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Subject: 2011 ePerformance Documents
Date: Tuesday, October 11, 2011 9:39:00 AM

The ePerformance documents for 2011 have been created in PeopleSoft HRMS. The due date to Establish Criteria for 2011 is December 15, 2011. The due date to complete Manager Evaluations is March 1, 2012. As requested, the 2010 responsibilities and manager responsibilities have been copied onto the 2011 documents if the employee is in the same position and has the same job code. Please contact Compensation if a document needs to be recreated and/or if a document was not created for one of the employees within your division/college. Additional HR communications to all ePerformance managers will follow within the next few days.

From feedback Human Resources received, there are a few modifications to the 2011 documents. The mission and initiatives sections have been minimized, but the university's mission and initiatives can be viewed by clicking the link within those sections. The numeric ratings have been expanded to two decimal places. While Human Resources encourages managers to save often when entering information into their documents, a message has been added when the document is saved warning managers that the weightings in a section do not equal 100% or that the section weightings for the overall rating do not equal 100%.

The workflows for ePerformance documents are the same as last year, but below are the workflow processes for your reference:

Manager, Staff, and Trades 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: Submitted (for pending HR approval)

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.

Executive Documents:

Employee Completes Criteria

E-mail sent to Manager to review and evaluate criteria

Establish Criteria Status: Complete

Review Status: In Progress

Approval Status: Not Submitted

Manager Evaluates Criteria and Rates Employee

Manager Marks Document "Available for Review"

E-mail sent to Employee to review ratings

Establish Criteria Status: Complete

Review Status: Available for Review

Approval Status: Not Submitted

Employee Reviews Document and Adds Comments, if applicable

Manager Marks Document "Review Held"

E-mail sent to Employee to acknowledge review held

Establish Criteria Status: Complete

Review Status: Review Held

Approval Status: Not Submitted

Employee Marks Document "Acknowledged" and Adds Comments, if applicable

E-mail sent 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: Submitted

HR Administrator Approves Document

E-mail sent to Manager that document is complete

Establish Criteria Status: Complete

Review Status: Complete

Approval Status: Approved

As you are probably aware, a report, in spreadsheet format, is available to assist you with monitoring the status of ePerformance Documents. The 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 UHS2011 = Staff Template

UHM2011 = Management Template

UHT2011 = Trades Template

UHE2011 = Executive 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 specifications for a report and associated security to provide division/college business administrators with ePerformance ratings to review merit increase recommendations, if a merit increase budget becomes available for FY13, are under development.

If you have any questions or need additional information regarding ePerformance document processes, please contact the Compensation/HRMS Section. For all other questions concerning ePerformance and conducting performance evaluations, please contact your HR Generalist.

Thank you in advance for your cooperation assisting with administration of the university's performance management system.

Susan

Susan Nester, Director

Compensation/HRMS

Human Resources Department

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