From:	Nester, Susan L
Sent:	Wednesday, May 11, 2011 4:18 PM
To:	Bangerter, Stephen A; Barrera, Dorothy; Benham, Mary; Broyles, Nicole; Capper, Maura E; Castro, Lisa; Chandapilla, Thomas P; Christ, Marsha S; Christophe, Mathilda A; Commissariat, Shaki; Cook, Brenda D; Cooper, Mark D; Gazdar, Roshan B; Gregory, Jason D; Haroon, Rubina; Hassumani, Sabrina; Hodge, Selesta M; Juarez, Mary A; Lehner, John A; Marin, Emilita A; Martinez, Carolyn A; McDonald, Helen; McGhee, Frederick D; Murphy, Diane L; Newsome, Barbara K; Nguyen, Bill; Nguyen, Mybao T; Paredes, Zagui; Roch, Paul M; Santee, Ornela K; Sayles, Patricia L; Short, Andrea; Smith, Georgeann W; Stafford, Rhonda; Tadevosyan, Lilit; Wilson, TaShawna C
Cc:	Nelson, Joan M; Coltharp, Sandy; Ponzio, Carla; Kemp, Connie; Hill, Robyn; Pino, Ann M; Armstrong, Sandra G; Chelette, Sara; Marlowe, Julia A
Subject:	Monitoring ePerformance Documents

As will be discussed at the College/Division Business Administrator meeting tomorrow morning, the ePerformance ratings phase is now available for managers to complete the ratings portion of the documents for their employees. To assist you with monitoring documents for your college/division, below is the workflow for ePerformance documents:

Manager Completes Performance Criteria
    E-mail sent to Employee to review criteria
        Establish Criteria Status: Complete
        Review Status: In Progress
        Approval Status: Not Submitted
Manager Evaluates Employee and Submits Document for Approval
    E-mail to Sr. Manager requesting approval
    E-mail to Manager confirming request for approval
        Establish Criteria Status: Complete
        Review Status: In Progress
        Approval Status: Submitted
Sr. Manager Approves Document
    E-mail to Manager confirming Sr. Manager approval
        Establish Criteria Status: Complete
        Review Status: In Progress
        Approval Status: Approved
Manager Marks Document "Available for Review"
    E-mail to Employee to review ratings
        Establish Criteria Status: Complete
        Review Status: Available for Review
        Approval Status: Approved
Employee Reviews Document and Add Comments, if applicable
Manager Marks Document "Review Held"
    E-mail to Employee to Acknowledge Review Held
        Establish Criteria Status: Complete
        Review Status: Review Held
        Approval Status: Approved
Employee Marks Document "Acknowledged" and Add Comments, if applicable
    E-mail to Manager that Employee Acknowledged Review
        (If Employee does not Acknowledge document, Manager can acknowledge
    document; no e-mail generated)

Establish Criteria Status: Complete
Review Status: Acknowledged
Approval Status: Approved
HR Administrator Approves Document
E-mail to Manager that Document is Complete
Establish Criteria Status: Complete
Review Status: Complete
Approval Status: Approved

If the Sr. Manager or HR Administrator denies the document, an e-mail is sent to the Manager that approval was denied and the Review Status reverts back to In Progress and the Approval Status reverts back to Not Submitted.

Additionally, a report, in spreadsheet format, has been developed to assist you with monitoring the status of ePerformance Documents. This report lists the current staff in the Department/College/Division requested and the status of their ePerformance Documents for the Calendar Year requested. Current staff without a document or cancelled document will not appear on the report.

The navigation to the report in PeopleSoft HRMS is:
UHS HRMS HR > Reports > EPM Document Status Report

The report will prompt you for division/college/department, the calendar year for the ePerformance documents, and effective date of the active staff roster.

Below is a legend of values for the report:
ePerf Temp ID   UHS2010 = Staff Template
UHM2010 = Management Template
UHT2010 = Trades Template
Job Mgr Empl ID and Name - Reports to from Job Data
ePerf Mgr Empl ID and Name - Manager that currently has the document

The report displays the Establish Criteria status, Review Status, and Approval Status described above.

Hopefully this information will assist you with monitoring the ePerformance documents. If you have any questions or need additional information regarding ePerformance document processes, please contact Compensation/HRMS: Sandra Armstrong, 713-743-1962; Sara Chelette, 713-743-5769; Julie Marlowe, 713-743-5006; or myself. For all other questions concerning ePerformance and conducting performance evaluations, please contact your HR Generalist.

Susan
Susan Nester, Director
Compensation/HRMS
Human Resources Department
713-743-8134