

9.1 ePerformance

Completing the Employee Evaluation Up To the Approval Process – Managers Job Aid



Completing the Employee Evaluation – Managers Job Aid

The employee, manager, and reviewing manager all have an active role in the evaluation process.

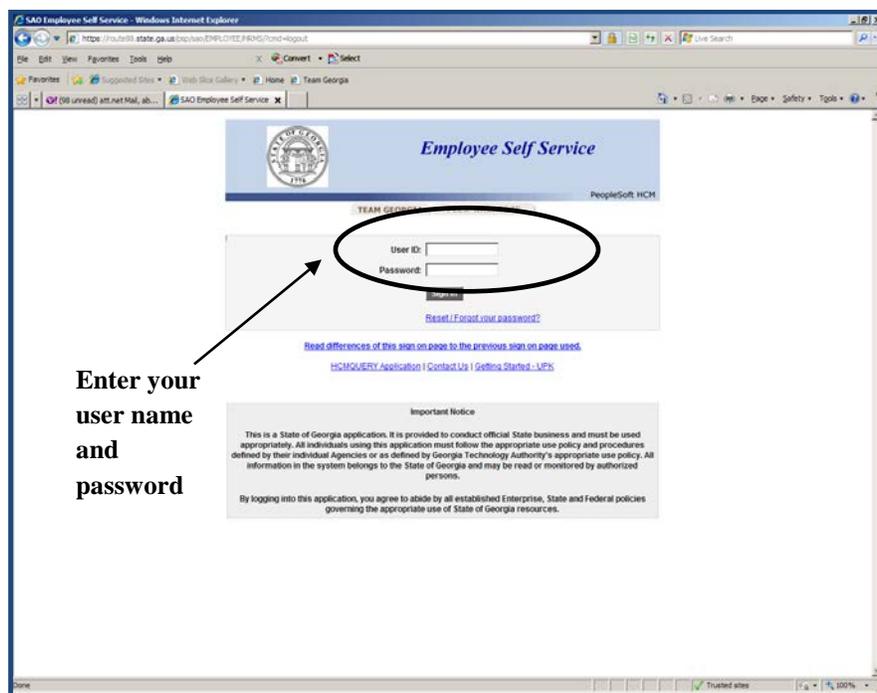
This document includes the steps that managers should follow to complete the employee's performance evaluation in ePerformance.

Step 1: Manager receives email notification that their employee has completed the Employee Self Evaluation (if applicable) OR Manager is notified by HR that it is time for them to complete the year-end evaluation. See example below.

From: Employee Self Service Email [mailto:SAO_PS_email@sao.ga.gov]
Sent: Friday, November 09, 2012 10:19 AM
To:
Subject: Your employee has completed their self evaluation

Your employee has completed their self evaluation for Annual Performance Review : <https://route88.state.ga.us/psp/sao/?cmd=login> (Please do not respond to this automatic notification.)

Step 2: Log into the Route 88 URL <https://route88.state.ga.us>

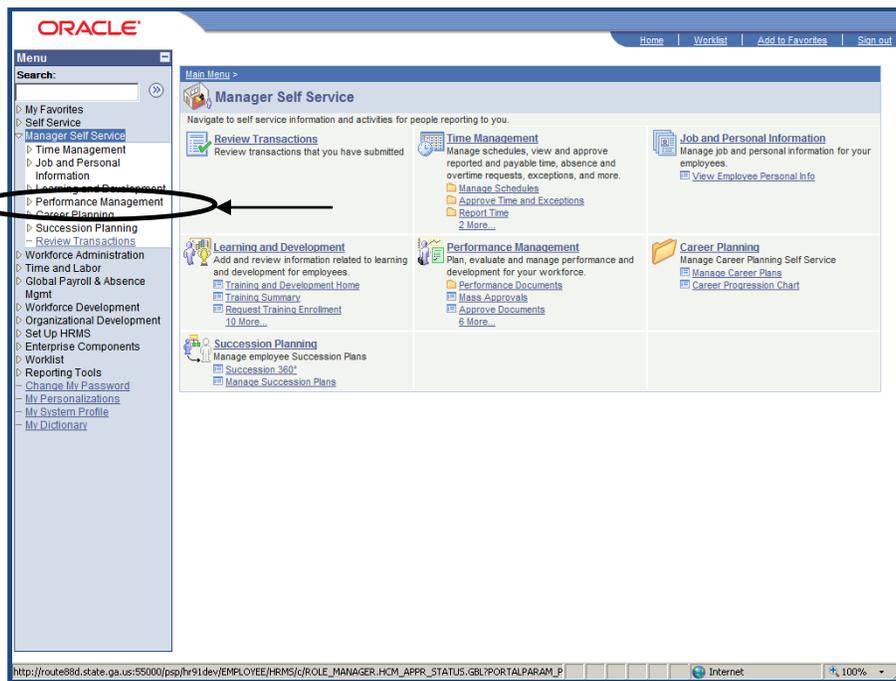


Logging in on this screen will take you directly to the Main Menu screen for PeopleSoft HCM.

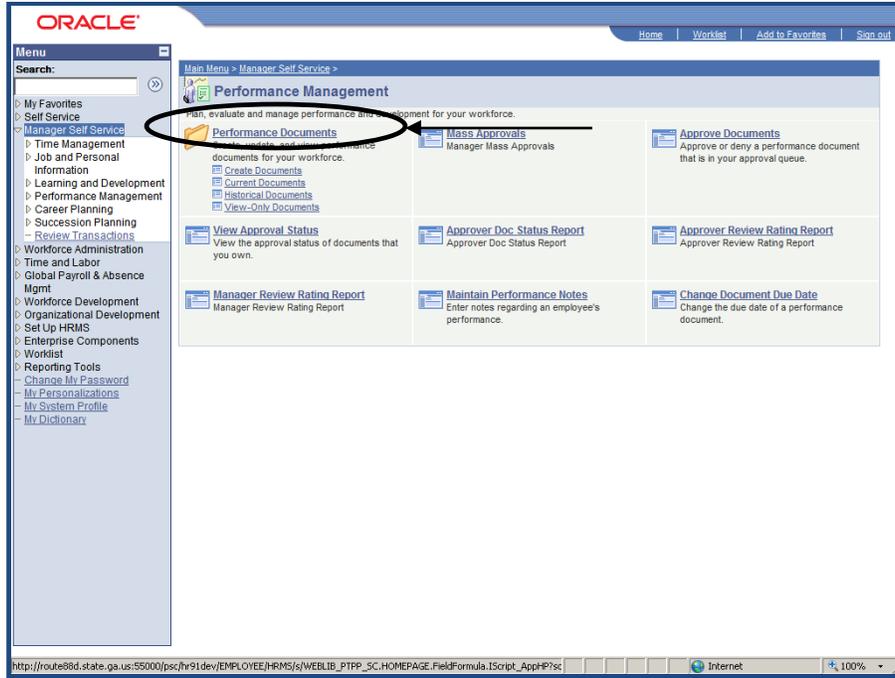
Step 3: Click on Manager Self Service



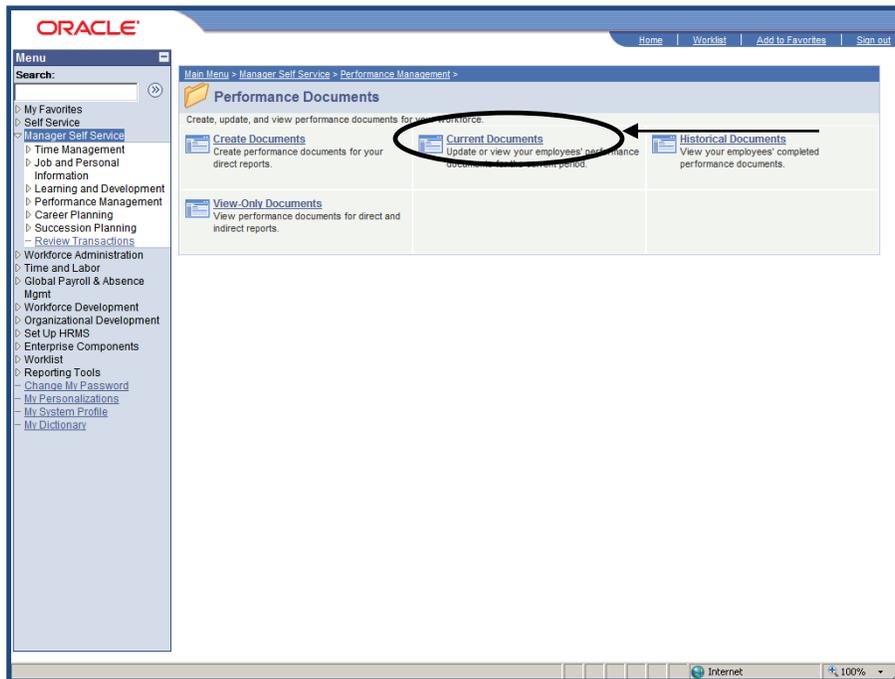
Step 4: Click on Performance Management



Step 5: Click on Performance Documents



Step 6: Click on Current Documents



Step 7: Click on the appropriate employee's document you are ready to evaluate

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Current Performance Documents

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

Employee	Mid Initial	Document Type	Start Date	End Date	Job Title	Status	Department
		Annual Performance Review	07/01/2017	06/30/2018	PS: Operations Analyst	In Progress	460148
		Annual Performance Review	06/01/2015	07/30/2016	PS: Operations Analyst (AL)	In Progress	460148
		Annual Performance Review	07/01/2012	06/30/2013	PS: Operations Analyst (AL)	In Progress	460148
		Annual Performance Review	07/01/2009	06/30/2010	PS: Business Analyst (SP)	In Progress	460148
		Annual Performance Review	07/01/2008	06/30/2009	PS: Business Analyst (SP)	In Progress	460711
		Annual Performance Review	06/01/2016	07/30/2017	PS: Hum Res Specialist (EL)	In Progress	460637
		Annual Performance Review	07/01/2013	06/30/2014	PS: Hum Res Specialist (EL)	In Progress	460637
		Annual Performance Review	07/01/2012	06/30/2013	PS: Hum Res Specialist (EL)	In Progress	460637
		Annual Performance Review	07/01/2016	06/30/2017	PS: Hum Res Specialist (WL)	In Progress	460637
		Annual Performance Review	07/01/2013	06/30/2014	PS: Hum Res Specialist (WL)	In Progress	460637
		Annual Performance Review	07/01/2012	06/30/2013	PS: Hum Res Specialist (WL)	In Progress	460637
		Annual Performance Review	07/01/2010	06/30/2011	PS: Hum Res Specialist (WL)	In Progress	460637

Note: All of the manager's direct report documents should be listed. If any of your direct reports are not listed, contact your agency's HR Administrator.

If your agency incorporates the Employee Self Evaluation step, print out the employee self-evaluation prior to moving to **Step 8**.

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Current Performance Documents

Document Details

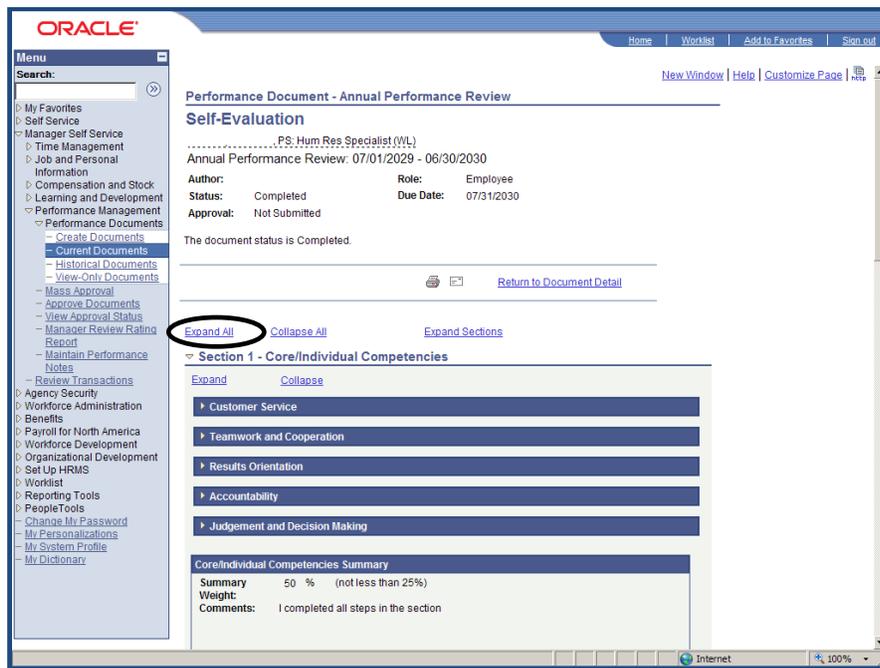
PS: Hum Res Specialist (WL)
Annual Performance Review: 07/01/2029 - 06/30/2030

Performance Document Details	
Employee:	Job Title: PS: Hum Res Specialist (WL)
Document Type: Annual Performance Review	Period: 07/01/2029 - 06/30/2030
Template: Annual Performance Review	Document ID: 571434
Manager:	Status: In Progress

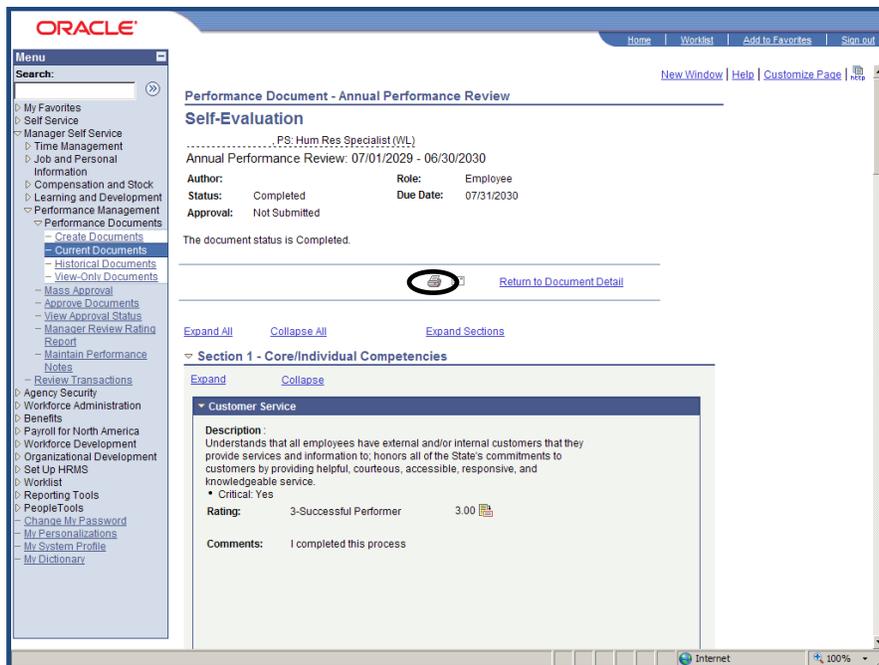
Document Progress				
Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	Completed	01/01/2030	View	
Review Self Evaluation	Completed	07/31/2030	View	
Complete Manager Evaluation	In Progress	07/31/2030	Edit	Submit

[Return to Select Documents](#)

- Click on **View** next to Review Self Evaluation



- Click the **Expand All** link



All of the document sections will expand to show the ratings and comments entered by the employee.

- Click on the **View Printable Evaluation** link (the printer icon)

The evaluation will appear in a PDF format. Once the document loads,

- Click on **File** (from the Tool Bar)
- Select **Print** from the File menu options

Step 8: Click on Start (or Edit) next to Complete Manager Evaluation

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Current Performance Documents

Document Details

SS: Clerk (EL)

Annual Performance Review: 07/01/2011 - 06/30/2012

You have successfully completed the Establish Criteria step.

Performance Document Details

Employee: SS: Clerk (EL)

Job Title: SS: Clerk (EL)

Document Type: Annual Performance Review

Period: 07/01/2011 - 06/30/2012

Template: Annual Performance Review

Document ID: 537393

Manager: []

Status: In Progress

Document Progress

Step	Status	Due Date	Action	Next Action
Establish Evaluation Criteria	Completed	01/02/2012	View	
Review Self Evaluation	Not Started	07/31/2012		
Complete Manager Evaluation	Not Started	07/31/2012	Start	

[Return to Select Documents](#)

If the manager has previously clicked on **Start** and only saved the information entered into the evaluation, the **Start** option will no longer be available. You will now click on **Edit** to open the evaluation.

Note: The Establish Evaluation Criteria step must have been completed before the Manager Evaluation can be completed. If the Establish Evaluation Criteria step isn't showing as completed, the manager must first go into that step and "Complete" the criteria.

If the employee completed a self-evaluation, the status of the **Review Self Evaluation** (which the employee completes on themselves) would read **Completed** or **In Progress**.

Step 9: Click on “Expand All” link

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Menu

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Worklist

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Change My Password

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My Dictionary

Performance Document - Annual Performance Review

Manager Evaluation

PS: Hum Res Specialist (WL)

Annual Performance Review: 07/01/2029 - 06/30/2030

Author: [] Role: Manager

Status: In Progress Due Date: 07/31/2030

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.

Save Submit for Approval [] [] Return to Document Detail

Expand All Collapse All Expand Sections

Section 1 - Core/Individual Competencies

Expand Collapse

Customer Service

Description:

Understands that all employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service.

Critical: Yes

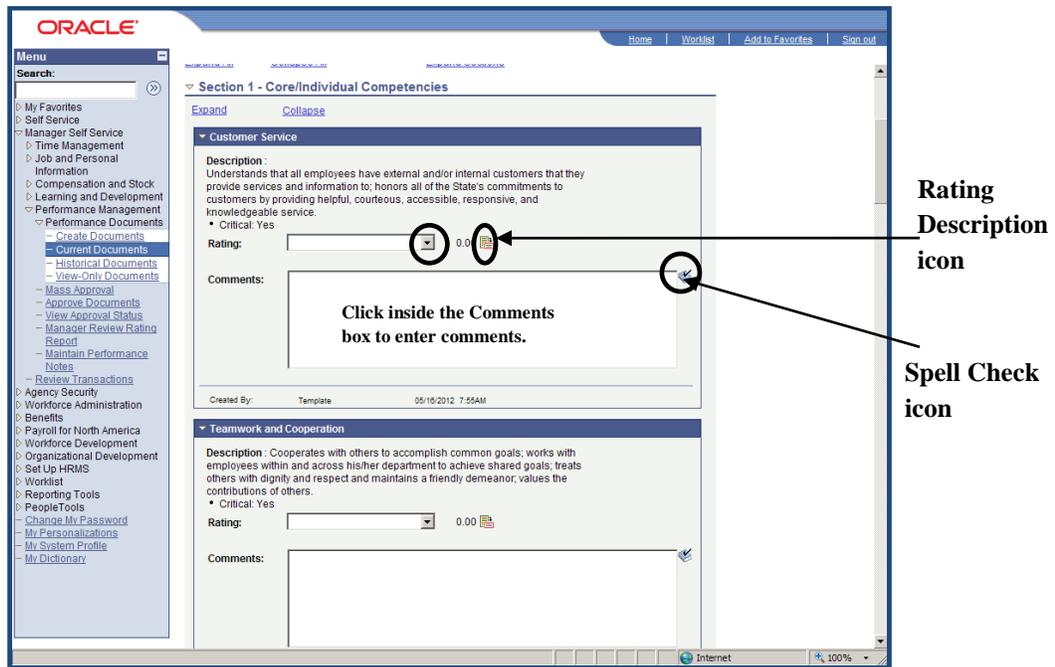
Rating: [] 0.00 []

Comments: []

Note: The Expand All link will open all sections of the document.

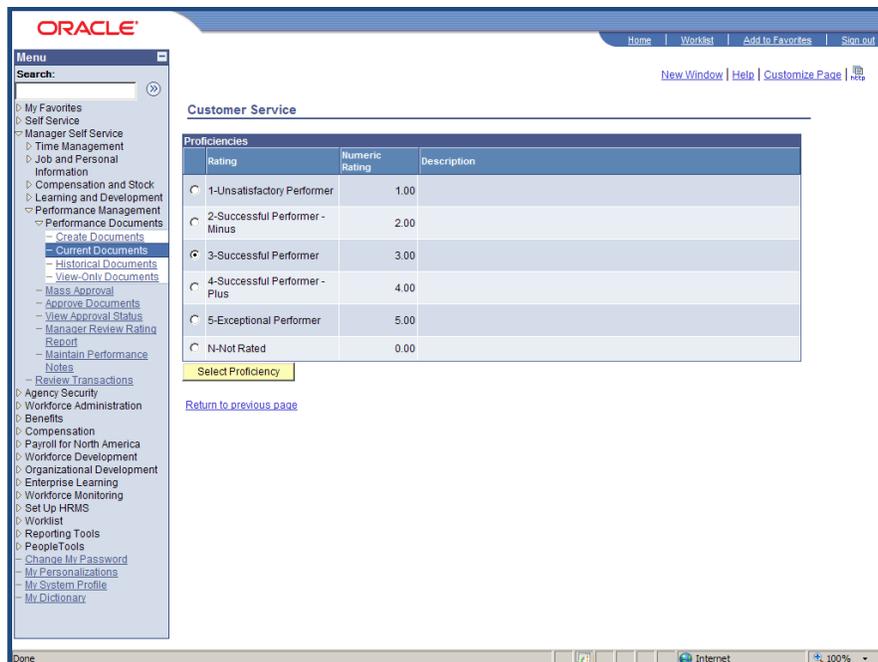
- The **Save** button should be used continuously as you are entering information into the system.
- The **Submit for Approval** should only be used once you are **completely finished** evaluating the employee and ready to submit the document to the Reviewing Manager and HR for approval.

Step 10: Click on the drop down menu to select the appropriate rating for each item in Section 1 (Core/Individual Competencies). Again, be sure to save often – the system will time-out after a period of inactivity and you will lose any work that has not been saved.



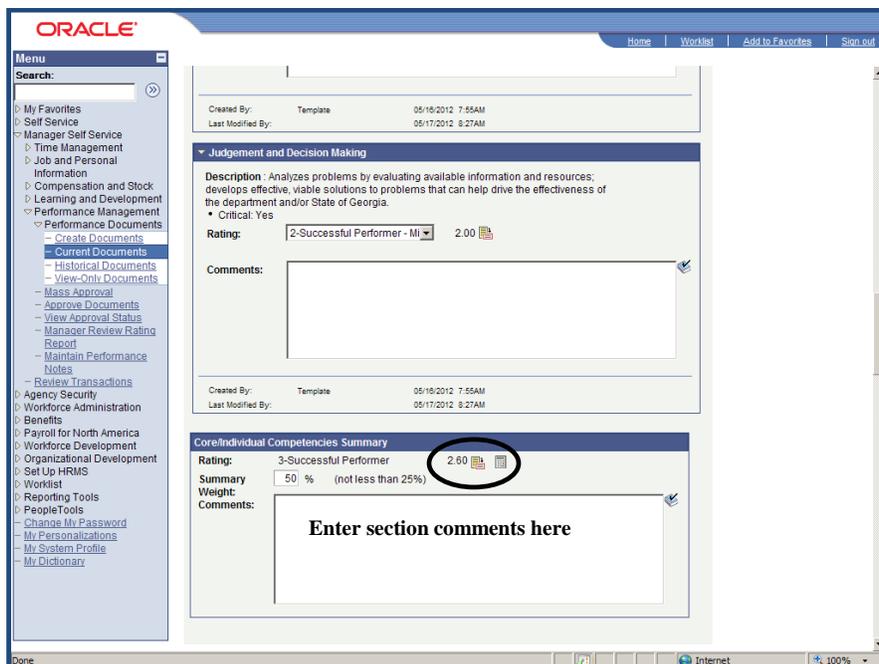
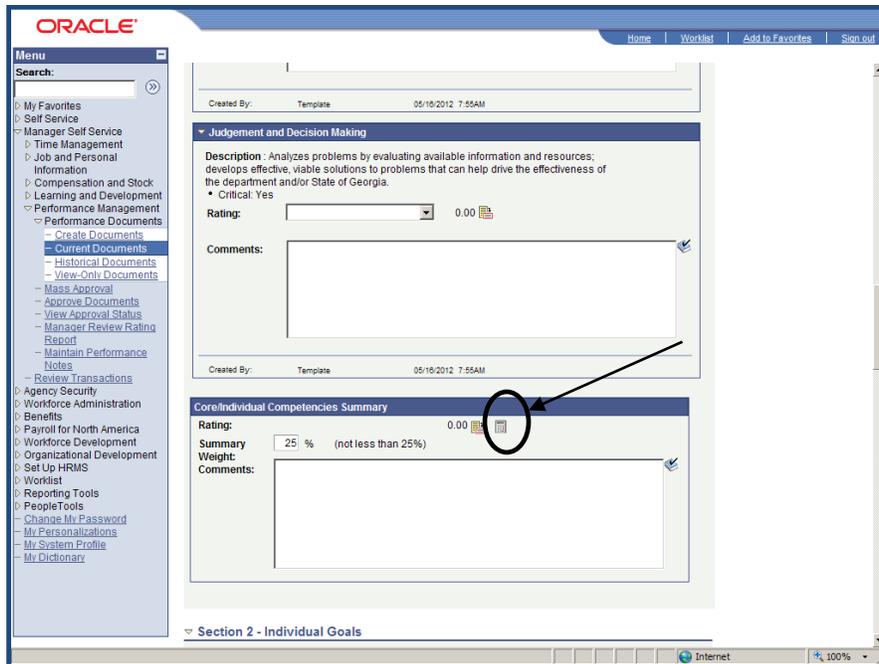
Comments for each Competency should be entered inside the comment box for each individual competency.

The ratings are based on a 5-point rating scale. Click on the Rating Description icon to view description of the ratings: (see below)



Note: To spell check your comment, click on the **Spell Check Comments** icon.

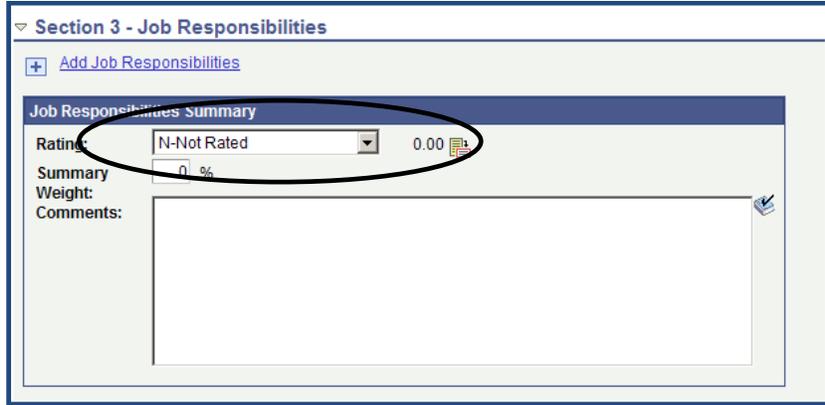
Step 11: At the end of **Section 1**, click on the calculator icon to calculate the overall section rating for section 1.



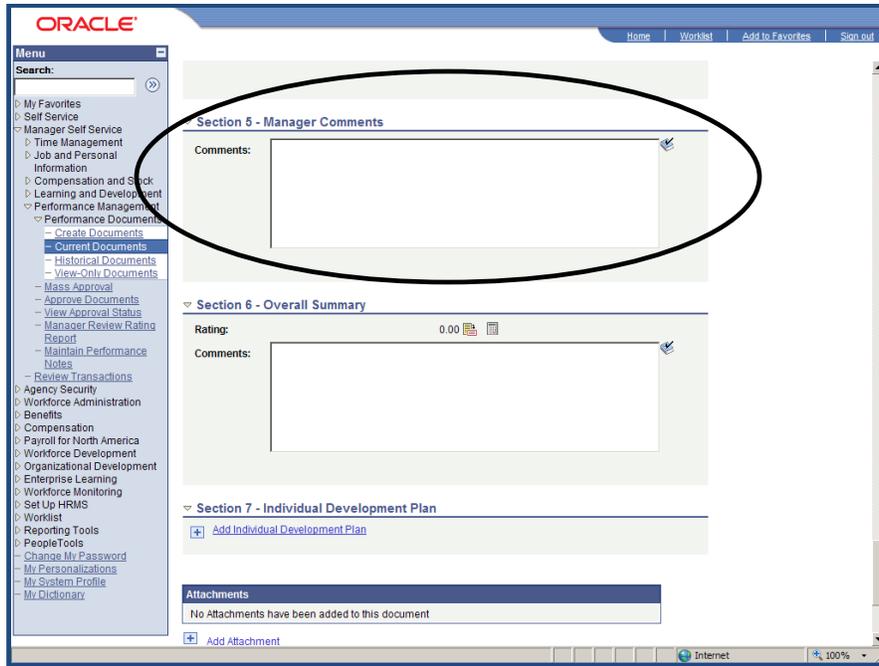
The system will display the Summary Rating for Section 1. Additional comments on the employee's performance against the competencies can be added to the Section 1 Summary box.

Step 12: Complete Step 10-11 for Sections 2 and 3 (based on sections identified by your agency)

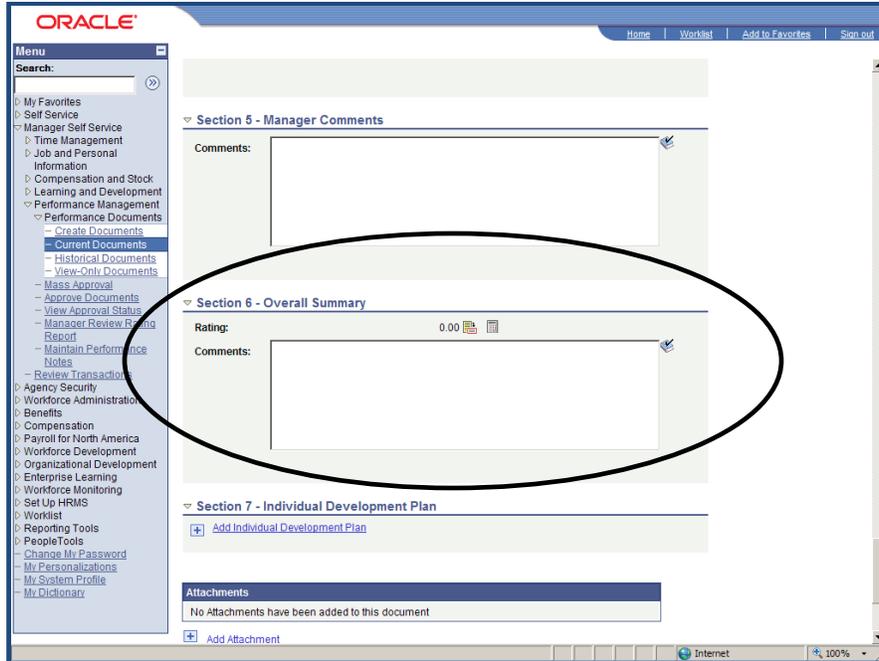
Note: If your agency is not using Sections 2 and/or 3 for those sections the rating should be N-Not Rated and the weight should be 0%. (See screen print below)



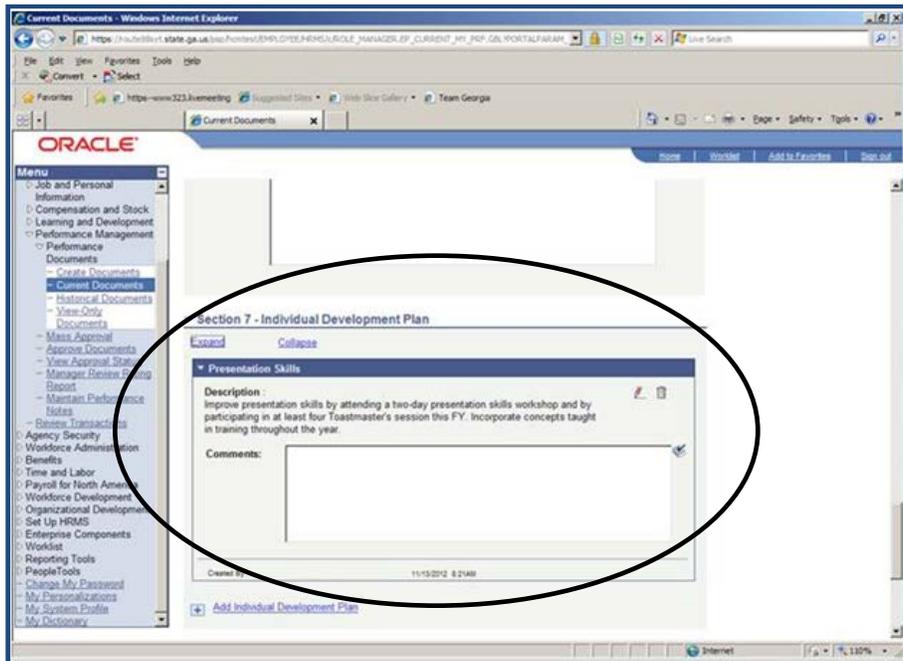
Step 13: After all section ratings and comments have been entered, enter overall Manager Comments for the review period.



Step 14: Enter Overall Summary comments for the review period

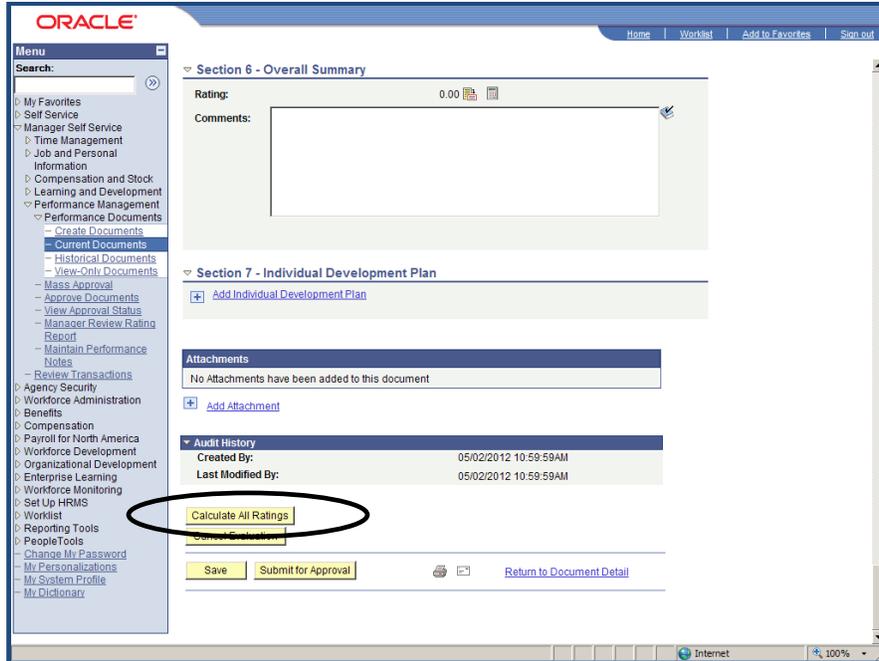


Step 15: If applicable, enter Individual Development Plan comments

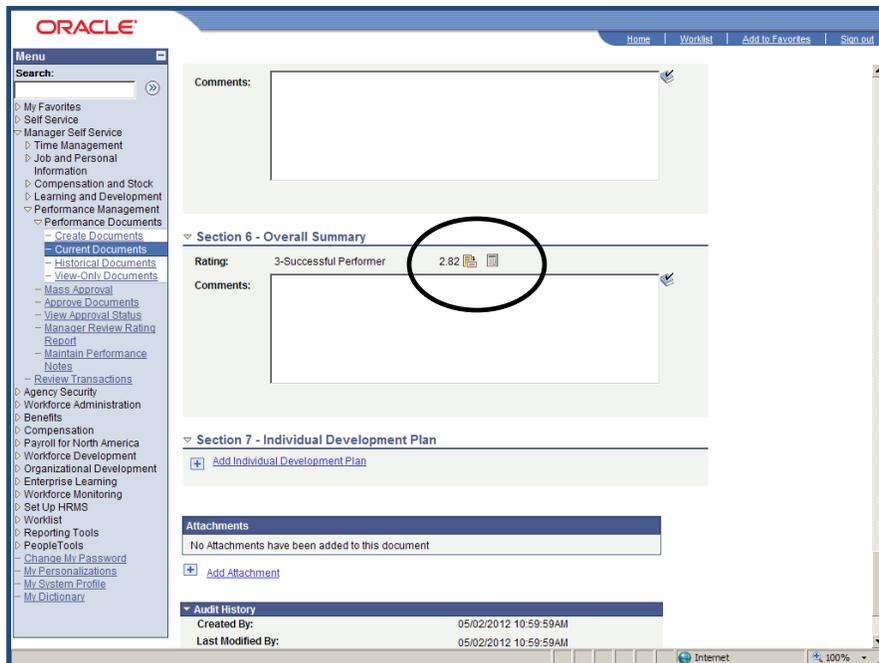


Note: This section is not weighted and will not be calculated with the employees overall performance evaluation rating.

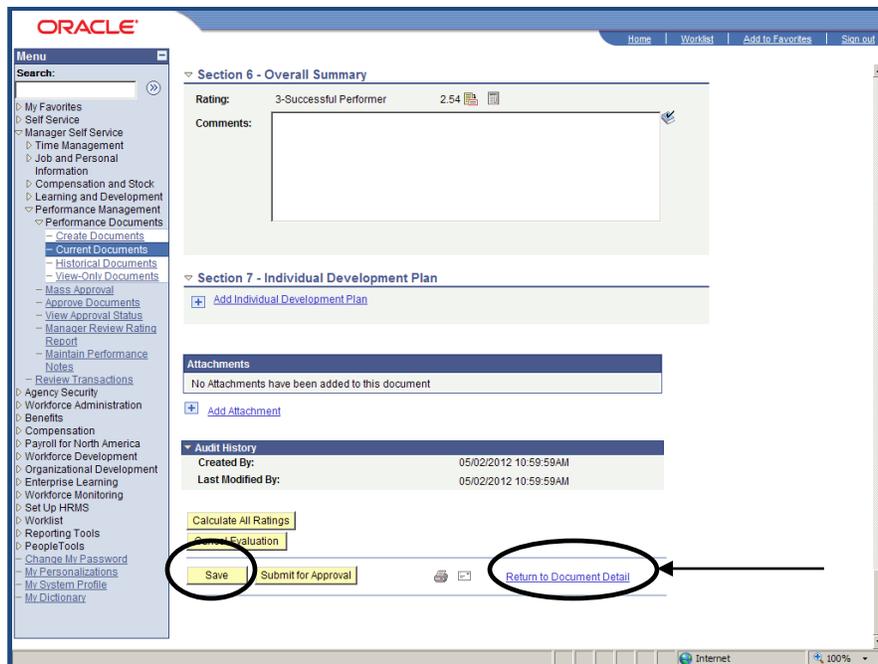
Step 16: Click the Calculate All Ratings button at the bottom of the page



Once you have clicked on the Calculate All Ratings icon, the employee's overall performance review rating will appear under Section 6 - Overall Summary (you may have to scroll back up the page).



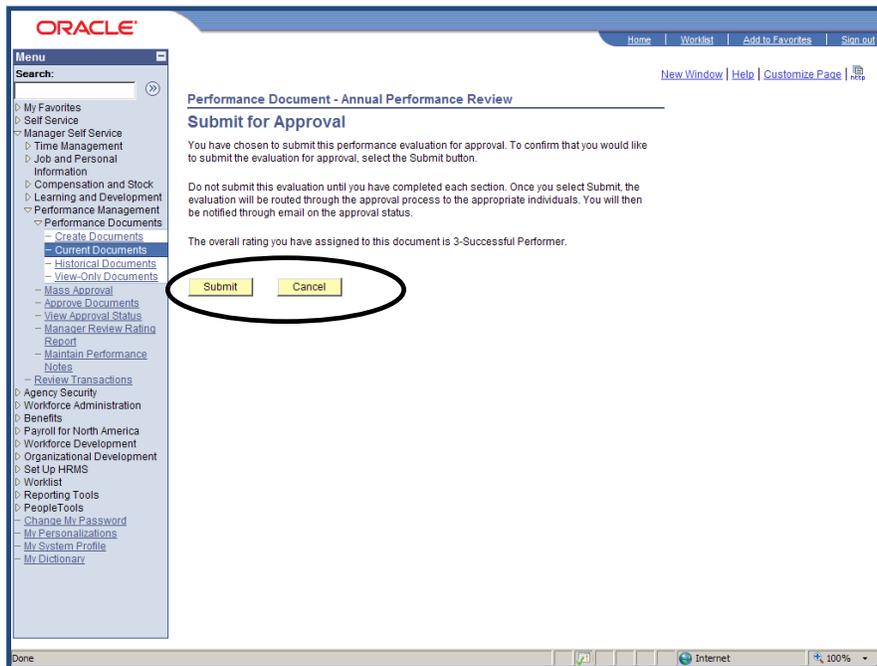
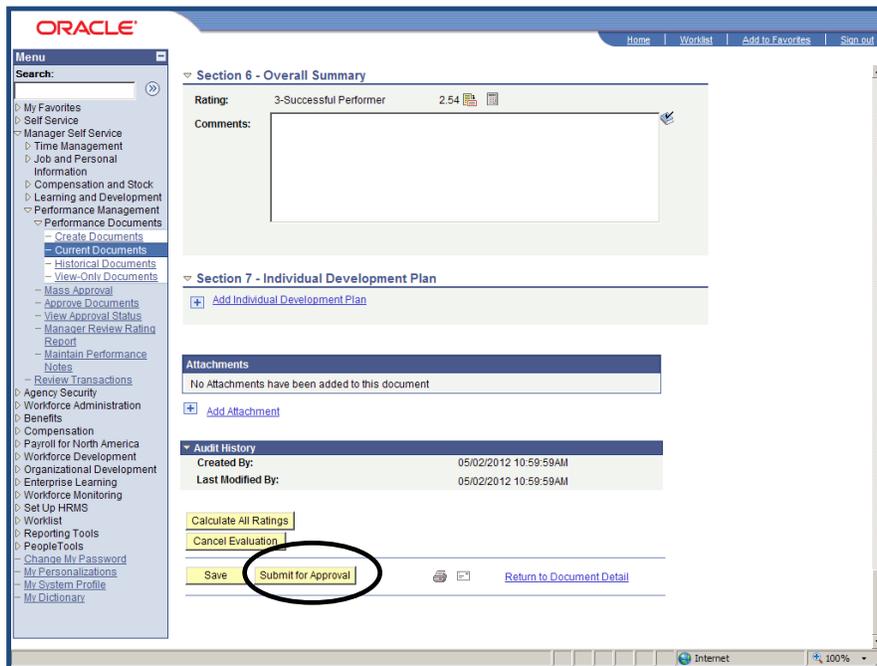
Step 17: Click the Save button



Once you have saved the performance document, you are still able to make additional edits to the document. If you are sure you have completed the evaluation, go to **Step 18**. If **you want to close the document and return at a later time to submit for approval**, then click on the **Return to Document Detail** link.

Note: If you choose to only “Save” the document, you can click on the “Edit” button at a later point in time to access the document in order to make additional edits.

Step 18: Click the “Submit for Approval” button.



You will be asked to verify that you are ready to Submit.

- If “Yes” click “Submit”
- If “No” click “Cancel” to go back to the document

An email will now be sent to the reviewing manager to alert them that the employee evaluation has been submitted for approval (see below).

From: Employee Self Service Email
Sent: Wednesday, October 24, 2012 11:21 AM
To:
Subject: Reviewing Manager Approval Needed.

This automatic notification is to alert you that the Annual Performance Review performance evaluation for _____ is ready to be approved. You may click on this link to go directly to the application: <https://route88syt.state.ga.us/psp/hcmtest/> (Please do not respond to this automatic notification.)

The reviewing manager will either approve or deny the evaluation. If the document is approved, it will be routed to the HR Admin for approval. If the document is denied, it will be routed back to the manager for editing.

Note: If you find that you need to edit the evaluation AFTER you have submitted for approval, you have two options:

1. Ask the reviewing manager to deny the evaluation. This will allow you to go back in the evaluation and edit it.
2. Call the HR Admin to have the evaluation reopened.