Performance Evaluation

MANAGER PROCESS GUIDE
ePerformance – Establishing Criteria

From the PeopleSoft home screen select the ePerformance icon.
The screen will display a list of your current employees performance document. Click on the employees name and their document will open up to begin establishing criteria.
In the Performance Process section to the left of the screen, select the double arrows to minimize this section.
Under the Goals tab select Add Goal

Performance Document

Define Criteria - Update and Approve

Lisa Simpson

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Adminstr, Business, Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Dory Fish</td>
</tr>
<tr>
<td>Period</td>
<td>01/01/2020 - 12/31/2020</td>
</tr>
<tr>
<td>Document Type</td>
<td>Performance Document</td>
</tr>
<tr>
<td>Template</td>
<td>UH Mgmt Performance</td>
</tr>
<tr>
<td>Status</td>
<td>In Progress</td>
</tr>
<tr>
<td>Document ID</td>
<td>43151</td>
</tr>
<tr>
<td>Due Date</td>
<td>04/09/2020</td>
</tr>
</tbody>
</table>

Select the tabs below to review and update the employee's Goals, Responsibilities, and Competencies for the evaluation period. The Established Criteria step must be complete by the Due Date indicated. Please remember the following related to the Established Criteria phase:

1. Employees should enter their preferred Goals during the Establish Criteria step through Employee Self Service. Managers should review the Goals and make appropriate updates prior to finalizing.
2. Enter appropriate Competencies, Customer Service items, and update Responsibilities.
3. Review the performance criteria with the employee.
4. Once the performance criteria is complete, select the Approve button to complete this step.
From here, as the manager, you can select to either add your own goal, copy a goal from your own document or copy a goal from another one of your employee’s documents. Please note that in order to copy a goal from another evaluation (yours or another employee), the goals must have already been set.
Select Add your own goal and click Next

Performance Document

Add Goal

You have chosen to add a new goal.

You can either enter a new goal on your own, or copy a goal from another evaluation. To copy a goal from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- Add your own goal
- Copy goal from My Document
- Copy Goal from My Team’s Documents

Next
Here you will add your employees goal by entering the title, description and employee measurement.
Any goals added should be SMART and must be attainable the end of the year. Once you’ve entered your goals, click Add.
This will take you back to your employees document where you will now see your employees goal displayed. Make sure you click Save in the top right hand corner once you’ve added an item to your employees document. To add additional goals repeat this same process.

Once all Goals have been entered, move on to the Responsibilities section.
A list of your employee’s responsibilities is displayed in Section 3 (or Section 2 if they had no Managerial Responsibilities). These responsibilities are pulled directly from your employee’s job description. These duties are built into the document so there is no option to edit them, only delete them. To see the description under each of these duties select Expand.
Select the Responsibilities Tab where additional sections can be found

- **Section 2 – Managerial Responsibilities**: If your employee is a manager or has management responsibilities, they will have an additional section called Managerial Responsibilities.
- **Section 3 – Responsibilities**: A list of your employee’s current job duties pulled directly from their job description.
Managerial Responsibilities Section

This is where you’ll set responsibilities directly related to how your employee manages people and/or processes.

- *if your employee has no Managerial Responsibilities section, skip to Responsibilities section starting on page 21.*

Select Add Item

**Section 2 - Managerial Responsibilities**

A manager responsibility is a task, action, or obligation that is a part of a management position or assignment. This section should contain leadership and managerial responsibilities such as sets objectives, organizes, motivates and communicates, measures, and develops employees.

Enter 2-4 manager responsibilities for the performance period. Click the Add Item button. Managers can create a new responsibility, or copy responsibilities from an existing evaluation.

Managerial Responsibilities will be evaluated by: Employee, Manager

Add Item
From here, as the manager, you can select to either add your own item, copy items from your own document or copy items from another one of your employee’s documents. Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

**Performance Document**

**Add Item**

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- ○ Add your own Item
- ○ Copy item from my Documents
- ○ Copy Item from My Team’s Documents

[Next button]
To Add your own Item

Select Add your own Item and click Next

**Performance Document**

**Add Item**

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- [ ] Add your own Item
- [ ] Copy item from my Documents
- [ ] Copy Item from My Team's Documents

[Next]
You’ll be automatically directed to the screen where you can now add your own item.

Enter the title and description of the Managerial Responsibility you are establishing. The responsibility set here should be separate from the employees regular responsibilities outlined in the Responsibilities section.

Once you’ve established this item select Add.
This will take you back to your employees document where you will now see your employees managerial responsibility displayed.

Make sure you click Save in the top right hand corner once you’ve added an item to your employees document.

- To *add* additional managerial responsibilities repeat this same process.

- To *edit* the responsibility, select the pencil icon

- To *delete* the responsibility, select the trash can icon
To Copy from another Document

Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

Select Copy item from my Documents OR Copy item from My Team’s Documents (whichever one you’re wanting to copy from) and click Next.

Performance Document

Add Item

You have chosen to add a new manager responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- Add your own Item
- Copy item from my Documents
- Copy Item from My Team's Documents

Next

Return
If there are no items to copy from you’ll receive a pop-up telling you that there are no items to be found. Click OK.
If there are items to copy, you’ll be re-directed to a screen that automatically populates the beginning of the current year (Example: 01/01/2020).

- If you’ve already established items on an employees document, you can leave this date as is.
• If you need to select items from a prior years document, you’ll update this date to 01/01/YYYY and select Filter.

Performance Document

Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

Filter Criteria

First Name [ ] Last Name [ ]
Document Type [ ] Document Status [ ]
Period Between [ ]

Click Select on the employees document you want to copy items from.
Previously established items will automatically populate.

Performance Document

Copy item from My Team's Documents

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

Copy from Document

<table>
<thead>
<tr>
<th>Name</th>
<th>Document Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisa Simpson</td>
<td>PERFORM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section</th>
<th>Content Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managerial Responsibilities</td>
<td>End Date 12/31/2019</td>
</tr>
</tbody>
</table>

Managerial Responsibilities to be copied

<table>
<thead>
<tr>
<th>Managerial Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>DBA Leadership</td>
</tr>
</tbody>
</table>

Select All  Deselect All

Copy  Cancel
To view the description of this item select the name hyperlinked in blue.
You’ll be re-directed to a description of the item. Once finished viewing the description, select Return.

Item Details

Managerial Responsibilities Section

**DBA Leadership**

**Description**: Oversee the business, financial, budget planning, oversight and monitoring for several departments with the Division of Administration & Finance (A&F). Provides supervision of department business services team members and serves as the liaison for senior leadership, directors and staff with other university departments and offices. Provide guidance, support, and development opportunities for all staff and students in your unit as a means of promoting higher levels of job satisfaction and employee loyalty. Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate.

Select the box to the left of the populated item and click Copy.
You’ll be re-directed back to your employees current document where the copied item will now be added.

- To edit the responsibility, select the pencil icon
To delete the responsibility, select the trash can icon.

Select Save.
Responsibilities Section

A list of your employee’s responsibilities is displayed in Section 3 (or Section 2 if they had no Managerial Responsibilities). These responsibilities are pulled directly from your employee’s job description. These duties are built into the document so there is no option to edit them, only delete them.

To see the description under each of these duties select Expand.

- If you want to combine some of these duties into one, you will need to add a new responsibility and delete the ones you’re combining.
- If some of the duties listed are repetitive or not applicable to this particular employee and you want to remove some of them, you certainly can. Please keep in mind that if you’re deleting a majority of the duties because they aren’t applicable, it’s possible that your employee is in the incorrect job. You will need to reach out to Compensation if that is the case to discuss options.
To View Responsibilities

Expand the responsibilities by 1 of 2 ways;

- Expand Individual Items – Select the arrow to the right of the individual responsibility listed

  **Responsibility 1: Business Administration - Duty**

  **Description**: Serves as the department liaison with Central Payroll, Human Resources, OSP and other department business managers.

  Created By: Profile 02/07/2020 3:43PM

- Expand All – Select Expand

  **Responsibility 1: Business Administration - Duty**

  **Description**: Serves as the department liaison with Central Payroll, Human Resources, OSP and other department business managers.

  Created By: Profile 02/07/2020 3:43PM

  **Responsibility 2: Business Administration - Duty**

  **Description**: Plans and manages the department’s human and financial resources to support department objectives.

  Created By: Profile 02/07/2020 3:43PM
To Delete Responsibilities

To delete the responsibility you don’t want to keep, click the trash can icon.

Section 3 - Responsibilities

Responsibilities will be evaluated by: Employee, Manager

Responsibility 1: Business Administration - Duty
Description: Serves as the department liaison with Central Payroll, Human Resources, OSP and other department business managers.

Created By: Profile 02/07/2020 3:43PM

Responsibility 2: Business Administration - Duty
Description: Plans and manages the department's human and financial resources to support department objectives.

Created By: Profile 02/07/2020 3:43PM

You’ll be asked to confirm you want to delete this responsibility, click Yes - Delete.

Performance Document

Delete Confirmation

Are you sure you want to delete (Business Administration - Duty)?

Yes - Delete  No - Do Not Delete
Once deleted, you’ll be re-directed back to your employees document where the deleted responsibility will be gone.

**Define Criteria - Update and Approve**

A responsibility is a task, action, or obligation that is part of your specific position or assignment and most often has a frequency and quality associated with it. This section of the evaluation comes directly from the job description. If the job duties in this section have changed, or are not specific enough, managers should edit by adding and deleting criteria to fit the employee’s actual job duties. Ideally employees should be evaluated on 4-6 responsibilities.

Responsibilities will be evaluated by: Employee, Manager

- Expand  |  Collapse  |  Add Responsibility

**Responsibility 1: Business Administration - Duty**

Description: Plans and manages the department's human and financial resources to support department objectives.

Created By  Profile  02/07/2020  3:43PM

Make sure you click Save in the top right hand corner once you’ve added an item to your employees document. To delete any additional responsibilities repeat this same process.
To Add Responsibilities

From here, as the manager, you can select to either add your own item, copy items from your own document or copy items from another one of your employee’s documents. Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

Performance Document

Add Responsibility

You have chosen to add a new responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- Add your own responsibility
- Copy responsibility from My Document
- Copy Responsibility from My Team’s Documents

Next
This will take you back to your employee’s document where you will now see your employees responsibility displayed. Make sure you click Save in the top right hand corner once you’ve added an item to your employee’s document.

- To **add** additional responsibilities repeat this same process.

- To **edit** the responsibility, select the pencil icon

<table>
<thead>
<tr>
<th>Responsibility 2: Standard Operating Procedures</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description:</strong> Establish Standard Operating Procedures for 5 processes utilized in this office.</td>
</tr>
</tbody>
</table>

- Created By: Dory Fish, 06/10/2020 9:24AM

- To **delete** the responsibility, select the trash can icon

<table>
<thead>
<tr>
<th>Responsibility 2: Standard Operating Procedures</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description:</strong> Establish Standard Operating Procedures for 5 processes utilized in this office.</td>
</tr>
</tbody>
</table>

- Created By: Dory Fish, 06/10/2020 9:24AM
To Copy from another Document

Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

Select Copy item from my Documents OR Copy item from My Team’s Documents (whichever one you’re wanting to copy from) and click Next.

Performance Document

Add Item

You have chosen to add a new responsibility.

You can either enter a new responsibility on your own or copy from an existing document. To copy a responsibility from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- Add your own Item
- Copy item from my Documents
- Copy item from My Team’s Documents

Next
You’ll be re-directed to a screen that automatically populates the beginning of the current year (Example: 01/01/2020).
- If you’ve already established items on an employees document, you can leave this date as is.
If you need to select items from a prior years document, you’ll update this date to 01/01/YYYY and select Filter.

Click Select on the employees document you want to copy items from.
Previously established items will automatically populate.

**Performance Document**

**Copy Item from My Team's Documents**

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

**Copy from Document**

<table>
<thead>
<tr>
<th>Name</th>
<th>Lisa Simpson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section</td>
<td>Managerial Responsibilities</td>
</tr>
<tr>
<td>Begin Date</td>
<td>01/01/2019</td>
</tr>
<tr>
<td>Document Type</td>
<td>PERFORM</td>
</tr>
<tr>
<td>Content Type</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2019</td>
</tr>
</tbody>
</table>

**Managerial Responsibilities to be copied**

- HR & AAO- Duty
- HR & AAO- Duty

To view the description of this item select the name hyperlinked in blue.

<table>
<thead>
<tr>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR &amp; AAO- Duty</td>
</tr>
</tbody>
</table>
You’ll be re-directed to a description of the item. Once finished viewing the description, select Return.

**Item Details**

**Responsibility Section**

**HR & AAO- Duty**

*Description*: Analyzes and conducts classification reviews, and prepares recommendations; composes and writes new job descriptions.

Select the box to the left of the populated item and click Copy.
You’ll be re-directed back to your employees current document where the copied item will now be added.

- To delete the responsibility, select the trash can icon

- Because the responsibilities pulled in are automatically generated from the pre-populated Responsibilities, there is no option to edit.
Make sure you click Save in the top right hand corner once you’ve added an item to your employees document.

Once all Responsibilities have been entered, move on to the Competencies section.
Select the Competencies Tab where additional sections can be found

- **Section 4 – Competencies**: Describes “how” one does a job, as opposed to “what” someone does. The specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role.
  
  *Standard Competencies can be found here.*

- **Section 5 – Customer Service**: Describes services to customers.
  
  *Customer Service Measures can be found here.*
To Add A Competency

Select Add Competency.

Section 4 - Competencies

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 competency is often described as "how" one does a job, as opposed to "what" someone does, although there may be some overlap.

Employees should have 2-4 competencies listed on the performance evaluation. Click the Add Competency button. Managers can select from a list of pre-defined competencies or copy from an existing evaluation.

Competencies will be evaluated by: Employee, Manager

Add Competency

Performance Document

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- Add pre-defined competency
- Copy competency from my Document
- Copy Competency from My Team's Documents

Next

Return
From here, as the manager, you can select to either add a pre-defined competency, copy competency items from your own document or copy items from another one of your employee’s documents. Please note that in order to copy items from another evaluation (yours or another employee), the responsibilities must have already been set.

**Performance Document**

**Add Competency**

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- Add pre-defined competency
- Copy competency from my Document
- Copy Competency from My Team’s Documents

[Next]

[Return]
To Add a Pre-Defined Competency Item

Select Add pre-defined competency and click Next.

Performance Document

Add Competency

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- Add pre-defined competency
- Copy competency from my Document
- Copy Competency from My Team’s Documents
You’ll be automatically directed to the screen where you can now add your own item

Performace Document

Add Competency

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- Add pre-defined competency
  - Copy competency from my Document
  - Copy Competency from My Team’s Documents

Enter the title and description of the Managerial Responsibility you are establishing. The responsibility set here should be separate from the employees regular responsibilities outlined in the Responsibilities section.

Once you’ve established this item select Add.
Managerial Responsibility 1

Manage the unit with the same exemplary behaviors and attitudes that you expect from your staff and setting an example that your team can emulate.
This will take you back to your employees document where you will now see your employees managerial responsibility displayed.
Make sure you click Save in the top right hand corner once you’ve added an item to your employees document.

- To *add* additional managerial responsibilities repeat this same process.
To Add Pre-Defined Competency

Select Add pre-defined competency and click Next.

**Performance Document**

**Add Competency**

You have chosen to add a new competency.

You may select a competency already defined in the system or copy from an existing document. To copy a competency from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- Add pre-defined competency
- Copy competency from my Document
- Copy Competency from My Team's Documents

[Next]

[Return]
You can search for a pre-defined competency by 1 of 2 ways;

- Enter the Competency name from the list
- Manually search for Competencies using the drop down arrows in the Content Group Type OR Content Group sections.

**Performance Document**

**Add a Pre-Defined Competency**

To search for Competencies to add to the document, select the Content Group Type and click the Search button. To narrow the results further, select a Content Group.

**Search Criteria**

- Competency
- Content Group Type
- Content Group

[Search] [Clear]

Return
Based on the Standard Competency list, enter the Competency Item name in the Competency section and click Search. The Competency will populate at the bottom, check the box to the left of the Competency and click Add.

<table>
<thead>
<tr>
<th>Competency Item</th>
<th>Competency Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptability</td>
<td>Maintaining effectiveness when experiencing major changes in work responsibilities or environment, adjusting effectively to work within new work structures, processes, requirements, or cultures.</td>
</tr>
<tr>
<td>Aligning Perform for Success</td>
<td>Focusing and guiding others in accomplishing work objectives.</td>
</tr>
</tbody>
</table>

**Search Criteria**

- **Competency**: Adaptability
- **Content Group Type**: 
- **Content Group**: 

**Search Results**

1. **Competencies**
   - Adaptability

**Buttons**

- Select All
- Deselect All
- Add
- Return
To manually search for Competencies using the drop down arrows in the Content Group Type OR Content Group sections:
- Select the drop down arrow next to the blank box in Content Group Type and select Competency Types.
- Select the drop down arrow next to the blank box in Content Group. A list of different content groups will populate, select the one that best applies to your employees position.
The Competency will populate at the bottom, check the box to the left of the Competency and click Add.

**Search Criteria**

- **Competency**
- **Content Group Type**
- **Content Group**

**Search Results**

- **Competencies**
  - **Adaptability**

Select All  Deselect All  Add

Return
Once added, you’ll be re-directed back to your document where the Competency will now be added. Don’t forget to click Save in the top Right corner of your document.
Customer Service Section

Select the Competencies Tab where additional sections can be found

- Section 4 – Competencies: Describes “how” one does a job, as opposed to “what” someone does. The specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role.
  
  *Standard Competencies can be found [here](#).*

- Section 5 – Customer Service: Describes services to customers.
  
  *Customer Service Measures can be found [here](#).*
To Add A Customer Service Measure

Select Add Item.

Section 4 - Competencies

Section 5 - Customer Service

Customer Service is the commitment to providing value added services to customers, including attitude, knowledge, technical support and quality of service in a timely manner.

Employees should have 2-4 Customer service measures listed on the performance evaluation. Click the Add Item button. Managers can select from a list of pre-defined items or copy from an existing evaluation.

Customer Service will be evaluated by: Employee, Manager

Performance Document

Add Item

You have chosen to add a new customer service item.

You may select an item already defined in the system or copy from an existing document. To copy an item from another employee's evaluation select the Copy from My Team's Document option.

Select the appropriate option and click the Next button to continue.

- Add pre-defined item
- Copy item from my Documents
- Copy item from My Team's Documents

Next

Return
From here, as the manager, you can select to either add a pre-defined customer service item, copy customer service items from your own document or copy items from another one of your employee’s documents. Please note that in order to copy items from another evaluation (yours or another employee), the customer service items must have already been set.

Performance Document
Add Item

You have chosen to add a new customer service item.

You may select an item already defined in the system or copy from an existing document. To copy an item from another employee’s evaluation select the Copy from My Team’s Document option.

Select the appropriate option and click the Next button to continue.

- Add pre-defined item
- Copy item from my Documents
- Copy Item from My Team’s Documents

Next

Return
Add a Pre-Defined Customer Service (CS) Measure

Select Add pre-defined item and click Next.
You can search for a pre-defined CS Measure by 1 of 2 ways:
- Enter the CS Measure name from the list
- Click Search and a list of the CS Measures will populate.
Based on the Customer Service Measures list, enter the CS Measure name in the Title section and click Search. The CS Measure will populate at the bottom, check the box to the left of the item and click Add.

<table>
<thead>
<tr>
<th>Customer Service Measure</th>
<th>Customer Service Measure Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUST01 Responsiveness</td>
<td>Responsiveness - the ability to build and maintain customer satisfaction through providing timely responses to inquiries, assignments and other deliverables.</td>
</tr>
<tr>
<td>CUST02 Availability</td>
<td>Availability – the individual person is accessible and open to assist whenever when needed.</td>
</tr>
</tbody>
</table>

Search Criteria

<table>
<thead>
<tr>
<th>Title</th>
<th>Responsiveness</th>
</tr>
</thead>
</table>

Search Results

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>1-1 of 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Responsiveness</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select All    Deselect All

Add
To view the full list of CS Measures, click Search.

- The full CS Measures list will automatically populate below the Search.
- From the list of CS Measures, select the one(s) you would like to apply to your employees document.

Performance Document

Add a Pre-Defined Item

To search for Customer Service items to add to the document, click the Search button. Leave the Title field blank to view all Customer Service items.

Search Criteria

Title

[ ] Search  [ ] Clear

Search Results

1-6 of 5

<table>
<thead>
<tr>
<th>Customer Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Responsiveness</td>
</tr>
<tr>
<td>[ ] Availability</td>
</tr>
<tr>
<td>[ ] Quality of Work</td>
</tr>
<tr>
<td>[ ] Knowledge of Work</td>
</tr>
<tr>
<td>[ ] Courtesy and Professionalism</td>
</tr>
<tr>
<td>[ ] Proactive in providing solutions</td>
</tr>
</tbody>
</table>

[ ] Select All  [ ] Deselect All

[ ] Add
Once added, you’ll be re-directed back to your document where the CS Measure will now be added. Don’t forget to click Save in the top Right corner of your document.
To Copy from another Document

Please note that in order to copy items from another evaluation (yours or another employee), the CS Measures must have already been set.

Select Copy item from my Documents OR Copy item from My Team’s Documents (whichever one you’re wanting to copy from) and click Next.
If you try copying items from a document that doesn’t already have items established you’ll receive a pop-up notification when you select Next. Click OK on the pop-up and try to copy from a document the other way.
(Example: No items were found when trying to copy from “My Documents”, try copying items from “My Teams Documents” instead).
If there are items already set that can be copied, you’ll be re-directed to a screen that automatically populates the beginning of the current year (Example: 01/01/2020).

- If you’ve already established items on an employees document, you can leave this date as is.
• If you need to select items from a prior years document, you’ll update this date to 01/01/YYYY and select Filter.

Performance Document

Select a Document

Below is a list of documents you own. Select the document you want to copy items from.

Filter Criteria

First Name
Last Name
Document Type
Document Status
Period Between

Filter
Clear

Performance Documents

Select | Name | Document Type | Document Status | Period Begin | Period End
---|---|---|---|---|---
Select | Lisa Simpson | Performance Document | Completed | 01/01/2019 | 12/31/2019

Click Select on the employees document you want to copy items from.
Previously established items will automatically populate.

**Copy Item from My Team’s Documents**

Select the check box next to each item you want to add. When you are finished, select the Copy button to return to the document where you can save your entry.

**Copy from Document**

<table>
<thead>
<tr>
<th>Name</th>
<th>Lisa Simpson</th>
<th>Document Type</th>
<th>PERFORM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section</td>
<td>Customer Service</td>
<td>Content Type</td>
<td>CUSTSVC</td>
</tr>
<tr>
<td>Begin Date</td>
<td>01/01/2019</td>
<td>End Date</td>
<td>12/31/2019</td>
</tr>
</tbody>
</table>

**Customer Service to be copied**

Select All  
Deselect All

- [ ] Quality of Work
- [ ] Courtesy and Professionalism

To view the description of an item, select the name hyperlinked in blue.

- Quality of Work
You’ll be re-directed to a description of the item. Once finished viewing the description, select Return.

**Item Details**

**Customer Service Section**

**Quality of Work**

Description: Quality of Work - the deliverable(s) that are produced are of quality and thoroughly worked on to reach a final product or solution.

Select the box to the left of the populated item and click Copy.
You’ll be re-directed back to your employees current document where the copied item will now be available.

- To delete the responsibility, select the trash can icon

- Because the items pulled in are automatically generated from the pre-populated Responsibilities, there is no option to edit.
Make sure you click Save in the top right hand corner once you’ve added an item to your employee’s document.
Now that you’ve set criteria for your employee you’re ready to finalize it. Before finalizing, go through each section to ensure that you have set an item for everything.

This is imperative as you’ll have to assign ratings to each of these sections. If there is nothing established in one of the sections, there is nothing to evaluate your employee on and therefore nothing to rate. In order to finalize the evaluation and close it out you MUST rate every section in the document.

Each section of the document has Section Summaries that include a Section Weight Percentage. These percentages are what determine the overall ePerformance rating for your employee. Each section has a minimum weight that must be assigned, but you as the Manager can determine how much value a section should have. (Example: You want Responsibilities to hold more value than the employees Goals).

- **Minimum Section Weights (section screen shots included on pages directly following step by step instructions)**
  - Goals – 40%
  - Managerial Responsibilities – 5% (N/A for employees in Non-Manager roles)
  - Responsibilities – 30%
  - Competencies – 5%
  - Customer Service – 5%

The total overall weight for the document MUST equal 100%. The minimum section weights only account for 80% - 85% (depending on if the document has the additional Managerial Responsibilities section), so as the Manager you will have to assign an additional 15% - 20% weight to the sections. You can assign the entire percentage to one section or you can split it up over as many sections as you want. **The system will NOT let you finalize the criteria until the overall weight equals 100%.**
CHANGING SECTION WEIGHTS

Under Goals Tab, scroll down to the Goals Summary Section and update the Section Weight to the percentage you want (can’t be less than 40%).

Under Responsibilities Tab, scroll down to the Managerial Responsibilities Summary Section and update the Section Weight to the percentage you want (can’t be less than 5%). If this section isn’t on the document, skip to the Responsibilities section.
Under Responsibilities Tab, scroll down to the Responsibilities Summary Section and update the Section Weight to the percentage you want (can’t be less than 30%).

Section Weight: 40% (not less than 30%)

Under the Competencies Tab, scroll down to the Competencies Summary Section and update the Section Weight to the percentage you want (can’t be less than 5%). *(The section weight was kept at 5%)*

Section Weight: 5% (not less than 5%)

Under the Competencies Tab, scroll down to the Customer Service Section and update the Section Weight to the percentage you want (can’t be less than 5%). *(The section weight was changed to 10%)*

Section Weight: 10% (not less than 5%)
Once you’ve updated all section weights, you’re ready to finalize your criteria. Before finalizing, take one final look at your employees document to ensure there are no additional changes you want to make.

To finalize the criteria, select Save on the top right hand of the document.

Select the tabs below to review and update the employee’s Goals, Responsibilities, and Competencies for the evaluation period. The Established Criteria step must be complete by the Due Date indicated. Please remember the following related to the Established Criteria phase:

1. Employees should enter their preferred Goals during the Establish Criteria step through Employee Self Service. Managers should review the Goals and make appropriate updates prior to finalizing.
2. Enter appropriate Competencies, Customer Service items, and update Responsibilities.
3. Review the performance criteria with the employee.
4. Once the performance criteria is complete, select the Approve button to complete this step.
Once you’ve selected Save, select Approve. If all of your section weights don’t total up to 100%, you’ll receive an error message indicating there was a problem completing your request. The error message also includes how much % needs to be adjusted.

Once you’ve selected Save, select Approve. If all of your section weights total up to 100% you’ll be re-directed to a confirm request page to confirm you want to approve your established criteria. Select Confirm.

Once confirmed, you’ll be re-directed to a confirmation page that you’ve successfully finalized your employee’s criteria. Select Return to Current Documents to return back to your employee ePerformance queue.
Section Weight Screen Shots

GOALS SECTION – Minimum 40% \((\text{Section Weight kept at 40\%})\)

Performance Document

Define Criteria - Update and Approve

<table>
<thead>
<tr>
<th>Long Format</th>
</tr>
</thead>
</table>

**Goals**

**Section 1 - Employee Goals**

Employee goals should be **SMART** goal(s). Goals should be: Specific, Measurable, Achievable, Realistic, and Time Sensitive. Most employees have new goals each year. Employees and managers should work together to define project goals, service or team goals, or individual performance improvement goals.

Enter 2-5 goals for the performance period. Managers will review all goals and determine which criteria will be included in the final evaluation. Click the **Add Goal** button. Managers can create a new goal, or copy goals from an existing evaluation.

Employee Goals will be evaluated by: Employee, Manager

**Goal 1: Add your Goal Title here (Example: ePerformance Process)**

**Goals Section Summary**

| Section Weight | 40 % (not less than 40%) |
RESPONSIBILITIES SECTIONS:

- Managerial Responsibilities – Minimum 5% *(Section Weight kept at 5%)*

  - Managerial Responsibilities Summary
    - Section Weight 5% *(not less than 5%)*

- Responsibilities – Minimum 30% *(Section Weight set at 40%)*

  - Responsibility 1: Business Administration - Duty
  - Responsibility 2: Adminstr, Business, Department - Summary

  - Responsibility Section Summary
    - Section Weight 40% *(not less than 30%)*
COMPETENCIES SECTIONS:

- Competencies – Minimum 5% *(Section Weight kept at 5%)*

  - Competency 1: Adaptability

  ```
  Competency Section Summary
  Section Weight 5 % (not less than 5%)
  ```

- Customer Service Measures – Minimum 5% *(Section Weight changed to 10%)*

  ```
  Customer Service Summary
  Section Weight 10 % (not less than 5%)
  ```