9.1 ePerformance

Completing the Employee Evaluation Up To the Approval Process – 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/psao/?cmd=login (Please do not respond to this automatic notification)
```

**Step 2:** Log into the Route 88 URL [https://route88.state.ga.us](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

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.

- 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

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

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)

![Screen print of Section 3 - Job Responsibilities](image1)

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

![Screen print of Manager Comments](image2)

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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).
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.