ePerformance FAQs

RECORDS RETENTION / ACCESSIBILITY

How will our records retention policy be followed with regards to ePerformance documents? Human Resources is responsible for personnel records retention and will comply with the UH records retention policy and purge records at the appropriate time.

When using the Notes function, who can view and access the notes? Only you, the supervisor, will have the notes readily accessible for your own viewing. However, you can grant access to view the notes by transferring it to another manager, a senior manager or even the employee if you wish. As with any document on the UH system, the notes as well are always accessible under the Freedom of Information Act and are discoverable.

REPORTS TO

What if an employee reports to two different people or has a “dotted line” reports to other than the immediate supervisor? Can both supervisors view and edit the document? Yes. The primary supervisor will need to work with the other supervisor to insure they both have input. Both supervisors can should utilize the Transfer Document function to send the document back and forth between each other.

What if a CBA/DBA wants to review all documents within College for consistency and to make sure there is nothing inappropriate in a document? If a CBA/DBA has been delegated the responsibility to review the documents, there are two options. The administrator can either change the “reports to” field to himself/herself. Or, the administrator can ask the manager to transfer the document(s) to the administrator.

ACCESS & SET UP

What do I do if I can’t log in? Request a new password. From the PeopleSoft Sign On screen click on Request a New Password or Request your User Id.

What if I can’t see the Performance Management module in Manager Self Service? Contact Sandra Armstrong at SGArmstrong@uh.edu or 713-743-1962.

What do I do if I get an alert that reads “You are not authorized to access this component….Contact your system administrator”? Send an email to the system administrator Sandra Armstrong at SGArmstrong@uh.edu stating the message you are receiving and the specific access you are being denied which you need.

What if I can’t see the Performance Documents in PASS? First, email your CBA/DBA to confirm that your group has been added to the Reports To Maintenance page. If that has been completed and you still do not see the Performance Documents, contact Sandra Armstrong at sparmstrong@uh.edu or 713-743-1962.

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Where do I go to change reporting structure when needed? Reporting changes should be communicated to the Department Business Administrator or College/Division Administrator. The Reports To Maintenance page is managed by each department.

What if I don’t see all of my Direct Reports? Email your CBA/DBA (and carbon copy your HR Generalist) listing the missing employee(s). The Reports To Maintenance page is managed by each department.

What if there are too many employees in my Current Documents list? Email your CBA/DBA (and carbon copy your HR Generalist) listing the additional employee(s). The Reports To Maintenance page is managed by each department.

Is the document template already pre-loaded to match the employee’s job-level/skill? Yes, HR has already identified if an employee qualifies for the staff, management or executive template and has loaded it accordingly.

May I attach documentation such as performance improvement plans or proof of accomplishments in order to support a “Needs Improvement” or “Outstanding Performance” rating? This is currently being considered and we hope to have this functionality in the future. We will update as progress is made.

Do Mac users have the same access and functionality with the PeopleSoft ePerformance system? Yes, access and functionality are the same. You must use one of the supported browsers, with Internet Explorer 8 highly recommended. Other supported browsers are listed on the PeopleSoft Login webpage.

TRAINING & ePerformance LIAISON

What are my options as manager for training and learning about the ePerformance process? Attend a training session offered to your department; attend one of the monthly general sessions offered by HR (check that calendar at http://www.uh.edu/hr/training/hrtraining.htm); or access the online training available at http://tsg.e.uh.edu/training/hr/eperformance/.

After training you can refer to the online course, access the support materials via the HR website and take your questions directly to your department’s ePerformance Liaison.

What are the training options for my staff to learn about the ePerformance process? Good news! During this phase, the staff training is minimal. You have many options, access the abbreviated slideshow and your or the department’s liaison can communicate the new process to the staff. Or, an HR Generalist can visit a staff meeting and present for you. Or, your staff member(s) can attend one of our short information sessions that will be held regularly in Room 341.

How do I know who is the ePerformance Liaison for my department? You should have received an email from your department’s liaison introducing themselves and asking that you direct questions to him/her. If not, contact your CBA or DBA.

ESTABLISHING CRITERIA

Explain the review period in relation to the Establish Criteria phase? This year the review period is from April 1, 2010, to December 31, 2010, with the actual evaluation being finalized in March 2011. Between August 9, 2010, and November 1, 2010, managers will work to set criteria (job responsibilities,
goals, competencies) in the ePerformance documents for each of their employees. Some of these items (responsibilities and goals) were probably discussed during the last PCD and will be transferred by the manager to the new document. In addition, some of the items are preset in the document from the job description and the competency matrix.

**Who determines the due date for “Establishing Criteria” and “Completion of Manager Evaluation” due dates?** These dates are pre-determined and populated by HR. You will receive auto-generated email reminders as the deadlines approach.

**For the CY2010 review cycle, what are the deadlines to establish criteria and complete the evaluation?** The approximate deadline for “Establishing Criteria” is November 1, 2010 while completing the evaluation ratings will be March 31, 2011.

**Do I need to establish performance criteria all at one time or can I do it in pieces?** You can work on establishing criteria for an employee in multiple sessions. You should “Save” your work at the conclusion of each session. It should be “Completed” by the established deadline.

**What happens if I don’t “Establish Criteria” for my employee(s) by the deadline?** You are strongly encouraged to meet the deadline to insure the evaluation process stays on schedule and dialogue with employees is continuous. However, if the deadline is not met you will receive email reminders.

**FUNCTIONS**

**FUNCTIONS WITHIN THE “ESTABLISH CRITERIA STEP”**

**Tell me about the “Save” function.** The “Save” function works like a bookmark. You can save changes from one session with the option to edit what you’ve provided thus far or add additional information. Once edited and saved previous versions are no longer available.

**What about the “Cancel” function within the Establish Criteria step?** Choosing “cancel” erases all the information you have entered during that session. If this is your first session it will restore the original document template. If you previously saved changes, choosing “cancel” will erase only the changes you’ve added in the current session.

**What about the “Complete” function?** Although you will see the “Complete” function at various points throughout the document, DON’T choose “complete” until you have entered all the performance criteria and the document is ready for the employee to view. Continue to “Save” until you are ready to “Complete” the document.

Choosing “complete” will send your employee an email notification that his/her performance criteria is available for viewing. This is generated every time you “complete” the document during the review period.

**What if I accidentally hit “complete” but I’m not finished?** Choosing “complete” will send your employee an email notification that his/her performance criteria is available for viewing. This is generated every time you “Complete” the document during the review period. If you accidentally “Complete” the document, notify the employee that you will reopen the document and they will get an additional notification when it is complete.

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The Document Details page for the employee will allow you to View the completed document. Click on “View” and you will see a “Reopen” button at the top of the page. You can “Reopen” the document to make changes at any time during the review period.

**ADMINISTRATIVE FUNCTIONS THAT APPLY TO THE ENTIRE PERFORMANCE DOCUMENT**

**How do I transfer an employee’s performance document in the same job title to another department or manager?** Use the transfer function within Administrative Tasks.

**How do I permanently cancel a performance document for an employee who terminates employment?** Use the cancel function within Administrative Tasks. It will be removed from your Current Documents queue, however HR will can still view it and will have a record for historical purposes.

**RESPONSIBILITIES, GOALS, & COMPETENCIES**

**I want to edit the competency definition but it won’t let me, Why?** The DDI competencies have been purchased as a library and have been tested and reviewed for legal compliance. We are unable to allow users to edit these definitions. You do have the ability to select another competency outside the Cluster provided.

**What is the difference between a goal and a competency?** A goal is objective or plan of action that a person or organization plans to achieve. A goal should be specific, measurable, attainable, realistic and timely. A goal is tangible.

A competency is the specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role.

**What is the difference between a competency and a responsibility?** A competency is the specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role.

A responsibility is a job task, action, or obligation that is part of your specific position or assignment and most often has a frequency and quality associated with it.

**Our department has a series of foundation goals that applies to every employee. Can the goals be pre-loaded by HR?** For this transition year departmental goals will need to be manually loaded by the manager. Each year going forward the documents will be cloned to provide consistency from year to year and will only require minor tweaking of goals and competencies and/or responsibilities. Our suggestion is to copy and paste the goals from a word document.

**WEIGHTING & RATING**

**What is the difference between Weighting and Rating?** Weighting is determining what percentage of time and effort is spent in relation to others. Rating is how well a person does on that particular task or set of tasks.

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I see fields for weighting the criteria, but not rating. Why? The rating fields will become available (and viewable) in Step 2 when the manager begins the evaluation process.

What is the difference between Weighting and Rating an Item and Weighting and Rating the Section? You will weight and rate sections of the ePerformance (responsibilities, goals, competencies) based on how critical each section is to the position. Within each section there will be individual items or tasks that will also be weighted and rated based on how critical each item is to that section.

Should I weight a pre-defined item zero or should I delete it from the page? Within the sections that are weighted, HR recommends that pre-defined section items loaded by HR should be weighted 0% rather than deleted.

What if I find that I am weighting several job responsibilities at zero percent (or choosing to delete them)? With this be audited by HR? How will HR deal with these situations? The HR Compensation Team will be working on revising the job descriptions over this next year. The data collected from the ePerformance process will be used as part of this process. The HR Compensation team will be reviewing after the process is finalized, prior to that if you as a manager/supervisor feel that the job description is not in line with what your employee does you should contact the HR Compensation team for more guidance.

What about sections items that I add? Must they also be weighted? HR recommends that you do weight each section item you add for a total of 100%. If you choose to leave the section items you added at 0%, the weight will be equally distributed among those sections items.

Does this new system affect merit? Currently, job performance is part of the criteria used to determine the distribution of merit when merit is available. Job performance when done accurately should identify your top performers and your top performers are the employees that should receive merit. Performance evaluations should not be used for pay equity issues or to give cost of living increases for employees.

Is it advisable to allocate more weight to one person whom you supervise in a particular job title than to another person you supervise in the same job title? This is fine and should be determined by job assignments within your department.

For example, one secretary is required to answer the main department telephone and another secretary is the backup for this. The first secretary would be weighted higher on this duty than the second secretary due to their job assignments.

How will documentation be submitted to substantiate an “Outstanding Performance” or “Needs Improvement Rating”? When we get to the rating portion of the ePerformance process (Step 2) in January, you will have an area to write comments. At that time you should be able to document behaviors that demonstrates either outstanding or needs improvement rating.

EMPLOYEE DEVELOPMENT AND TRAINING OPPORTUNITIES

How will this tool be used to identify areas for employee development? Who will be responsible for this? Will HR be identifying these needs? The HR Training team will be looking at areas with high concentrations and will be developing or identifying training that needs to be developed. Once areas
have been identified between supervisor and employee, the training team can help identify appropriate resources.

If customer service is a required competency, why is customer service training not required? How can we begin to evaluate employees on this now when it is almost end of evaluation period? If you, as a manager, have not identified specific service excellence requirements for your employees, you should use this as an opportunity to do so. Based on your operation, identify behaviors (internal and external) that exemplify great Customer Service. If you need assistance you can contact your HR Training Team. Customer Service has been an ongoing focus of the University and while Customer Service Training is not yet a required training, it has been offered on a regular basis. Remember you are setting the criteria now that you will actually rate the employee on between January through March. So you still have time to begin holding people accountable for Service Excellence if you are not already doing so.