SAN BERNARDINO COUNTY

Human Resources
EMACS

ePerformance

Manager Tutorial

Overview

- 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 Walkthrough

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?

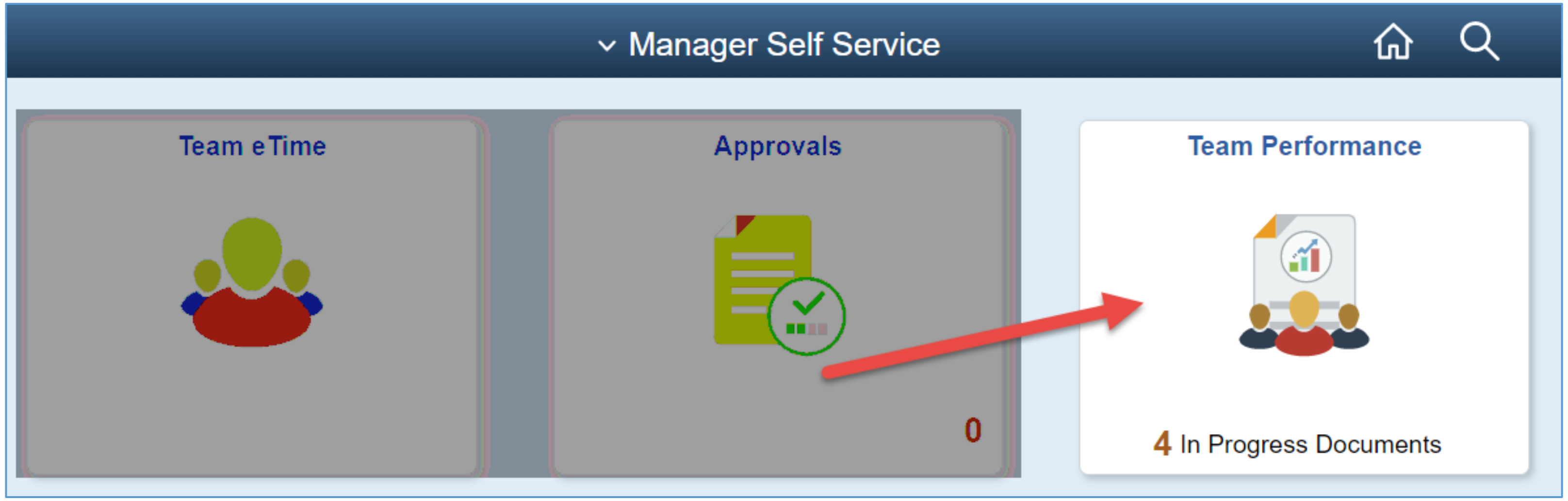
- Documents are created bi-weekly with the closing of each payroll cycle
- Using Go-Live PP08/2023 as an example:

MARCH						
S	M	T	W	Th	F	S
			1	DTA 2	H 3	4
5	6	P 7	Pay Day 8	9	End PP6 10	11
12	13	EE MGR 14	15	DTA 16	H 17	18
19	20	P 21	Pay Day 22	23	End PP7 24	Go - Live 25
26	27	EE MGR 28	29	DTA 30	H 31	
1st Quarter Ends PP6 (1–6)						

APRIL						
S	M	T	W	Th	F	S
						1
2	3	P 4	Pay Day 5	6	End PP8 7	8
9	Processing PP08/2023 10	11	12	13	14	15
16	First Doc's Available 17	P 18	Pay Day 19	20	End PP9 21	22
23	24	EE MGR 25	26	DTA 27	H 28	29
30						

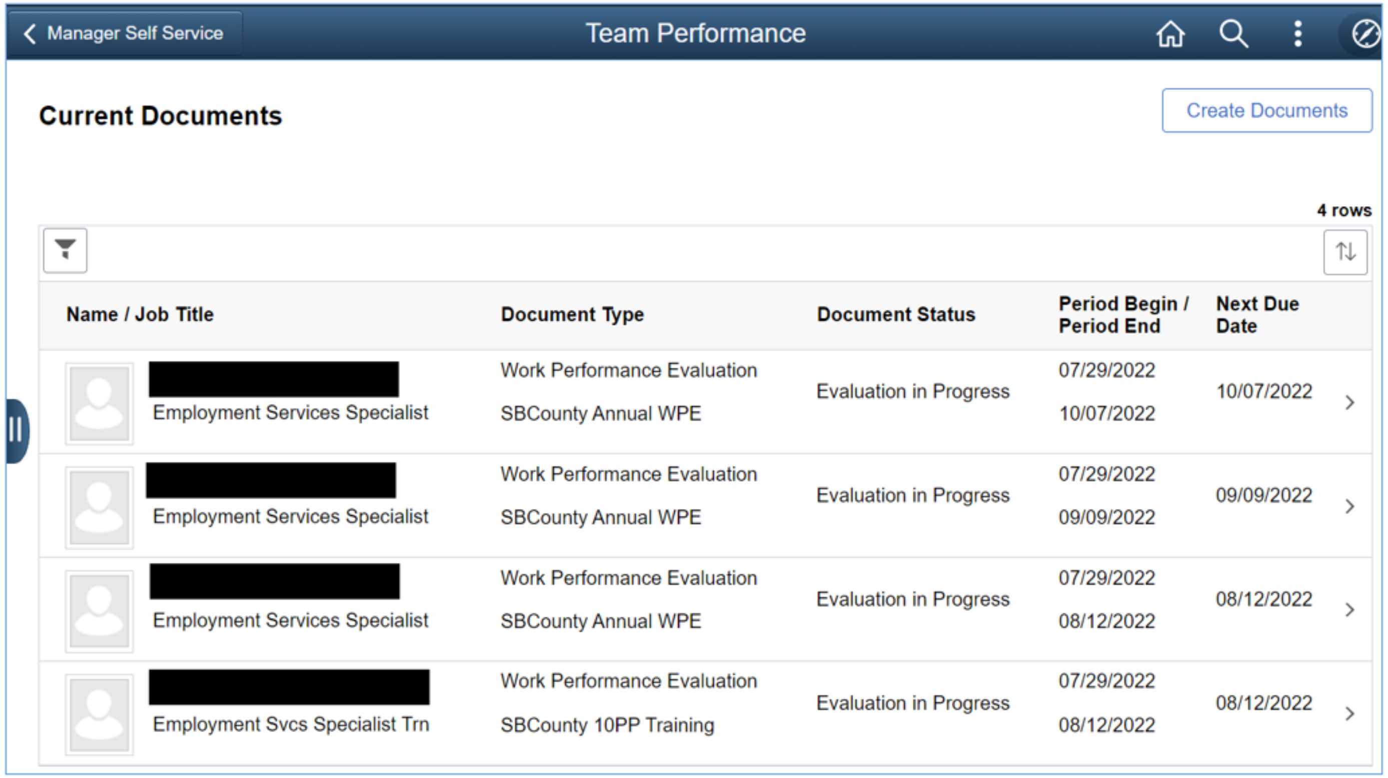
Step 1 – Navigating to a document

- New evaluations will be created bi-weekly with the closing of each payroll cycle (see next slide for example)
- Managers and employees will be notified via email when a new document is in their queue
- Navigation Path:
  - Manager Self Service Homepage > Team Performance Tile



Step 2 – Accessing the Document

- Navigation Path
  - Manager Self Service Homepage > Team Performance Tile > Select the employee from the Current Documents queue
- All outstanding documents of the manager's direct reports will appear in the "Current Documents" queue
- After a document has been completed, it will be moved to the manager's "Historical Documents" queue
  - Also found in the Team Performance tile



Step 3 – Completing Each Category

- Section – Performance Standards/Competencies
  - Prepopulated on every document
  - Ability to identify if the employee performs in a “Supervisor” capacity for additional rating items
  - Rating category must be selected
  - Manager comment is only required for ratings other than Meets Job Standards with one exception
    - If the item does not apply to the evaluation select Meets Job Standards and in the Manager’s Comments section indicate N/A: *Employee not evaluated in this category.*
- Section – Accomplishments for this Rating Period
  - Customizable, free form section
  - No ratings in this section
- Section – Goals for the Next Rating Period
  - Customizable, free form section
  - No ratings in this section
- Section – Action
  - Select the action being performed with this evaluation (step related, progress satisfactory, etc.)
  - A selection must be made in this section
- Overall Summary
  - Must provide an overall rating for the evaluation
  - A comment must be included
  - If the Performance Standards / Competencies are not being used to evaluate the employee, the department’s evaluation must be included as an attachment and referenced in this comments section by indicating *See attachment for full work performance evaluation.*

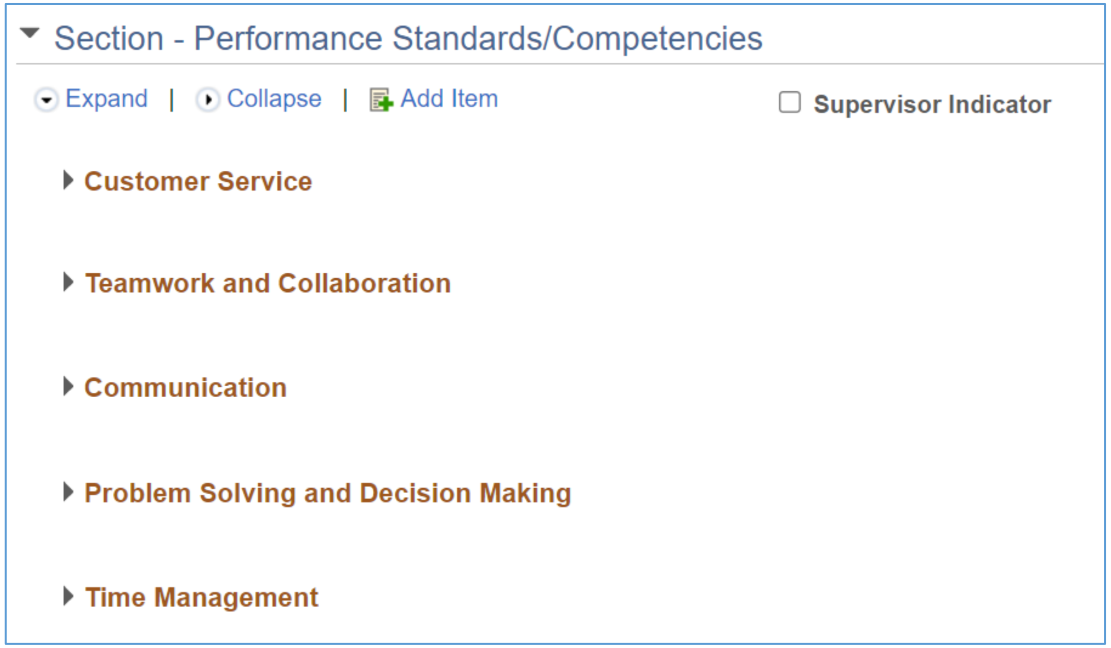
Completing an ePerformance Document

The following slides will be a step-by-step walkthrough of how to complete an ePerformance document

Section – Performance Standards/Competencies

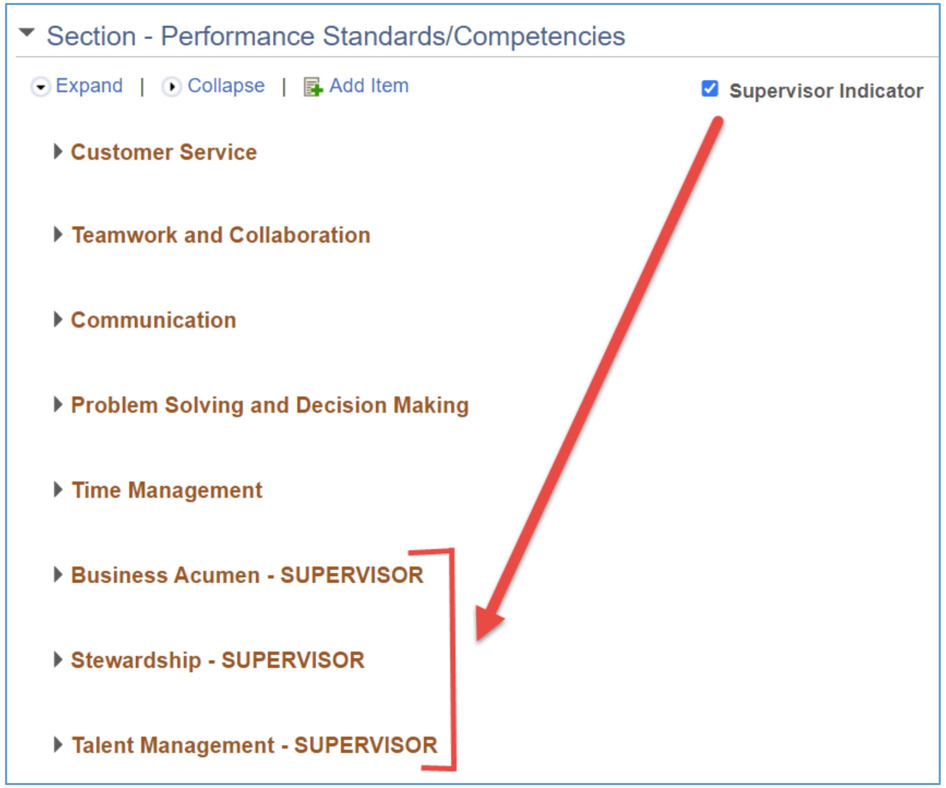
Default View

- Categories used to evaluate employees



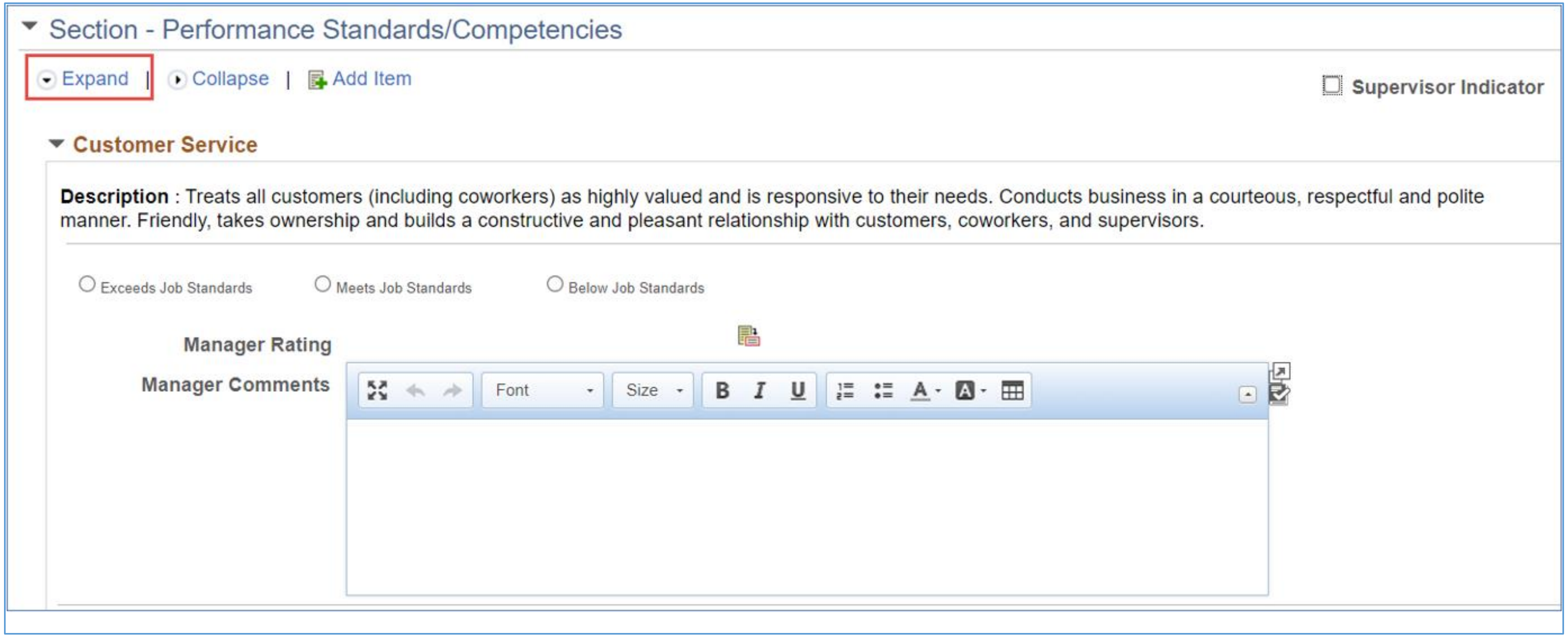
Supervisor Indicator On

- Additional categories to evaluate employees performing manager / supervisory duties



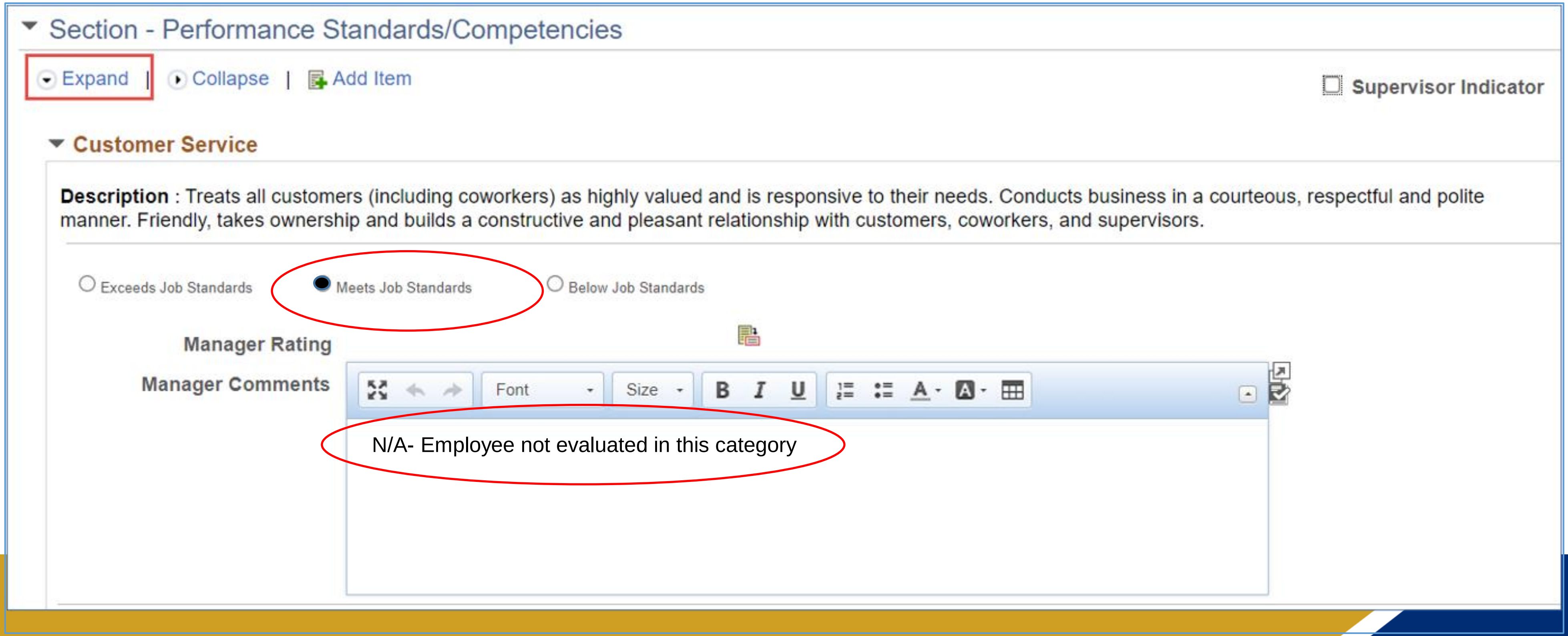
Step 1 - Select *Expand* to open each section:

- In order to open each category, select *Expand*



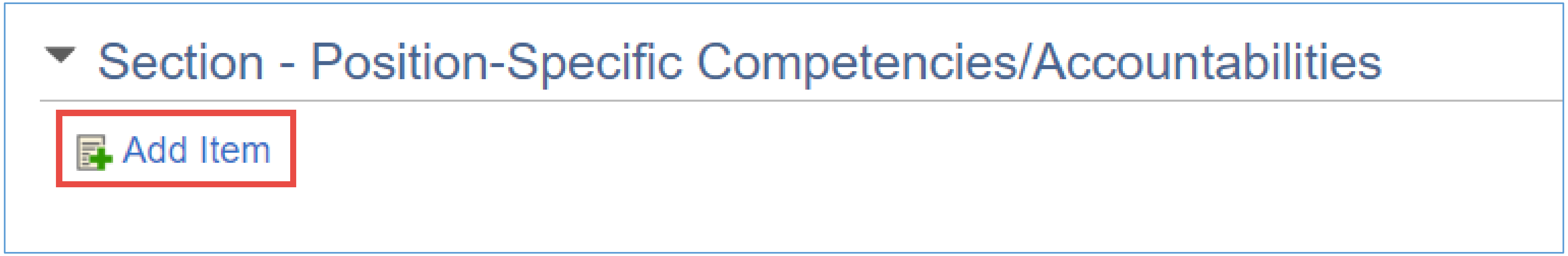
Step 2 – Rating and Manager Comments

- You will now be able to evaluate the employee on each item
  - A rating must be selected for all items in the Performance Standards / Competencies Section
  - Manager comment is only required for ratings other than Meets Job Standards with one exception
    - If the item does not apply to the evaluation select Meets Job Standards and in the Manager's Comments section indicate *N/A: Employee not evaluated in this category.*



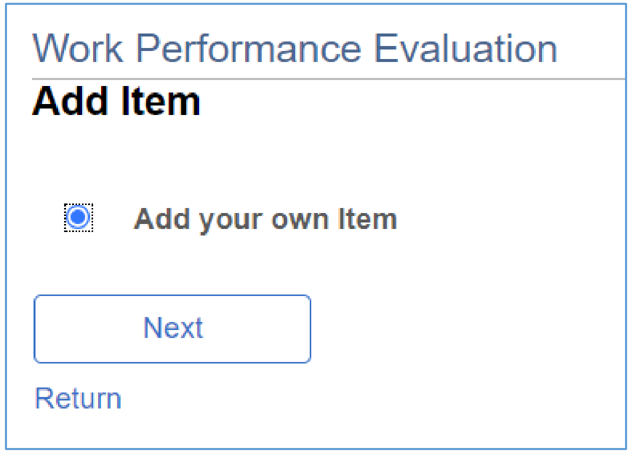
Step 3 - Completing Accomplishments for this Rating Period Section

- This section is optional and will be blank, unless a manager chooses to add their own items to share with the employee
- Items are not required in this section to complete the evaluation.
- Items in this section are not rated
- To include an item for review, select *Add Item*

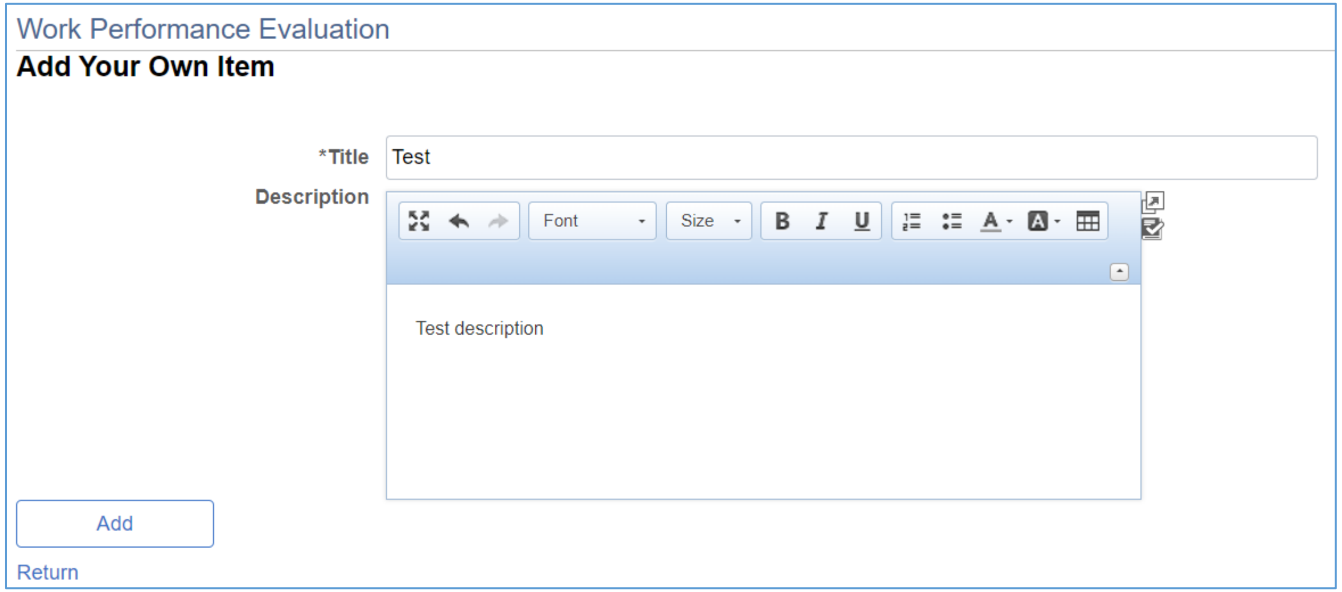


Step 4 – Adding an Item

- After clicking *Add Item*, select *Add your own item*, then hit *Next*

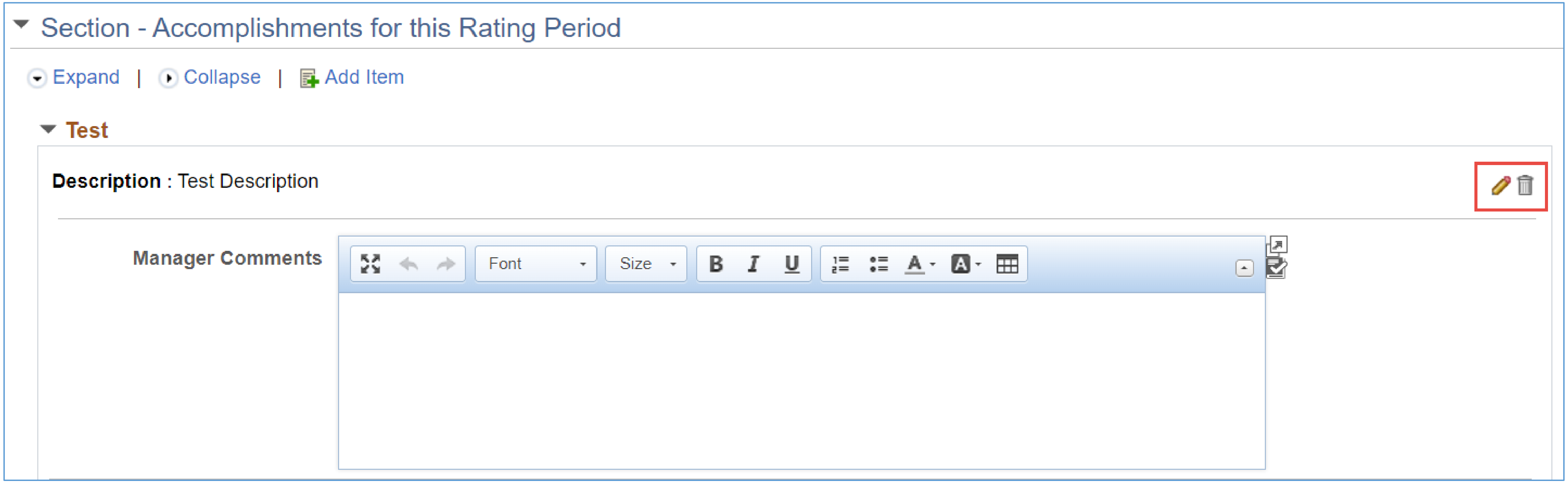


- You will now be able to specify the title and description of the item being added for review
- Once the title and description is completed click *Add*



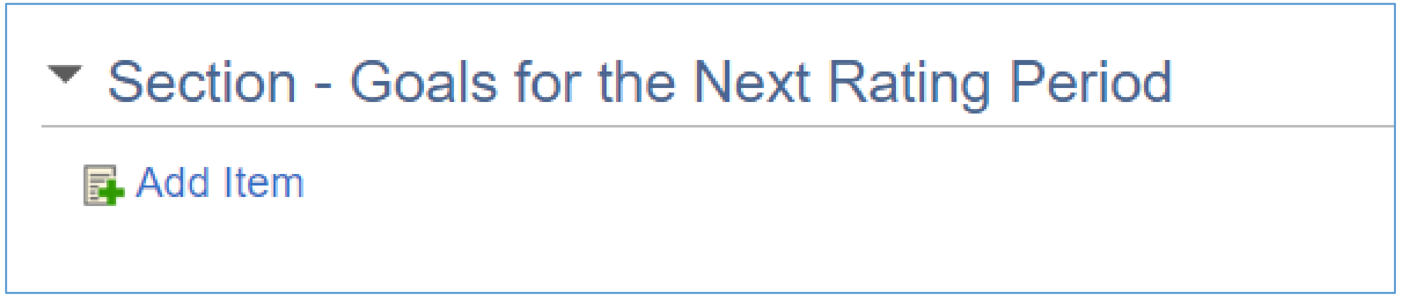
Step 5 – Add Item (cont.)

- Your item is now added to the document and will appear for review in this section.
- If you need to edit the item select the *pencil* icon
- If you need to delete the item select the *trashcan* icon



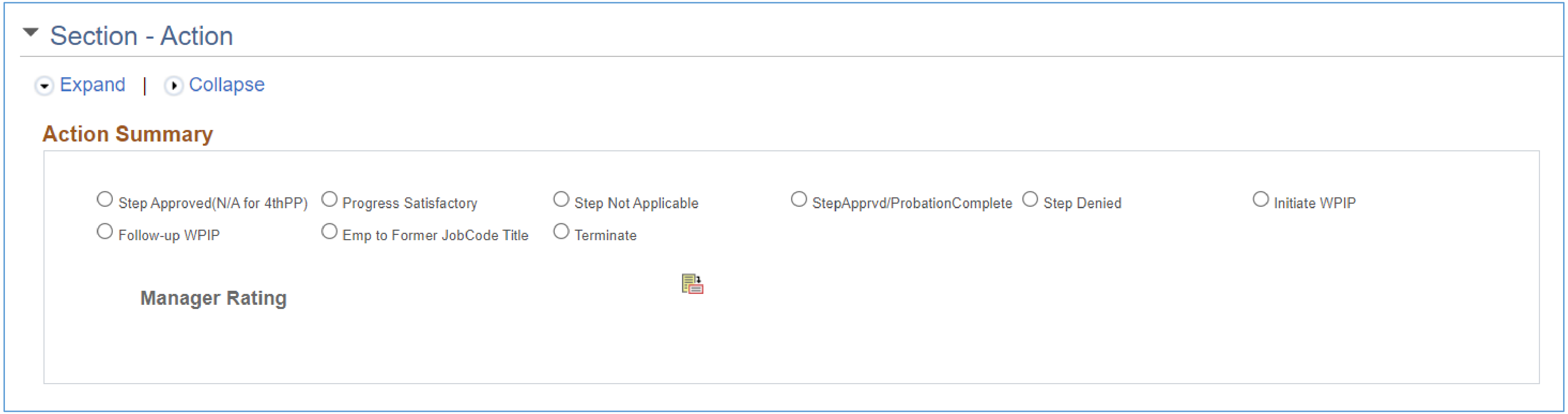
Step 6 – Completing Goals for the Next Rating Period Section

- This section is optional and will be blank, unless a manager chooses to add their own items to share with the employee
- Items are not required in this section to complete the evaluation.
- Items in this section are not rated
- To include an item for review, select *Add Item*
- Select *Add Item* and follow the steps in slides 14 and 15



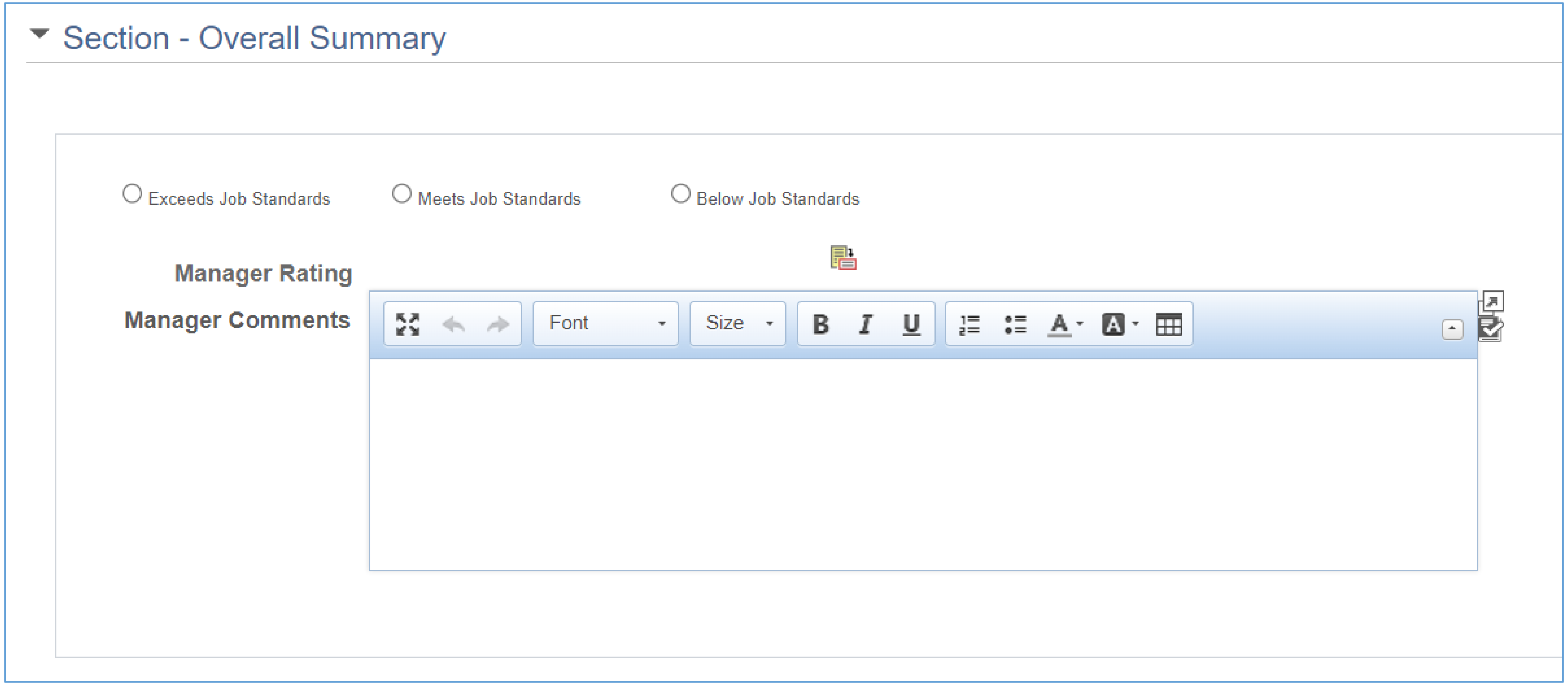
Step 7 – Completing Action Section

- Select the appropriate action for the evaluation that is being completed
- An action must be selected in order to complete the evaluation



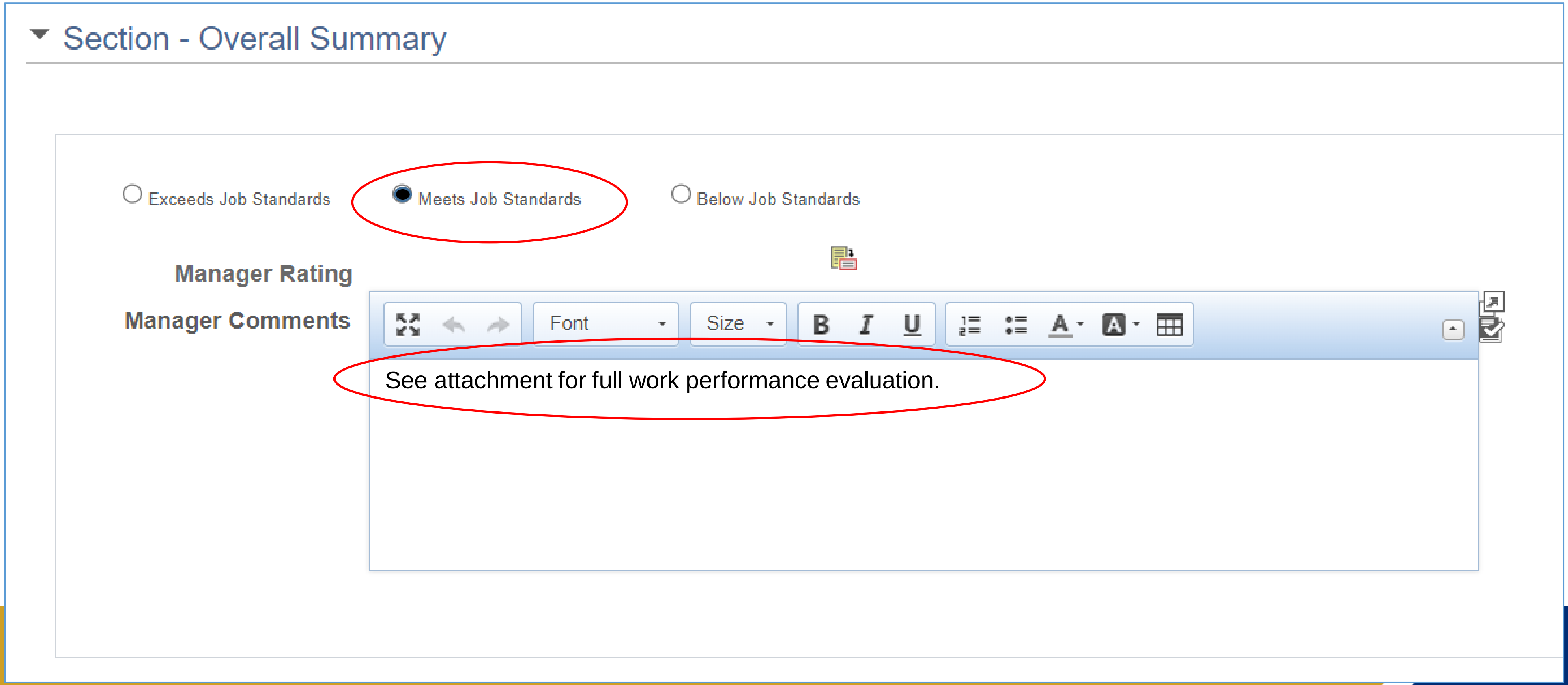
Step 8 – Completing Overall Summary Section

- Select an Overall Summary rating for the employee
- A manager comment is always required in this section



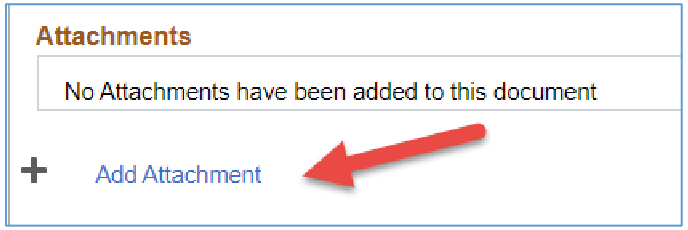
Step 8 – Continued

- If the Performance Standards / Competencies are not being used to evaluate the employee, the department's evaluation must be included as an attachment and referenced in this comments section by indicating *See attachment for full work performance evaluation.*

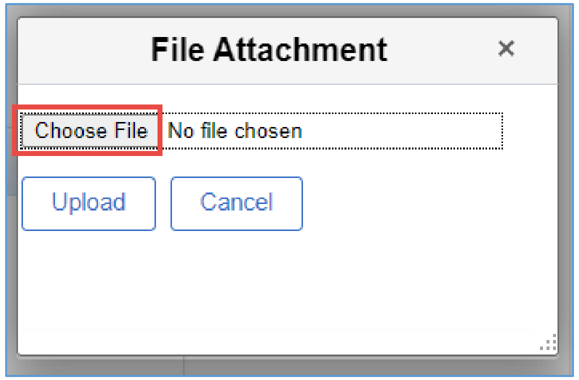


How to Add an Attachment

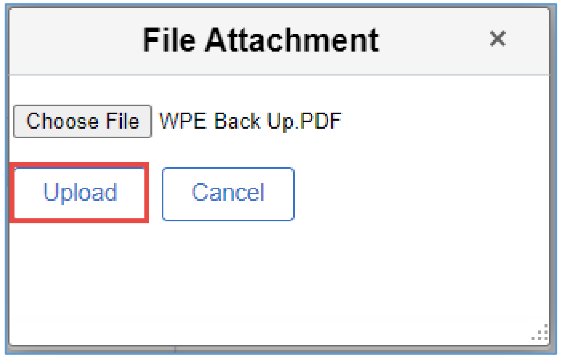
1. Click the *Add Attachment* link



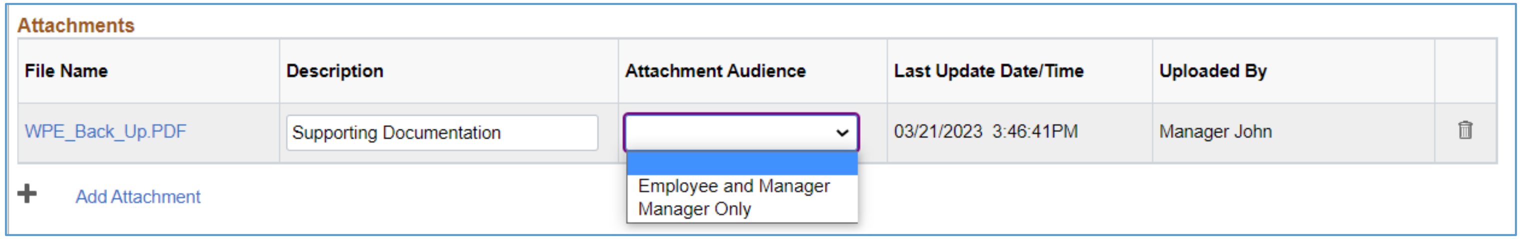
2. Click *Choose File* and select a file to upload



3. Select *Upload*

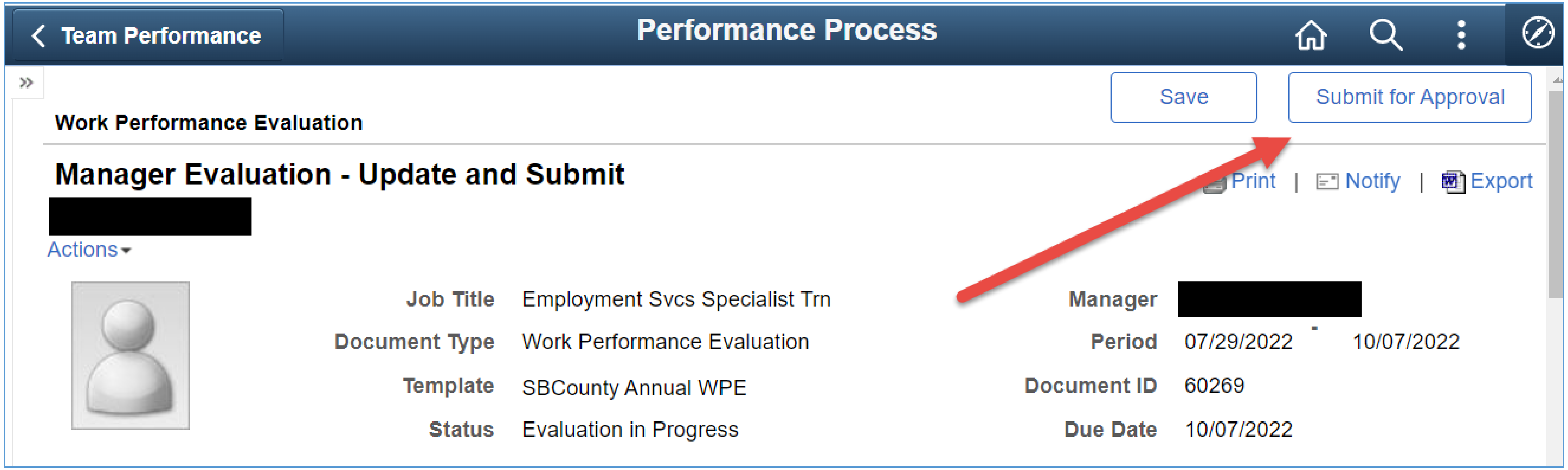


4. Give the attachment a description and choose who can view the attachment



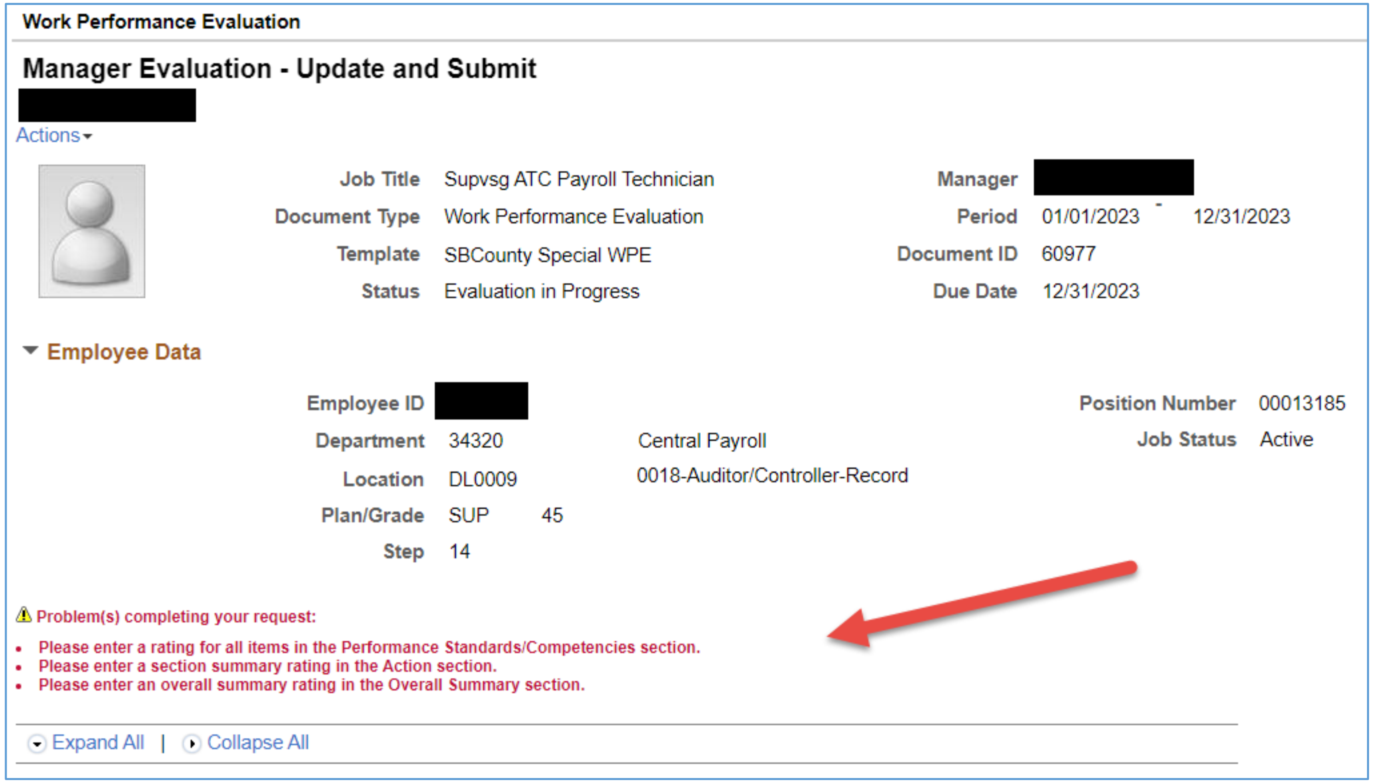
Step 9 – Submit for Approval

- Once each section of the document has been completed, it can be submitted for approval to the reviewing official
- Select the *Submit for Approval* button in the top right corner of the page



Step 9 – Continued

- If the document being submitted is not completed correctly, red error messages detailing the issues will appear in the header section
- Errors must be corrected before the document can be submitted for approval



Work Performance Evaluation

Manager Evaluation - Update and Submit

[redacted]

Actions

Job Title	Supvsg ATC Payroll Technician	Manager	[redacted]
Document Type	Work Performance Evaluation	Period	01/01/2023 - 12/31/2023
Template	SBCounty Special WPE	Document ID	60977
Status	Evaluation in Progress	Due Date	12/31/2023

Employee Data

Employee ID	[redacted]		Position Number	00013185
Department	34320	Central Payroll	Job Status	Active
Location	DL0009	0018-Auditor/Controller-Record		
Plan/Grade	SUP 45			
Step	14			

Problem(s) completing your request:

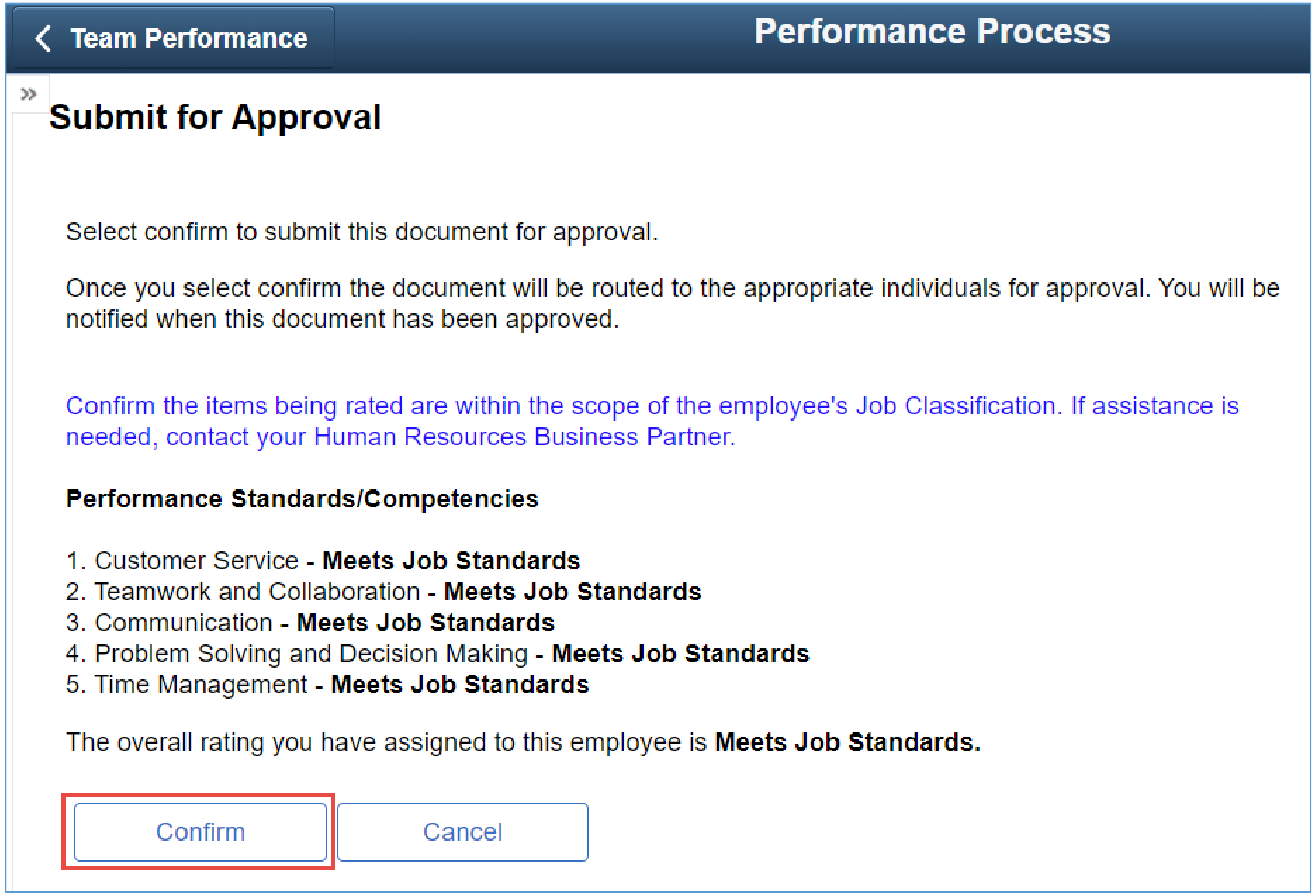
- Please enter a rating for all items in the Performance Standards/Competencies section.
- Please enter a section summary rating in the Action section.
- Please enter an overall summary rating in the Overall Summary section.

Expand All | Collapse All

Step 10 – Confirm the Document Submittal

- The confirmation page will display the rating selected for each item completed, and the overall rating of the employee.
- Select *Confirm*, if no further edits are required.

Note – Department Human Resources Business Partner (HRBP) will be notified via email for performance evaluations with an overall rating of Below Job Standards and/or an action of Extend Probation

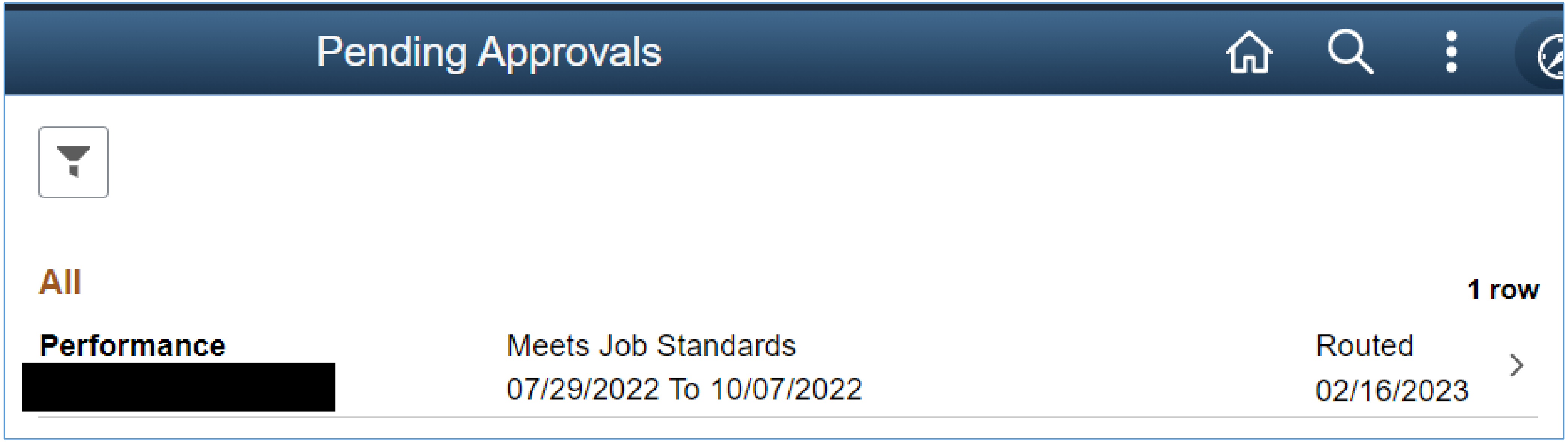


Step 11 – Approval/Denial by the Reviewing Official

- After the document has been submitted for approval, it will be routed to the reviewing official
- Reviewing Official will have view only access to the evaluation and cannot make edits to the document. See slide 29 if edits are necessary.
- The pending document will be located in the reviewing official's *Approvals* tile on the Employee Self Service Homepage:

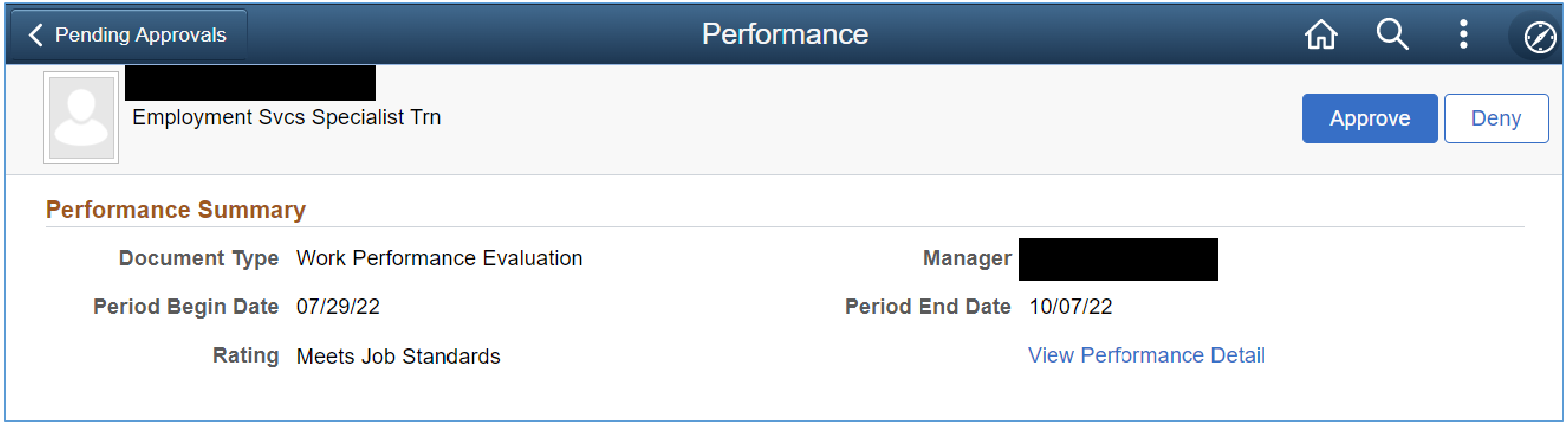
Step 12 – Select the Pending Approval

- After selecting the Approvals tile, a summary of the evaluation will appear with the employee's name, and the evaluation begin and end dates
- To review the evaluation, select the employee:



Step 13 – Approve/Deny the Document

- After selecting the employee, a performance summary will be displayed with a link to view the performance evaluation document
- The link will take you to a view only copy of the document for review
- The reviewing official can choose to Approve or Deny the document
- If the document does not require any further edits, select *Approve* in the top right corner of the page and it will be routed back to the manager performing the evaluation

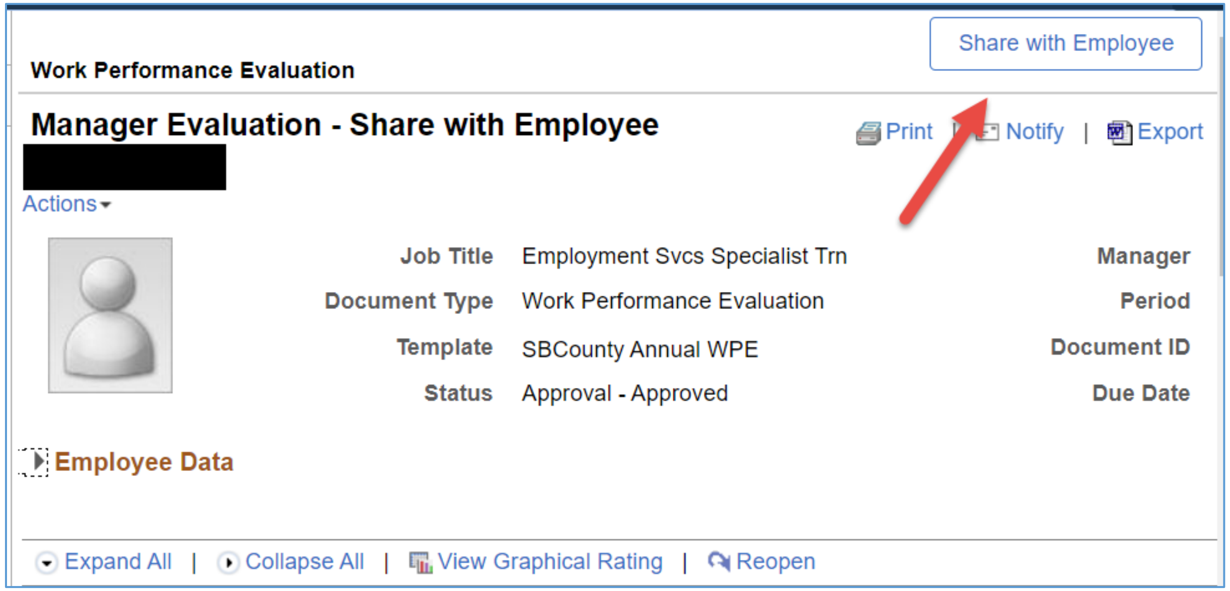


Step 14 – Document is Routed back to the Manager

- If the reviewing official denies the document, it will reset the workflow and sent back to the manager's queue for edits
- In order for the manager to access the evaluation they will need to navigate back to the Team Performance tile on the Manager Self Service homepage, and select the employee (see slide 6 for navigation path)
- After all edits are completed, the document will need to be resubmitted for approval to the reviewing official (see slides 21 – 23)
- Once approved by the reviewing official, the document is now ready to be reviewed with the employee

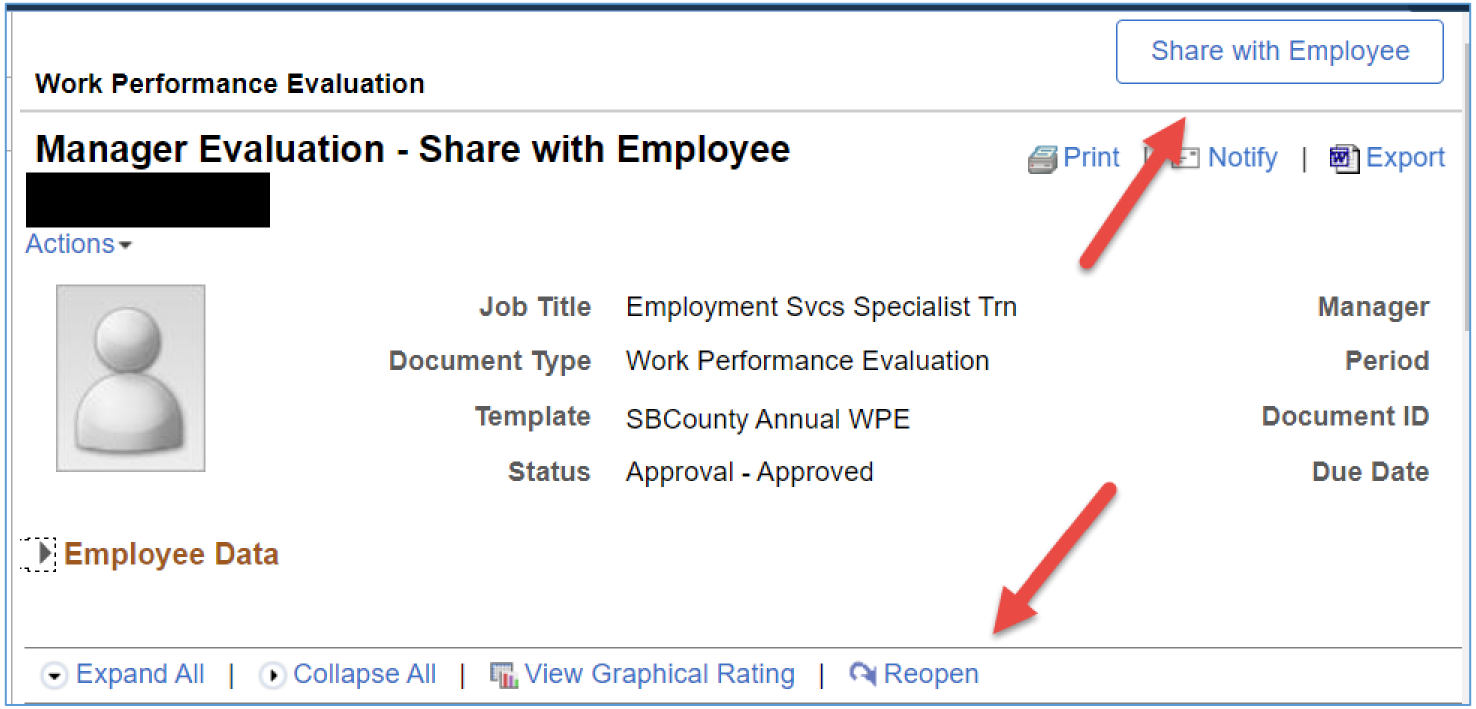
Step 15 – Share the Document with the Employee

- Before the evaluation can be shared with the employee, the manager **MUST** review the evaluation with the employee **PRIOR** to sharing the document
  - When you share the document, you will be asked to acknowledge that you have reviewed the evaluation with the employee
- To share the document with the employee, navigate back to the Team Performance tile on the Manager Self Service homepage (see slide 6)
- Select the employee, and click the *Share with Employee* button on the top right corner of the page



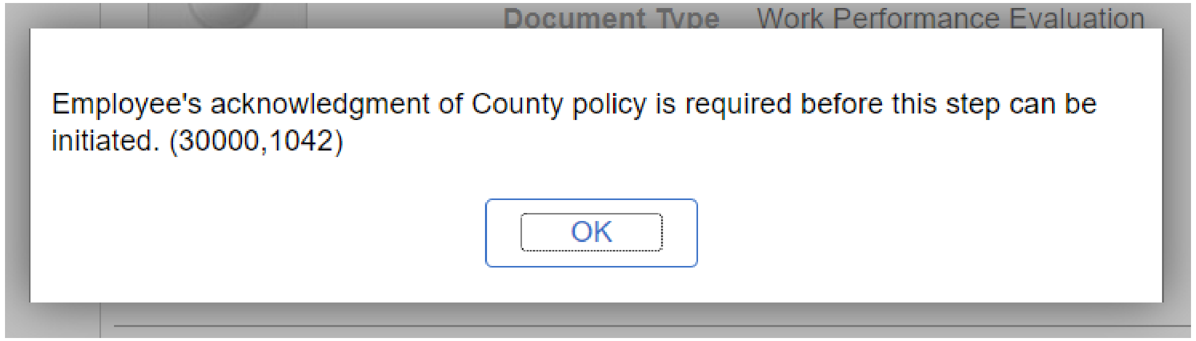
Note – Reopening a Document

- At any time before the employee acknowledges the evaluation, the document can be reopened and edited
- Reopening a document resets the workflow and must be resubmitted for approval



Warning Message

- If you have selected to share the evaluation with the employee and receive the following message, the employee has not acknowledged review of the *Policy Prohibiting Discrimination, Harassment and Retaliation*



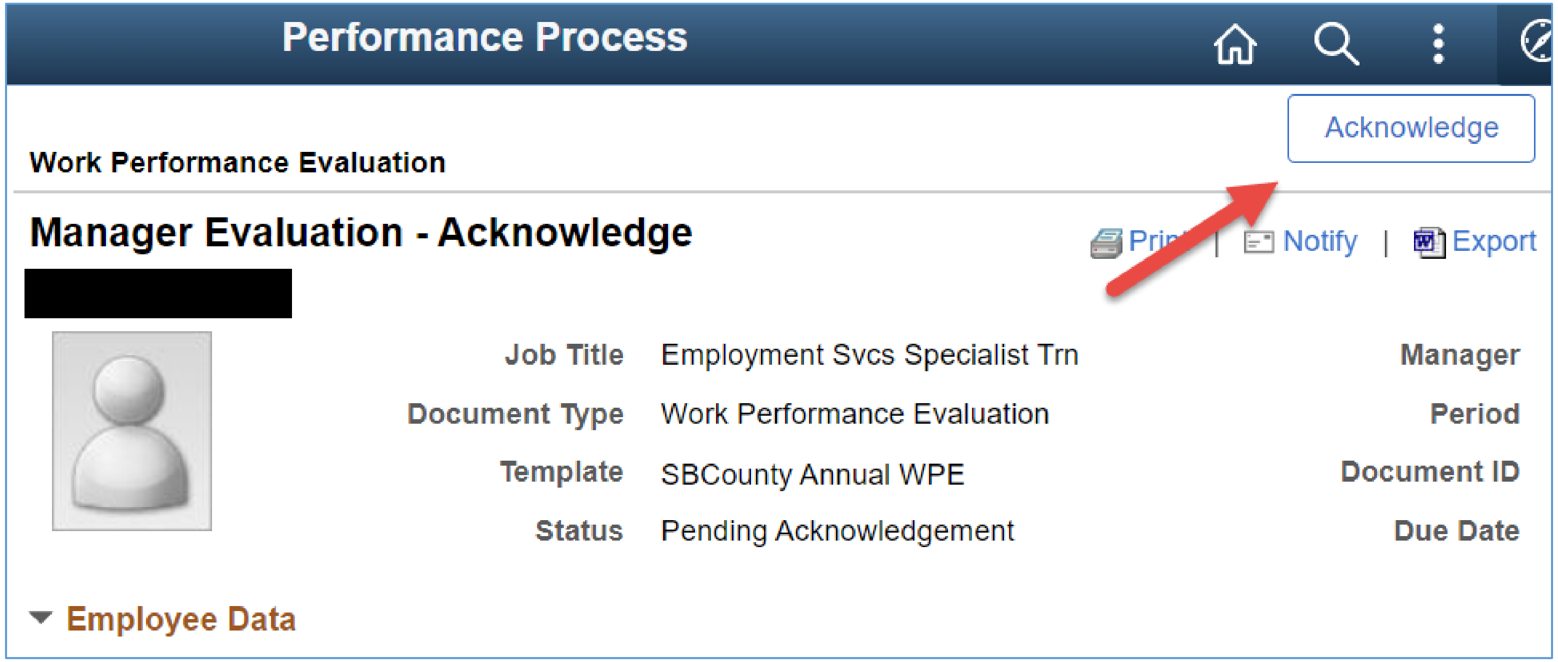
- Please have the employee navigate to their Performance tile on the Employee Self Service homepage to complete the acknowledgment
- Once this step has been completed the document is now ready to be shared with the employee

Step 16 – Employee Acknowledgment

- After the manager has shared the document with the employee, the employee can now access a view only copy of the evaluation via their Performance tile on their Employee Self Service homepage
  - Employee Self Service ePerformance training documents can be found on the ePerformance FAQ tile in EMACS and the EMACS forms website under EMACS Resources, Training Materials and Tutorials

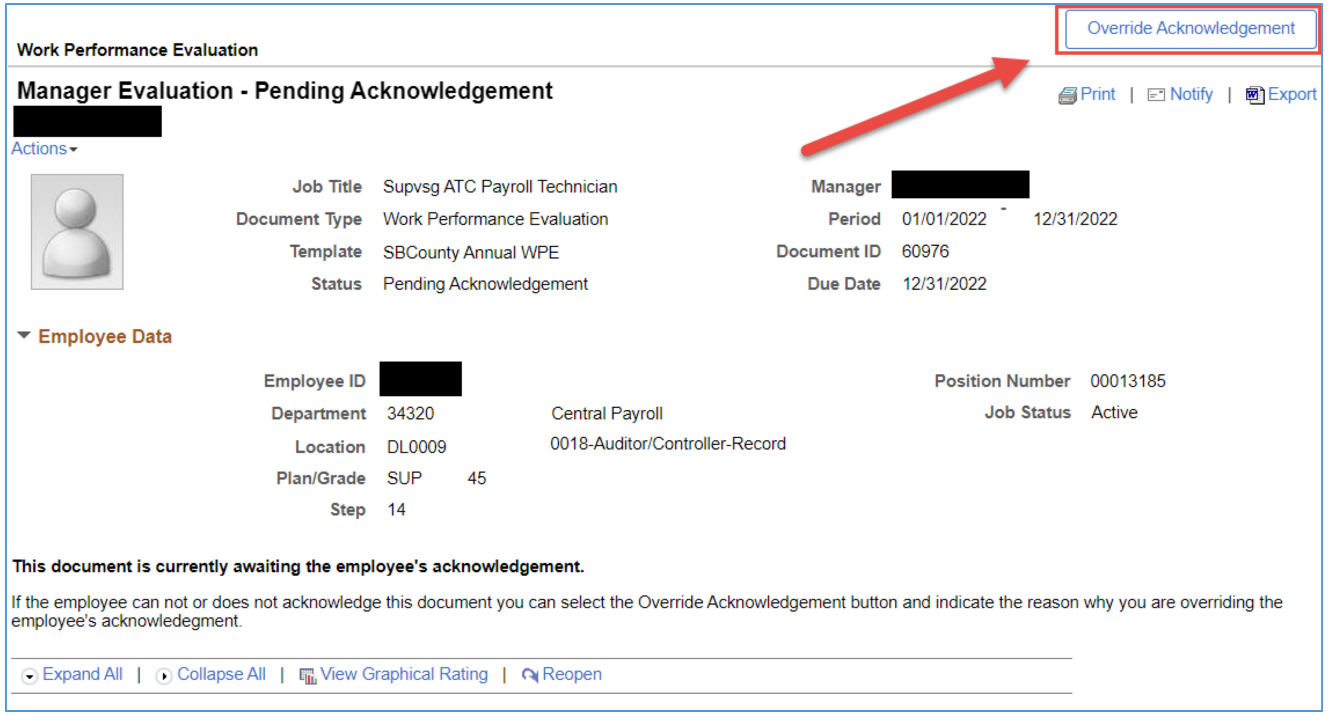
Step 17 – Employee Selects Acknowledge

- After the employee has reviewed the evaluation one-on-one with their manager, and the document has been shared they will be able to select *Acknowledge* in the top right of the page:



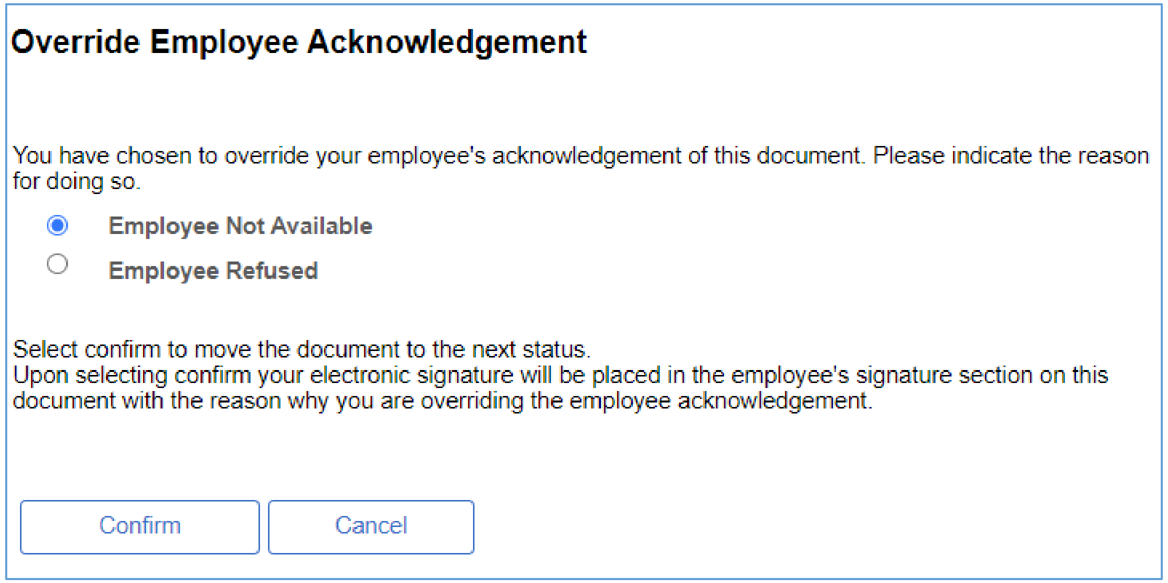
Manager Overrides Employee Acknowledgment

- If the employee is unable or refuses to acknowledge the evaluation document, the manager has the ability to override and acknowledg on the employee’s behalf by selecting the *Override Acknowledgement* button



Manager Overrides Employee Acknowledgment Continued

- After selecting *Override Acknowledgment*, click a reason for doing so.
- Click *Confirm*
- This will complete the final step of the document, marking it complete



Complete

- Upon the employee’s or manager’s acknowledgement of the evaluation document, the document is now complete and can be accessed in the employee’s and manager’s Historical Documents queue via their ePerformance tiles.
- If you have any questions, please contact your ePerformance Department Administrator or your Human Resources Business Partner.