# PeopleSoft 9.0 ePerformance Module

# **User Manual**



Career Service Authority
Training and Organization Development &
Classification and Compensation



# **TABLE OF CONTENTS**

EPERFORMANCE PROCESS	3	
CREATE DOCUMENTS (PEP)	4	
CREATE PERFORMANCE DOCUMENTS/PEP BY CLONING	6	
CREATE PERFORMANCE CRITERIA (PEP)	7	
DELIVERED OUTCOMES	12	
ADD PERFORMANCE NOTES	12	
EDITING/DELETING ALREADY EXISTING DUTIES	13	
EDITING/DELETING AN ALREADY EXISTING OUTCOME	15	
COMPLETING THE PEP	15	
PEPR STAGE	17	
SUBMIT FOR MANAGER APPROVAL	19	
APPROVING/DENY PEPR AT MANAGER LEVEL	20	
ADMINISTRATIVE TASKS	22	
TRANSFER DOCUMENTS TO ANOTHER SUPERVISOR CANCEL DOCUMENT DELETE DOCUMENTS RESET DOCUMENT STATUS		22 23 24 24

# **ePerformance Process**

Action	Role
<b>Create Performance Documents (PEP)</b>	Supervisor
<b>Edit Performance Documents (PEP)</b>	Supervisor
Complete Performance Criteria/Turn Into	Supervisor
PEPR	
Further Refine PEPR (if needed)	Supervisor
Rate Employee/Complete PEPR	Supervisor
Send PEPR for Mgmt Approval	Supervisor
Sup/Mgr Receive E-mail	
Review/Approve or Deny PEPR	Manager
Supervisor receives e-mail	
<b>Review Manager Comments</b>	Supervisor
Make Necessary Changes (if needed)	Supervisor
Return to Manager (if needed)	Supervisor
Sup/Mgr receives e-mail	
Review/Approve or Deny PEPR	Manager
Supervisor receives e-mail	
Deliver PEPR to Employee	Supervisor
<b>Enter employee comments</b>	Supervisor
Complete PEPR	Supervisor

# **ACCESSING PEOPLESOFT EPERFORMANCE**

To access PeopleSoft ePerformance perform the following steps:

- Log into the DOT using your userID and password
- Click on the Home Page Tab in the upper left corner
- In the Global Menu, click on "Online Tools and Programs"
- Click on "PeopleSoft Tools"
- Click on "Manager Self Service"
- Click on "Performance Management"

# **Create Documents (PEP)**

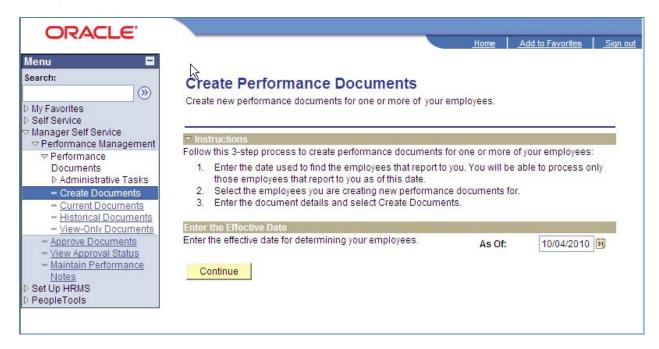
Section Objective:

• Create performance documents (PEP)

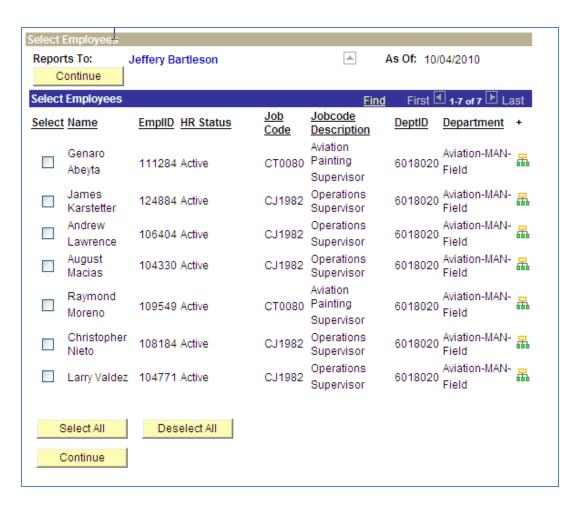
The first step is to create documents for your direct reports. To start the process click on:

- 1. Performance Documents
- 2. Create Documents

From the "Create Performance Documents" screen enter the "As Of" date for determining your employees and then click the "continue" button.

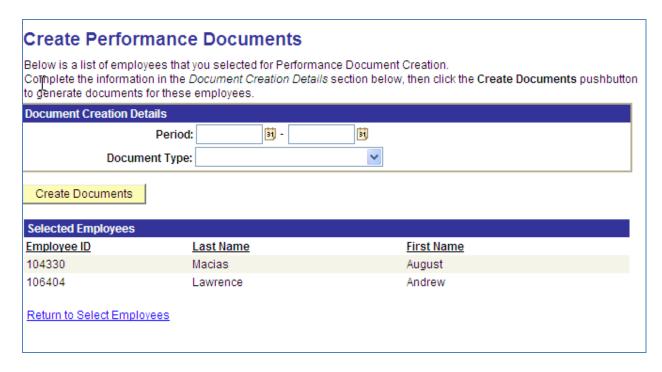


After clicking the "Continue" button, you should see a list of direct reports based on the "As of" date entered in the prior screen.



Select the names of the individuals that require a PEP followed by the "Continue" button. Note: If you would like to do all PEP's at once, click the "Select All" button followed by the "Continue" button.

You will then have access to the "Create Performance Documents" screen showing the individuals selected as well as the "period start and end date" and "Document type" fields.



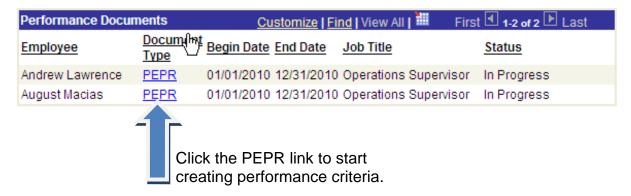
- The start and end dates will be for the evaluation period (i.e. 1/1/2010 12/31/10).
- There is one option for Document type and that is "PEPR".
- The "Create from Prior Document" field and "Template" fields will appear once the "PEPR" document type has been selected. If you are creating a PEP from scratch, make sure to once again select "PEPR" in the "Template" field and leave the "No" option selected in the "Create from Prior Document" field. It you want to copy or "clone" a PEP to use on another employee, go to the next section for instructions.
- Click the "Create Documents" button.

The "Create Performance Documents – Results" screen appears that will include a "Create Documents" and "Current Documents" links. To continue the process, click on the "Current Documents" link.

To begin the editing process click the "PEPR" link next to the employee you would like to edit.

# Current Performance Documents

Listed below are the current performance documents for which you are the Supervisor.



# **Create Performance Documents/PEP by Cloning**

Section Objective:

Clone/Copy an already existing PEP/R to use on another employee.

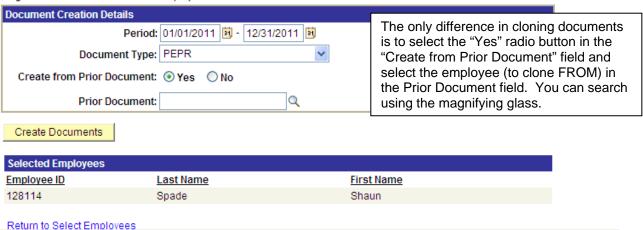
One of the nice features of this system is that you can take an already existing report and make a copy to use for another employee. This is called "Cloning". To clone, follow these steps:

- Click on Performance Documents
- Click on Create Documents
- Enter the "As of date" to obtain the direct reports list. Click the Continue button
- Select the employees FOR whom you would like to create documents
- Click the Continue button
- Enter the start date and end date for the evaluation period in the Period field
- Choose "PEPR" in the Document type dropdown field
- Click the "Yes" radio button in the "Create from Prior Document" field

## **Create Performance Documents**

Below is a list of employees that you selected the Performance Document Creation.

Complete the information in the Document Creation Details section below, then click the Create Documents pushbutton to generate documents for these employees.



- Click the magnifying glass search icon to search for the document from which you would like to clone
- From the search results, click on the employee name link in the evaluate column to select the "from clone" document
- Click the "Create Documents" button

# **Create Performance Criteria (PEP)**

Section Objectives:

- Add and Weight Outcome(s)
- Add Additional Duty(ies)
- Add Development Section

To establish performance criteria for the PEP, follow this path:

- Manager Self Service
- 2. Performance Management

- 3. Performance Documents
- 4. Current Documents

You will be taken to the "Current Performance Documents" screen.

# **Current Performance Documents**

Listed below are the current performance documents for which you are the Supervisor.



Click on the "PEPR" link next to the person you would like to edit. This will take you to the "Document Details" screen which includes the name of the individual, title and evaluation period (start date and end date of the evaluation period).

## **Current Performance Documents**

#### **Document Details**

Florence Espinoza, Master Trades Worker PEPR: 01/01/2010 - 12/31/2010

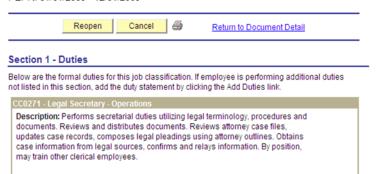


This screen contains information including the "Establish Evaluation Criteria (PEP)" with a "Start" link as well as the "Complete Supervisor Evaluation (PEPR) sections. To begin editing a PEP, click on the "Start" link.

#### City and County of Denver

# Performance Criteria (PEP) - Draft

Stan Lechman Jr., Legal Secretary PEPR: 01/01/2009 - 12/31/2009



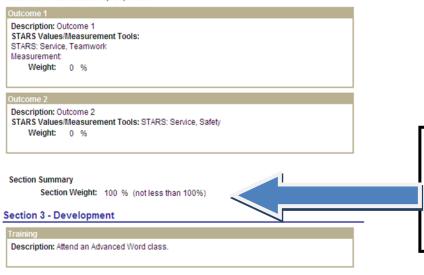
#### Section 2 - Outcomes

STARS Values: Service, Teamwork, Accountability and Ethics, Respect, Safety.

Measurement Tools: Customer Feedback, Team Feedback, Peer Feedback, Supervisor Observations, Reports.

Select the appropriate STARS value and measurement tool and enter them in the STARS and Measures section for each Outcome after clicking Add an Outcome link.

Outcomes will be evaluated by: Supervisor



Example of the PEP template.

- Click on "Add an additional Duty" to add a duty.
- Click on "Add an Outcome" to add an outcome.
- Click on "Add a Development Item" to add development items.

The ability to assign a weight to outcomes for rating purposes is available. If you decide to use this feature, the total weight must be 100.

#### Section 4 - Employee Comments

Reopen

Employee Comments

Section 5 - Supervisor C	ommente		
Supervisor Comments	Omments		

-

Return to Document Detail

Cancel

You can establish performance criteria for a PEP by editing or adding to these three sections:

- To add an additional duty Click on the "Add an Additional Duty" link.
- To add an outcome Click on the "Add an Outcome" link
- To add a Development Item Click on the "Add a Development Item" link.

Complete each field: "Title", "Description", "STARS Values/Measurement Tools" and then click the "Update" button to add to the PEP. You can also check spelling by clicking on the spell check icon located to the right of many of these fields. The icon is a book with a checkmark. Once you are satisfied, don't forget to save the document.

ity and County o	f Denver		Figure 1: Add an
Add an Addit	Additional		
Andrew Lawrence, PEPR: 01/01/2010	Operations Supervisor - 12/31/2010		Duty Example
*Title:		24.41	City and County
Description:			Add an Outo
		<u>~</u>	Stan Lechman Jr PEPR: 01/01/200
Update Return	to Performance Criteria		STARS Values: Serv
			Measurement Tools Observations, Repo
			Select the appropria Measures section be
			*Title
			Description
			STARS Values
			Measurement Tools
			Undate Reti

Figure 2: Add an Outcome Example

City and County of Denver		
Add a Development Item		
Andrew Lawrence, Operations Supervisor PEPR: 01/01/2010 - 12/31/2010		
*Title:	A	
Description:		
Update Return to Performance Criteria		

Figure 3: Add a Development Item Example

## **Delivered Outcomes**

Certain job classifications that require supervision will have two delivered outcomes appear in each PEP/R. As with the delivered duties that are associated with the job specifications, these delivered outcomes will not be able to be changed or deleted.



#### **Add Performance Notes**

## Section Objective

• Add performance note(s)

Throughout the year, you can add performance notes for each employee as you receive comments or want to add your own.

To add performance notes follow these steps:

- Click on Performance Management
- Click on Performance Documents
- Click on Maintain Performance Notes
- Enter the employee ID for the employee or click on the magnifying glass to the right of the ID field
- If you use the magnifying glass search feature, click on the appropriate search item in the "Search by" dropdown (emplid, firstname, lastname, name).
- · Click on the link next located to the left of the corresponding employee
- Enter a note start and end date.
- Click on the "Add a New Note" button.

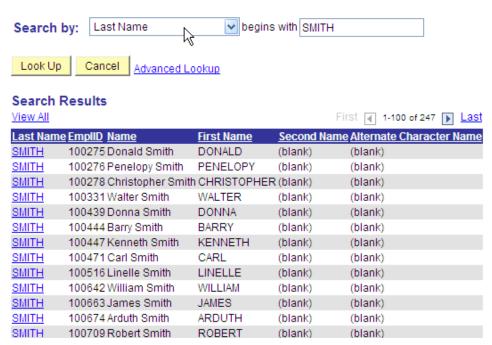
# Performance Notes - New Note

Instructions  Applications			
Selected Perfor	mance Note		
ID:	100278	Christopher Smith	Created: 10/18/2010 2:04PM Creator: Kendra Moskal Last Update: by:
Cubicate	I	À.	
Subject:	L		
Note Text:			
			V
Save			

Return To: Performance Note Selection

• Edit the notes information including Subject and Note text and then click the "Save" button. Note: The screen will not change after you have saved. If you wish to go back to a PEP click the "Current Document" link in the main menu.

# Look Up ID

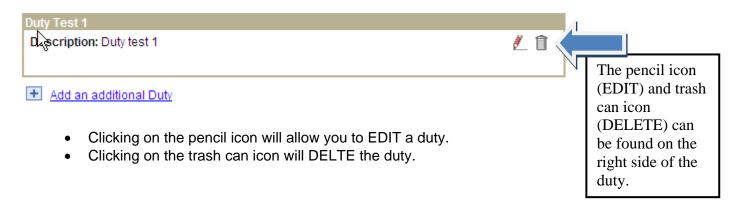


# **Editing/Deleting Already Existing Duties**

# Section Objective:

- Edit already existing duty/outcome(s)
- Delete already existing duty/outcome(s)

Once a duty has been saved in a PEP, it can still be edited. Observe the pencil and trash can icons that appear to the right of the duty.



# **Editing/Deleting an already existing Outcome**

Once an outcome has been saved in a PEP, it can still be edited or deleted. Observe the pencil and trash can icons that appear to the right of the duty. You will also observe a third icon, the notepad, for adding performance notes to that outcome.



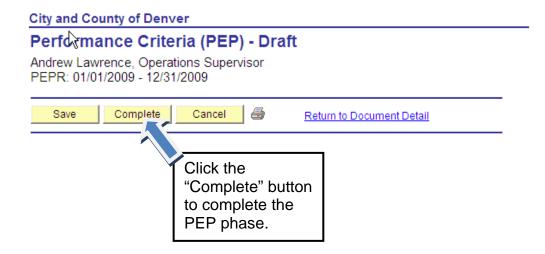
Complete the PEP

Once you have started the editing process. The Document details screen will change slightly to reflect the status of the PEP and will also add a "Complete" link. You must complete a PEP in order to obtain the ability to rate the outcomes.

#### **Current Performance Documents Document Details** Andrew Lawrence, Operations Supervisor PEPR: 01/01/2009 - 12/31/2009 Employee: Andrew 106404 Job Title: OperationsCJ1982 Status has Supervisor Lawrence Document Type: PEPR Period: 01/01/2009 - 12/31/2009 changed to "In Template: PEPR Document ID: 854 Progress" Supervisor: Jeffery Bartleson Status: In Progress Document Progress Due Date Step Status "Complete" Establish Evaluation Criteria link now 03/07/2010 In Progress Edit Complete (PEP) appears. Complete Supervisor Evaluation Not Started 03/07/2010 (PEPR)

Return to Select Documents

To change the document into a PEPR to begin the rating process, click the complete link in the "Establish Evaluation Criteria" section. This will once again bring up the PEP. Click the "complete" button at the top of the document.



The document details screen will now look like this with a "Start" link in the PEPR section. At the top a message appears stating that "You have successfully completed the Establish Criteria step."

#### **Current Performance Documents**

#### **Document Details**

Andrew Lawrence, Operations Supervisor PEPR: 01/01/2009 - 12/31/2009

You have successfully completed the Establish Criteria step.



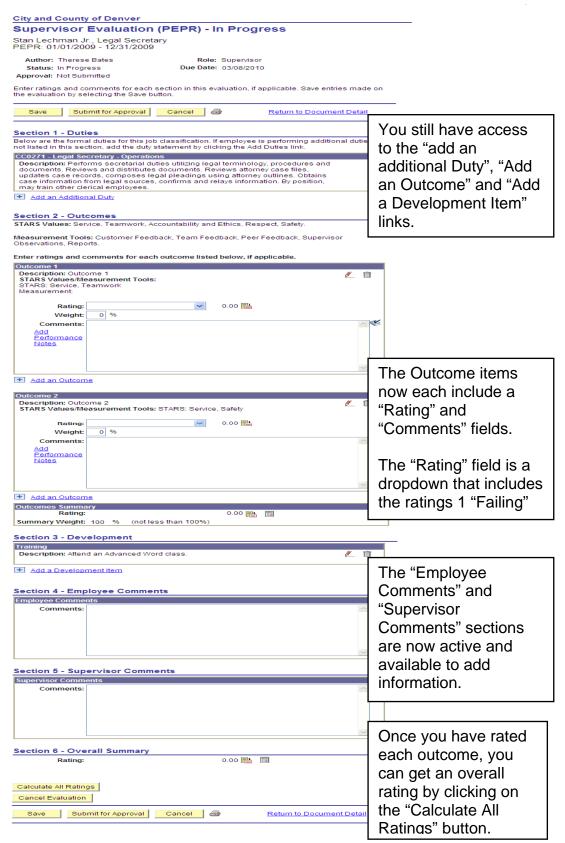
Return to Select Documents

# **PEPR Stage**

Section Objectives:

- Add Duties
- Add Outcomes
- Rate Outcomes
- Calculate PEPR rating
- Add/Edit Employee Comments
- Add/Edit Supervisor Comments

Once you have completed a PEP, the document will then become the PEPR. You can still add additional Duties/Outcomes in this phase but we would recommend that you discuss those with the employee. You will also have the ability to rate each item of the Outcome section.



**Example of PEPR template** 

# **Submit for Manager Approval**

Once the PEPR is finished (rated, etc.), you will want to submit the report to your manager for approval. To do so, click the "submit for approval" button and then click the "Submit" button on the Submit for Approval page. Before you click the "submit" button, you will see the overall rating. An e-mail will be generated for both you as the supervisor and your manager. NOTE: The Document Details screen will still show the PEPR with the status of "In Progress".

# City and County of Denver

# Supervisor Evaluation (PEPR) - In Progress

Florence Espinoza, Master Trades Worker PEPR: 01/01/2010 - 12/31/2010

Author: Kendra Moskal Role: Supervisor Status: In Progress Due Date: 03/07/2011

Approval: Not Submitted

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.



The following request was successfully submitted for approval(s). You will be notified when it is approved or denied by each approver.

Submitted Request Employee ID: XXXXXX

Employee Name: Ersula Stanford Transaction: Performance Document

Please visit the following url for detailed information about the

request:

## E-mail Example

# **Approving/Deny PEPR at Manager Level**

Once the PEPR has been sent to the manager by the supervisor, the manager will receive a workflow email letting them know that the PEPR is available for approval. The manager needs to log into ePerformance and do the following:

Click on Approve Documents

# Select Transaction to Approve

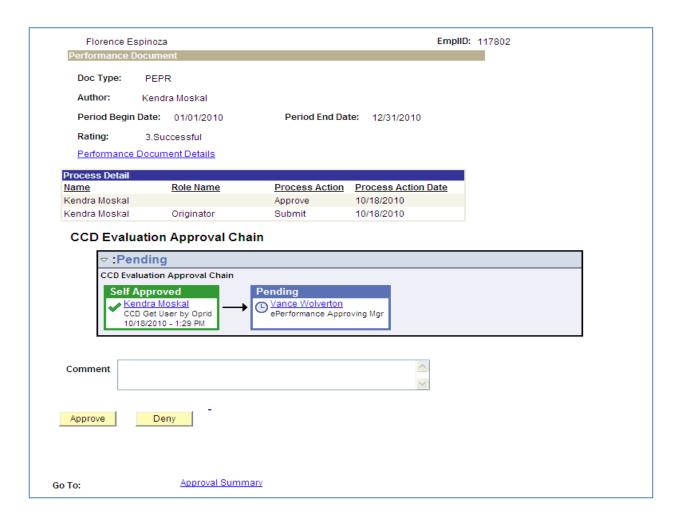
The hyperlinks below indicate employees which require your participation in an approval process. Click on a hyperlink to see details about what needs to be approved for each employee



#### Return to Performance Management

- Click on the name of the employee to approve
- Enter any comments.
- Click the "Approve" or "Deny" button.
- An e-mail will be generated to the supervisor.
- Supervisor will go to "View Approval Status" to access the comments.
- If changes need to be made, supervisor will have to "reopen" the PEPR by clicking on the "Reopen" button located at the bottom of the PEPR.

NOTE: Once the PEPR has received management approval, supervisor will have to complete PEPR one more time (usually after the PEPR has been delivered to the employee). The PEPR will move to the "Historical Documents" section upon final completion.



Below is the latest activity with regard to this self service request.

The following request has been approved by all required approvers and the document has been finalized.

Employee Id: XXXXXX
Employee Name: Isaac Leichtle
Transaction: Performance Document

Please visit the following URL for detailed information about the request:

http://goversdevhr@1.gov.dnvr:878@/psp/HR9@TMP/EMPLOYEE/HRMS/c/ROLE MANAGER.EP APPRAISAL STAT.GBL?Page=EP APPRAISAL EE&Action=U&EP APPRAISAL ID=86

This communication was sent via Workflow Technology. Please do not reply to this email.

## **Administrative Tasks**

Section Objectives:

- Transfer Documents to another Supervisor
- Reset Document Status
- Cancel Document
- Delete Document

You can perform any of the following items in Administrative Tasks:

- Transfer Documents to another Supervisor
- Reset Document Status
- Cancel Document
- Delete Document

# **Transfer Documents to Another Supervisor**

Note: PEP must be "In Progress" to perform this function.

- Click on Performance Management
- Click on Performance documents
- Click on Administrative Tasks
- Click on Transfer Document



- Select the employee you would like to transfer by placing a checkmark in the box to the left of the name.
- Click the "continue" button. (The confirm transfer screen will appear.)

#### **Transfer Document**

#### Confirm Transfer



You have chosen to transfer the document indicated above to another Supervisor. Select the receiving Supervisor by using the "Select a Supervisor" hyperlink, then click the Save button to complete the transfer.



- To select the receiving supervisor, click the "Select a Supervisor" link.
- To search for the receiving supervisor, complete the name, last name or first name field and then click the search button.
- Select the appropriate supervisor from the Person Search Simple page and then click the "OK" button.
- Verify the information in the Confirm Transfer screen and then click the "Save" button.
- Verify that the save was successful and click the "OK" button on the transfer document screen.

# **Cancel Document**

There may be times when you wish to cancel the PEP/PEPR document due to an employee leaving the employ of the City, etc.

- Click on Performance Management
- Click on Performance Documents
- Click on Administrative Tasks
- Click on cancel document (You will now be on the "Cancel Document" screen.)



name of the employee whose PEP/R you would like to cancel by placing a checkmark in the box to the left of the employee name.

- Click the "Continue" button.
- Verify the cancel information, then click the "Save" button in the Confirm Cancellation screen.

S

е

е

С

t

t

h

е

#### **Delete Documents**

Once you have canceled the document, it now resides in the delete documents section. To delete a document, follow these steps:

- Click on the "Delete Document" link in the menu found under Administrative Tasks
- Select the name of the employee, whose PEP/R you would like to delete
- Click the "Continue" button.
- Verify the information in the confirm delete screen, then click the "Save" button.
- The deletion should be successful if noted as such in the save confirmation screen.
- Click the "OK" button.

#### **Delete Documents**

To delete a performance document, select the checkbox next to the Employee's Name and click the Continue push button. Only "Cancelled" performance documents can be deleted.



#### **Reset Document Status**

To change a performance document's status back to "In Progress", select the checkbox next to the Employee's Name and click the Continue button. Only "Available for Review", "Review Held", "Acknowledged", or "In Progress" (with Approval Status of "Submitted" or "Approved") documents can be changed back to "In Progress".

- Click on Reset Document Status located in the "Administrative Tasks" menu.
- Select the employee's PEPR that you would like to reset by placing a check mark in the box to the left of the name.
- Click the "Continue" button.
- On the Confirm Status Reset page, verify the information. If the information is correct, click the "Save" button.
- Check successful save on the reset document status page and click the "Ok" button.

#### **Reset Document Status**

To change a performance document's status back to "In Progress", select the checkbox next to the Employee's Name and click the Continue push button. Only "Available for Review", "Review Held", "Acknowledged", or "In Progress" (with Approval Status of "Submitted" or "Approved") documents can be changed back to "In Progress".

