



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Agency Administrator Functions in Performance Management Documents

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Agency Administrator Functions in Performance Management Documents

Overview

This desk aid guides agency administrators on understanding, accessing and working with performance management documents in order to assist managers through the evaluation process. The agency’s templates and performance documents are configured within Performance Management to accommodate most employees within an agency. Some internal business processes might require further standardization of employee evaluations beyond the delivered performance document.

The information provided in this desk aid is based on the CAPPS multi-agency use performance management template and displays all the functionality available within Performance Management. Some of the information may not apply, depending on your agency’s template configuration. Contact your agency’s Human Resources Department with any questions.

Performance Management

Performance Management is a module designed for accessing, creating and updating evaluation documents that support the performance review process. The module supports:

- Goal setting and tracking
- Regular check-ins between the manager and the employee for ongoing feedback
- Requests for feedback from other reviewers in the agency
- Communications
- Feedback sharing between the manager and the employee in the final evaluation
- Approval of evaluation documents

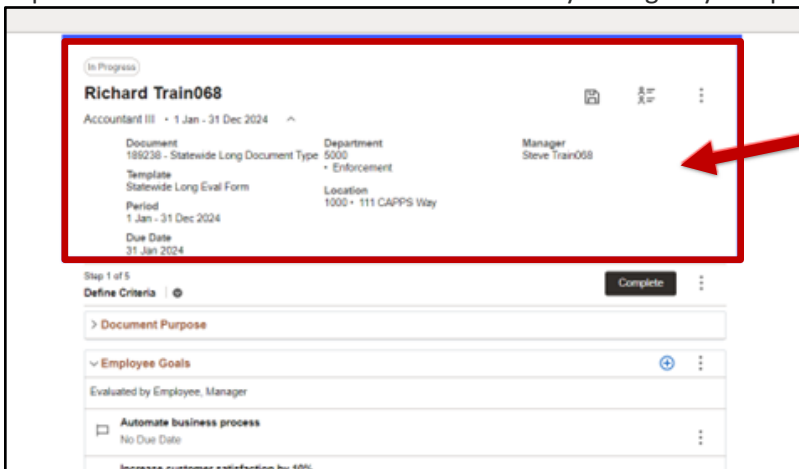
Understanding Performance Documents

This section is copied from the *Manager Self Service* Desk Aid and offers an overview of performance documents. Referring to this section may be helpful when reviewing the administrator tasks.

Document Structure

Document Header

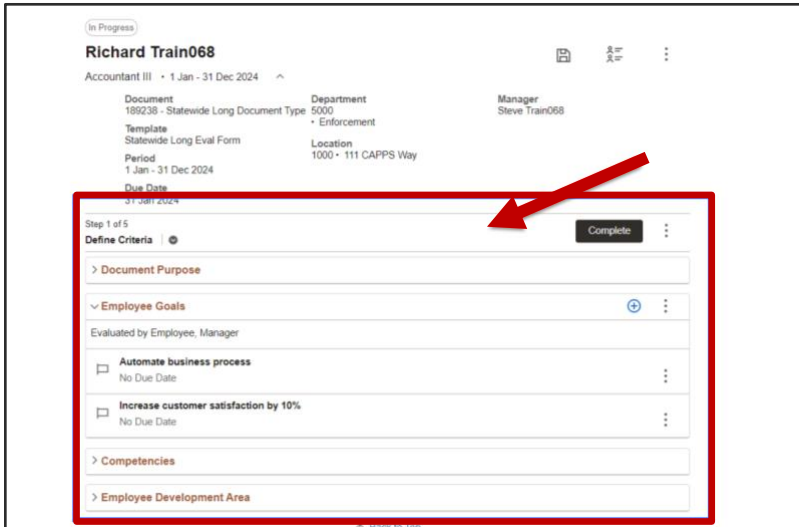
The document headers displays general information about the document and the employee when expanded. Some of the fields are determined by the agency template.



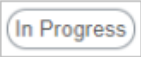

Document Body







Includes one or more sections for evaluating the employee. This area is for:

- Defining evaluation criteria
- Tracking checkpoint progress
- Entering performance feedback



Common Icons and Controls

Icon or Control	Description
<p>Document Status</p> 	<ul style="list-style-type: none"> • Displays the current state of the document. • Informational. • Values for each step include: <ul style="list-style-type: none"> ○ DEFINE CRITERIA: In Progress ○ CHECKPOINT or FINALIZE CRITERIA: In Progress ○ EVALUATION: <ul style="list-style-type: none"> ▪ Evaluation in Progress ▪ Shared with Employee ▪ Shared with Manager ▪ Request Acknowledgment ▪ Pending Acknowledgement ▪ Acknowledged ▪ Approval ▪ Canceled ▪ Completed <p>Note: These values are also used as document statuses to organize and filter documents.</p>
<p>Drop-Down Arrow</p> 	<p>Displays the list of related actions that can be initiated for the employee.</p>

Icon or Control	Description
Expand or Collapse  	Expands or collapses the area that displays general information about the performance document (such as the document ID and type), the associated template and due date.
Save 	Saves the changes made.
Nominate Participants  	Adds individuals to participate in the employee’s performance review or manage participant evaluations on the <i>Add/Review Participants</i> page. A blue dot in the upper right corner of the icon indicates updates are available on the page. Note: This icon only displays if configured to do so on the template.
More Actions (Ellipsis Icon) 	Displays more available actions that apply to the document. Note: Available actions vary based on factors (such as the template setup, current step of the document and user’s role).

More Actions Menu

The *More Actions* ellipsis (...) icon displays in various locations on document pages. The actions available depend upon the user’s access, stage/level and area of each document.

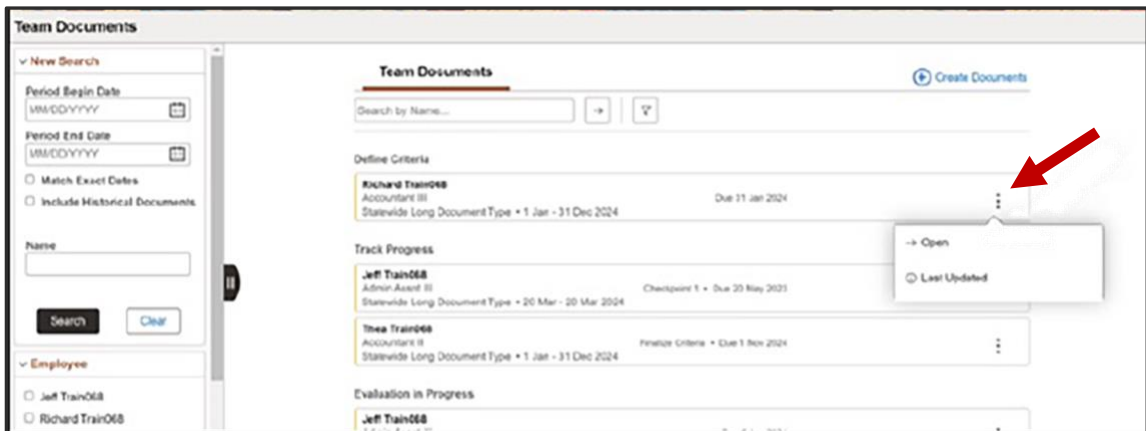
Document Level

There are two levels and menu areas:

Document Cards

The *More Actions* ellipsis (...) icon is located on the right of each document card and includes actions for:

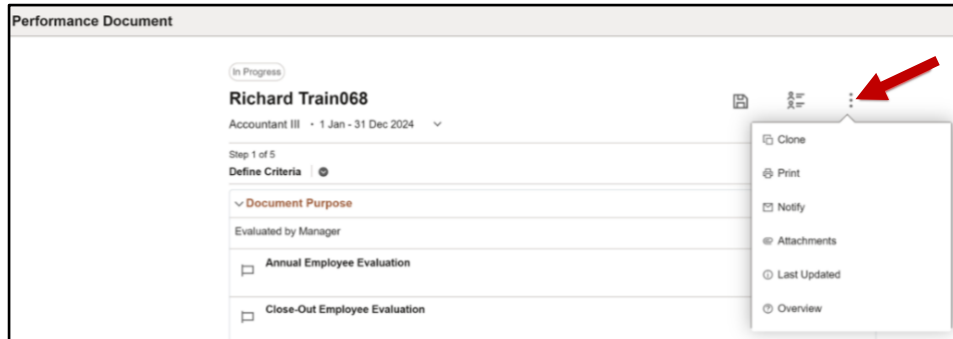
- Open
- Last Updated



Performance Documents

The *More Actions* ellipsis (...) icon is located near the top header area on the *Performance Document* page and includes the actions to:

- Clone
- Print
- Notify
- Attachments
- Last Updated
- Overview

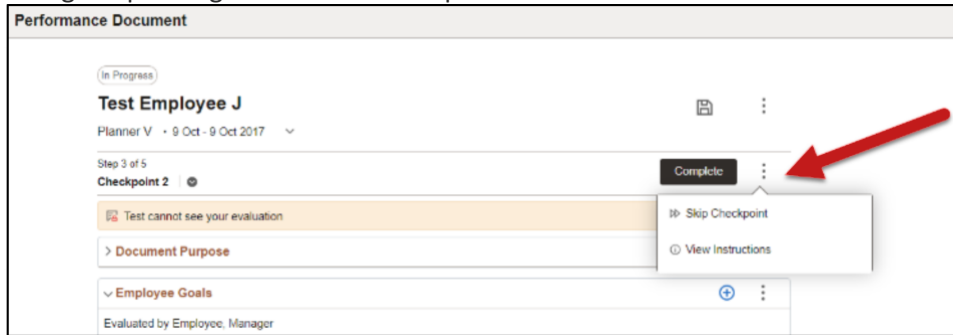


The *More Actions* ellipsis (...) menu located in the *header* area of a document provides options for document-level action descriptions.

Field or Control	Description
Open	Opens the document on the <i>Performance Document</i> page, which is the same as selecting the employee’s name on a Document Card.
Clone	<ul style="list-style-type: none"> • Creates a new document by copying the corresponding document with a new evaluation period that the user specified. • Allows the user to create a new document quickly for the same employee, document type, and document template for the new evaluation period. • Displays if the option to allow cloning from existing documents is enabled for your role in the document type setup.
Print	Displays a printable version of the document in PDF format (when logged in with manager access) and provides the options of participant feedback: <ul style="list-style-type: none"> • With participant identity included • Without participant identity included • To be excluded
Notify	Displays a message about the document on the <i>Notify</i> page.
360 Graphical Rating	Allows viewing ratings provided by all evaluators as well as the calculated average rating for each section, item and sub-item of the evaluation on the <i>360 Graphic View</i> page. <p>Note: Only available in the <i>Evaluation</i> step and only if the <i>View Average Rating</i> option is selected for your role (manager, employee or both) on the template configuration.</p>
Attachments	Allows adding attachments to the document on the <i>Attachment</i> page. <p>Note: Only available in the <i>Evaluation</i> step.</p> <p>Note: The user can view but not add attachments to completed or canceled documents.</p>
Last Updated	Displays the document’s last updated information on the <i>Last Updated</i> page.
Overview	Displays the description and objective of each step in the performance process on the <i>Performance Process Overview</i> page.

Step Level

The *More Actions* ellipsis (...) icon is located to the right of the selected checkpoint. The available actions change depending on the current step or document status.

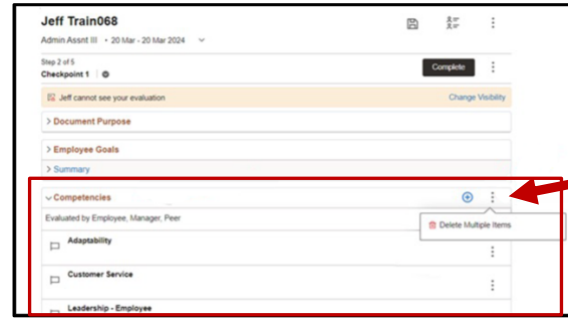


Step Level Actions

Field or Control	Description
Skip Checkpoint	Skips the current Checkpoint step if it is no longer needed. Note: Available with the Checkpoint step only.
Reopen Prior Step	Reopens the previous step for the update. Note: Available if the previous step was just completed or skipped and no changes were made to the current step. Note: Unavailable in the first step of the document.
View Employee Evaluation	Displays the self-evaluation of the employee on the Self-Evaluation – <status> page. Note: Only available for managers in the <i>Evaluation</i> step.
Reopen Employee Evaluation	Reopens the employee’s self-evaluation that was completed or canceled by the manager or the system. Updates the document status of the employee’s self-evaluation to Evaluation in Progress. Note: Only available for managers in the <i>Evaluation</i> step.
Reopen Manager Evaluation	Reopens the manager document for update by changing the document status to Evaluation in Progress. Note: Only available for managers in the <i>Evaluation</i> step and only when the evaluation is passed the <i>Evaluation in Progress</i> status but is not yet completed. Note: A document cannot be reopened if it was submitted for approval.
Cancel Overall Evaluation	Cancels the entire evaluation and updates the document status to a <i>Canceled</i> status. Note: Only available for managers in the <i>Evaluation</i> step.
Change Due Date	Modifies the due date of the employee’s self-evaluation that is currently in progress. Note: Only available for managers in the <i>Evaluation</i> step.
View Instructions	Displays the instructions provided for the current document step on the <i>Instructions</i> page. Note: Available with all document steps.

Section Level

The *More Actions* ellipsis (...) icon is located on the right of the selected checkpoint. The available actions change depending on the current step or document status.



Section Level Actions

Field or Control	Description
Delete Multiple Items	Removes one or more items from document sections on the <section> page. Note: Only available if the user’s role can delete items in the current step based on the template setup.

Optional Actions

Field or Control	Description
Define Section Weight	Specifies section weights for the document on the <i>Section Weight</i> page. Note: Only available if the section can be weighted based on the Template configuration.
Define Item Weight	Specifies section weights for the document on the <i>Section Weight</i> page. Note: Only available if items in the section can be weighted based on the template configuration.

Item Level

The *More Actions* ellipsis (...) icon is located next to the add (+) icon on the *Performance Document* page and in the header area of an item. The available actions change depending on the current step or document status.

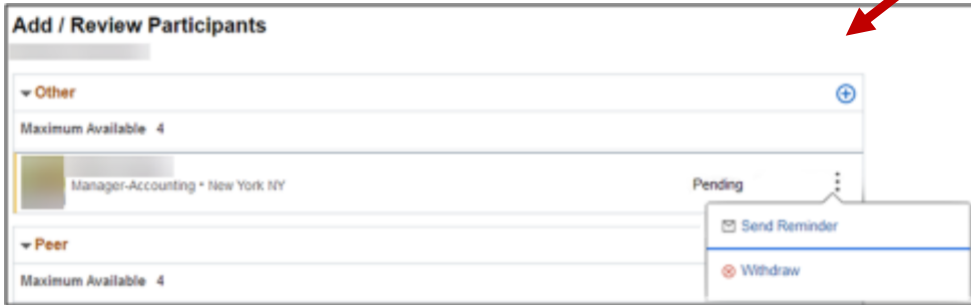
Item Level Actions

Field or Control	Description
View Graphical Rating	Displays ratings provided by all users for the item in a horizontal bar chart on the <i>Average Ratings</i> page. Note: Only available in the <i>Evaluation</i> step and only when the VIEW AVERAGE RATING check box is selected for your role on the <i>Template Definition – Process</i> page.
Delete	Removes the corresponding item. Note: Only available if the user’s role can delete items in the corresponding document step based on the template setup.
Last Updated	Displays the last updated information of the corresponding item on the <i>Last Updated</i> page.
Define Item Weight	<ul style="list-style-type: none"> Specifies item weights for the section on the <i>Item Weight</i> page. Allows view of the <i>Section</i> or <i>Item Weight</i> page. Note: Only available if the agency-specific template is configured to allow for weighted sections or content items.

Participant Reviews

The *More Actions* ellipsis (...) icon for participants allows two actions:

- Participant request
- or–
- Evaluation



Participant Review Actions

Field or Control	Description
Cancel Evaluation	<ul style="list-style-type: none"> • Available for: <ul style="list-style-type: none"> ○ Managers only. ○ Accepted requests or participant evaluations listed as <i>Evaluation in Progress</i>. • Cancels the participant evaluation.
Change Due Date	<ul style="list-style-type: none"> • Available for: <ul style="list-style-type: none"> ○ Managers only. ○ Accepted requests or participant evaluations listed as <i>Evaluation in Progress</i>. • Updates the due date of the participant evaluation.
Delete Evaluation	<ul style="list-style-type: none"> • Available for: <ul style="list-style-type: none"> ○ Managers only. ○ <i>Canceled</i> participant evaluations. • Deletes the canceled participant evaluation.
Reopen Evaluation	<ul style="list-style-type: none"> • Available for: <ul style="list-style-type: none"> ○ Managers only. ○ <i>Completed</i> or <i>Canceled</i> participant evaluations. • Reopens the participant evaluation.
Resubmit	<ul style="list-style-type: none"> • Available for <i>Canceled</i>, <i>Withdrawn</i> or <i>Declined</i> requests. • Resubmits the participant request, which sets its status to <i>Pending</i>.
Send Reminder	<ul style="list-style-type: none"> • Available for <i>Pending</i> requests. • Sends an email reminder to the individual about a <i>Pending</i> request.
View Participant Evaluation	<ul style="list-style-type: none"> • Displays evaluations completed by participants on the <i>Participant Evaluation</i> page. • Applicable to completed participant evaluations for users whose role is specified in the VIEW EVALUATIONS field on the template configuration. <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p>Note: See the <i>Performance Document</i> or <i>Participant Evaluation</i> page.</p> </div>
Withdraw	<ul style="list-style-type: none"> • Withdraws the request from the individual. • Applicable for <i>Pending</i> requests.

Accessing Performance Administration

Navigation

Dashboard: Employee Self Service, Workforce Administration; **Tile:** Performance Administration

The *Performance Administration* page displays the default *Create Documents* page and contains a left-hand navigation menu.

Performance Administration Tasks

Performance documents can be created, transferred, reopened, canceled and deleted. To complete tasks, agency administrators:

- Use navigation menus, pages and searches.
- Assist agency managers with processes and workflows to enhance employees' workplace performance.
- View document creation results and performance documents.
- Approve performance documents.
- Maintain Performance Notes.

Creating Performance Documents

Agency administrators are authorized to create performance documents for any employee within the agency and need the same information that a manager uses:

- PERIOD BEGIN DATE and PERIOD END DATE
- DOCUMENT TYPE
- TEMPLATE ID
- MANAGER SELECTION METHOD BY REPORTS TO POSITION
- CREATE DOCUMENT USING EMPLOYEE ID

To create a performance document:

1. Create a RUN CONTROL ID.
2. Choose the employee(s) by using the EMPLID and NAME.
3. Populate all fields.
4. Select **Run**.

The screenshot shows the 'Performance Administration' interface. At the top right, there are buttons for 'Report Manager', 'Process Monitor', and 'Run'. The 'Run' button is highlighted with a red box and a red arrow. Below this is the 'Run Request Parameters' section with several input fields: 'Period Begin Date' (04/01/2024), 'Period End Date' (09/30/2024), 'Document Type' (Statewide 6 Month Document Typ), and 'Template ID' (STW_6MO). There is also a 'Manager Selection Method' dropdown set to 'By Reports To Position'. Below that is the 'Create Documents Using' section with radio buttons for 'Group ID' and 'Employee ID', where 'Employee ID' is selected. At the bottom, there is a table titled 'Documents Using Employee ID' with the following data:

Employees to Process				
*Empl ID	Empl Record	Name	Language Code	
1	70681000163	0 Jeff Train068		+ -

The *Process Scheduler Request* with the checked *Select* box displays.

5. Select **OK** to begin the process of creating the performance document.

Process Scheduler Request

User ID 00310072870 Run Control ID JP_TEST

Server Name Run Date 05/13/2025

Recurrence Run Time 7:24:42AM

Time Zone

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Mass Create Employee Documents	EP_MGRDOC	Application Engine	Web	TXT	Distribution

The *Process List* page displays.

The document is created when the:

- RUN STATUS changes to *Success*.
- DISTRIBUTION STATUS to *Posted*.

Note: You may need to select **Refresh** several times until the *Run* and *Distribution* statuses are completed.

Transferring Documents

Agency administrators are authorized to transfer a performance document from one manager to another manager within the same agency. When search criteria is entered on the *Transfer Document* page, the user receives a list of documents that can be selected.

Note: In the following example, the search uses tester EMPLOYEE ID 70681000169.

Performance Administration

Transfer Document

To transfer a performance document, select the checkbox for the Employee and then select the Continue push button.

▼ Search for Documents

First Name Last Name

Manager First Name Last Name

Document Type Document Status

Period Between - Employee ID 70681000169

Document ID

Performance Documents

	Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
<input checked="" type="checkbox"/>	70681000169	Richard Train068	189253	Statewide Long Document Type	Define Criteria	04/01/2024	04/01/2024	Accountant III	Luna Train068
<input type="checkbox"/>	70681000169	Richard Train068	189237	Statewide Long Document Type	Approval - Submitted	03/01/2024	03/29/2024	Accountant III	Steve Train068
<input type="checkbox"/>	70681000169	Richard Train068	189250	Statewide Long Document Type	Completed	01/01/2024	12/31/2024	Accountant III	Steve Train068

Select All Deselect All

To transfer a document to another manager:

1. Select **Continue**.

The Transfer Document on the *Confirm Transfer* page displays.

Performance Administration

Transfer Document New Window | Personalize Page

Confirm Transfer

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
70681000169	Richard Train068	189253	Statewide Long Document Type	Define Criteria	04/01/2024	04/01/2024	Accountant III	Luna Train068

You have chosen to transfer the document indicated to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the **Save** button to complete the transfer.

New Manager ID: [Select a Manager](#)

[Return to Previous Page](#)

2. Select the *Select a Manager* hyperlink to open a *Search* page.

Note: The chosen manager must be within your agency.

3. Enter search criteria.

Person Search

Select a Manager

Search Criteria and Results
> Instructions

Search Criteria

Name: STEVE
Last Name: TRAIN
Second Last Name: Train068
First Name:
ACName:

Search Results

Steve Train068

[Return to Previous Page](#)

4. Select **OK**.

The *Confirm Transfer* page displays again with the selected manager

Performance Administration

Transfer Document New Window | Personalize Page

Confirm Transfer

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
70681000169	Richard Train068	189253	Statewide Long Document Type	Define Criteria	04/01/2024	04/01/2024	Accountant III	Luna Train068

You have chosen to transfer the document indicated to another manager. Select the receiving manager by using the "Select a Manager" hyperlink, then select the **Save** button to complete the transfer.

New Manager ID: Steve Train068 [Select a Manager](#)

[Return to Previous Page](#)

5. Select **Save**.

The document transfer was successful and the *Save Confirmation* page displays.

6. Select **OK**.

Performance Administration

Transfer Document

Save Confirmation

✓ The Save was successful.

The previous *Transfer Document* page now displays the transferred document.

Transfer Document
To transfer a performance document, select the checkbox for the Employee and then select the Continue push button.

Search for Documents

First Name: Last Name:
 Manager First Name: Last Name:
 Document Type: Document Status:
 Period Between: - Employee ID: 70681000169
 Document ID:

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
<input type="checkbox"/>	70681000169 Richard Train068	189253	Statewide Long Document Type	Define Criteria	04/01/2024	04/01/2024	Accountant III	Steve Train068
<input type="checkbox"/>	70681000169 Richard Train068	189237	Statewide Long Document Type	Approval - Submitted	03/01/2024	03/29/2024	Accountant III	Steve Train068
<input type="checkbox"/>	70681000169 Richard Train068	189250	Statewide Long Document Type	Completed	01/01/2024	12/31/2024	Accountant III	Steve Train068

Reopening Documents

Agency administrators are authorized to reopen documents that managers cannot. In the following example, the search is by **EMPLOYEE ID** and **DOCUMENT STATUS** with a *Canceled* status document.

On the Reopen Document page:

1. Select **Continue**.

Performance Administration

Reopen Document
To change a performance document's status back to "Evaluation", select the checkbox next to the Employee's Name and then select the Continue push button.

Search for Documents

First Name: Last Name:
 Manager First Name: Last Name:
 Document Type: Document Status: Canceled
 Period Between: - Employee ID: 70681000163
 Document ID:

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
<input type="checkbox"/>	70681000163 Jeff Train068	189241	Statewide Long Document Type	Canceled	03/22/2024	03/22/2024	Admin Assnt III	Steve Train068
<input checked="" type="checkbox"/>	70681000163 Jeff Train068	189259	Statewide 6 Month Document Type	Canceled	01/01/2024	06/30/2024	Admin Assnt III	Steve Train068

The *Confirm Reopen Document* page displays.

Performance Administration

Reopen Document
Confirm Reopen Document

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
70681000163	Jeff Train068	189259	Statewide 6 Month Document Type	Canceled	01/01/2024	06/30/2024	Admin Assnt III	Steve Train068

You have chosen to change the status of the performance document listed. The status will be changed to **In Progress**. Note that changing the status of an Employee's self-evaluation will not change the status of the overall document. To change the overall document status, you must change the status of the Manager's document.

To confirm this status change, select the **Save** button.

2. Select **Save**.

The *Save Confirmation* page displays.

3. Select **OK**.

Performance Administration

Reopen Document
Save Confirmation

The Save was successful.

To verify that the document was reopened for the employee:

1. Navigate to the *View Performance Documents* page.
2. Enter the desired search criteria.

View Performance Documents
Use the Search capabilities to find a specific document or documents to view. After searching, all the documents for which you have access within that criteria will be listed.

Search for Documents

First Name Last Name
 Manager First Name Manager Last Name
 Document Type: Statewide 6 Month Document Type
 Document Status:
 Period Between: - Employee ID: 70681000163
 Document ID:

Search Clear

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager
70681000163	Jeff Train068	189259	Statewide 6 Month Document Type	Define Criteria	01/01/2024	06/30/2024	Admin Assnt III	02/01/2024	Steve Train068

3. Select **Search**.
The document is listed under *Performance Documents*.

Canceling Documents

Agency administrators are authorized to cancel a document — a document must be canceled before it can be deleted. In the following example, the administrator selects the previously reopened document and sets it to canceled again. The search criteria is by **EMPLOYEE ID** and **DOCUMENT ID**.

To cancel a document:

1. Select **Continue**.

Cancel Document
To cancel a performance document, select the checkbox for the Employee and then select the Continue push button. All documents can be cancelled except for already "Cancelled" performance documents.

Search for Documents

First Name Last Name
 Manager First Name Manager Last Name
 Document Type: Document Status:
 Period Between: - Employee ID: 70681000163
 Document ID: 189259

Search Clear

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager	
<input checked="" type="checkbox"/>	70681000163	Jeff Train068	189259	Statewide 6 Month Document Type	Define Criteria	01/01/2024	06/30/2024	Admin Assnt III	Steve Train068

Select All Continue Deselect All

The *Confirm Cancellation* page displays.

2. Select **Save**.

Cancel Document
Confirm Cancellation

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
70681000163	Jeff Train068	189259	Statewide 6 Month Document Type	Define Criteria	01/01/2024	06/30/2024	Admin Assnt III	Steve Train068

You have chosen to cancel performance documents listed. **Save** Return to Previous Page

A confirmation of the *Cancel Document* displays.

3. Select **OK**.

Performance Administration

Cancel Document

Save Confirmation

The Save was successful.

OK

Deleting Documents

Only agency administrators can delete documents, including documents that were canceled. Documents cannot be deleted accidentally. In the following example, the previously canceled Document ID 189259 will be deleted.

1. Select **Continue**.

Performance Administration

Delete Documents

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

Search for Documents

First Name

Manager First Name

Document Type

Period Between -

Last Name

Last Name

Document Status

Employee ID

Document ID

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager	
<input checked="" type="checkbox"/>	70681000163	Jeff Train068	189259	Statewide 6 Month Document Typ	Canceled	01/01/2024	06/30/2024	Admin Assnt III	Steve Train068

The *Confirm Delete* page displays.

2. Select **Save**.

Performance Administration

Delete Documents

Confirm Delete

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Manager
70681000163	Jeff Train068	189259	Statewide 6 Month Document Typ	Canceled	01/01/2024	06/30/2024	Admin Assnt III	Steve Train068

You have chosen to delete the performance documents listed. To confirm this deletion, select the **Save** button.

A confirmation of the *Delete Documents* displays.

3. Select **OK**.

Performance Administration

Delete Documents

Save Confirmation

The Save was successful.

Viewing Performance Documents

Agency administrators are authorized to view documents within the agency.

If an administrator needs to review performance documents:

1. Access the *View Performance Documents* menu.
2. Search by EMPLOYEE ID.
3. Select the employee's name in the list of performance documents.

Performance Administration

View Performance Documents

Use the Search capabilities to find a specific document or documents to view. After searching, all the documents for which you have access within that criteria will be listed.

Search for Documents

First Name

Manager First Name

Document Type

Period Between -

Last Name

Last Name

Document Status

Employee ID

Document ID

Performance Documents

Employee ID	Name	Document ID	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager
70681000163	Jeff Train068	189257	Statewide Long Document Type	Define Criteria	04/10/2024	04/10/2024	Admin Assnt III	05/11/2023	Steve Train068
70681000163	Jeff Train068	189242	Statewide Long Document Type	Evaluation in Progress	03/22/2024	03/22/2024	Admin Assnt III	05/21/2024	Steve Train068
70681000163	Jeff Train068	189241	Statewide Long Document Type	Canceled	03/22/2024	03/22/2024	Admin Assnt III		Steve Train068
70681000163	Jeff Train068	189239	Statewide Long Document Type	Track Progress - Checkpoint 1	03/20/2024	03/20/2024	Admin Assnt III	05/20/2023	Steve Train068

The employee's performance document displays in *View Only* mode.

Performance Document

In Progress

Jeff Train068

Admin Assnt III • 20 Mar - 20 Mar 2024

Document
189239 - Statewide Long Document Type

Template
Statewide Long Eval Form

Period
20 Mar - 20 Mar 2024

Due Date
20 May 2023

Department
2000
Accounting

Location
1000 • 111 CAPPS Way

Manager
Steve Train068

Step 2 of 5

Checkpoint 1

Document Purpose

Evaluated by Manager

- Annual Employee Evaluation
- Close-Out Employee Evaluation
- Probationary Employee Evaluation

The screenshot displays a performance management interface with several sections:

- Employee Goals:** Includes a goal titled "Cut operational expenses by 3%" with a "No Due Date" and a "Summary" sub-section.
- Manager:** Steve Train068
- Competencies:** Lists "Adaptability", "Customer Service", and "Leadership - Employee", each with a "Summary" sub-section.
- Employee Development Area:** Includes a "Development" goal with a "No Due Date".
- STW-Job Description Certification:** Includes two questions: "Is the EE's Job Description accurate for this position?" and "Has the EE's current Job Description been recently revised?".

A "Back to Top" link is located at the bottom of the interface.

Maintaining Performance Notes

Agency administrators are authorized to add, delete or transfer *Performance Notes* for employees in the agency.

To add, delete or transfer Performance Notes:

1. Search for and select an **Empl ID**.
2. Select **Add a New Note**.

The screenshot shows the "Performance Administration" interface with the "Performance Notes" section active. The left sidebar contains navigation options: "Performance Documents", "View Document Creation Results", "Approve Documents", "View Performance Documents", and "Maintain Performance Notes".

The main content area includes:

- Performance Notes** header with an "Instructions" dropdown.
- Selection Criteria:** A search box containing "*Empl ID 70681000163" and "Jeff Train068". Below it are "Notes From" and "Through" date pickers.
- Buttons:** "Search" and "Add a New Note". The "Add a New Note" button is highlighted with a red box and a red arrow.
- Message:** "There are no existing notes for the specified selection criteria."

3. Enter a SUBJECT and NOTE TEXT.

Performance Notes - Add/Update Notes

> Instructions

Selected Performance Note

Applications

Empl ID 70681000163 Jeff Train068 Created 04/11/2024 3:25PM
 Creator Brian Train068
 Last Update
 Updated By

Subject The is an example performance note for an employee

Note Text The admin and/or manager will enter a performance note for an employee.

Save

Return to Performance Note Selection

4. Select **Save**.
5. Select the checkbox on an existing performance note row.

Performance Notes

> Instructions

Selection Criteria

*Empl ID 70681000163 Jeff Train068

Notes From Through

Search Add a New Note

Existing Performance Notes for this Employee

Select	Subject	Created
<input checked="" type="checkbox"/>	The is an example performance note for an employee	04/11/2024 3:25PM

6. Select **Delete** –or– **Transfer**.

Existing Performance Notes for this Employee

Select	Subject	Created
<input checked="" type="checkbox"/>	The is an example performance note for an employee	04/11/2024 3:25PM

Select All Deselect All

Delete Transfer

Viewing Document Creation Results

Agency administrators are authorized to see if the document was created successfully.

Note: Agency administrators are authorized to create a document using the assigned template(s) but are not authorized to make changes to the documents.

To view a created document:

1. Search by RECENT SEARCHES, SAVED SEARCHES, or RUN CONTROL ID.

View Document Creation Results

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches

Saved Searches: Choose from saved searches

Run Control ID: begins with Demo068_0411

Show fewer options

Case Sensitive

Search Clear

2. Select **Search**.
The *View Document Creation Results* page displays.

View Document Creation Results

Run Control ID: Demo068_0411

Run Request Parameters

Period Begin Date: 04/01/2024 | Period End Date: 09/30/2024
 Document Type: STW-6MO | Statewide 6 Month Document Typ
 Manager Selection Method: By Reports To Position

Create Documents Using

Group ID | Employee ID

Documents Using Employee ID

Employee Processed

Empl ID	Empl Record	Name	Template ID	Manager ID / Mentor ID	Supervisor Name	Success?	Status
70681000163	0	Jeff Train068	Statewide 6 Months Eval Form	70681000177	Steve Train068	Yes	Document created successfully

Save Return to Search

The administrator can use the *View Performance Documents* function to view the created document (this is view only).

(In Progress)

Jeff Train068

Admin Assnt III • 1 Apr - 30 Sep 2024

Step 1 of 4

Define Criteria

Employee Goals

Evaluated by Employee, Manager

No items have been defined in this section.

Competencies

Evaluated by Employee, Manager, Peer

Adaptability

Employee Development Area

Evaluated by Employee, Manager

Development

No Due Date

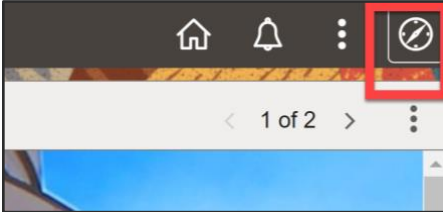
ePM Reports and Queries

There is a substantial amount of data the agency can use to compare and monitor the agency’s performance management program. This data can be exported using the delivered *Multi-Agency Use* queries.

Note: Only an agency administrator can access and run these queries.

Accessing Multi-Agency Use queries:

1. Select the **Navigation** tool.



The navigation window displays.

2. Select **Menu**.
3. Select **Reporting Tools**.
4. Select **Query**.
5. Select **Query Viewer**.

The *Query Viewer* page displays.

6. Select the **Query Name** item from the drop-down menu for the SEARCH BY field.



7. Enter **TX_EP** in the **BEGINS WITH** field.

Note: All performance management queries begin with **TX_EP**.

- Select **Search**.
The **Query** section populates.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
TX_EP_AGY_EMPLS_WO_EVALS_DOCS	Empls w/o evals or docs	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EMPL_EVAL_DOC_STATUS	Empl Eval Document Statuses	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EMPL_EVAL_DUE_DATES	Empl Eval Document Due Dates	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EMPL_EVAL_JOB_DESCR	Doc Statuses with Job Descr	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EMPL_EVAL_PERF_NOTES	Empl Eval Performance Notes	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EMPL_EVAL_WITH_ATTCH	Empl Eval with Attachments	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EVAL_APPR_STATUS	Empl Eval Approval Statuses	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EVAL_DOC_AUDIT_TRAIL	Empl Eval Document Audit Trans	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EVAL_ITEM_RATING	Empl Eval with Item Ratings	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EVAL_SECTION_RATING	Empl Eval with Section Ratings	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EVAL_SKIPPED_CHKPNTS	Empl Eval Docs Skipped Chkpnts	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_EVAL_SUBITEM_RATING	Empl Eval with SubItem Ratings	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_ITEM_CHKPNT_CMMTS	Empl Eval Item Chkprnt Comments	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_ITEM_COMMENTS	Empl Eval Item Comments	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_MGR_OVDS_EE_ACK_ST	Mgr Overrides of EE Acknw Stat	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_SECTION_CHKPNT_CMMTS	Empl Eval Section Chkprnt Cmmts	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_AGY_SECTION_COMMENTS	Empl Eval Section Comments	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
TX_EP_DOC_STATS_BY_MGR	Doc Status by Mgr's Reports To	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Note: Each Query can be run to HTML or Excel.

- Enter at least one of the available fields.

TX_EP_AGY_EMPLS_WO_EVALS_DOCS - Empls w/o evals or docs

*Agency:

Department (Blank for All):

*Search Begin Date:

*Search End Date:

HR Status:

View Results

Row	Agency	Dept	Department	Manager's Name	EMPLID	First Name	Last Name	Hire Date	Document ID	Document Type	Period Begin Date	Period End Date	Created By	Created Date/Time	Canceled By	Canceled Date/Time	HR Status
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- Select **View Results**.
A corresponding *View Results* page displays.

Revision History

Date	Description of Change	Changed By
Feb. 19, 2026	Initial release.	J. Partin