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COUNTY

Human Resources
EMACS

ePerformance

Department Administrator Tutorial

- What is ePerformance?
  - A new module in EMACS that replaces the current manual process of routing and completing Work Performance Evaluations (WPEs) using online approvals and electronic workflow.

- Document workflow
  - Manager to employee relationships are established using the existing eTime supervisor configuration.
  - Contact your department administrator to update eTime supervisor if needed.

- What if the person that approves my eTime is different from the manager that performs my WPE?
  - Department administrators will have the ability to reroute documents as needed

- Notification System
  - Managers and employees will be notified via email of upcoming evaluations (approx. 5 pay periods prior)

- What if the Performance Standards / Competencies do not align with the department's WPE template?
  - On the rating, select Meets Job Standards and in the Manager's Comments section indicate *Employee not evaluated in this category.*

ePerformance Document Lifecycle

Manager
- 1st Stop
- Document will be placed in manager's "Current Documents" queue for them to work
- Once complete, manager submits the document for approval to the reviewing official

Reviewing Official
- 2nd Stop
- Reviewing official has read-only access to review the document and either approves or denies the evaluation

Manager
- 3rd Stop
- Once approved by the reviewing official, the document is routed back to the manager for them to have a one-on-one meeting with the employee being evaluated
- After the one-on-one meeting, the manager can then share the document with the employee

Employee
- 4th Stop
- After the manager has shared the evaluation with the employee, the employee can now access the document via their "Performance" tile on the Employee Self Service homepage
- Once the employee has reviewed the document, they can formally acknowledge the document in ePerformance, completing the document's workflow

NOTES
- If an employee refuses to acknowledge the document, the manager has the ability to override the acknowledgment and specify the reason of the override
- If a document is denied by the Reviewing Official, workflow is reset, and the document is reopened for edits in the manager's queue
- Before a manager can share the document with the employee, the employee must formally acknowledge review of the *Policy Prohibiting Discrimination, Harassment and Retaliation* via their Performance tile
- Completed documents can be accessed in the "Historical Documents" queue in the Employee and Manager Self Service Performance tiles

When are documents created?

- Documents are created bi-weekly with the closing of each payroll cycle
- Using Go-Live PP08/2023 as an example:

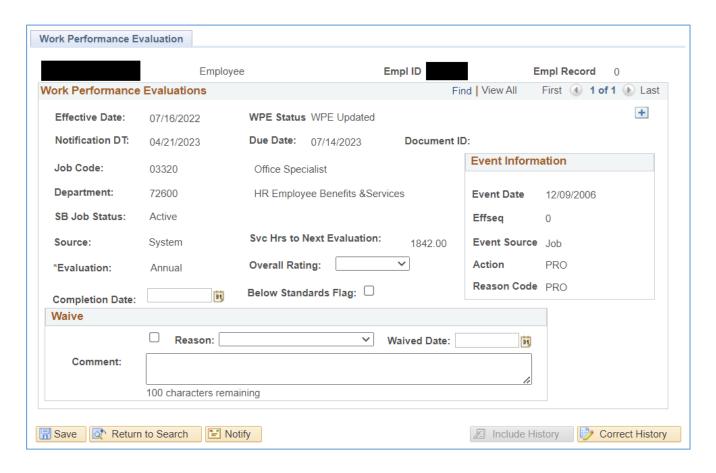# When is an ePerf department administrator needed?

- Viewing an evaluation's current status
  - In progress
  - Pending approval
  - Completed

- Create ePerformance documents

- Transferring a document from one manager to another

- Canceling a document when the evaluation is not needed (4th Pay Period Probationary evaluations, etc.)

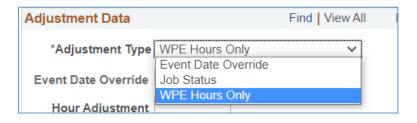- Confirming the configuration of the department's eTime supervisor setup

Redesigned *Employee Evaluation* Page
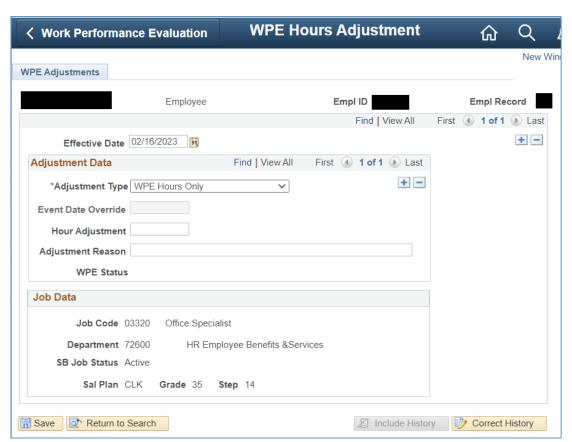
- New Features
  - Redesigned layout
  - Automated updates triggered by ePerformance evaluation progress
    - Due date changes
    - Completion date population
    - Waive information population
  - Added additional fields to assist with employee research
    - Event date
    - Event action
    - ePerformance Document ID
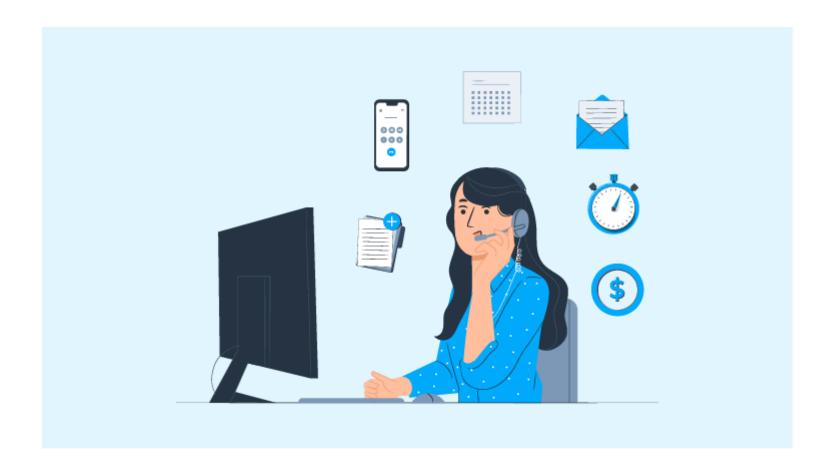   - Service hours to next evaluation

New *WPE Hours Adjustment* Page

- Easy WPE hour and date adjustments
  - Event Date Overrides
  - Job Status Hour Adjustments
  - WPE Hour Adjustments
    - Both positive and negative values accepted
- The new and improved process will look here for any employees that require these types of adjustments and update their evaluation criteria accordingly
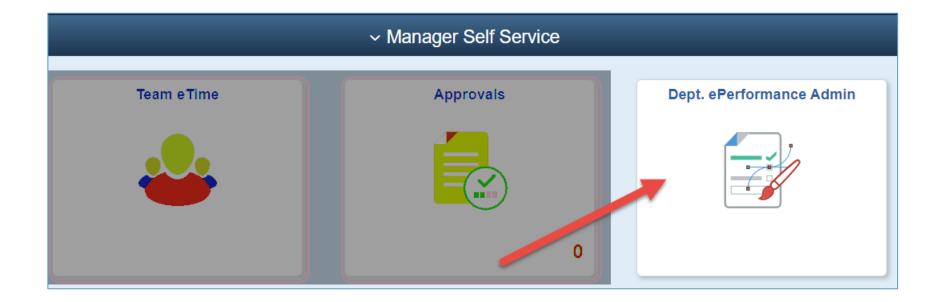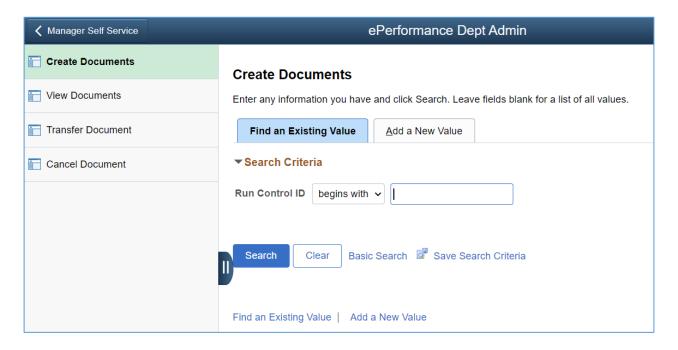
Department ePerformane Admin Tile

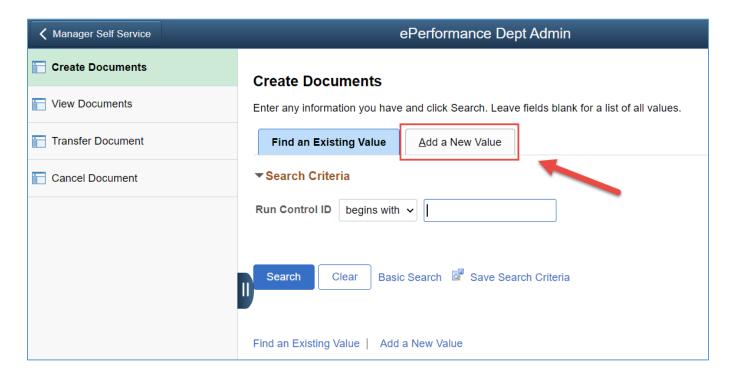- Navigation: Manager Self Service Home Page > Dept. ePerformance Admin tile

Create Documents

- When will documents need to be manually created?
  - If the department would like to evaluate any of the following:
    - Extra-help employees
    - Recurrent employees
    - Contract employees
  - When a manager would like to perform a "Special" evaluation
  - In all other instances, the automated process will create documents for applicable employees with the closing of each payroll cycle
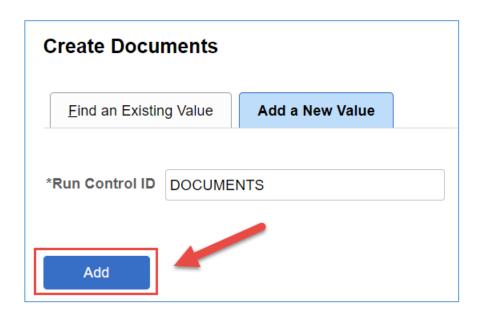
- Navigate to the Create Documents page
  - Manager Self Service Home Page > Dept. ePerformance Admin tile
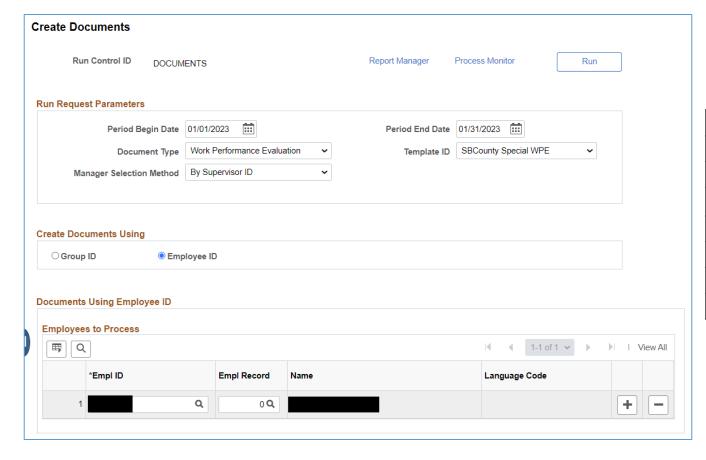- Select *Create Documents* (this will be the default page when entering the tile)

- If this is your first time creating a document, you will need to create a Run Control ID
- Select *Add a New Value*:

Create Documents – Step 3

- Give the Run Control ID a name. You will only have to do this one time. This will save your document preferences on the following page for easy use going forward.
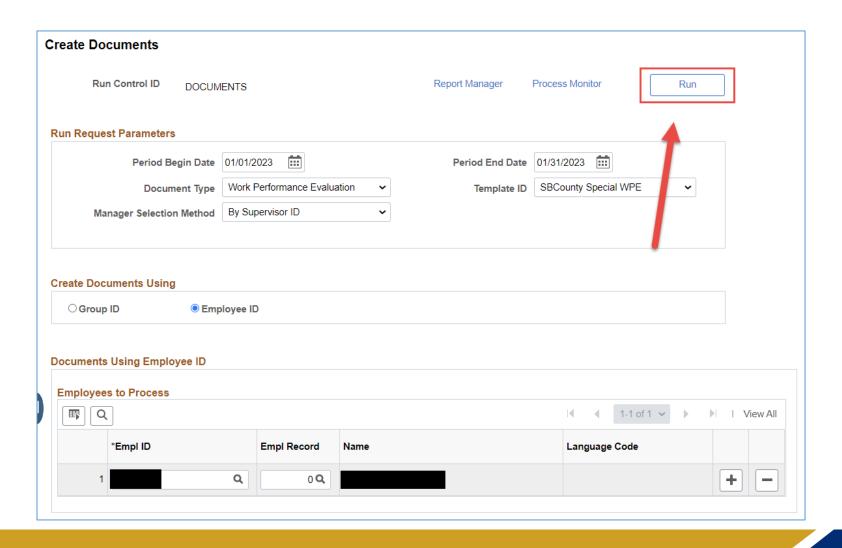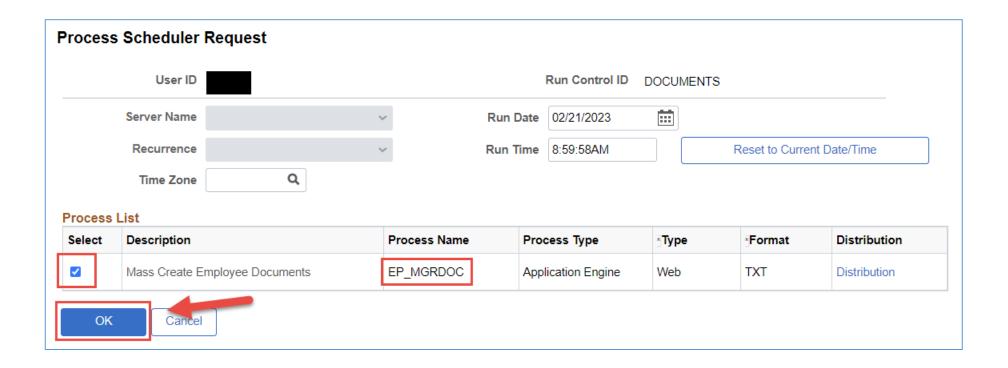
- Select *Add*

Document Parameters

Create Documents

Run Control ID   DOCUMENTS   Report Manager   Process Monitor   [Run]

Run Request Parameters

Period Begin Date 01/01/2023	Period End Date 01/31/2023
Document Type Work Performance Evaluation	Template ID SBCounty Special WPE
Manager Selection Method By Supervisor ID	

Create Documents Using

○ Group ID   ● Employee ID

Documents Using Employee ID

Employees to Process

1-1 of 1   View All

	*Empl ID	Empl Record	Name	Language Code		
1	▮▮▮	0	▮▮▮		+	−

Required Fields

Field	Criteria
Period Begin Date	WPE Begin Date
Period End Date	WPE End Date
Document Type	Work Performance Evaluation
Template ID	Evaluation Type
Manager Selection Method	By Supervisor ID
Create Documents Using	Employee ID
Employees to Process	Employee ID

Create Documents – Step 5

- Select *Run*

Create Documents – Step 6
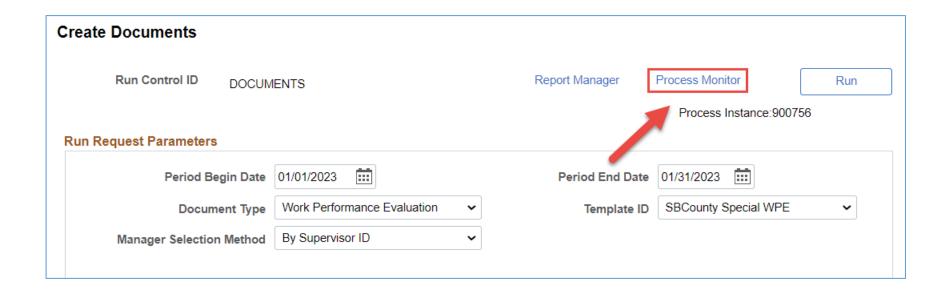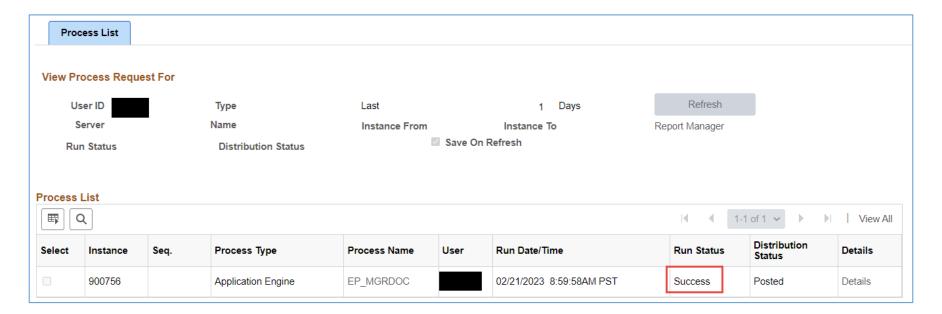
- Make sure the EP_MGRDOC process is selected on the following page:
- Select *OK*

- Select the *Process Monitor* link to monitor the status of the submitted request

Create Documents – Step 8

- Once the document is created, the Run Status will display as "Success"
- The employee and Manager will both be notified via email that a new document is ready for them in their Current Documents queue
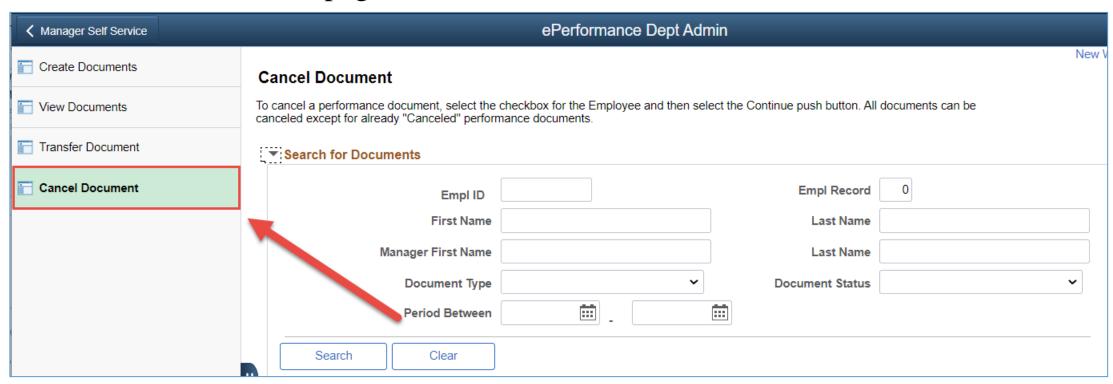- Exit the page

Cancel/Waive Documents

- When will documents need to be canceled/waived?
  - 4th pay period probationary evaluation not required
  - Employee no longer in the classification/department
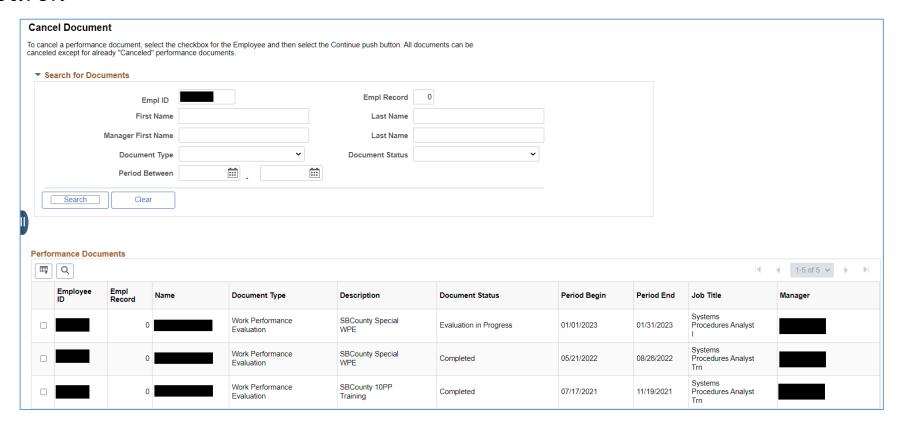 - Document was manually created by mistake

- Navigate to the Cancel Document page
  - Manager Self Service Home Page > Dept. ePerformance Admin tile
- Select *Cancel Document* page

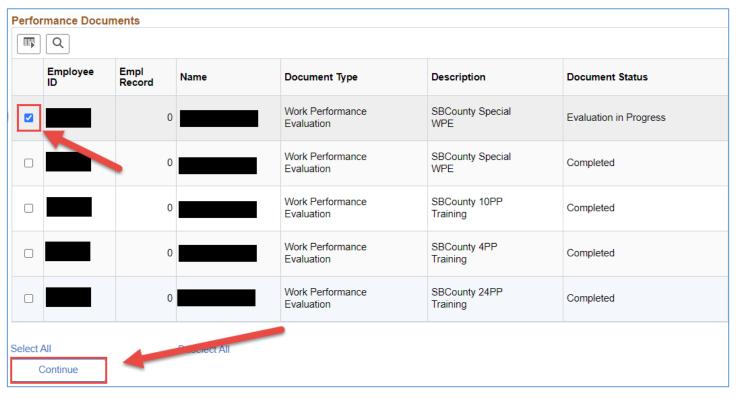# Cancel Documents – Step 2

Page 21

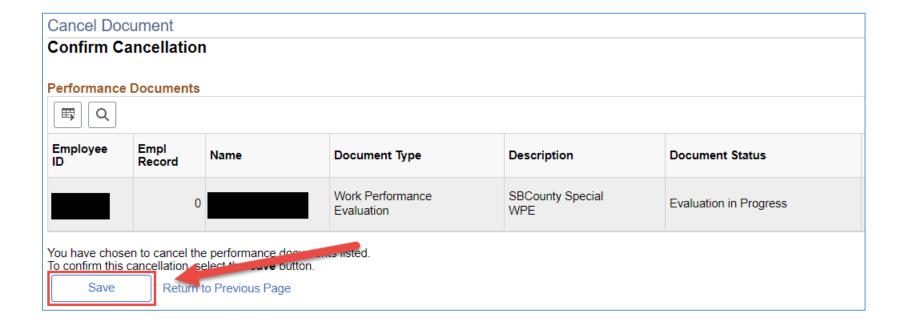- Enter Employee ID of the individual that needs their document canceled
- Select *Search*

- Select the document you wish to cancel
- Select *Continue*

- Confirm Cancellation
- Select *Save*

- When you search the employee on the View Documents page, the status will now show Canceled and no longer appear in the manager or employee's Current Documents queue

Performance Documents

Employee ID	Empl Record	Name	Document Type	Description	Document Status	Period Begin	Period End
██████	0	██████	Work Performance Evaluation	SBCounty Special WPE	Canceled	01/01/2023	01/31/2023

Transfer Documents

- When will documents need to be transferred?
  - When the eTime supervisor is not the individual who performs the employee's evaluation
  - When the document is in one manager's queue but needs to be completed by another individual
- Note
  - Document transfers can only be done for the first level managers. When the reviewing official needs to be transferred after a document has already been submitted for approval, please email the EMACSDevelopmentTeamRequests@hr.sbcounty.gov inbox for assistance:
    - In your email, include:
      - Subject line: ePerformance Approval Transfer Request
      - Body of email:
        - Document ID (found in the document's header)
        - Employee's name and ID (employee being evaluated)
        - Old approver's name and ID
        - New approver's name and ID

Transfer Documents – Step 1

- Navigate to the Transfer Document page
  - Manager Self Service Home Page > Dept. ePerformance Admin tile
- Select *Transfer Document* page

- Enter Employee ID of the individual that needs their document transferred
- Select *Search*

Transfer Documents – Step 3

- Select the document you wish to transfer
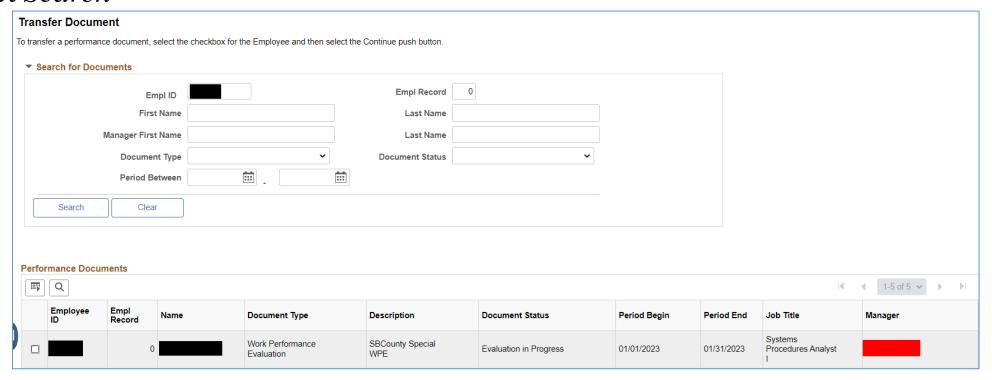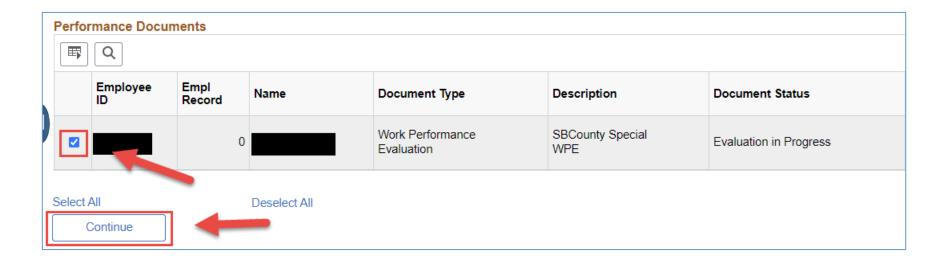- Select *Continue*

- Click the *Select a Manager* link

- Enter new manager's name
  - It is easiest to search using a combination of the last name and first name search fields
- Select *Search*

- Verify the new manager's employee ID and name are displayed
- Select the new manager, and click *OK*

Transfer Documents – Step 7

- Confirm the new manager's name is under the New Manger ID section of the following page
- Select *Save*

- After saving the page and re-searching the employee, the new manager's name will now appear as the Manager for the employee's ePerformance document
- The new manager will be notified via email that the document has been transferred to them

- When will I need to search for documents?
  - Manager unable to locate a document assigned to them
  - View the status of the evaluation
  - Assist the department with normal on-going evaluation questions

- Navigate to the View Documents page
  - Manager Self Service Home Page > Dept. ePerformance Admin tile
- Select *View Documents* page
  - Page will open in a new tab

View Documents – Step 2

- Enter search criteria of the employee
- Select the name of the employee
  - The name is a link to the evaluation document

Job Status Automation

- Job Status changes (probationary to active) are now automated
- No paper form is required by the department to change the probationary status of an employee to active, unless the employee had their probation extended
- Once the employee reaches the required service hour threshold per their job classification / MOU requirements, their job status will be automatically changed from probationary to active
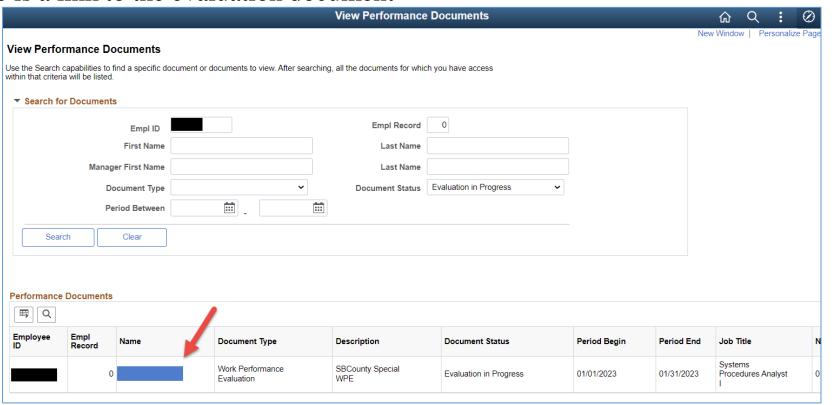- This automated process will run biweekly when we process each payroll cycle
- A PDF summary report will be distributed to your department detailing the changes made
- Dual fill employees can now be classified as both dual fill and probationary/training/active at the same time
  - Dual fill moved to new field on job data called "Position Status"

Job Status Automation Report Example

```
Report ID:  SBWP006                        County of San Bernardino - EMACS H92TST              Page No.  305
                                                  PROBATION TO ACTIVE REPORT                     Run Date 09/13/22
                                             Pay Period End: 05/21/21 Run ID: W11                Run Time 08:26:53
Department: 45204     CS Loma Linda Operations                                                   HPDL0121

                                   Probation    Probation    Total      Hours     Adjusted    Active
Emplid    Seq#    Name             Start Date    Hours       Hours      Worked     Hours       Date       Message
████████████████████████          11/21/2020   1,040.00   1,040.00   1,040.00      0.00     05/22/2021
```
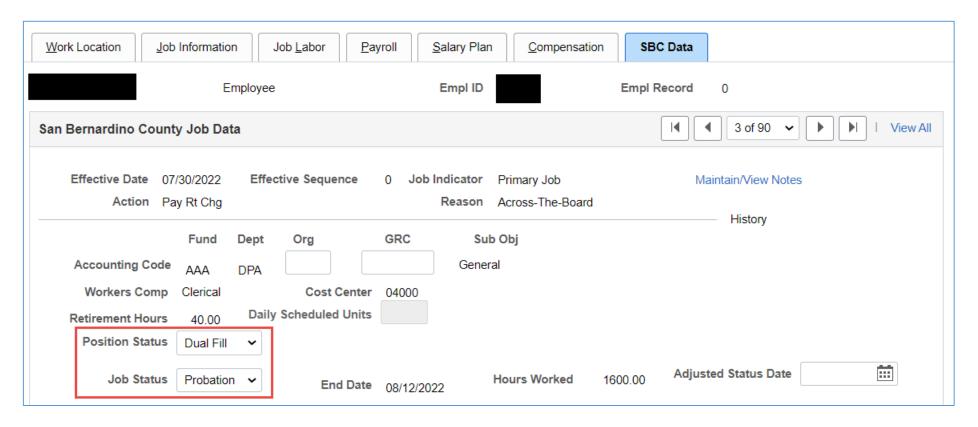
- A DTA/STC job data row will be inserted at the employee's job data reflecting the status change
- If an employee has had their probation extended, adjusted event date, or hours entered, they will also be noted on this report
- Once an employee's probation has been extended, a paper form will be required to change them to active status
- Job Status changes will be effective the pay period following the pay period they reach the required service hour threshold

- Employees can now be flagged as both dual fill and probationary/training/active
- Dual fill has moved to the new Position Status field on Job Data

- By default, when an employee is flagged as both dual fill and probationary, all hours will count towards their WPE's

- If a department were to choose not to allow the employee's hours worked in the dual fill position to count towards their WPE, an *ePerformance / Auto Wage Progression Adjustment Request* form must be submitted to reduce their hours worked in the dual fill position
  - See next slide for form details

Paper Forms

When are paper forms needed?

- Probation Extension
  - Form required in order to ensure a probation extension is keyed before the employee reaches their service hour threshold for active status
  - Form required when employee with an extended probation needs to be changed to active status
- Waive Probation
  - Form required when an employee's probationary period is waived and they can be moved to active status early, prior to meeting their required service hour threshold
  - Continue to use Open Work Performance Evaluations Report (SBBEN019)
- Service Hour Adjustments / Event Date Overrides
  - Form required if employee needs their WPE/Job Status hours increased or decreased
  - Form required if employee needs an adjustment to their event date
    - i.e., department requires a lateral transfer to serve a probationary period
- Submit all forms to the EMACS-HR team via normal processes
- LINKS TO ALL FORMS CAN BE FOUND VIA THE EPERFORMANCE FAQ TILE

Queries

- EPER_DOCUMENTS_DUE – prompts by dept ID and due date
  - Used to view documents by due date and research overdue evaluations
- EPER_COMPLETED_DOCUMENTS – prompts by dept ID and due date
  - Used to view completed documents
- EPER_CANCELED_DOCUMENTS – prompt by dept ID
  - Used to view canceled documents
- EPER_DOCUMENTS_BY_EMPLOYEE – prompt by employee ID
  - Used to view list of documents by employee and their statuses
- EPER_DOCUMENTS_BY_PAYPERIOD – prompt by dept ID and pay period end date
  - Will display documents created for the pay period end date entered
  - Used to search for new documents