EUT Course - 190

Performance Management for Employees

PeopleSoft 9.2

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Performance Management for Employees

Section 2 - Employee Performance Process Steps

Reviewing Defined Criteria for Long Document

Section 2, Lesson 1 Exercise - Scenario: Reviewing Defined Criteria for Long Document

Procedure

In this lesson you will learn how to review defined criteria on a Statewide Long Document.

Step 1. **Note**: The CAPPS HR/Payroll Dashboard (home page) that you see here is for training purposes only and may display more functionality (menus) than you will see in your environment.

The view of your home page will vary according to your role.

Step 2. Click the **Self Service** link.

Step 3. All of the Performance Management tasks will be conducted within the **Performance Management** Module.

Step 4. Click the **Performance Management** link.

Step 5. Within the Performance Management Module, there is a folder for **Performance Documents.**

Step 6. The **Other's Performance Documents** folder is where you will find requests from managers nominating you to participate in providing feedback to another employee's performance evaluation.

Step 7. This is also where you will complete the participant evaluation (Competency section) and review historical participant evaluations that you have completed.

Step 8. Click the **My Performance Documents** link.

Step 9. Within the **My Performance Documents** folder, there are links for documents that need to be **Created (not used for Employees),** have been created (**Current**), and are Complete (**Historical**).

Step 10. Click the **Current Documents** link.

Step 11. This page lists the **Current Performance Documents** for you.

There will normally be one document listed on the Current Performance Documents page that will indicate the **Document Status** and **Period Dates**.

Step 12. Agencies will have various names for the Performance Documents.

In training, we will use either the **Statewide Long** or **Short Document Types**.

Step 13. **Reviewing Defined Criteria** is not a required step therefore some agencies may or may not require their employees to review.

Step 14. The next step in the process is Checkpoint 1 (if applicable) that is why you see it listed as the Document Status.

Step 15. Click the **Statewide Long Document Type** link.

Step 16. Let's review this page by sections.

To the left is the **Activity Guide** which tells you where you are within the Performance Management Process.

Step 17. Depending upon your business process(es), you may or may not complete every single step/task.

Step 18. You will notice that there is a green icon next to **Define Criteria.** This means that this step is Complete.

The Define Criteria step was completed by the manager and now you can review what they completed.

Step 19. Yellow means this step is waiting to be completed as in the Checkpoint 1 listed.

Step 20. There are due dates within the steps. They serve as a guide for the Manager to complete the steps in the process.

Step 21. Managers have 30 days to complete **Define Criteria**.

Step 22. **Checkpoint 1** due dates are 305 days before Period End Date.

(Completing Checkpoints are optional).

Step 23. **Checkpoint 2** is 180 days before Period End Date.

Step 24. **Finalize Criteria** is 60 days before the Period End date.

Step 25. **Complete Self Evaluation** and **Review Manager Evaluation** are the last steps for the Employee to complete**.** The due dates are 15 days after the Period End Date.

Step 26. Click the **Overview** link.

The Overview page provides details on the Performance Process Steps.

Step 27. Keep in mind that it all depends on your agency's business processes if certain steps will be performed or not.

Step 28. Click the **More Details** link.

Step 29. Click the **Close** link.

Step 30. You may need to minimize the **Activity Guide** to review the Statewide Document on the right.

Step 31. Click the **Minimize Performance Process** button.

Step 32. To bring the **Activity Guide** back,

Click the **Expand** button.

Step 33. To see details for the Defined Criteria step you must expand this step.

Step 34. Click the **Expand Sub Steps** button.

Step 35. To view the Statewide Long Document Type with the defined criteria more easily you will use the **View** option.

Step 36. Click the **View** link.

Step 37. The top portion of the page states the **Define Criteria - Completed** because you are viewing the defined criteria that was completed by the manager.

This section also includes details regarding this evaluation.

Step 38. The print icon allows you to view and print the document in a pdf format.

Step 39. The bottom half of the page contains **Evaluation Tabs** with defined criteria for your review.

The current tab is on **Type of Evaluation**. This tells you the Document Purpose.

Step 40. This particular document is for an **Annual Employee Evaluation**.

Step 41. Click the **Goals/Objectives** tab.

Step 42. The **Goals/Objectives** are collapsed so you will expand them in order to few all of the details at once.

Step 43. Click the **Expand** link.

Step 44. You will review every **Goal,** the descriptions, and any other information that has been entered.

Step 45. Click the scrollbar.

Step 46. Review **Goals** and **Descriptions** for Goals 2, 3 and 4.

Step 47. Click the scrollbar.

Step 48. Click the **Core Competency** tab.

Step 49. Click the **Expand** link.

Step 50. Review all of the **Competencies** and the **descriptions**.

Step 51. Click the scrollbar.

Step 52. Continue reviewing the **Competencies** and **descriptions**.

Step 53. Click the scrollbar.

Step 54. Click the **Career Development** tab.

Step 55. Click the **Expand** link.

Step 56. Review the **Employee Career Development Area** and any descriptions and comments.

Step 57. Click the scrollbar.

Step 58. **Note: Goals/Objectives** and **Career Development** can be added/deleted/edited throughout the entire Performance Management process.

Step 59. Based on discussions and performance, the manager may make changes in these areas.

Step 60. **Competencies** can be added/deleted/edited up until the manager completes the **Finalize Criteria** step. After that, no additional changes can be made to competencies.

Step 61. Reviewing defined criteria is not a requirement for an employee unless the manager requests, therefore there is no action for you to perform in the system.

Step 62. However, there is a notify button that you can use to send an email to your manager informing them that you have reviewed per their request.

Step 63. Click the **Notify** link.

Step 64. Enter the desired information into the **To** field. Enter "**manageremail@texas.gov**".

Step 65. Enter the desired information into the **Message Text** field. Enter "**I have reviewed the defined criteria per your request.**".

Step 66. Click the **Send** button.

Step 67. Click the **Home** link.

Step 68. Congratulations! You have successfully completed this lesson.

Reviewing Checkpoint Feedback

Section 2, Lesson 2 Exercise - Scenario: Reviewing Checkpoint Feedback

Procedure

In this lesson you will learn how to review Checkpoint feedback, if applicable.

Step 1. Click the **Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Statewide Long Document Type** link.

Step 5. You are about to review the **Checkpoint 1 feedback** provided by your manager.

Checkpoints are status updates within the evaluation period where a manager has identified where an employee stands with the assigned Goals/Objectives, Competencies and Employee Development for their position.

Step 6. Click the **Minimize Performance Process** button.

Step 7. Click the **Goals/Objectives** tab.

Step 8. Click the **Expand** link.

Step 9. You will review the **Status** and **Manager Comments** for each **Goal** assigned.

Step 10. Click the **Scroll bar**.

Step 11. The manager may have added their comments in the **Goals & Objectives Summary** text box.

Step 12. Click the **Scroll bar**.

Step 13. Click the **Core Competency** tab.

Step 14. For **Competencies,** there are no status updates within a Check Point. Although managers may include comments for the Competency summary.

The manager can also add and delete competencies throughout the year prior to them finalizing criteria.

Step 15. Click the **Career Development** tab.

Step 16. Click the **Expand** link.

Step 17. The manager has indicated PMP certification as an area planned for development.

Step 18. Review the Manager Comments for this area.

Step 19. Click the **Scroll bar**.

Step 20. The manager did not make any updates to the Development section and there are no comments.

Step 21. Click the **Scroll bar**.

Step 22. You have reviewed the Checkpoint 1 feedback and will notify the manager.

Step 23. Click the **Notify** link.

Step 24. Enter the desired information into the **To** field. Enter "**manageremail@texas.gov**".

Step 25. Enter the desired information into the **Message Text** field. Enter "**I have reviewed the Checkpoint Feedback.**".

Step 26. Click the **Send** button.

Step 27. Click the **Home** link.

Step 28. Congratulations! You have completed this lesson.

Completing Self-Evaluation

Section 2, Lesson 3 Exercise - Scenario: Completing Self-Evaluation

Procedure

In this lesson, you will learn how to complete an employee self evaluation upon request by your manager.

Step 1. Click the **Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Current Documents** link.

Step 4. This page lists the current document where you will need to complete your self-evaluation with a status of Evaluation in Progress.

Step 5. Click the **Statewide Long Document Type** link.

Step 6. You are on the **Update and Complete Self Evaluation** step.

Step 7. Click the **Minimize Performance Process** button.

Step 8. You will go through each of the **Evaluation Tabs** and enter information accordingly.

Step 9. There will be **ratings** to select and comment boxes for **Goals** and **Competencies**.

Step 10. Click the **Expand** link.

Step 11. Click the **Scroll bar**.

Step 12. Click the **Employee Rating** list.

Step 13. Click the **4- Exceeds Expectations** list item.

Step 14. Click the **Employee Rating** list.

Step 15. Click the **4- Exceeds Expectations** list item.

Step 16. Click the **Scroll bar**.

Step 17. Click the **Employee Rating** list.

Step 18. Click the **3- Meets Expectations** list item.

Step 19. Enter the desired information into the field. Enter "**I am making great progress toward meeting and exceeding the assigned goals/objectives.**".

Step 20. Click the **Spell Check Comments (Alt+5)** button.

Step 21. Click the **OK** button.

Step 22. Click the **Scroll bar**.

Step 23. Click the **Core Competency** tab.

Step 24. Click the **Expand** link.

Step 25. Click the **Employee Rating** list.

Step 26. Click the **4- Exceeds Expectations** list item.

Step 27. Click the scrollbar.

Step 28. Click the **Employee Rating** list.

Step 29. Click the **4- Exceeds Expectations** list item.

Step 30. Click the **Employee Rating** list.

Step 31. Click the **4- Exceeds Expectations** list item.

Step 32. Click the scrollbar.

Step 33. Enter the desired information into the field. Enter "**I am exceeding all of the Competencies that relate to my position.**".

Step 34. Click the **Spell Check Comments (Alt+5)** button.

Step 35. Click the **OK** button.

Step 36. Click the scrollbar.

Step 37. Click the **Save** button.

Step 38. Click the **Overall Summary** tab.

No entries to make on the Overall Summary tab.

Step 39. Click the **Career Development** tab.

Step 40. Click the **Expand** link.

Step 41. Click the scrollbar.

Step 42. Enter the desired information into the field. Enter "**I have submitted the dates that the PMP certification courses are offered and am awaiting an approval.**"

Step 43. Click the **Save** button.

Step 44. Click the **Job Description** tab.

Step 45. Click the **Expand** link.

Step 46. Click the **Yes** option.

Step 47. Click the scrollbar.

Step 48. Click the **No** option.

Step 49. Click the **Save** button.

Step 50. You will select the Complete button once you are all done and want the manager to be notified.

Click the **Complete** button.

Step 51. Click the **Confirm** button.

Step 52. Click the **Home** link.

Step 53. Congratulations! You have completed this lesson.

Accepting/Completing Participant Evaluation

Section 2, Lesson 4 Exercise - Scenario 1: Accepting/Completing Participant Evaluation

Procedure

In this lesson you will learn how to accept a nominee request and complete a Participant evaluation for the designated employee.

Step 1. When you are nominated to participate in the evaluation of an employee, you will receive an auto-generated email request similar to this one.

Within the email, you can select the **URL** and it will take you to the log in screen otherwise you can navigate there.

Step 2. Click the **Self Service** link.

Step 3. Click the **Performance Management** link.

Step 4. **Other's Performance Document** folder is where you will always go to respond to a nominee request to participate, complete the other employee's evaluation, and to review historical evaluations that you have completed for others.

Step 5. Click the **Other's Performance Documents** link.

Step 6. Click the **Pending Evaluation Requests** link.

If you were nominated for multiple employees those requests would be listed here.

Step 7. The manager has the ability to delete their request whereby it will be removed from the list.

Step 8. Click the **Test Employee DEFG** option.

Step 9. When you **Accept** or **Deny** the participant request, your response will automatically be sent via email to the manager.

Click the **Accept** button.

Step 10. After your acceptance, the manager receives an email indicating that you have accepted the request to participate as a Nominee.

Step 11. You can either come back to complete the employee evaluation or complete the evaluation now.

In training, you will go ahead and complete the evaluation.

Step 12. Click the **Test Employee DEFG** link.

Step 13. Notice that the **Role** says Peer at the top of this document.

Step 14. As a Participant (nominee), you are completing the **Competencies** section of the evaluation for the designated employee.

The employee will not see your participant evaluation only the manager can see it.

Step 15. Click the **Expand** link.

Step 16. Review each **Competency** and the description and then enter a Rating.

Step 17. Click the **Rating** list.

Step 18. Click the **4- Exceeds Expectations** list item.

Step 19. Click the **Scroll bar**.

Step 20. Click the **Rating** list.

Step 21. Click the **3- Meets Expectations** list item.

Step 22. Click the **Scroll bar**.

Step 23. Click the **Rating** list.

Step 24. Click the **3- Meets Expectations** list item.

Step 25. Enter the desired information into the field. Enter "**This employee is doing well enough to meet expectations.**".

Step 26. Click the scrollbar.

Step 27. You have an option to save what you have entered so far and come back to complete your evaluation.

Click the **Save** button.

Step 28. You have completed everything and want to move your evaluation forward to the manager.

Click the **Complete** button.

Step 29. Click the **Confirm** button.

Step 30. The manager receives an email indicating that you have completed the Participant Evaluation.

Step 31. They can review what you have entered.

Step 32. Click the **Home** link.

Step 33. Congratulations! You have completed this lesson.

Declining the Participant Request

Section 2, Lesson 4 Exercise - Scenario 2: Declining the Participant Request

Procedure

In this lesson you will learn how to decline a request to participate as a nominee.

Step 1. Click the **Self Service** link.

Step 2. Click the **Other's Performance Documents** link.

Step 3. Click the **Pending Evaluation Requests** link.

Step 4. Click the **Test Employee DEFG** option.

Step 5. When you **Accept** or **Decline** the participant request, the system will send your response via email to the manager.

Step 6. Click the **Decline** button.

Step 7. You can enter comments although they are not required.

Step 8. Enter the desired information into the **Enter Comments** field. Enter "**I'm not familiar enough to be able to evaluate this employee.**"

Step 9. Notice the red text above, Are you sure you want to decline this evaluation request?

Step 10. Click the **Yes** button.

Step 11. Click the **Home** link.

Step 12. Congratulations! You have completed this lesson.

Reviewing Employee Final Evaluation

Section 2, Lesson 5 Exercise - Scenario: Reviewing Final Employee Evaluation

Procedure

In this lesson you will learn how to review the final employee evaluation and include comments.

Step 1. Click the **Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **Current Documents** link.

Step 4. Click the **Statewide Long Document Type** link.

Step 5. Click the **Minimize Performance Process** button.

Step 6. You should review the Manager Ratings and any comments entered on all of the **Evaluation Tabs**.

Step 7. Click the **Expand** link.

Step 8. Click the **scrollbar**.

Step 9. Continue reviewing **Goals.**

Step 10. Click the **scrollbar**.

Step 11. The manager has entered comments in the Goals Summary section.

Step 12. Click the **scrollbar**.

Step 13. Click the **Core Competency** tab.

Step 14. Click the **Expand** link.

Step 15. Continue with reviewing the **Competency Manager Ratings** and **Comments**.

Step 16. Click the **scrollbar**.

Step 17. Click the **Overall Summary** tab.

Step 18. The **Overall Summary** page provides an average of all the ratings entered.

Step 19. The Manager may have added **Comments** within this section as well.

Step 20. Click the **Career Development** tab.

Step 21. Click the **scrollbar**.

Step 22. Click the **Job Description** tab.

Step 23. You may enter your comments regarding the employee final evaluation.

Step 24. Click the **Employee Comments** link.

Step 25. Enter the desired information into the field. Enter "**Thank you for the positive employee performance evaluation.**".

Step 26. Click the **Save** button.

Step 27. Click the **Home** link.

Step 28. Congratulations! You have completed this lesson.

Acknowledging Evaluation

Section 2, Lesson 6 Exercise - Scenario: Acknowledging Evaluation

Procedure

In this lesson you will learn how to Acknowledge a performance evaluation upon request from your manager.

Step 1. Click the **Self Service** link.

Step 2. Click the **Performance Management** link.

Step 3. Click the **My Performance Documents** link.

Step 4. Click the **Current Documents** link.

Step 5. Click the **Statewide Long Document Type** link.

Step 6. Notice where you are in the process.

Highlighted in yellow is what needs to occur - Employee Acknowledgement.

Step 7. Click the **Minimize Performance Process** button.

Step 8. Click the **Acknowledge** button.

Step 9. Click the **Confirm** button.

Step 10. The manager will receive an automated email indicating that the document has been acknowledged by you.

Step 11. In the case you are absent or refuse to acknowledge, the manager can override the acknowledgement and complete the evaluation process.

Step 12. Click the **Home** link.

Step 13. Congratulations! You have completed this lesson.

Viewing/Printing Historical Documents

Section 2, Lesson 7 Exercise - Scenario: Viewing/Printing Historical Documents

Procedure

In this lesson you will learn how to view, print, save your completed employee performance evaluation.

Step 1. Click the **Self Service** link.

Step 2. Click the **My Performance Documents** link.

Step 3. Once an evaluation is completed, it will be located under Historical Documents.

Click the **Historical Documents** link.

Step 4. Click the **Statewide Long Document Type** link.

Step 5. Click the **Minimize Performance Process** button.

Step 6. Click the **Print** link.

Step 7. Using this tool bar, you can either **Save, Print,** and/or **View.**

Step 8. Click the **Next Page** object.

Step 9. Click the **Next Page** object.

Step 10. Click the **Next Page** object.

Step 11. Click the **Next Page** object.

Step 12. Click the **Next Page** object.

Step 13. The eSignature section displays your signature once you acknowledge the evaluation.

Step 14. When a manager overrides the acknowledgement, their name appears in the Employee Signature section with (Manager Override) indicated.

Step 15. Click the **scrollbar**.

Step 16. Click the **Close** button.

Step 17. Click the **Close current tab** button.

Step 18. Click the **Home** link.