State Personnel Administration
State of Georgia Human Resource Services

Georgia

SYSTEM

ePerformance Trainer Guide
2009

ePerformance System 12.1.2

Preparation Time
(2.5 to 3 hours)

Instruction Time
(20 minutes)

Planning Phase - Manager

Preparation: The trainer needs to be very familiar with the ePerformance System modules. The modules themselves are self explanatory. The trainer will utilize the "Try It" mode within the User Productivity Kit (UPK) CD provided. **You will press enter on the computer as you tell the class where to click on the links within ePerformance.**

Prior to class: Make sure that the computer and projector are working properly. Load the CD in the computer.

Go to Start>My Computer>Locate and click on the CD Drive> Open Folder to review files>click on the Play.exe icon

Windows Internet Explorer may give you a pop-up message reading: **"The web page you are viewing is trying to close the window. Do you want to close this window?"** Click "NO."

You will see ORACLE USER PRODUCTIVITY KIT. Place the cursor on USER PRODUCTIVITY KIT and double click.

Module 12 ePerformance will be seen with a plus + sign to the far left. Click on the "+" sign to expand the module

There should be four lessons. Click on the "+" sign next to Annual Performance Plan.

Click and highlight 12.1.2 Planning Phase – Manager

At the top of the page, you will see a rectangular box labeled "Playback Mode" Place the cursor on Try It! and click.

Prior to training class, you need to understand how to maneuver in the demo. There is an "Action" option in the bubble that allows you to go back to the previous step or re-start the demo. Otherwise, you can press enter or click on the appropriate area to move forward in the demo.

You are now ready to start this demonstration.

SAY: Read the scenario from the pop-up on the UPK screen:

"You have been notified that Performance Evaluation documents have been generated by the HR Administrators for your agency.

Your task during the Planning Phase is to work with your employee to determine their competencies, goals and objectives for the performance period. Let's begin by adding and deleting goals and assigning a weight to the various sections of the employee's Performance Evaluation document. Remember that statewide core competencies cannot be modified. However, depending on your agency's policy, it is possible to adjust the weight of that section upwards from the default setting of 25%."

SAY: We will press enter to start this demo.

SAY: At this point, you will be logged into Manager Self Service and be able to follow this menu navigation. Click the **Manager Self Service** link.

ACTION: You will press enter on the computer as you tell the class to click on the links within ePerformance.

SAY: Click the following links **Performance Management**, **Performance Documents, Current Documents.**

SAY: Here you will see all of the Performance Documents for this manager. Click the **Annual Performance Review** link for Hannah Miller. Click the **Edit** link next to the Establish Criteria section to begin this process.

ACTION: Refer to the projector screen:

SAY: As mentioned earlier in the day, the first section is **Statewide Core Competencies**. These are pre-populated for all employees and may not be changed or deleted.

ACTION: Click the right scroll bar to scroll down to Section 2.

SAY: Next, we will add Individual Goals/Competencies. **Click the Add Individual Goals/Competencies link**. The Individual Goals/Competencies should be specific to the individual as well as the position. Now, we will add a pre-defined item and **Click Next**. Then, **Click Search**.

SAY: The search will display a list of pre-defined Individual Goals/Competencies. We will **Select "Project Management".** Then, **Select "Initiative"** and **Click the right scroll bar to view the bottom of the page. Now Click Save**.

SAY: We will also add our own item. **Click the Add Individual Goals/Competencies link**. Next, **Click Add your own item**. Then, **Click Next**.

As we begin to add our own goal, keep in mind that these goals can be either results oriented or task oriented.

SAY: Click Title. Type att in the "**Title"** field, type **"Take advantage of Internal training resources,"** then, **Click in the "Description"** field and type **"Attend In service training classes and complete online courses".** Then, **Click Update**.

SAY: Now, that the goal has been added to the performance evaluation. We are going to delete one of the pre-defined goals added earlier. Next, **Click Delete.** This deletes the item from the evaluation. **Click, Yes – Delete** to complete this process.

After the statewide core competencies, individual goals/competencies and job responsibilities have been established, we will begin to look at section weights. The sections will be pre-populated with a default (recommended) percentage; however you can modify the section weights.

SAY: Let us adjust the section weight. **"Double click inside the Statewide Core Competencies field to type a new section weight."** We will adjust the percentage to 25%. **Type,** "**25**" into the field. Click the right scroll bar to scroll down to the next section weight. Double click inside the existing value in the section weight. Next, we will adjust the Individual Goals/Competencies to 45%. **Type, "45"** into the field. Click the right scroll bar to scroll down to the bottom of the page. Then, click Save. Next, Press enter. After adjusting each section weight, **Click Complete and again Click Complete** which closes the evaluation criteria phase. Press enter to finish the demo.

Now that the manager has saved and completed the section weights, the employee will be able to review the performance document. The employee will receive a system generated e-mail notification letting them know that their Goals and objectives have been established.

If there is a need to add additional competencies, goals or job responsibilities throughout the year, the manager has the ability to reopen the document.

SAY: You have successfully completed the Manager Planning Phase. A very simple process. Are there any questions?

ePerformance System 12.1.5

Instruction Time
(5 minutes)

Performance Notes - Manager

SAY: Managers will have the ability to save performance notes on their employees throughout the year. They will be able to reference these performance notes when completing manager evaluations on an employee.

This demo will detail the steps for managers to utilize the performance notes feature for their employees throughout the year in preparation for the Mid-Year and Annual Performance Evaluations.

Action: Click on 12.1.5 Performance Notes – Manager, Click on "Try It" playback mode.

Refer to the module on the screen and press enter to display each step

SAY: Lets begin the performance notes. **Click Manager Self Service.** Then**, Click Performance Management.** Go to **Maintain Performance Notes** and then, **Click the ID field**. **Enter 99 as the ID. Then, click the magnifying glass (look up ID button).**

The system will display all employee IDs that begin with 99. (Note: If the manager does not know the employee's ID, the employee id could be left blank and the search will display a list where the manager could select by name)

Click on the Last Name field. Enter last name (mil) of employee, click Look Up. Select the appropriate employee. **Click the employee** and **Select Add a New Note**.

SAY: Now, we will add a new performance note. **Click the Subject field** and **Type "Performance Management Project – Business Analyst."** Next**, Click in the Note Text field** and **Type "Performed above expectations as Bus. Analyst on Performance Management Project."** Then, **Click Save**. The performance note for the employee has now been saved. Press enter to finish the demo.

The employee can also maintain performance notes through out the performance period. The manager can not view employee notes and employee's can not view manager's notes. This field does not have spell check or a legal scan. All notes should be professional, objective in nature and help to assess your performance.

BEFORE BEGINNING SYSTEM DEMONSTRATION OF PERFORMANCE EVALUATION, PLEASE REFER TO POWERPOINT SLIDE – EVALUATION to preview the evaluation steps. Read the slide.

- There are nine steps in completing a Performance Evaluation:
    - ☐ 1) Employee Self-Evaluation
    - ☐ 2) Manager Evaluation
    - ☐ 3) Manager Submits for Approval
    - ☐ 4) Manager's Manager Approval
    - ☐ 5) HR Administrator Approval
    - ☐ 6) Manager has performance discussion with employee
    - ☐ 7) Manager changes document status to "Available for
    - ☐ Review" and "Review Held"
    - ☐ 8) Employee "acknowledges" the review was held
    - ☐ 9) Manager Completes/Closes-Out Performance Evaluation

ePerformance System 12.1.6

Instruction Time
(10 minutes)

Performance Evaluation - Employee Self-Evaluation

Action: Click on 12.1.6 Performance Evaluation – Employee Self Evaluation, Click on "Try It" playback mode.

SAY: The employee will perform a self-evaluation of their performance for their midpoint and annual reviews. The process is the same for both.

(The trainer will continue to press enter to continue the demo)

SAY: Go to the **Self Service** link, **Performance Management, My Performance Documents, Current Documents, and we will select the Annual Performance Review** link. The employee is going to rate themselves on all the competencies and goals, and if necessary, responsibilities.

Click **Start. Click right scroll bar to scroll down to Customer Service.**

Click the **Rating:** drop-down list and the **3- Successful Performer Rating** is selected. Next Click in the **Comments** field. Enter the appropriate information to substantiate the rating chosen.

These steps are repeated for each of the Statewide Core Competencies.

(NOTE: The trainer needs to continue to press enter and just mention the competency being shown and the rating that the employee chooses.)

SAY: Here we have **Teamwork and Cooperation**. The employee rates themselves a **2- Successful Performer - Minus** from the **Rating** drop-down list and puts in a **Comment.** This employee acknowledges that there is room for improvement.

ACTION: Trainer must continue to press enter.

SAY: Next we have **Results Orientation** with the self-rating of **4- Successful Performer - Plus** and puts in a **Comment**.

SAY: Accountability receives a rating of **3- Successful Performer.** Comments are added**.**

SAY: Judgment and Decision Making is the last Statewide Core Competency and the employee gives a **3- Successful Performer** with the following comments. (Read from the screen)

SAY: The employee can place comments in the **Statewide Core Competencies Summary** field to bring this section to a close by clicking the right scroll bar.

SAY: Now we are ready to tackle Section 2, Individual Goals/Competencies.

SAY: For the goal of reducing the average age of accounts receivable the employee rates themselves a **4- Successful Performer - Plus** and gives the reasoning in the comment field.

SAY: We scroll down to "**Take advantage of internal training resources**. The employee rates this as a **5- Exceptional Performer** and comments.

SAY: Next are **Team Leadership** and a rating of **2- Successful Performer - Minus** and comments.

SAY: Initiative is given a rating of **3- Successful Performer** with comments**. Creativity and Innovation** is given a **2- Successful Performer - Minus with comments**.

SAY: The employee can summarize their comments in the last comments field for **Individual Goals/Competencies**.

SAY: If your agency utilizes the Job Responsibilities section, the same exact steps we took for the Statewide Core Competencies and Individual Goals/Competencies will be taken. This is really a simple process. If you understand what we have done in this section, we will not go to the responsibility section because the steps are the same. Are there any questions?

Trainer: If there are some concerns about the Responsibility section, emphasize the steps are the same as it relates to the rating and comments. If there is a lot of uneasiness, show the first example:

SAY: We will go to **Performs job responsibilities with minimal supervision**.
The employee rates themselves a **Successful Performer - Plus** with comments.
SAY: Once the self-evaluation is completed by the employee. They will click the Complete button. If the employee has not completed the self-evaluation, it can be saved and completed later. Once the self-evaluation has been saved, it triggers an e-mail to the employee's manager indicating that the self-evaluation is complete and viewable to the manager.

ePerformance System 12.1.7

Instruction Time
(10 to 15 minutes)

Performance Evaluation - Manager

Action: Click on 12.1.7 Performance Evaluation – Manager Evaluation, Click on “Try It” playback mode.

SAY: The next step is the Manager Evaluation. **Click the Manager Self Service.** Then**, Click Performance Management**. **Select, Performance Documents.** Then**, Click Current Documents.** Now**, Select Annual Performance Review.**

Before we begin the Manager Evaluation, notice the Manager can review the employee’s completed Self Evaluation. We will now complete the Manager Evaluation.

SAY: Click Start to begin**.** We will complete Section 1 – Statewide Core Competencies. Now, **Scroll down to Customer Service.** You will notice average rating will display the rating from the Employee Self Evaluation, once the employee has completed the self-evaluation. Now, Click the **Rating drop down list**. **Select, 4-Successful Performer – Plus.** Then**, Click the Comments field and enter a comment.**

Enter a comment for each section.

SAY: Now, **Scroll down to Teamwork and Cooperation.** Click the **Rating drop down list**. **Select, 3-Successful Performer.** Then**, Click the Comments field and enter a comment.** Next, **Scroll down to Customer Service Orientation.** Now, Click the **Rating drop down list**. **Select, 3-Successful Performer.** Then**, Click the Comments field and enter a comment.**

SAY: Next, **Scroll down to Accountability.** Click the **Rating drop down list**. **Select, 3-Successful Performer.** Then**, Click the Comments field and enter a comment.** And finally, **Scroll down to Judgment and Decision Making.** Click the **Rating drop down list**. **Select, 2-Successful Performer - Minus.** Then**, Click the Comments field and enter a comment.**

SAY: Now, **Scroll down to Statewide Core Competencies Summary.** We will now calculate the rating for this section. The calculate section rating will provide an average rating for the section. Now, **Select Calculate Section Rating.** Then, **Click the Comments field and enter a comment.**

SAY: We will now, **Scroll down to “Reduce average age of Accounts Receivable”** and **Click the Rating drop down list. Select, 4-Successful Performer – Plus.** Then**, Click the Comments field and enter a comment.** Next, **Scroll down to “Take Advantage of Internal Training Resources.”**

Click the **Rating drop down list**. **Select, 5-Exceptional Performer.** Then**, Click the Comments field and enter a comment.**

SAY: Next, **Scroll down to Team Leadership.** Click the **Rating drop down list**. **Select, 3-Successful Performer.** Then**, Click the Comments field and enter a comment.** Now, **Scroll down to Initiative.** Click the **Rating drop down list**. **Select, 4-Successful Performer - Plus.** Then**, Click the Comments field and enter a comment.**

SAY: And finally, **Scroll down to Creativity and Innovation.** Click the **Rating drop down list**. **Select, 2-Successful Performer - Minus.** Then**, Click the Comments field and enter a comment.**

We will now, **Scroll down to Individual Goals/Competencies Summary.** We will now calculate the rating for this section. Now, **Select Calculate Section Rating.** Then, **Click the Comments field and enter a comment.**
Click the **Rating drop down list**. **Select, 3-Successful Performer.** Then**, Click the Comments field and enter a comment. Type, "Hannah is a self starter and self managing to a large extent."**

SAY: Next, **Scroll down to Serves as job expert or organization resource.** Click the **Rating drop down list**. **Select, 2-Successful Performer - Minus.** Then**, Click the Comments field and enter a comment.** Now, **Scroll down to Conducts legal research...** Click the **Rating drop down list**. **Select, 3-Successful Performer.** Then**, Click the Comments field and enter a comment.**

SAY: Next, **Scroll down to Serves as Evaluates and processes claims....** Click the **Rating drop down list**. **Select, 3-Successful Performer - Plus.** Then**, Click the Comments field and enter a comment.** Now, **Scroll down to May analyze new laws or regulations.** Click the **Rating drop down list**. **Select, 2-Successful Performer - Minus.** Then**, Click the Comments field and enter a comment.**

SAY: Next, **Scroll down to May Supervise…** Click the **Rating drop down list**. **Select, 3-Successful Performer - Plus.** Then**, Click the Comments field and enter a comment.** Now, **Scroll down to Monitors claims and payments...** Click the **Rating drop down list**. **Select, 2-Successful Performer - Minus.** Then**, Click the Comments field and enter a comment.**

SAY: Next, **Scroll down to Provides Assistance…** Click the **Rating drop down list**. **Select, 3-Successful Performer - Plus.** Then**, Click the Comments field and enter a comment.** Now, **Scroll down to Researches relevant data...** Click the **Rating drop down list**. **Select, 3-Successful Performer.** Then**, Click the Comments field and enter a comment.**

SAY: And finally, **Scroll down to Reviews claim forms…** Click the **Rating drop down list**. **Select, 3-Successful Performer - Plus.** Then**, Click the Comments field and enter a comment.**

We will now, **Scroll down to Job Responsibilities Summary.** We will now calculate the rating for this section. Now, **Select Calculate Section Rating.** Then, **Click the Comments field and enter a comment.**
Click the **Rating drop down list**. **Select, Calculate Overall Rating**. Then**, Click the Comments field and enter a comment.**

SAY: Go to Section 7 – Individual Development Plan. Click Add Individual Development Plan. Then, **Click the Title field. Now, enter the appropriate title.** Click the **Description field and enter a comment.** Now, **Click Update.**

SAY: ***<u>This is very important</u>***. Managers should always click the Calculate All Ratings button before submitting for approval. This ensures that all items are calculated and correct.

SAY: Now, **Click Calculate All Ratings.** Then, **Submit for Approval and Click Submit.**

Upon submitting for approval, the performance evaluation is routed to the manager's manager for approval. After the manager's manager has approved the performance evaluation, it is then sent to the HR Administrator. When the manager conducts a review with the employee, the evaluation is finalized.

ePerformance 12.1.8

Instruction Time
(10 minutes)

Approve Evaluation - Manager's Manager Approval

Action: Click on 12.1.8 Performance Evaluation – Manager Manager's Approval, Click on "Try It" playback mode.

SAY: Lets begin the Manager's Manager Approval. Go to **Manager Self Service.** Then**, Click Performance Management.** Now, **Click Approve Documents** and **Click the Performance Document 5** for Bella Swan's Performance Document.

SAY: Then, Click Performance Document Details. This gives the manager an opportunity to review the comments in the document. If you see comments that are questionable, you will have the opportunity to discuss this with the first line manager prior to approving.

SAY: Click Return to Performance Document Approval.

SAY: Now, Scroll down and Click the Approve/Deny drop down list. Then, Select Approve. We will now enter a comment. Click the comment field and Type "Well done Bella**."**

SAY: We will now **Click SAVE**. Then, **Click OK. Select Approve Documents** and **Click Performance Document 6** for Edward Cullen's Performance Document.

SAY: Now, Scroll down and Click Approve/Deny. Select Approve from the drop down list. Click the comment. Type "Well done Edward." Click Save and Click OK.

SAY: Next, We want to do a Mass Approval of documents. This is a situation where you know and feel comfortable with the comments and ratings for each person.

SAY: So you will **Click Mass Approval** and **Select the checkbox for 4-Successful Performer – Plus. Now, Click Submit** and **Click the 1 Checkbox. Next, Click Approve** and **Click Continue. Now, Click OK.**

You have successfully completed the Manager's Manager Approval. The evaluation will now be sent to the HR Administrator.

We will not go through the steps of the HR Administrator approval. However, the HR Administrator will approve the evaluations. After HR Administrator approval, managers will be able to go into the documents and finalize the evaluation.

Anticipated question/answer:
1. Is there an e-mail notification sent to the manager once the HR Administrator approves the performance document? There is no automatic e-mail notification from the HR Administrator to the manager. The manager will need to check the documents for his or her direct reports. If the document has been approved, once the manager goes into the employee's evaluation the will see the "Available for Review" button. If the employee's evaluation is still in the approval process, the manager will not see the "Available for Review" button and only be able to cancel back out of the document.

PLEASE NOTE THAT ONCE ALL APPROVALS ARE COMPLETED. THE MANAGER AND EMPLOYEE WILL SIT DOWN TO HAVE A FACE-TO-FACE PERFORMANCE REVIEW MEETING.

ePerformance System 12.1.10

Instruction Time
(15 minutes)

Action: Click on 12.1.10 Finalize Evaluation – Manager and Employee, Click on “Try It” playback mode.

<u>Please note that finalizing the evaluation should not occur until a face to face review has been held with manager and employee.</u>

Finalize Evaluation – Manager and Employee

SAY: We will now Finalize the Performance Evaluation. This process is the same for mid-year and the end of year evaluation. This is a two step process: the manager will change document status to “Available for Review” and “Review Held”. Navigate to Manager Self Service. Then, Click Performance Management. Select Performance Documents. Then, Click Annual Performance Review, Next the Edit link, then the Available for Review Button. Now, Click OK and Logoff

The document is now in the "Available for Review" status.

SAY: Navigate to Manager Self Service. Then, Click Performance Management. Select Performance Documents. Then, Click Current Documents. Now, Click Annual Performance Review and Select Mark Review Held. Then, Click Review Held and Click Ok.

The document is in the "Review Held" status and ready for employee acknowledgement. The employee is notified via e-mail that the system is ready for the employee to log in and acknowledge that the review was held.

SAY: At this time, the employee must log in and acknowledge the review was held. Click Self Service - Performance Management. Remember the employee is acknowledging that the review was held not agreement with the rating. Now, Click My Performance Documents and Select Current Documents. Next, Click Annual Performance Review and Click Acknowledge. After clicking acknowledge, we will now Select Acknowledge Review and Click OK.

The employee has acknowledged that the review was held. The manager receives an e-mail that the employee has acknowledged the review. The manager may now go back in and complete the evaluation.

Anticipated question/answer: Can the employee enter comments at this point? Yes the employee can scroll down and enter comments before he or she acknowledges.

Anticipated question/answer: What if the employee just does not acknowledge the performance document? The manager will have the ability to do a manager

override. There are two options to choose: employee refused or manager override. The manager will select one and provide comments.

SAY: Now, we are the Manager. Click, Manager Self Service. Then, Click Performance Management. Select Performance Documents. Then, Click Current Documents. Now, Select Annual Performance Review for Edward Cullen and Click Complete. Click Complete again and again. Then, Select OK.

The Performance Evaluation is complete and is now stored in historical documents.

ePerformance System (Manager Reports)

Please bring up PowerPoint to discuss the system reports.

REPORTS OVERVIEW SLIDE 2

Say: We will now take a look at the manager reports. Currently the manager UPK is being updated to reflect the information that you will be reviewing on the attached power point slides. You will be able to review the updated UPK on line within the next few weeks. There are three types of reports that we will be reviewing today, the "manager's Review Status Report," "Approver's Review Rating Report" and the "Approver's Doc Status Report."

REPORTS OVERVIEW SLIDE 3

Say: Read information on the slide

REPORTS OVERVIEW SLIDE 4

Say: These two fields are on all of the reports. They help you understand where the performance document is in the process. Read through the slide.

APPROVER REVIEW RATING REPORT SLIDE 4

Say: Approver is synonymous with reviewing manager.
Say: The approver's review rating report will allow the manager's manager to view the ratings of their manager's direct reports.
Say: The reviewing manager has different search criteria. He can search by manager by ratings, etc. Once the manager enters in criteria and clicks search, the results are displayed.

APPROVER'S REVIEW RATING REPORT SLIDE 5

Say: There are two result tabs: a header tab and a detail tab. Manager will click on the review details tab.

APPROVER'S REVIEW RATING REPORT SLIDE 6

Say: Here all of the employees that fit the criteria will be displayed. Notice the employee names are blanked out. The reviewing manager can select the link beside an employee and this will take him directly to the employee's evaluation. Notice the document status and approval status columns that help the manager understand where the document is in the process.

Say: Notice the grid that is circled on the slide. That is an excel icon. The reviewing manager can click on the grid and this will bring up an excel version of the results.

APPROVER'S REVIEW RATING REPORT SLIDE 7

Say: This will be displayed in Excel and can be saved and/or printed as any normal excel file.

The manager review rating report will allow the manager to view the ratings of their direct reports. Same process as approver review rating but manager will only be able to see results for their direct reports.

APPROVER'S DOCUMENT STATUS REPORT SLIDE 8

The approver's document status report will allow the manager's manager to view the "completed" and "not yet completed" performance evaluations of their manager's direct reports.

APPROVER'S DOCUMENT STATUS REPORT SLIDE 9

Say: Same concept as before two result tabs: a header tab and a detail tab. Manager will click on the review details tab.

APPROVER'S DOCUMENT STATUS REPORT SLIDE 10

Say: Same concept all of the employees that fit the criteria will be displayed. The reviewing manager can select the link beside an employee and this will take him directly to the employee's evaluation. Notice the document status and approval status columns that help the manager understand where the document is in the process.
Say: Notice the grid that is circled on the slide. That is an excel icon. The reviewing manager can click on the grid and this will bring up an excel version of the results.

APPROVER'S DOCUMENT STATUS REPORT SLIDE 11

Say: Same concept: This will be displayed in excel and can be saved and/or printed as any normal excel file.