sources, provided that they are enabled for the section or item on the document template.

The Suggested Results page presents text items that are most directly related to the section and item. Select a tool from the available options in the Find Additional Content field to use an advanced search for text that is not directly related to the section, items, and rating from which the writing tool was accessed to search for text suggestions.

Below are the possible sources for text suggestions:

Source	Description
Results Writer	Contains predefined statements that describe an employee's proficiency for a given competency or subcompetency. These statements appear on the Suggested Results page for competency sections only. Other sections can be located for results statements by using the advanced search. Note: A section must be rated before a section or item suggested results appear.
Development Tips	Consists of predefined statement that provide tips on how employees can develop their proficiency. Development tips are related to competencies or subcompetencies, but can apply to other evaluation criteria as well. Note: A section must be rated before development tips appear.
Comments	Contains comments that evaluators in other roles have entered for the same section and item. Comments from another evaluator appear only if the role's evaluation status is **`Complete`**. • If the Suggested Results page is accessed from an item, all comments from complete evaluations for the item appear. • If the Suggested Results page is accessed from a section, only comments from complete evaluations for the section appear. Comments do not appear at the item level.
Performance Notes	Contains performance notes that were entered during the Establish Criteria for the section are available on the Suggested Results page, and are available only to the person who entered the note. Note: Employees and managers can also enter notes that are not directly tied to an evaluation. Search for these notes using the advanced search capabilities.

For more information see:

Language Checker Tool 141

Language Checker Tool

The Language Checker tool alerts managers to inappropriate language that appears in a manager's evaluation and suggests alternative language. It is enabled on the document template for an evaluation as a whole and is not turned off or on at the section or item level.

Updating Evaluations

This section discusses how to enter and maintain evaluation data.

Before entering evaluation data as a manager or employee, complete the Establish Criteria step, if it is specified on the document template. To enter evaluation data as another participant, a nomination must have been received and accepted to participate in the evaluation.

Note: The availability and order of the pages below depend on the template being used and the role of the participant.

Evaluations are divided into sections, with each section containing a different type of content. Sections contain the items and subitems against which an employee's performance is evaluated and can include mission statement, goals and objectives, responsibilities, competencies, employee comments, manager comments, and overall summary, signature lines, or organization-specific sections that were defined in the template.

Each role evaluation contains header information that identifies the role and the person who is evaluated. The header information also contains instructional text of system data that is supplied with the ePerformance function, but can be modified by using the Text Catalog.

The information that displays in a section depends on the type of section, special processing associated with the section, and the parameters selected on the Template Definition page - Structure tab.

To Enter and Maintain Evaluation Data:

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***Performance Documents*** menu item.

4. Select the ***Current Documents*** component. The Current Performance Documents page is displayed.

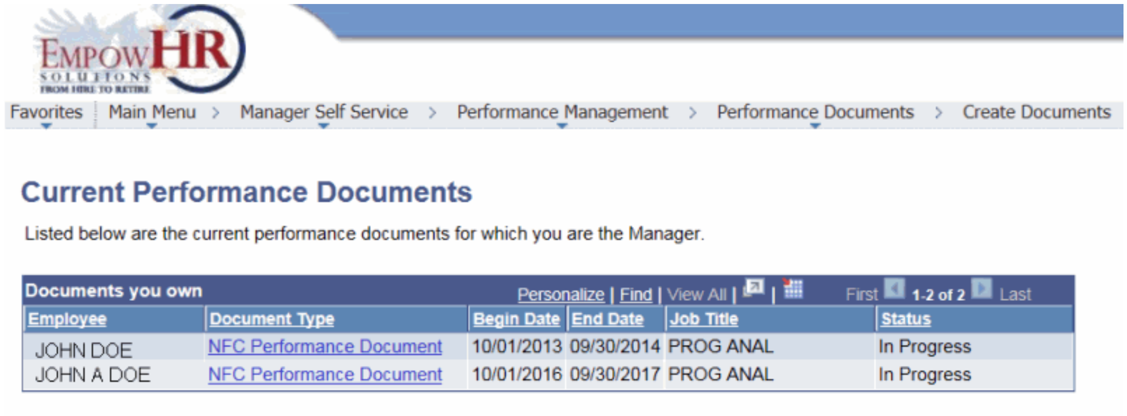


Figure 60: Current Performance Documents Page

5. Select the applicable document from the Document Type column. The Current Performance Documents - Document Details page is displayed.

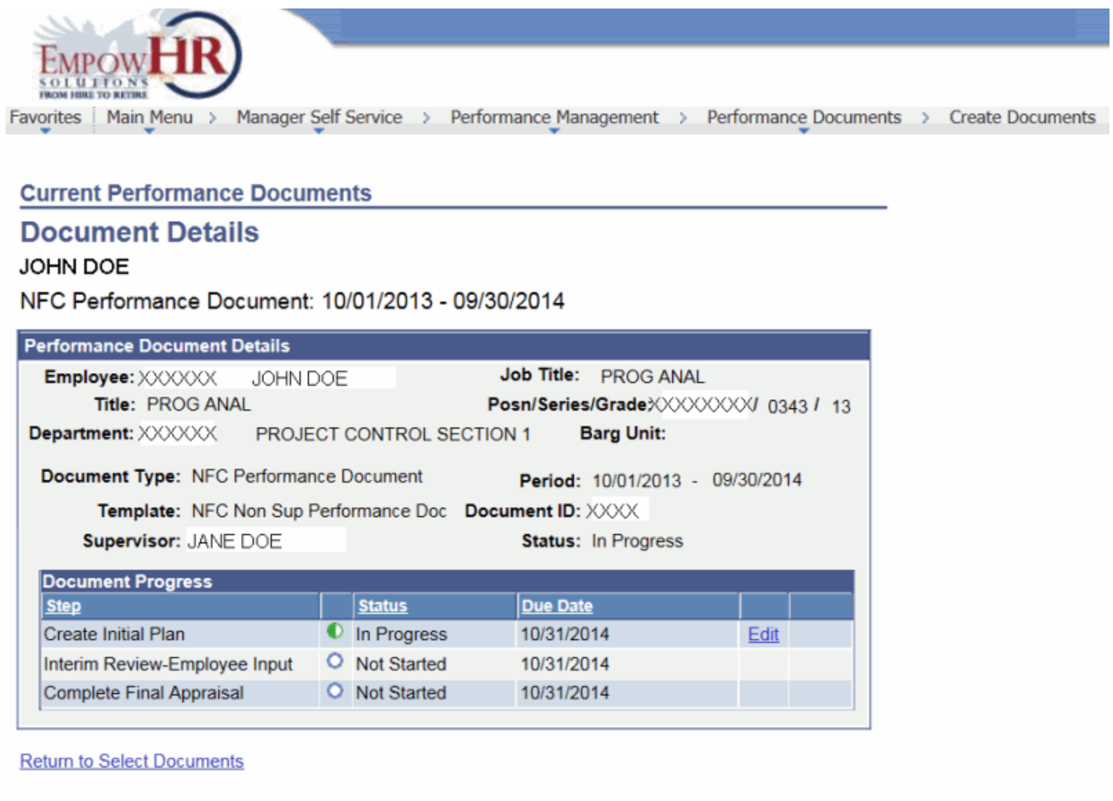


Figure 61: Current Performance Documents - Document Details Page

Note: If a Document Process Step indicates the ***Mark for Review*** and/or ***Edit,*** click the link. The Performance Document page - Manager Evaluation tab is displayed.

The fields on this page are as follows: (The name, title, and evaluation dates are displayed at the top of the page).

Performance Document Details	Description
Employee	Populated with the name of the employee or participant.
Job Title	Populated with the title of the employee or participant.
Title	Populated with the employee's job title.
Posn/Series/Grade	Populated with the employee's position number, series, and grade.
Department	Populated with the Department numeric location code and the narrative name for the location code.
Barg Unit	Populated with the Bargaining Unit Code.
Document Type	Populated with the document type selected.
Period	Populated with the period of the document.
Template	Populated with the template of the document type.
Document ID	Populated with the identification number of the document.
Supervisor	Populated with the supervisor name.
Status	Populated based on the status of the evaluation.
Document Progress	**Description**
Step	Populated with the steps of the document.
Status	Populated with the statuses of the document.
Due Date	Populated with the due date that is established on the document template.

6. Enter the ratings and comments for each section in the evaluation, if applicable.

7. Complete the fields as follows:

Field	Description/Instruction
Requirements	Populated with the requirements of the MAR.
Expectations	Populated with the employee's expectations of the MAR.
Major Duties	Populated with the major duties expected of the employee.

Field	Description/Instruction
Critical	Displays if the Critical check box is selected on the Template Definition page - Structure tab. `Yes` or `No` displays as the content for the Critical field if it is defined on the Template Definition page - Content tab.
Rating	Select the applicable rating from the drop-down list. The valid values are based on the document template. Populated with the average of the rating for the particular section. This field displays if the Rate check box is selected for the section and the applicable Rate Section, Rate Item, or Rate Subitem check box is selected in the Rate/Weight tab on the Section Roles grid. View or enter ratings. The action that is permitted depends on the level (subitem, item, section) where the field occurs if calculation is enabled in the document template, and the user actions that the template definition permits. For example, at the overall summary and section summary level, the rating field is read-only unless the role has permission to override system-calculated ratings or calculate field was not enabled on the document template.
Weight	Enter the weight of an item relative to the other items in the same section or relative to other sections in the evaluation. The weight field displays if the Weight check box is selected for the section and the applicable Weight Section or Weight Item check box is selected in the Rate/Weight tab - Section Roles grid. Note: The sum of the weights for all items in a section or all sections in a document, must equal 100 percent in the manager's document.
Comments	Enter comments regarding the rating given.

The Rating, Average Rating, Rating, and Summary Weight will be completed for each Section of the document.

8. Complete the fields as follows:

Field	Description
Rating	Populated with the average of the rating for the particular section. This field displays if the Rate check box is selected for the section and the applicable Rate Section, Rate Item, or Rate Subitem check box is selected in the Rate/Weight tab on the Section Roles grid. View or enter ratings. The action that is permitted depends on the level (subitem, item, section) where the field occurs if calculation is enabled in the document template, and the user actions that the template definition permits. For example, at the overall summary and section summary level, the rating field is read-only unless the role has permission to override system-calculated ratings or calculate field was not enabled on the

Field	Description
	document template.
Summary Weight	Populated with the summary weight.

At this point, the following buttons may appear on the Overall Summary Section.

Step	Description
Calculate Ratings	Calculates all of the items and section ratings, as well as the overall rating that appears on the performance document. Ratings are not calculated for items, sections, or summaries that are overridden. The Performance Document page - Submit for Approval tab is displayed. Available in the Summary Group box and the Overall Summary Section. Click to calculate ratings.
Cancel Evaluation	Moves the current evaluation from a status of `In Progress` to a status of `Canceled`. If the manager cancels the evaluation, then all the evaluations, employees, and peers, that might have already been sent to the Manager Profiles business process will be deleted. If the employee cancels the evaluation, then only their evaluation is deleted.
Save	Displays on an evaluation when the evaluation status is `In Progress`.
Available for Review	Submits the document for review by the employee, according to the review and approval rules. This button is available when the review process is selected in the Manager Evaluation group box on the Template Definition page - Process tab. This specifies that the employee review is required and that all the required information has been entered.
Manager Override	Displays at the following levels on the performance review page, depending on the template definition: Item level - to override the system-calculated average of the individual subitem ratings. Section summary level - to override the system-calculated average of the individual subitem ratings. Overall performance review summary level - to override the system-calculated average of individual section ratings. Note: An override that is entered remains in place until it is reviewed. To have EmpowHR recalculate the rating, remove the override.

9. Complete the remaining field on the page at the end of the performance document as follows:

Field	Instruction
Comments	Enter free-form text to describe an employee's performance relative to the corresponding item or section. The comments section always has access to the spell checker and optionally has access to writing tools. This field can appear at the item level or the section summary level. Displays if the Comments check box is selected in the Section tab - Section Roles region - Structure tab - Template Definition page or Item tab - Section Roles region - Structure tab - Template Definition page.

At this point, the following options are available:

Step	Description
Click **Review Held**	Records the fact that a review of the evaluation was held. This button displays if the review process specifies that an employee review is required, and the employee has reviewed the manager's fictionalized evaluation.
Click **Reopen**	Changes the status to **`In Progress`**. This button appears for manager and administrators when the evaluation is in the **`Complete`** status.
Click **Edit Details**	Edits detail information for the item. The Edit Details icon displays on the evaluation if the Update check box was selected from the role in the Item tab - Section Roles region - Structure tab - Template Definition page for the section.
Click **Delete**	Deletes the content item. Delete is available if the Mandatory check box is not select on the Template Definition page - Content tab.

Finalization Activities

Although managers can rate items, add comments to their evaluations, and record notes anytime during the evaluation cycle, additional steps must be performed to finalize and complete evaluations. These steps include writing final evaluation comments and conducting reviews and approvals if required.

After evaluations are complete, the manager consolidates feedback and ratings into the manager evaluation. The manager conducts a review with the employee (if a review process is required) and submits the evaluation for approval (if an approval process is required).

Administrative Tasks

Certain administrative tasks can be performed outside of the evaluation cycle. Typically, administrators perform these tasks for documents that belong to one or more groups of employees that do not report to them, while managers work only with documents for employees or groups that report directly to them. Administrative tasks may only be performed in Manager Self Service.

For more information see:

Transferring Documents 149
Resetting Document Status 153
Canceling Documents 156
Deleting Documents 159
Preliminary Ratings 162
Viewing Documents..163

Transferring Documents

A document may be transferred from one manager to another if an employee is reassigned or if a reorganization occurs. Administrators can transfer any document that is in any status. Managers can transfer only documents that they currently own with a status of **In Progress**, **Available for Review**, **Review Held**, or **Acknowledged**.

When a document is transferred, EmpowHR automatically notifies the new manager that he/she is responsible for completing the evaluation process that is in progress for that employee.

To Transfer a Document*:*

1. Select the ***Manager Self Service*** menu.

   OR

   Select the ***Workforce Development*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Performance Documents*** menu item.

   OR

   Select the ***Development Documents*** menu item.

4. Select the ***Administrative Tasks*** menu item.

5. Select the ***Transfer Document*** component. The Transfer Document page is displayed. This page allows the user to search, select, and transfer any document with a status of **`In Progress`** regardless of the manager.

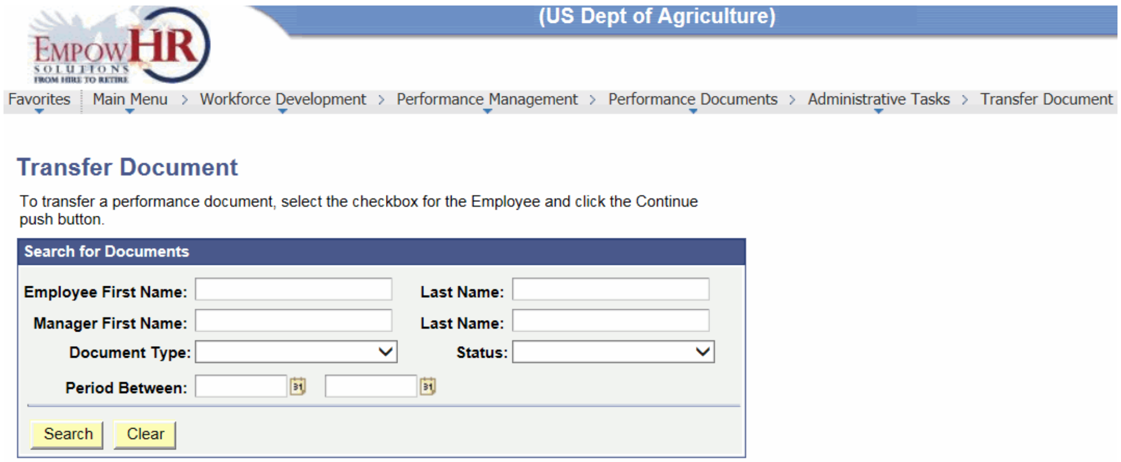


Figure 62: Transfer Document Page

6. Complete the fields as follows:

Search for Documents	Instruction
Employee First Name	Type the employee's first name.
Last Name	Type the employee's last name.
Manager First Name	Type the manager's first name.
Last Name	Type the manager's last name.
Document Type	Click the down arrow to select the document type of the document to be transferred.
Status	Click the down arrow to select the status of the document to be transferred.
Period Between	Either enter the dates or click the calendar icon to select the time period.

7. Click **Search** to search for the employee. A list of available employee(s) is displayed.

OR

Click **Clear** to clear the fields.

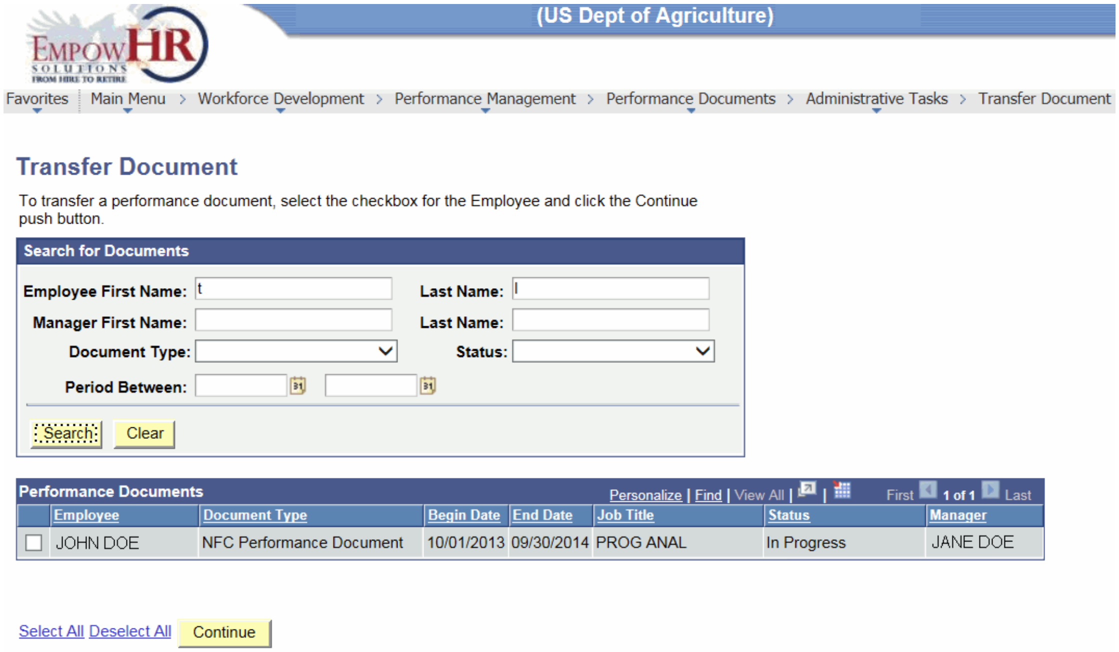


Figure 63: Transfer Document Page (after clicking Search)

8. Select the checkbox for the Employee to change the document status. The following fields are displayed.

OR

Click the ***Select All*** link to select all the employees on the list.

OR

Click the ***Deselect All*** link to deselect all the employees on the list.

Performance Documents	Description
Employee	Employee's name.
Document Type	Type of document to be canceled.
Begin Date	Starting date of the performance document.
End Date	Ending date of the performance document.
Job Title	Job title of the employee.
Status	Status of the document.

Performance Documents	Description
Manager	Manager's name.

9. Click **Continue**. The Transfer Document - Confirm Transfer Page is displayed.

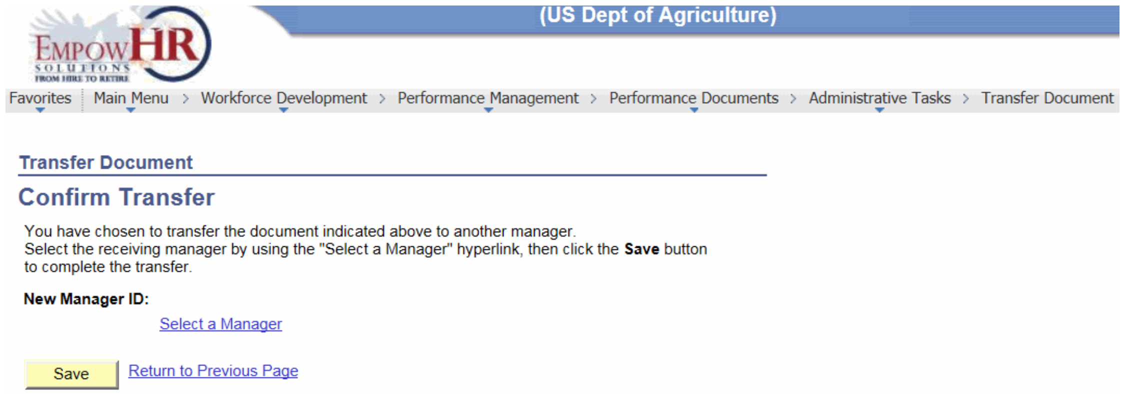


Figure 64: Transfer Document - Confirm Transfer Page

10. Click the ***Select a Manager*** link. The Person Search - Simple page is displayed.

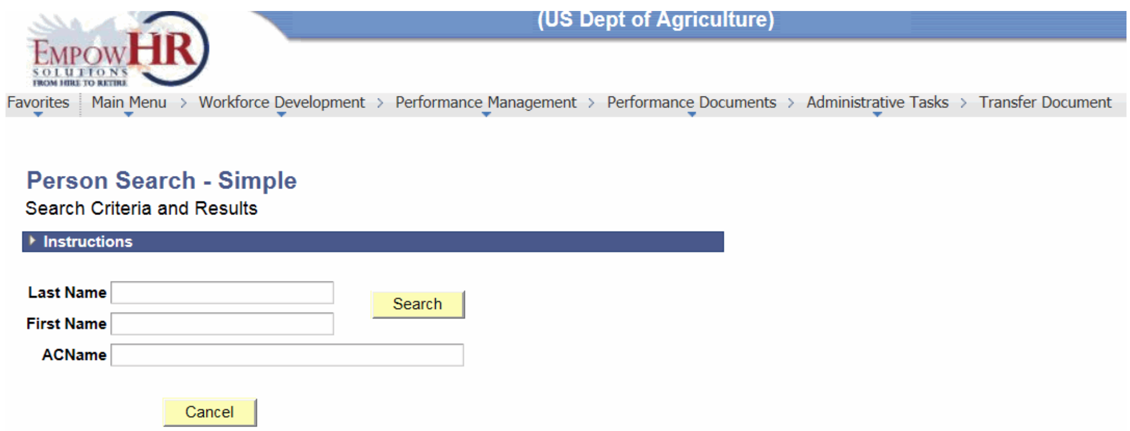


Figure 65: Person Search Simple Page

11. Complete the fields as follows:

Instructions	Instruction
Last Name	Enter the last name of the manager where the document will be transferred.
First Name	Enter the first name of the manager where the document will be transferred.
ACName	Enter the name, if applicable.

Note: One of the fields above must be entered before the search function can be used.

12. Click **Search**. A list of applicable employees is displayed.

13. Select the applicable employee.

14. Click **OK**. The manager's name is populated.

    OR

    Click **Cancel** to return to the previous page.

15. Click **Save**.

Resetting Document Status

The status of individual evaluations that are part of a document changes when employees and managers perform tasks such as opening and completing the evaluation, or managers mark an evaluation as **`Available for Review`**, **`Review Held`**, or **`Acknowledged`**. The manager can also change the status of an employee evaluation by clicking **Reopen** on the Employee Evaluation page. This changes the status of the employee evaluation back to **`In Progress`**. **Reopen** is available to the manager and ePerformance Administrator (ePerformance Admin) for evaluations when they are not the owner (the manager can't reopen their own evaluations), and the evaluation status is **`Complete`** or **`Canceled`**, and the overall document status is **`In Progress`**. Once the manager moves the document status past **`In Progress`**, they can not reopen the employee evaluation.

However, additional situations might occur where managers or ePerformance administrators need to change the statuses of documents as a whole. Document statues are changed using pages that are found on the ***Administrative Tasks*** menu. Document statuses can only be changed to **`In Progress`**.

Managers can change document to **`In Progress`** from any of the following statuses:

- **`Available for Review`**
- **`Review Held`**
- **`Acknowledged`**
- **`Canceled`**
- **`Complete`**

If a document changes from **`Canceled`** or **`Complete`** to **`In Progress`** status, the document is removed from all approval queues and becomes inaccessible to the employee. If the status is changed from **`Complete`** to **`In Progress`**, the following steps on the Document Details page also change to **`In Progress`**: Nominate Participants; Track Nominations; and Review Participant Evaluations.

Any competency ratings that were pushed from the completed evaluation to competency management are rolled back. A Manager must then move the document back through the entire sequence of statuses until they can once again mark it as **`Complete`**.

To Reset the Document Status:

1. Select the ***Manager Self Service*** menu.

   OR

   Select the ***Workforce Development*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Performance Documents*** menu item.

   OR

   Select the ***Development Documents*** menu item.

4. Select the ***Administrative Tasks*** menu item.

5. Select the ***Reset Document Status*** component. The Reset Document Status page is displayed. The manager's view of this page includes all documents in the **`Available for Review`**, **`Review Held`**, or **`Acknowledged`** status appear in the list.

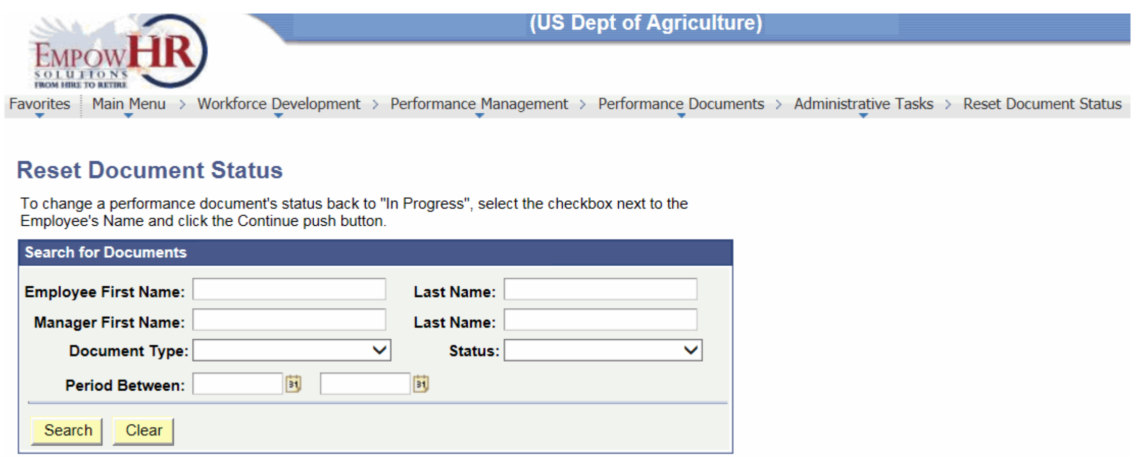


Figure 66: Reset Document Status Page

6. Complete the fields as follows:

Search for Documents	Instruction
Employee First Name	Type the employee's first name.
Last Name	Type the employee's last name.

Search for Documents	Instruction
Manager First Name	Type the manager's first name.
Last Name	Type the manager's last name.
Document Type	Click the down arrow to select the document type of the document to be reset.
Status	Click the down arrow to select the status of the document to be reset.
Period Between	Either enter the dates or click the calendar icon to select the time period.

7. Click **Search** to search for the employee. A list of available employee(s) is displayed.

   OR

   Click **Clear** to clear the fields.

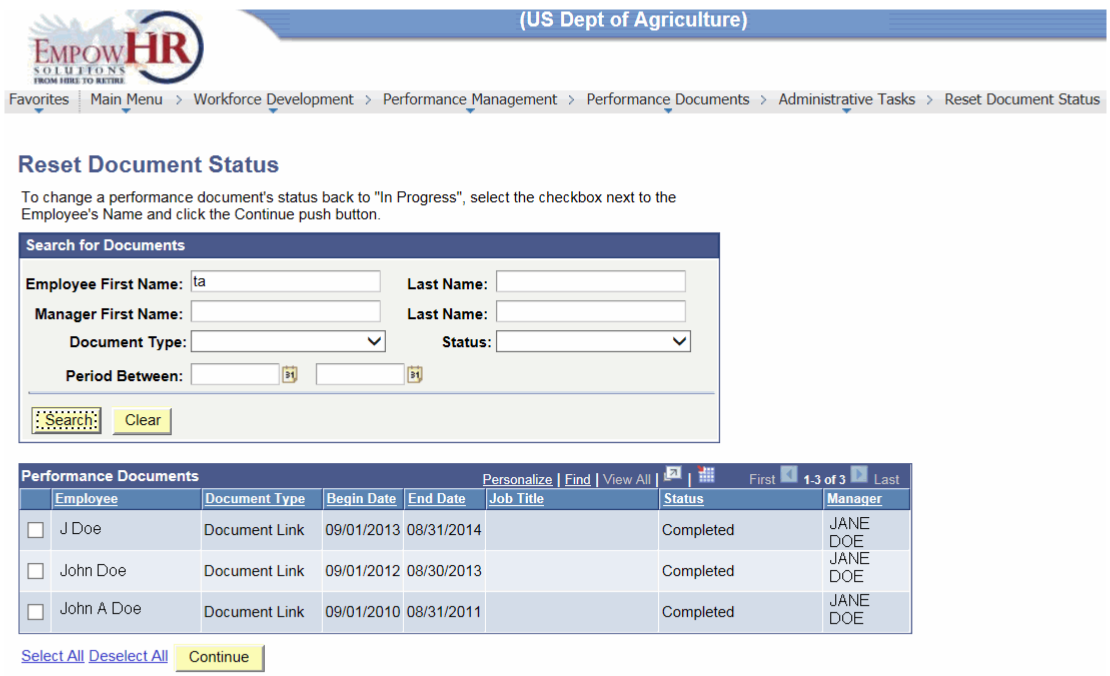


Figure 67: Reset Document Status Page (after clicking Search)

8. Select the checkbox for the Employee to change the document status. The following fields are displayed.

   OR

   Click the ***Select All*** link to select all the employees on the list. Click the ***Deselect All*** link to deselect all the employees on the list.

Performance Documents	Description

Performance Documents	Description
Employee	Employee's name.
Document Type	Type of document to be canceled.
Begin Date	Starting date of the performance document.
End Date	Ending date of the performance document.
Job Title	Job title of the employee.
Status	Status of the document.
Manager	Manager's name.

9. Click **Continue**.

Canceling Documents

Performance enables managers and ePerformance administrators to cancel a document. Managers can only cancel documents with a status of `In Progress`. ePerformance administrators can cancel any document that is not already canceled.

After the document is canceled, it becomes inactive. Canceling a document does not remove it from EmpowHR - it only marks it as Canceled, and the document appears in the Historical Documents page instead of Current Documents.

If EmpowHR is to update Manage Profiles, EmpowHR deletes all documents that have been completed and updated to the Manager Profiles business process.

To Cancel Documents:

1. Select the ***Manager Self Service*** menu.

   OR

   Select the ***Workforce Development*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Performance Documents*** menu item.

   OR

   Select the ***Development Documents*** menu item.

4. Select the ***Administrative Tasks*** menu item.

5. Select the ***Cancel Document*** component. The Cancel Document page is displayed. Managers use this search box to search for documents they own and where the status is **`In Progress`**. ePerformance administrators use this group box to search for non-canceled documents, regardless of the manager.

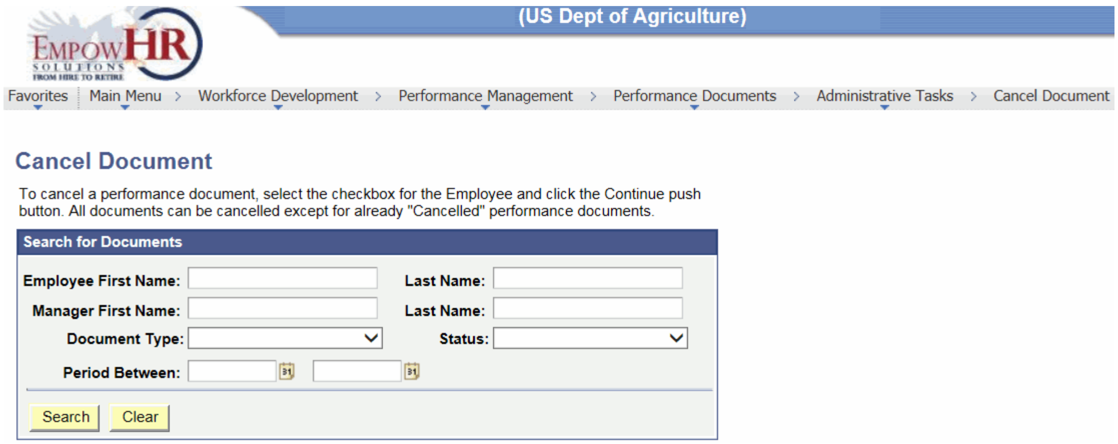


Figure 68: Cancel Document Page

6. Complete the fields as follows:

Search for Documents	Instruction
Employee First Name	Type the employee's first name.
Last Name	Type the employee's last name.
Manager First Name	Type the manager's first name.
Last Name	Type the manager's last name.
Document Type	Click the down arrow to select the document type of the document to be canceled.
Status	Click the down arrow to select the status of the document to be canceled.
Period Between	Either enter the dates or click the calendar icon to select the time period.

7. Click **Search** to search for the employee. A list of available employee(s) is displayed.

OR

Click **Clear** to clear the fields.

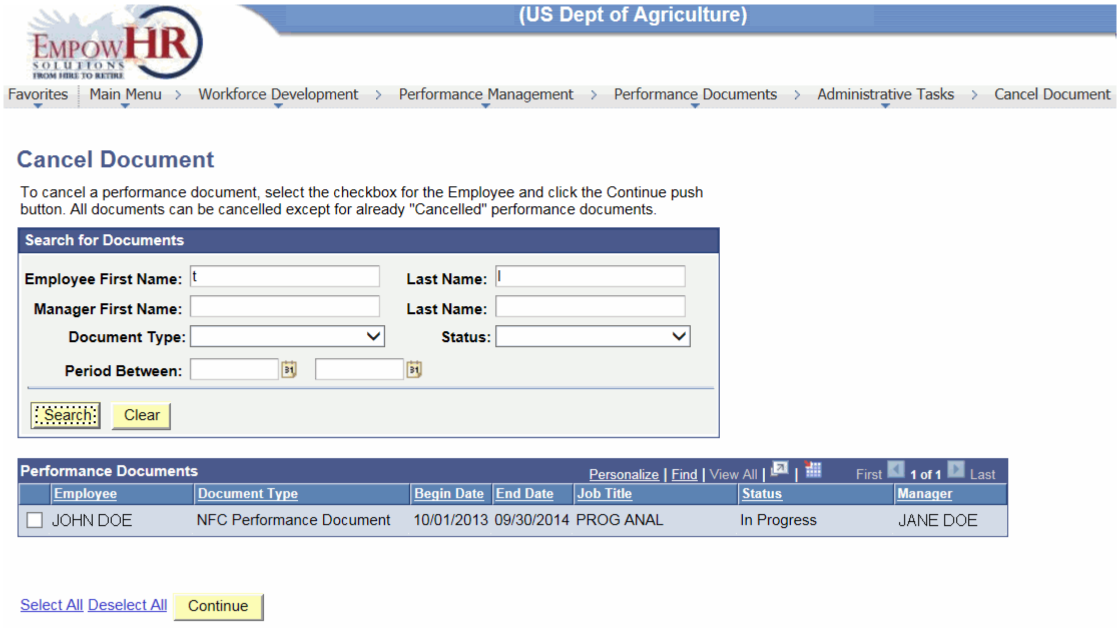


Figure 69: Cancel Document Page (after clicking Search)

8. Select the checkbox for the Employee to cancel the document. The following fields are displayed.

OR

Click the ***Select All*** link to select all the employees on the list. Click the ***Deselect All*** link to deselect all the employees on the list.

Performance Documents	Description/Instruction
Employee	Employee's name.
Document Type	Type of document to be canceled.
Begin Date	Starting date of the performance document.
End Date	Ending date of the performance document.
Job Title	Job title of the employee.
Status	Status of the document.
Manager	Manager's name.

9. Click **Continue**. The Cancel Document - Confirm Cancellation page is displayed.

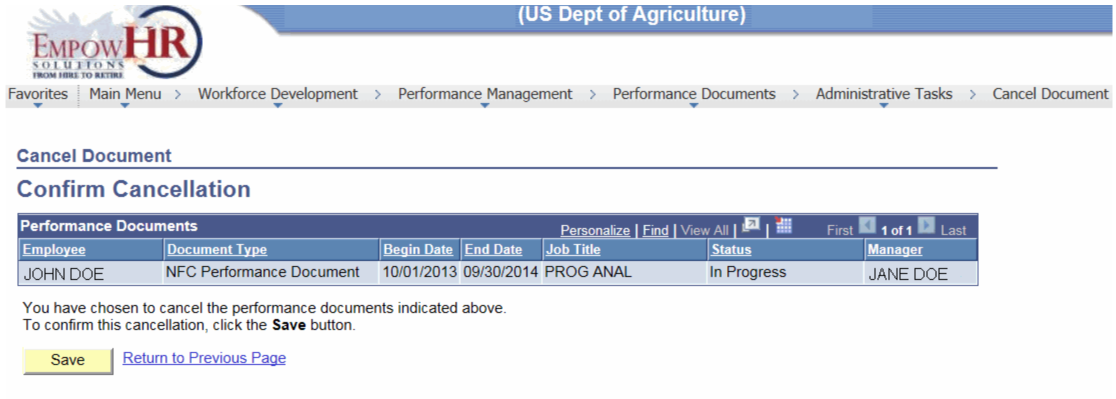


Figure 70: Cancel Document - Confirm Cancellation Page

10. Click **Save**.

Deleting Documents

Because canceled documents are not physically deleted from EmpowHR, ePerformance provides a delete function that enables the document to be removed and all their associated evaluations completely removed from EmpowHR.

To Delete Documents:

1. Select the ***Manager Self Service*** menu.

   OR

   Select the ***Workforce Development*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Performance Documents*** menu item.

   OR

   Select the ***Development Documents*** menu item.

4. Select the ***Administrative Tasks*** menu item.

5. Select the ***Delete Document*** component. The Delete Documents page is displayed. The ePerformance administrator can only delete a document that is in the **Canceled** status. The Manager's view displays the canceled document(s) that the manager owns.

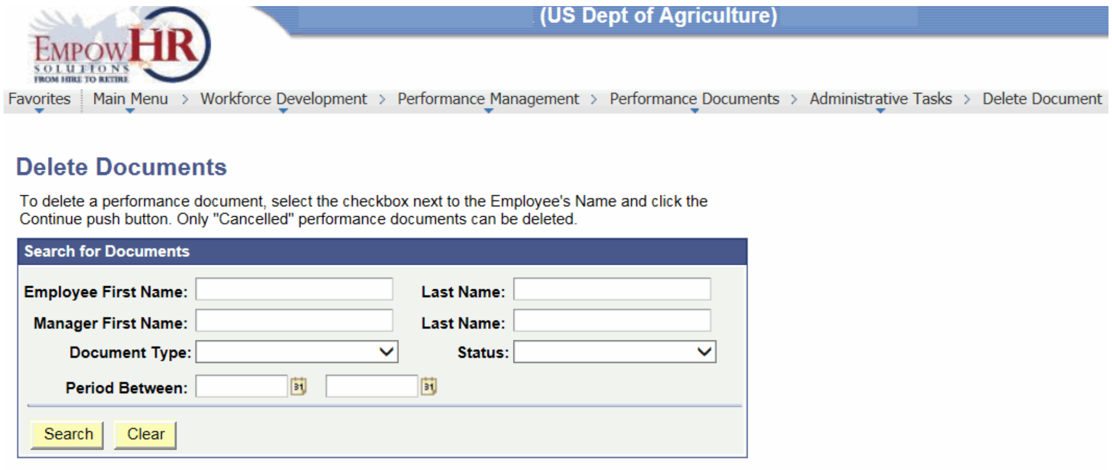


Figure 71: Delete Documents Page

6. Complete the fields as follows:

Search for Documents	Instruction
Employee First Name	Type the employee's first name.
Last Name	Type the employee's last name.
Manager First Name	Type the manager's first name.
Last Name	Type the manager's last name.
Document Type	Click the down arrow to select the document type of the document to be deleted.
Status	Click the down arrow to select the status of the document to be deleted.
Period Between	Either enter the dates or click the calendar icon to select the time period.

7. Click **Search** to search for the employee. A list of available employee(s) is displayed.

OR

Click **Clear** to clear the fields.

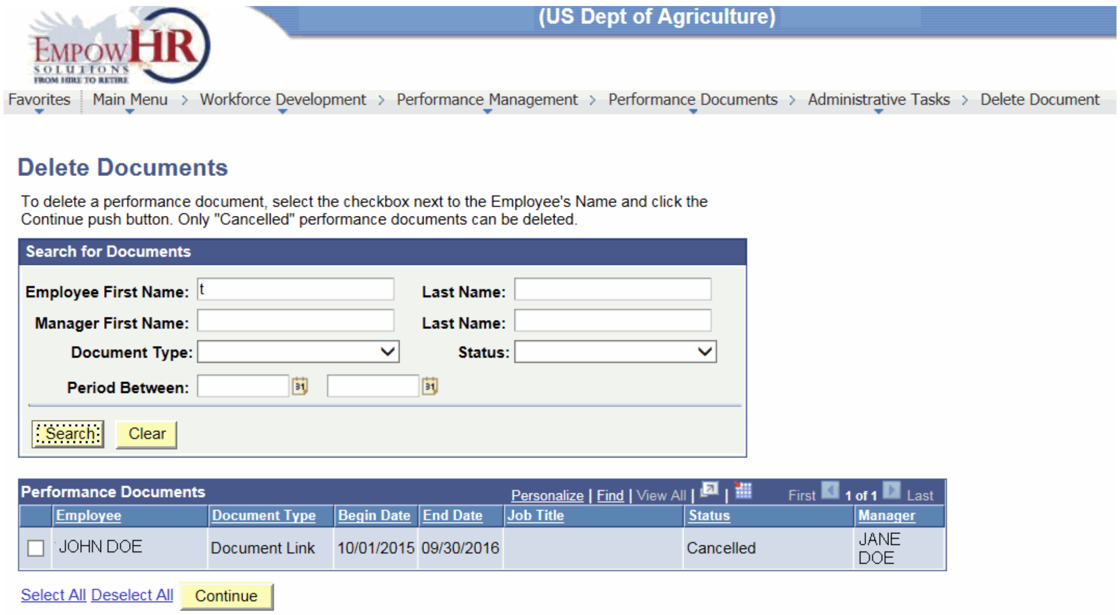


Figure 72: Delete Documents Page (after clicking Search)

8. Select the checkbox for the Employee to delete the document. The following fields are displayed.

Performance Documents	Description
Employee	Employee’s name.
Document Type	Type of document to be deleted.
Begin Date	Starting date of the performance document.
End Date	Ending date of the performance document.
Job Title	Job title of the employee.
Status	Status of the document.
Manager	Manager's name.

9. Click **Continue**. The Delete Documents - Confirm Delete page is displayed. The employee(s) that were selected appear on this page.

OR

Click the ***Select All*** link to select all the employees on the list. Click the ***Deselect All*** link to deselect all the employees on the list.

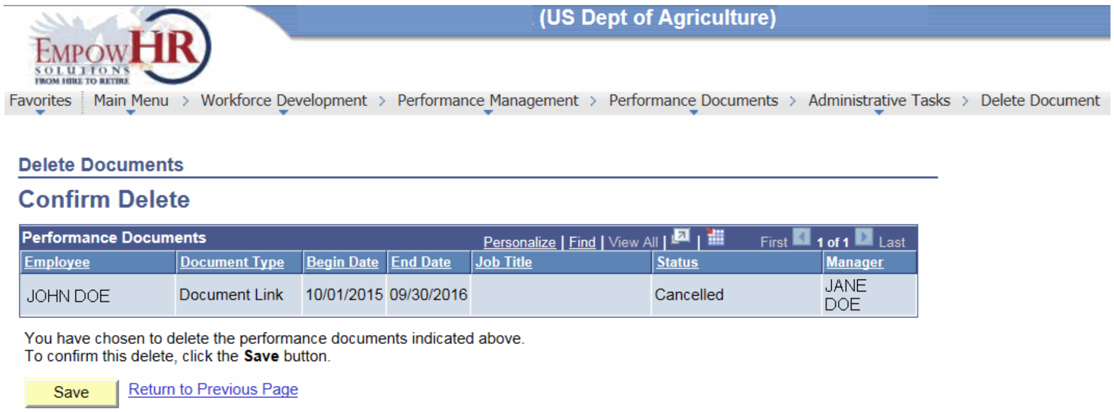


Figure 73: Delete Documents - Confirm Delete Page

10. Click **Save**.

Preliminary Ratings

Managers can enter preliminary ratings for employees and update these ratings at any time that a document's status is `In Progress`. Preliminary ratings use the rating model that is defined for the Overall Summary section and are used to generate the View Ratings Summary report used to analyze whether ratings are distributed in the expected manner. Employees cannot view preliminary ratings.

To Enter a Preliminary Rating:

1. Select the ***Manager Self Service*** menu.

   OR

   Select the ***Workforce Development*** menu.

2. Select the ***Performance Management*** menu group.
3. Select the ***Performance Documents*** menu item.

   OR

   Select the ***Development Documents*** menu item.

4. Select the ***Administrative Tasks*** menu item.

5. Select the ***Enter Preliminary Ratings*** component. The Enter Preliminary Ratings page is displayed.

6. On the Enter Preliminary Ratings page, select the checkbox for the employee whose preliminary rating is to be entered. The following fields are located on the page.

   OR

   Click ***Select All*** to select all the employees on the list. Click ***Deselect All*** to deselect all the employees on the list.

Documents you own	Description
Employee	Employee’s name.
Document Type	Type of document to be entered.
Begin Date	Starting date of the performance document.
End Date	Ending date of the performance document.
Job Title	Job title of the employee.
Status	Status of the document.

7. Click **Continue**. The Enter Preliminary Ratings - Preliminary Ratings page is displayed. The employee(s) that were selected appear on this page.

8. Click **Continue**. The Enter Preliminary Ratings page - Preliminary Ratings tab is displayed.

9. Click **Save**. The Enter Preliminary Ratings - Save Confirmation Page is displayed.

Viewing Documents

The ePerformance administrator role can view any document in any status for groups that they manage and perform certain tasks that change the document status or due date. This is a "safety valve" in case the employee or manager is unable to complete tasks.

To View Documents:

1. Select the ***Manager Self Service*** menu.

   OR

   Select the ***Workforce Development*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Performance Documents*** menu item.

   OR

   Select the ***Development Documents*** menu item.

4. Select the ***View Documents*** menu item. The View Performance Documents page is displayed.

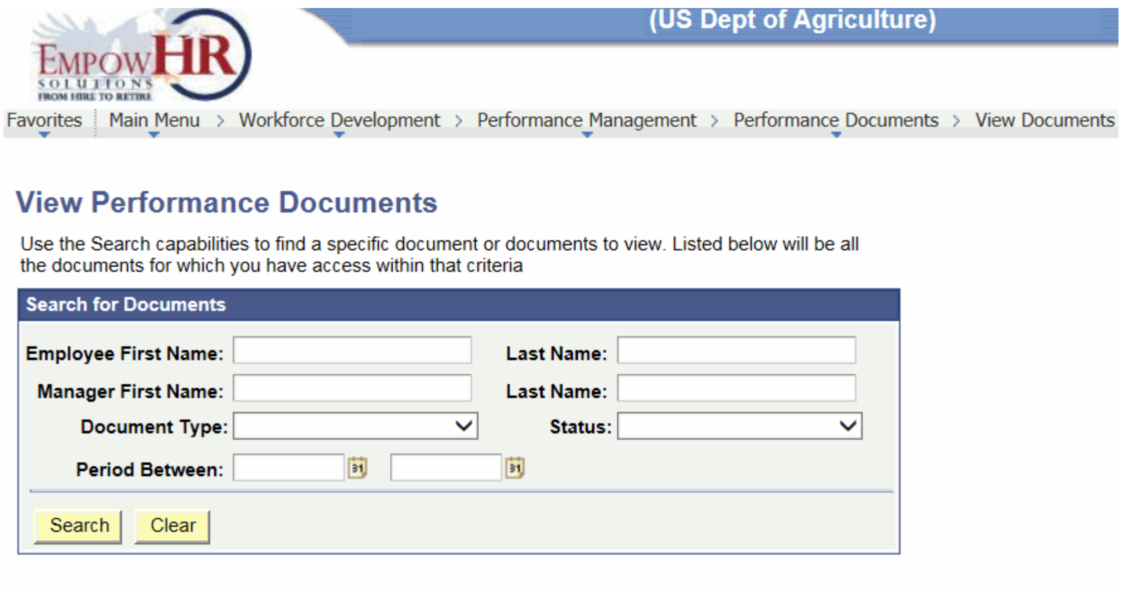


Figure 74: View Performance Documents Page

5. Complete the fields as follows:

Search for Documents	Instruction
Employee First Name	Enter the employee's first name.
Last Name	Enter the employee's last name.
Manager First Name	Enter the manager's first name.
Last Name	Enter the manager's last name.
Document Type	Click the down arrow to select the applicable document type.
Status	Click the down arrow to select the applicable document status.
Period Between	Enter the starting and ending dates or select dates from the calendar icons.

6. Click **Search**. A list of employees with the corresponding documents is displayed.

OR

Click **Clear** to return to the previous page.

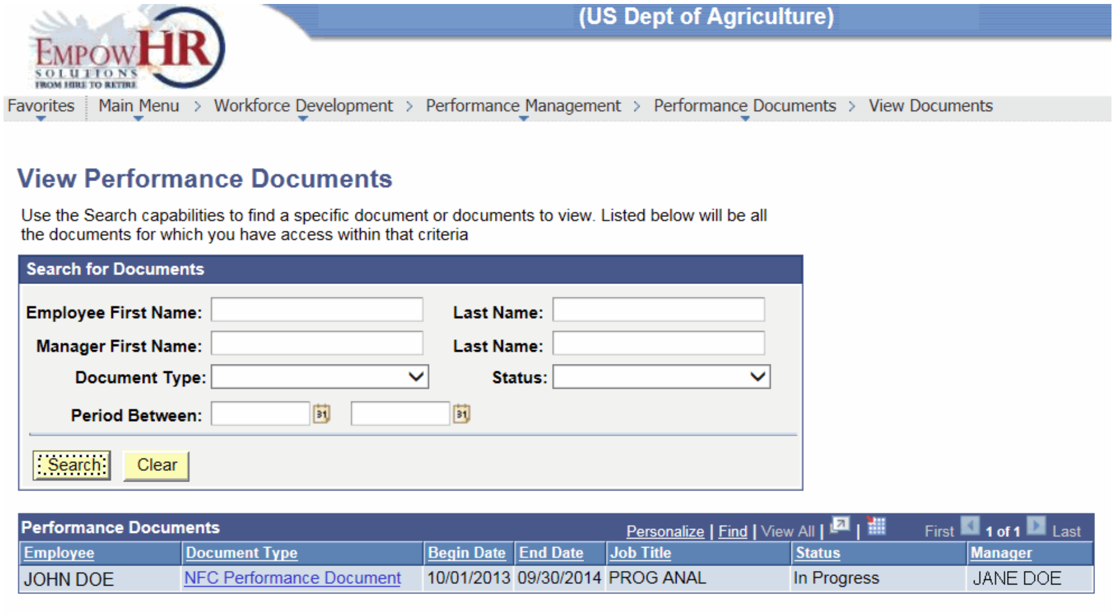


Figure 75: View Performance Documents Page (after clicking Search)

7. Select the applicable document. The document is available for viewing.

Reports

There are reports that ePerformance provides to assist HR administrators and managers with the tools to monitor documents. These reports are available under either the ***Manager Self Service*** or ***Workforce Development*** menu group.

This section provides an overview of reports in ePerformance and discusses how to generate reports.

For more information see:

Printable Performance Appraisal/Development Plan **166**
Missing Documents **167**
Late Documents Report **170**
Performance Summary **174**
Detailed Staff Report **175**
Staff Summary - Series **176**
Staff Summary - Location **177**
Retirement Eligibility **179**
Executive Summary **180**

Printable Performance Appraisal/Development Plan

A Performance Appraisal/Development Plan can be printed during the process or when the process is complete.

Note: The popup blocker must be turned off to print a document. If the document does not display, depress the **ALT** and **Ctrl** at the same time while clicking the print icon on the document. Continue to hold the **Alt** and **Ctrl** until the document appears.

To Print a Document:

1. Select a Document Type from the Current/History Performance Documents/Development Documents for the applicable employee.

2. Click the printer icon to print the document.

Missing Documents

This report lists documents that were not created for a group of employees that are selected by group ID, document type, and date range. Knowing whether documents are missing is important if the HR Department has defined desired rating distribution percentages. This is the result of the distribution report not being reliable unless everyone in the group has a document and receives a rating during the period.

To Generate Missing Documents Report:

1. Select the ***Workforce Development*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Reports*** menu item.

4. Select the ***Missing Documents Reports*** component. The Missing Documents page - Find an Existing Value tab is displayed.

Figure 76: Missing Documents Page - Find an Existing Value Tab

5. Complete the field as follows:

Field	Instruction
Run Control ID	Enter the run control ID for the applicable value.

6. Click **Search**. The Missing Documents page is displayed.

OR

Click **Clear** to clear the entry.

OR

Select the ***Add a New Value*** tab. The Missing Documents page - Add a New Value tab is displayed.

Figure 77: Missing Documents Page - Add a New Value Tab

7. Complete the field as follows:

Field	Instruction
Run Control ID	Enter the run control ID for the applicable value.

8. Click **Add**. The Missing Documents page is displayed.

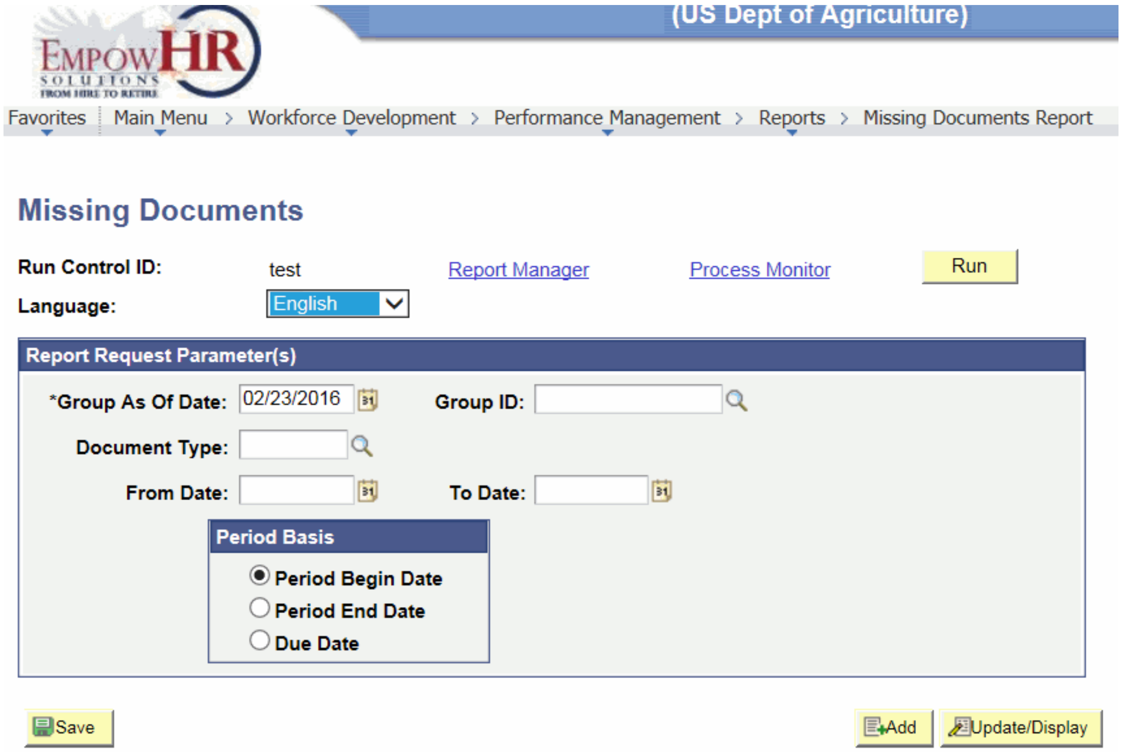


Figure 78: Missing Documents Page

9. Complete the fields as follows:

Field	Description/Instruction
Run Control ID	Populated based upon the search criteria entered.
Language	Defaults to **`English`**. To change, select data from the drop-down list.
Report Request Parameter(s)	**Instruction**
***Group As Of Date**	Required field. Enter a group as of date or select a date from the calendar icon. The report generates a list of missing documents for employees belonging to the group that is defined in the Group ID field as of the data specified.
Group ID	Enter the group ID or select data by clicking the search icon. Identifies the group of employees to include in the report.
Document Type	Enter a document type, such as quarterly, annual, or yearly or select data by clicking the search icon.
From Date	Beginning date of the data for the report. Enter the from date or select a date from the calendar icon.

Field	Description/Instruction
To Date	Ending date of the data for the report. Enter the to date or select a date from the calendar icon.
Period Basis	**Description**
Period Begin Date	Determines which of the dates on the manager evaluation EmpowHR uses when selecting mission documents to publish in the report. Select this option to search for employees who do not have a document of the specified type with a period begin date falling within the range that was entered in the From Date and To Date fields.
Period End Date	Determines which of the dates on the manager evaluation EmpowHR uses when selecting mission documents to publish in the report. Select this option to look for employees who do not have a document of the specified type with a period ending date falling within the range that was entered in the From Date and To Date fields.
Due Date	Determines which of the dates on the manager evaluation EmpowHR uses when selecting mission documents to publish in the report. Select this option to look for employees who do not have a document of the specified type with a due date falling within the range entered in the From Date and To Date fields.

10. Click **Save**.
11. Click **Run** to run the report.
12. Click the ***Report Manager*** link.

    OR

    Click the ***Process Monitor*** link.

    For more information on Run, Report Manager or Process Monitor, refer to EmpowHR, Section 14, Reporting.

Late Documents Report

Use this report to generate a list of late documents, by document type, for a group of employees. If the current date is greater than the due date and the status of the manager evaluation is not yet complete, the document is reported as late. This report ignores documents that are canceled.

To Generate Late Documents Report:

1. Select the ***Workforce Development*** menu.
2. Select the ***Performance Management*** menu group.

3. Select the ***Reports*** menu item.

4. Select the ***Late Documents Report*** component. The Late Documents page - Find an Existing Value tab is displayed.

Figure 79: Late Documents Page - Find an Existing Value Tab

5. Complete the fields as follows:

Field	Instruction
Run Control ID	Enter the run control ID for the applicable value.
Case Sensitive	Check this box if the search criteria is case sensitive.

6. Click **Search**. The Late Documents page is displayed.

   OR

   Click **Clear** to clear the entry.

OR

Select the ***Add a New Value*** tab. The Late Documents page - Add a New Value tab is displayed.

Figure 80: Late Documents Page - Add a New Value Tab

7. Complete the field as follows:

Field	Instruction
Run Control ID	Enter the run control ID for the applicable value.

8. Click **Add**. The Late Documents page is displayed.

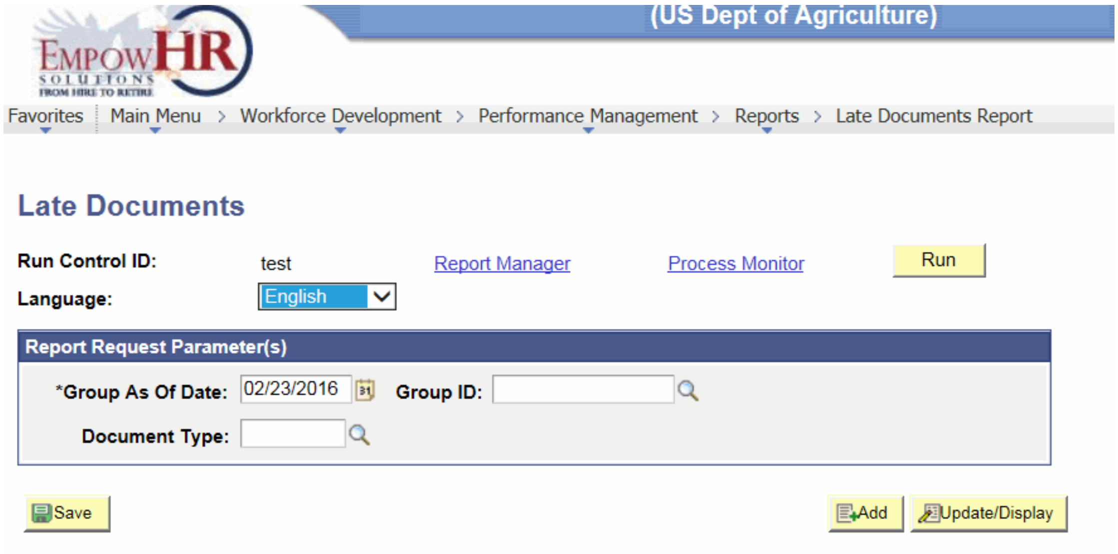


Figure 81: Late Documents Page

9. Complete the fields as follows:

Field	Description/Instruction
Run Control ID	Populated based upon the search criteria entered.
Language	Defaults to **`English`**. To change, select data from the drop-down list.
Report Request Parameter(s)	**Instruction**
***Group As Of Date**	Required field. Enter a group as of date or select a date from the calendar icon. The report generates a list of late documents for employees belonging to the group that is defined in the Group ID field as of the date specified.
Group ID	Enter the group ID or select data by clicking the search icon. This field identifies the group of employees to include in the report.
Document Type	Enter a document type, such as quarterly, annual, or yearly or select data by clicking the search icon.

10. Click **Save**.

11. Click **Run** to run the report.

12. Click the ***Report Manager*** link.

OR

Click the ***Process Monitor*** link.

For more information on Report Manager and Process Monitor, refer to EmpowHR, Section 14, Reporting.

Performance Summary

Use this report to generate information on the summary of performance for employees.

To Generate a Performance Summary Report:

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***Reports*** menu item.
4. Select the ***Performance Summary*** component. The Performance Summary tab is displayed.

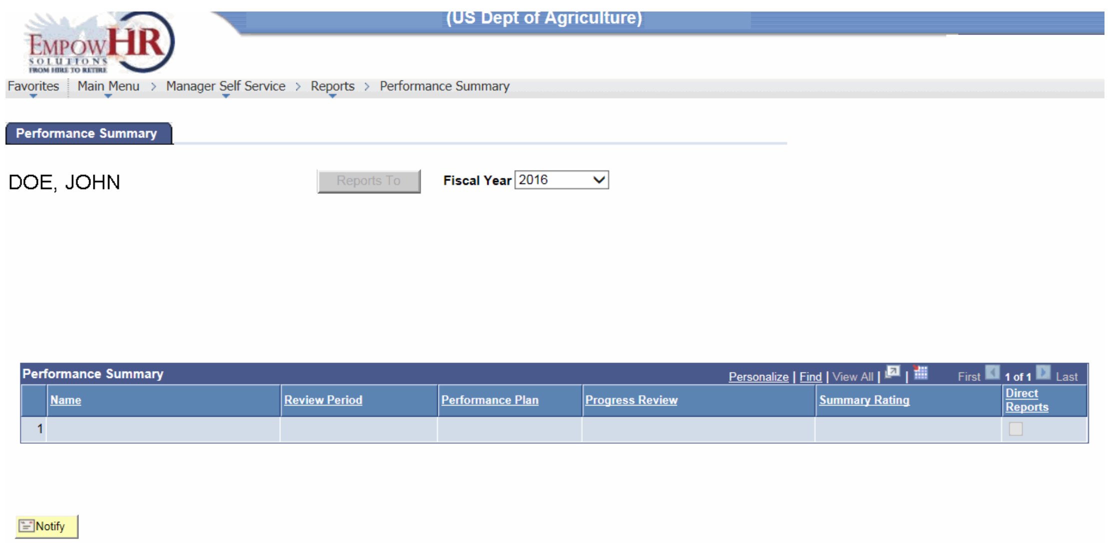


Figure 82: Performance Summary Tab

5. Complete the fields as follows:

Field	Description/Instruction
Fiscal Year	Select the applicable fiscal year (XXXX) to determine the report results from the drop-down list.
Performance Summary	**Description**
Name	Populated with the applicable employee name.
Review Period	Populated with the review period, if there are documents for that employee.

Field	Description/Instruction
Performance Plan	Populated with the type of document, if applicable.
Progress Review	Populated with the status of the review, if applicable.
Summary Rating	Populated with the status of the summary, if applicable.
Direct Reports	Checked if the employee has direct reports.

The results are automatically generated. The names listed are the employees that report to the name (manager/supervisor) at the top of the page.

Detailed Staff Report

This report lists the detailed staff.

To Generate a Detailed Staff Report:

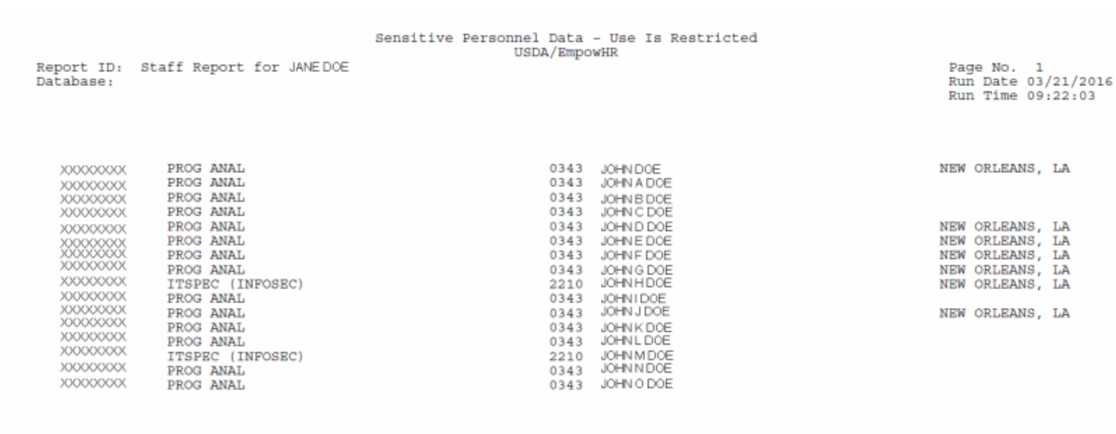
1. Select the ***Manager Self Service*** menu.
2. Select the ***Reports*** menu item.
3. Select the ***Detailed Staff Report*** component. The check box to run the Details Staff Report is displayed.

Figure 83: Detailed Staff Report Page (checkbox)

4. Check the box. The ***View Detailed Summary*** link is displayed.

Figure 84: Detailed Staff Report Page (View Detailed Summary)

5. Click the link. The Detailed Staff Report page is displayed.



Sensitive Personnel Data - Use Is Restricted
USDA/EmpowHR

Report ID: Staff Report for JANE DOE
Database:

Page No. 1
Run Date 03/21/2016
Run Time 09:22:03

XXXXXXXX	PROG ANAL	0343	JOHN DOE	NEW ORLEANS, LA
XXXXXXXX	PROG ANAL	0343	JOHN A DOE	
XXXXXXXX	PROG ANAL	0343	JOHN B DOE	
XXXXXXXX	PROG ANAL	0343	JOHN C DOE	
XXXXXXXX	PROG ANAL	0343	JOHN D DOE	NEW ORLEANS, LA
XXXXXXXX	PROG ANAL	0343	JOHN E DOE	NEW ORLEANS, LA
XXXXXXXX	PROG ANAL	0343	JOHN F DOE	NEW ORLEANS, LA
XXXXXXXX	PROG ANAL	0343	JOHN G DOE	NEW ORLEANS, LA
XXXXXXXX	ITSPEC (INFOSEC)	2210	JOHN H DOE	NEW ORLEANS, LA
XXXXXXXX	PROG ANAL	0343	JOHN I DOE	
XXXXXXXX	PROG ANAL	0343	JOHN J DOE	NEW ORLEANS, LA
XXXXXXXX	PROG ANAL	0343	JOHN K DOE	
XXXXXXXX	PROG ANAL	0343	JOHN L DOE	
XXXXXXXX	ITSPEC (INFOSEC)	2210	JOHN M DOE	
XXXXXXXX	PROG ANAL	0343	JOHN N DOE	
XXXXXXXX	PROG ANAL	0343	JOHN O DOE	

Figure 85: Detailed Staff Report Page

Staff Summary - Series

Use this report to generate a list of series for a manager's staff.

To Generate a Staff Summary - Series Report:

1. Select the ***Manager Self Service*** menu.

2. Select the ***Performance Management*** menu group.

3. Select the ***Reports*** menu item.

4. Select the ***Staff Summary - Series*** component. The Staff Summary by Series page is displayed.

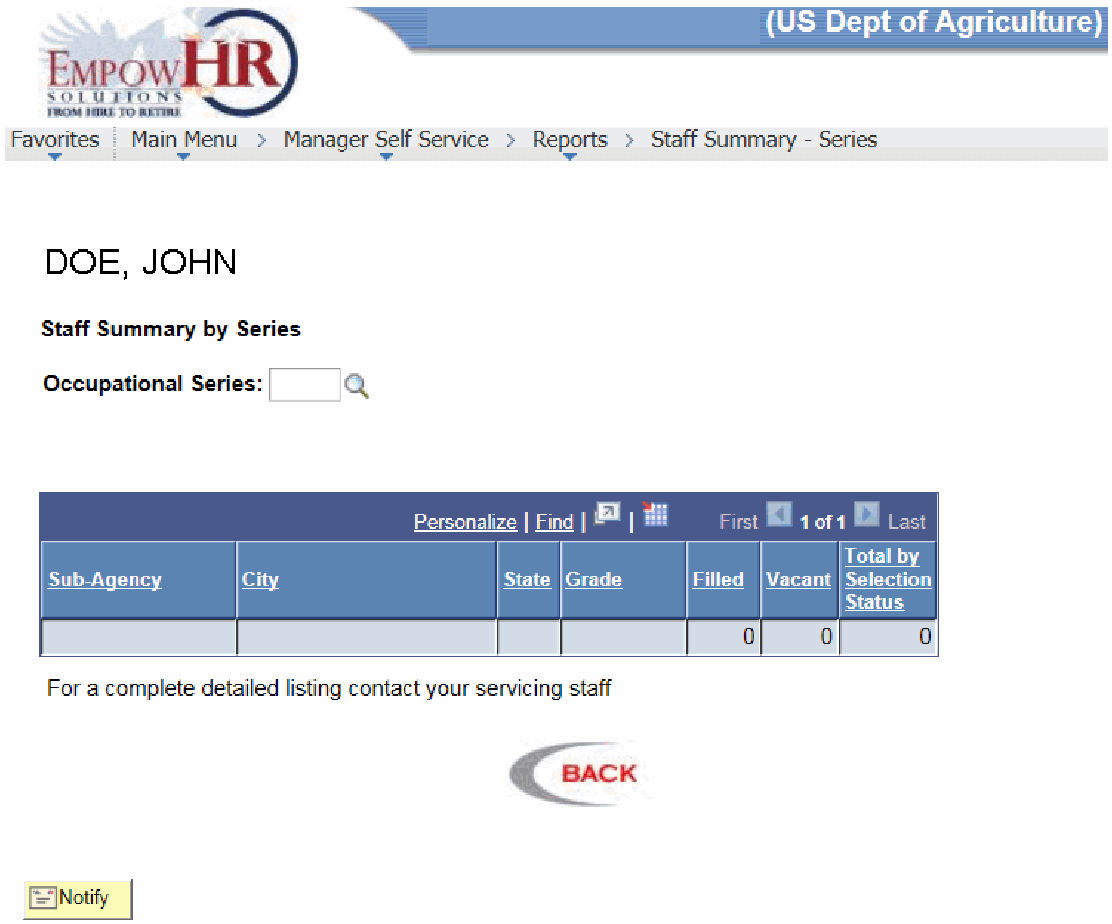


Figure 86: Staff Summary by Series Report Page

5. Complete the field as follows:

Field	Instruction
Occupational Series	Enter the series or select data by clicking the search icon.

6. Click the search icon. The literal is displayed.

Staff Summary - Location

Use this report to generate the location of employees in the organization

To Generate a Staff Summary - Location Report:

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***Reports*** menu item.
4. Select the ***Staff Summary - Location Report*** component. The Staff Summary by Location page is displayed.

Figure 87: Staff Summary by Location Page

5. Complete the field as follows:

Field	Instruction
Location Code	Enter the location code or select data by clicking the search icon.

Retirement Eligibility

This report list employees that are eligible for retirement by entering a date range.

To Generate a Retirement Eligibility Report:

1. Select the ***Manager Self Service*** menu.
2. Select the ***Reports*** menu group.
3. Select the ***Retirement Eligibility*** component. The Retirement Eligibility tab is displayed.

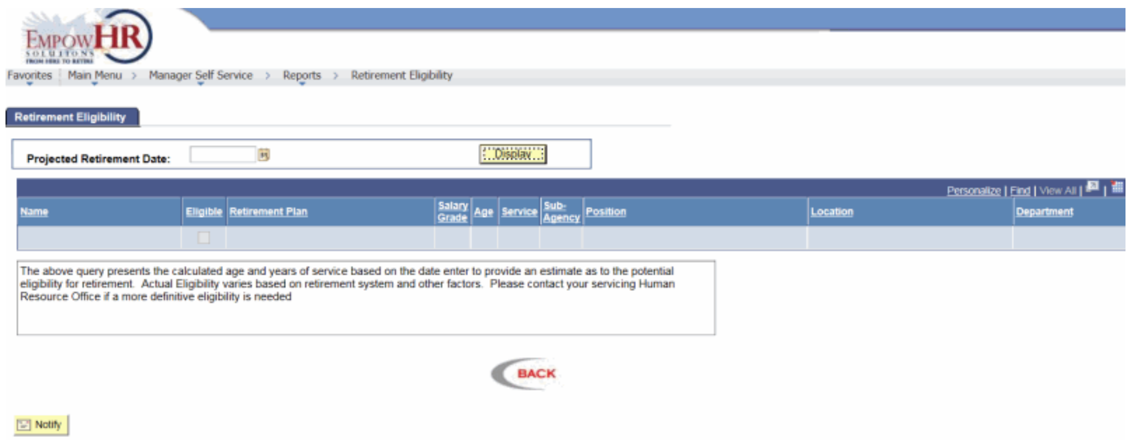


Figure 88: Retirement Eligibility Tab

4. Complete the field as follows:

Field	Instruction
Projected Retirement Date	Enter projected date for the retirement report results or select a date from the calendar icon.

5. Click **Display**. The applicable name(s) are displayed on the report.

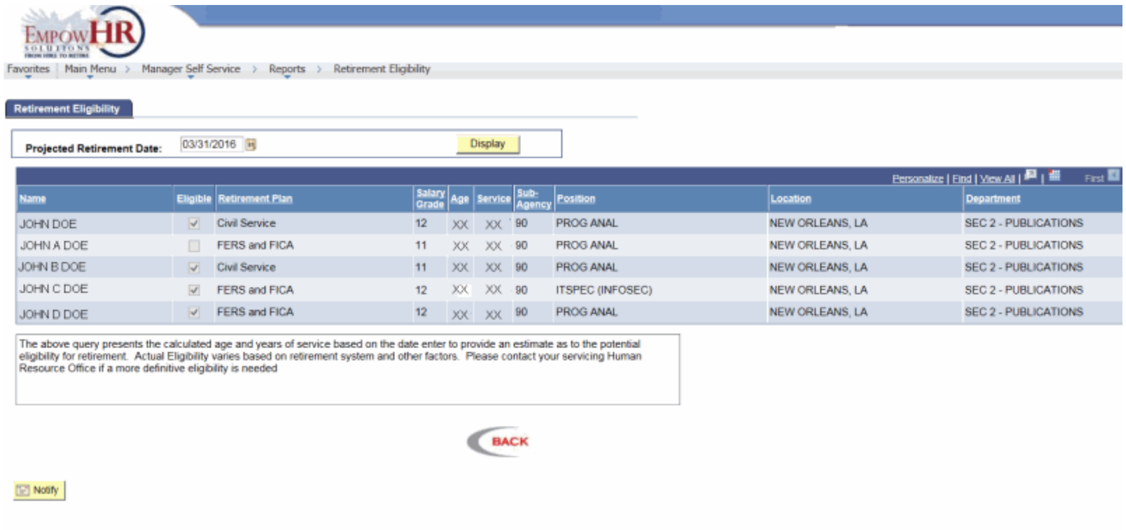


Figure 89: Retirement Eligibility Tab Page (after selecting date)

Executive Summary

This report displays the number of executives by organization.

To Generate an Executive Summary Report:

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select the ***Reports*** menu item.

4. Select the ***Executive Summary*** component. The Executive Summary report is displayed.

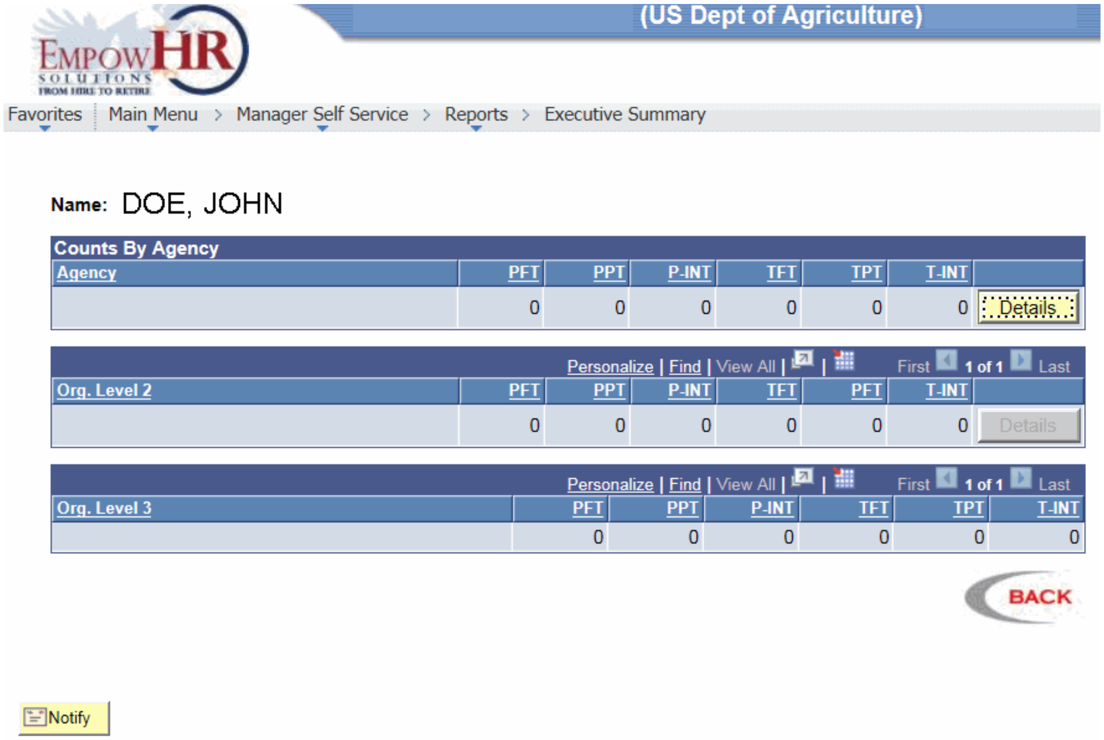


Figure 90: Executive Summary Page

5. Click **Details** to view the details of the report.

Inquiry

Inquiry pages are available for employees, managers, and HR administrators.

Manager and Employee Pages

Managers, employees, and HR administrators can access different inquiry pages that enable them to view data of interest to their role.

Managers and employees can view lists of their completed documents for both performance and development evaluations and can drill down to detail documents.

Additionally, managers can view the approval status of documents for their direct reports and access documents for their indirect reports in view-only mode.

Administrator Pages

The following inquiry pages are designed specifically for HR administrators:

Page	Description
Rating Distribution Summary Page	Contains preliminary, actual, and desired rating distributions for a group of employees, defined by group ID, in the form of a bar chart. Administrators use this page to determine whether ratings are distributed in the expected manner, and to plan how to bring actual ratings in line with desired ratings.
Status Summary Page	Contains a pie chart that summarizes the status of documents for a group of employees.
Debug/Trace Results page	Lists the detailed calculations that are associated with a particular document. An HR administrator can use this information to debug suspected problems with rating calculations.

The table below describes the page and the navigation to view historical documents:

Page Name	Navigation	Usage
Performance Document History	Access this page through different paths: • Manager Self Service, Performance Management Performance Documents Historical Documents Performance Document History • Self Self Service, Performance Management Performance Documents Historical Documents	Access completed documents for employees that are managed by you or for yourself.

Page Name	Navigation	Usage
	Performance Document History	
Development Document History	• Manager Self Service, Performance Management Development Documents Historical Documents Development Document History • Self Self Service, Performance Management Performance Documents Historical Documents Development Document History	Access completed documents for employees that are managed by you or for yourself.
My Historical Evaluations for Others	• Self Service, Performance Management Performance Documents Historical Evaluations My Historical Evaluations for Others • Self Self Service, Performance Management Development Documents Historical Evaluations My Historical Evaluations for Others	Access completed documents for multi-participant evaluations in which you participated.

To Access Completed Documents:

The navigation for the pages is in the above table. These pages are all similar in appearance and usage; only the Performance Document History page (as an example) is displayed here.

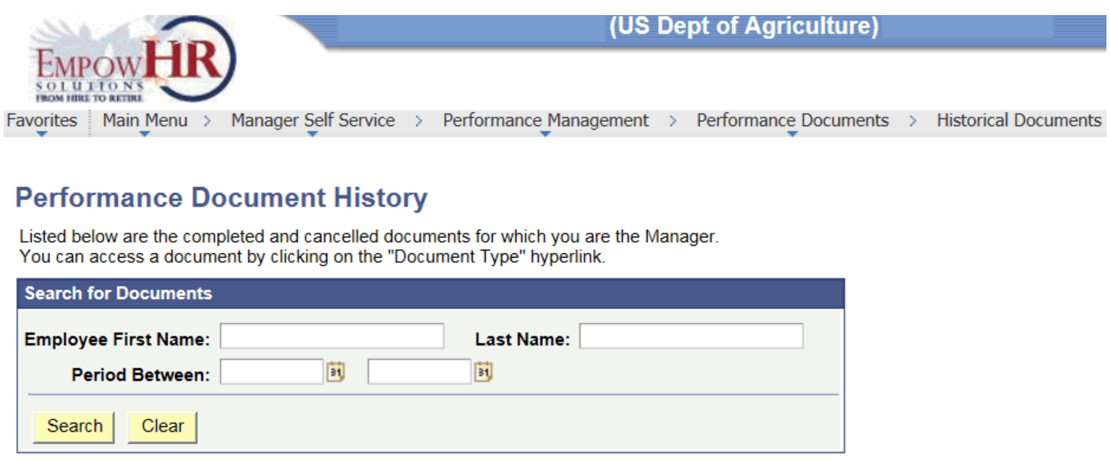


Figure 91: Performance Document History Page

1. Complete the fields as follows. You can enter search criteria to limit which documents appear on the list.

Search for Documents	Instruction
Employee First Name	Enter the first name of the employee whose document is being accessed.
Last Name	Enter the last name of the employee whose document is being accessed.
Period Between	Enter a date or select a date from the calendar icon for which to view documents.

2. Click **Search** to search for the criteria entered.

   OR

   Click **Clear** to clear the search criteria entered.

3. Click the link under the ***Document Type*** link to open the document for viewing.

To View a Document for Indirect Reports:

1. Select the ***Manager Self Service*** menu.
2. Select the ***Performance Management*** menu group.
3. Select ***Performance Documents***.
4. Select the ***View Only Documents*** component. The View-Only Documents page is displayed.

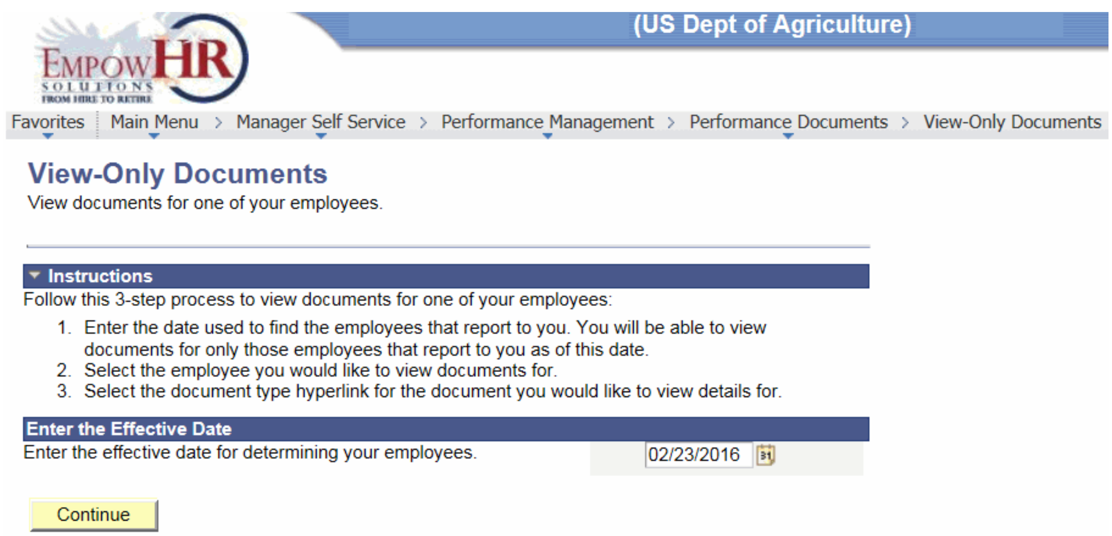


Figure 92: View-Only Documents Page

5. Complete the field as follows:

Field	Instruction
Enter the Effective Date	Enter the effective date or select a date from the calendar icon.

6. Click **Continue**. A list of employees is displayed.

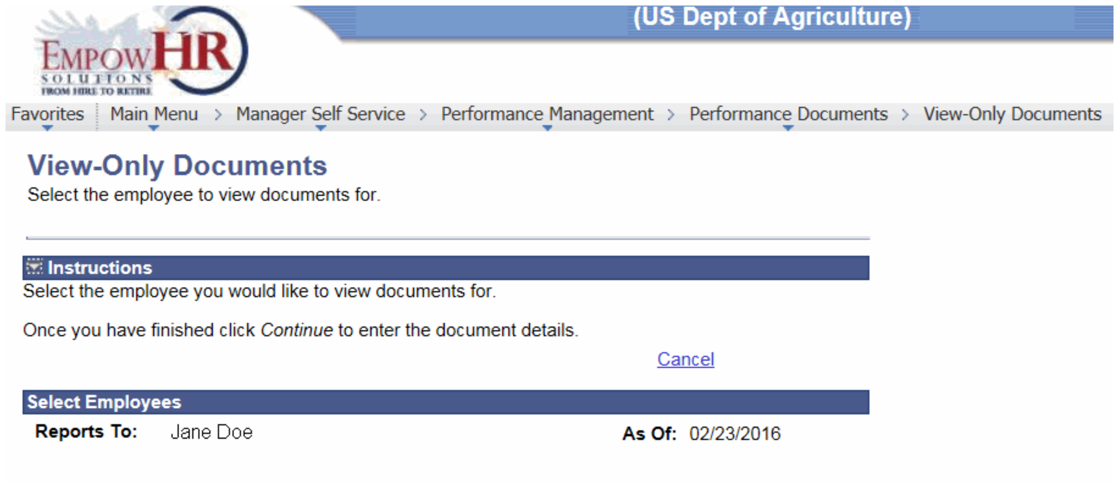


Figure 93: View-Only Documents Page (after clicking Continue)

7. Select an employee.

8. Click **Continue**.

9. Click the link under the ***Document Type*** link to open the document for viewing.

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