



Human Resources
EMACS

ePerformance

Manager 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

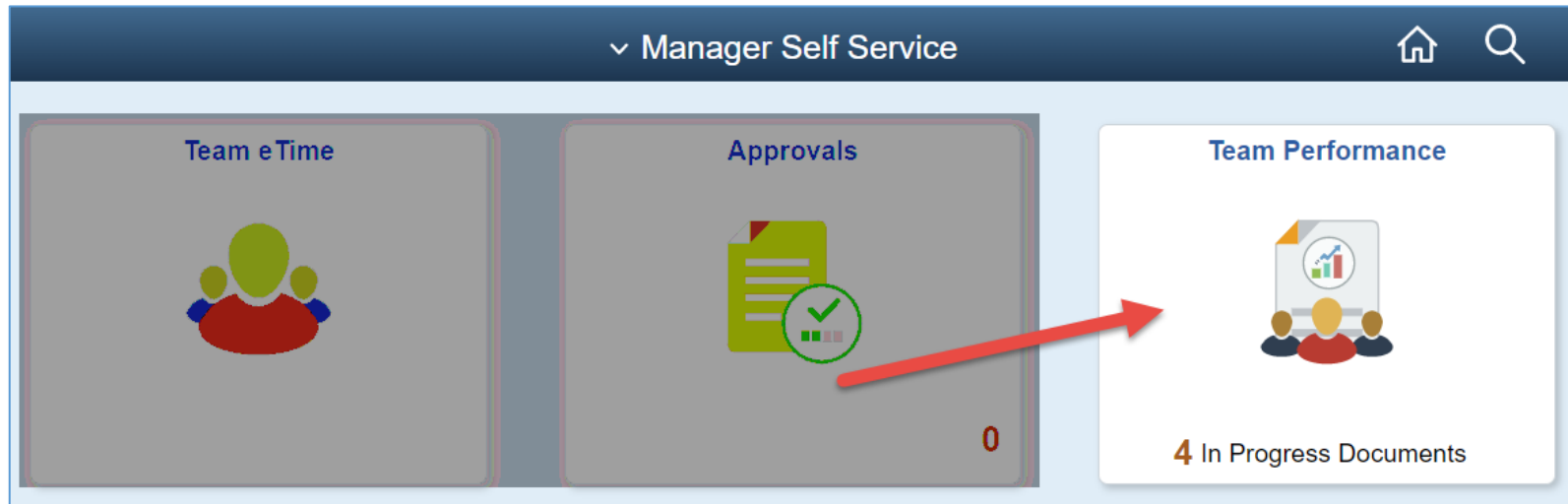
When are documents created?

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

MARCH							APRIL						
S	M	T	W	Th	F	S	S	M	T	W	Th	F	S
			1	DTA	H	4							1
		P	Pay Day		End PP6				P	Pay Day		End PP8	
5	6	7	8	9	10	11	2	3	4	5	6	7	8
		EE MGR		DTA	H		Processing PP08/2023						
12	13	14	15	16	17	18	9	10	11	12	13	14	15
		P	Pay Day		End PP7	Go - Live		First Doc's Available	P	Pay Day		End PP9	
19	20	21	22	23	24	25	16	17	18	19	20	21	22
		EE MGR		DTA	H				EE MGR		DTA	H	
26	27	28	29	30	31		23	24	25	26	27	28	29
1st Quarter Ends PP6 (1-6)							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

The screenshot shows the 'Manager Self Service' interface with the 'Team Performance' section active. The 'Current Documents' section is displayed, featuring a 'Create Documents' button and a table with 4 rows. The table columns are: Name / Job Title, Document Type, Document Status, Period Begin / Period End, and Next Due Date. Each row includes a user icon, a redacted name, and a right-pointing arrow.

Name / Job Title	Document Type	Document Status	Period Begin / Period End	Next Due Date
[Redacted] Employment Services Specialist	Work Performance Evaluation SBCounty Annual WPE	Evaluation in Progress	07/29/2022 10/07/2022	10/07/2022
[Redacted] Employment Services Specialist	Work Performance Evaluation SBCounty Annual WPE	Evaluation in Progress	07/29/2022 09/09/2022	09/09/2022
[Redacted] Employment Services Specialist	Work Performance Evaluation SBCounty Annual WPE	Evaluation in Progress	07/29/2022 08/12/2022	08/12/2022
[Redacted] Employment Svcs Specialist Trn	Work Performance Evaluation SBCounty 10PP Training	Evaluation in Progress	07/29/2022 08/12/2022	08/12/2022

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

Default View

- Categories used to evaluate employees

The screenshot shows a web interface for 'Section - Performance Standards/Competencies'. At the top, there are controls for 'Expand', 'Collapse', and 'Add Item', along with an unchecked checkbox for 'Supervisor Indicator'. Below this, a list of categories is displayed with right-pointing chevrons: Customer Service, Teamwork and Collaboration, Communication, Problem Solving and Decision Making, and Time Management.

Supervisor Indicator On

- Additional categories to evaluate employees performing manager / supervisory duties

The screenshot shows the same web interface as the 'Default View', but with the 'Supervisor Indicator' checkbox checked. A red arrow points from the checked checkbox to a red bracket that groups the following categories: Business Acumen - SUPERVISOR, Stewardship - SUPERVISOR, and Talent Management - SUPERVISOR. The other categories (Customer Service, Teamwork and Collaboration, Communication, Problem Solving and Decision Making, and Time Management) remain unchanged.

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

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

The screenshot displays a web interface for performance standards. At the top, a section titled "Section - Performance Standards/Competencies" is shown with a dropdown arrow. Below this, there are three buttons: "Expand" (highlighted with a red box), "Collapse", and "Add Item". To the right of these buttons is a "Supervisor Indicator" checkbox. Underneath, a sub-section titled "Customer Service" is expanded, showing a "Description" field with the text: "Treats all customers (including coworkers) as highly valued and is responsive to their needs. Conducts business in a courteous, respectful and polite manner. Friendly, takes ownership and builds a constructive and pleasant relationship with customers, coworkers, and supervisors." Below the description are three radio buttons for rating: "Exceeds Job Standards", "Meets Job Standards", and "Below Job Standards". At the bottom, there is a "Manager Rating" section with a "Manager Comments" text area. The text area has a rich text editor toolbar with options for font, size, bold, italic, underline, bulleted list, numbered list, text color, background color, and a table icon.

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.*

Section - Performance Standards/Competencies

Expand | Collapse | Add Item

Supervisor Indicator

Customer Service

Description : Treats all customers (including coworkers) as highly valued and is responsive to their needs. Conducts business in a courteous, respectful and polite manner. Friendly, takes ownership and builds a constructive and pleasant relationship with customers, coworkers, and supervisors.

Exceeds Job Standards Meets Job Standards Below Job Standards

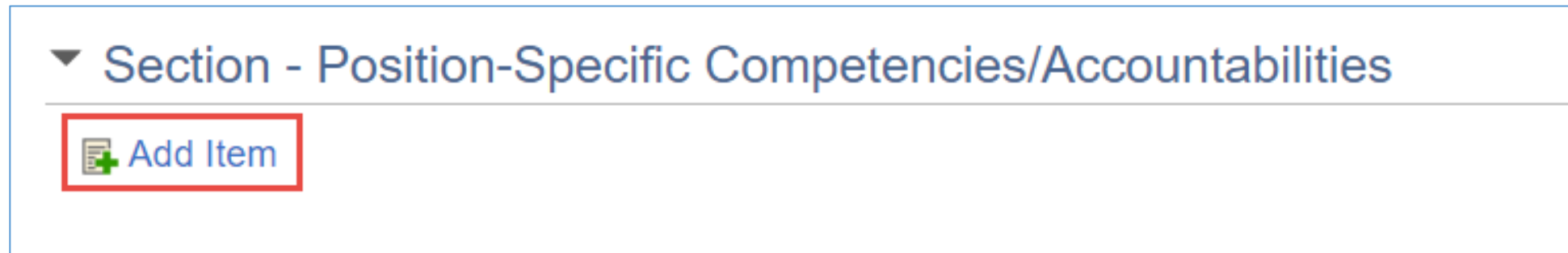
Manager Rating

Manager Comments

N/A- Employee not evaluated in this category

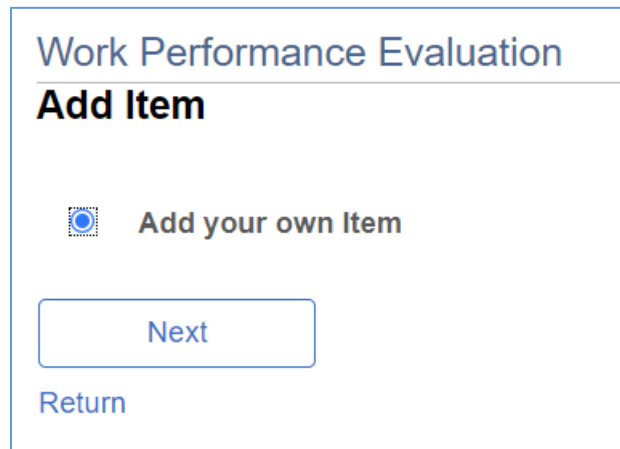
Step 3 - Completing Accomplishments for this Rating Period Section

- 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*



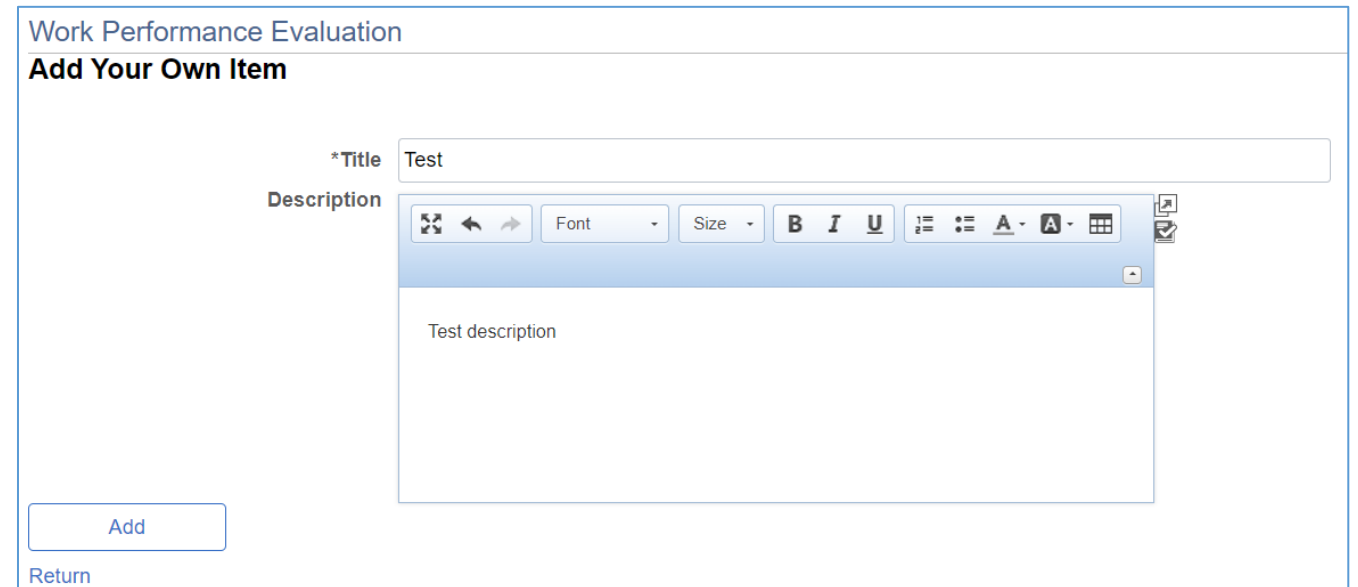
Step 4 – Adding an Item

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



The screenshot shows a web interface titled "Work Performance Evaluation" with a sub-header "Add Item". Below the header, there is a button labeled "Add your own Item" with a small icon to its left. At the bottom of the screen, there are two buttons: "Next" and "Return".

- 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*



The screenshot shows a detailed form titled "Work Performance Evaluation" with a sub-header "Add Your Own Item". The form contains a text input field for the title, which has the text "Test" entered. Below the title field is a rich text editor for the description, which has the text "Test description" entered. The rich text editor includes a toolbar with various formatting options like bold, italic, underline, and font size. At the bottom of the form, there are two buttons: "Add" and "Return".

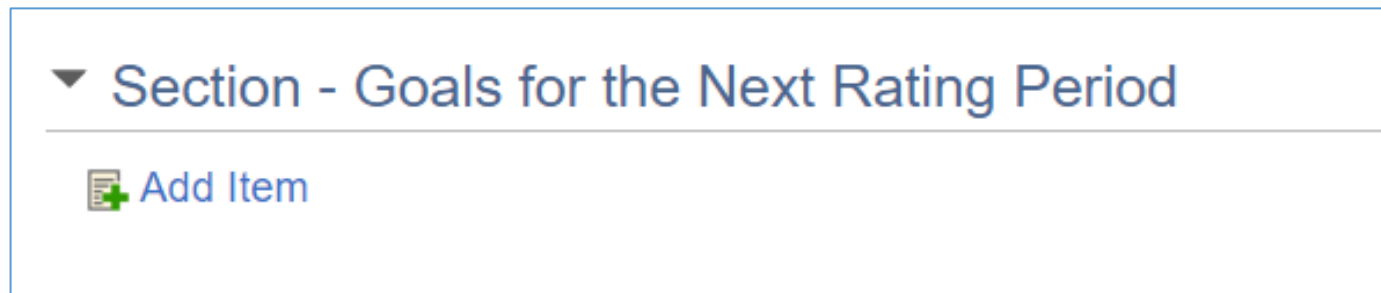
Step 5 – Add Item (cont.)

- 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

The screenshot displays a software interface for managing a document. At the top, a section is titled "Section - Accomplishments for this Rating Period". Below this, there are controls for "Expand", "Collapse", and "Add Item". A sub-section titled "Test" is expanded, showing a "Description : Test Description" field. To the right of the description, a red box highlights two icons: a pencil (edit) and a trash can (delete). Below the description is a "Manager Comments" field with a rich text editor toolbar. The toolbar includes icons for undo, redo, font color, size, bold, italic, underline, bulleted list, numbered list, text color, background color, and a table 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


▼ Section - Action

Expand | Collapse

Action Summary

Step Approved(N/A for 4thPP) Progress Satisfactory Step Not Applicable StepApprvd/ProbationComplete Step Denied Initiate WPIP

Follow-up WPIP Emp to Former JobCode Title Terminate


Manager Rating 

Step 8 – Completing Overall Summary Section


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

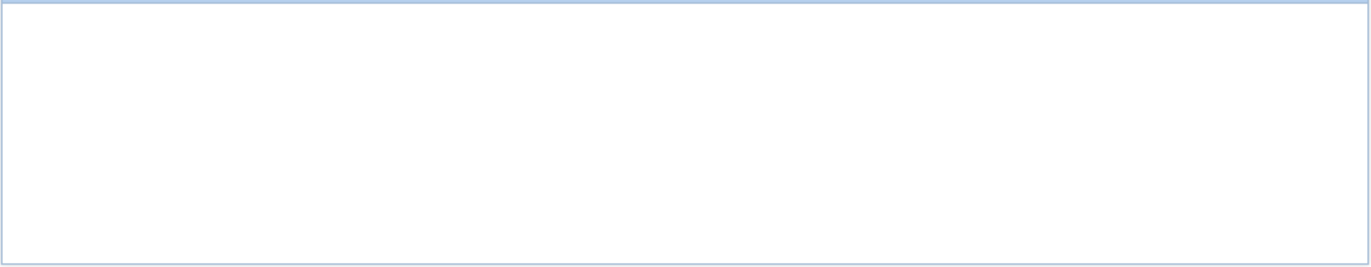
▼ Section - Overall Summary

Exceeds Job Standards Meets Job Standards Below Job Standards

Manager Rating 

Manager Comments






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*.

▼ Section - Overall Summary

Exceeds Job Standards Meets Job Standards Below Job Standards

Manager Rating 

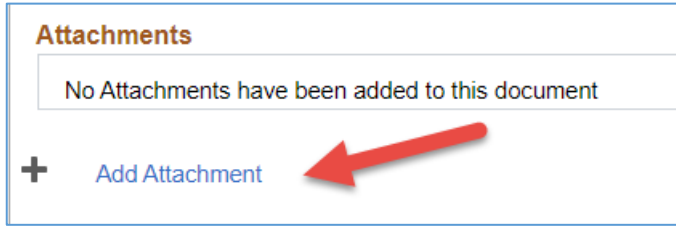
Manager Comments



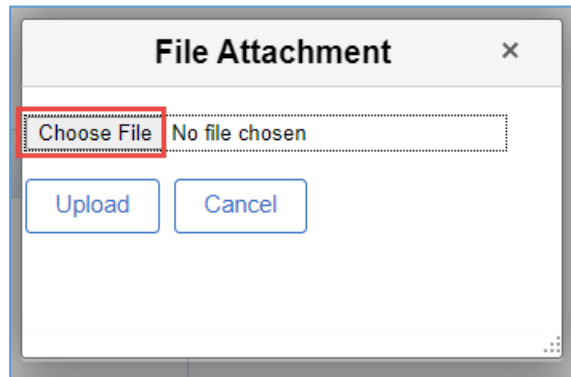
See attachment for full work performance evaluation.

How to Add an Attachment

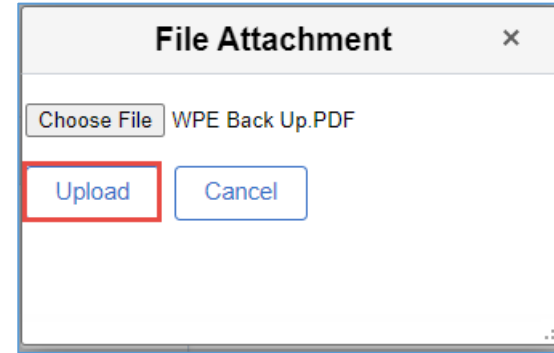
1. Click the *Add Attachment* link



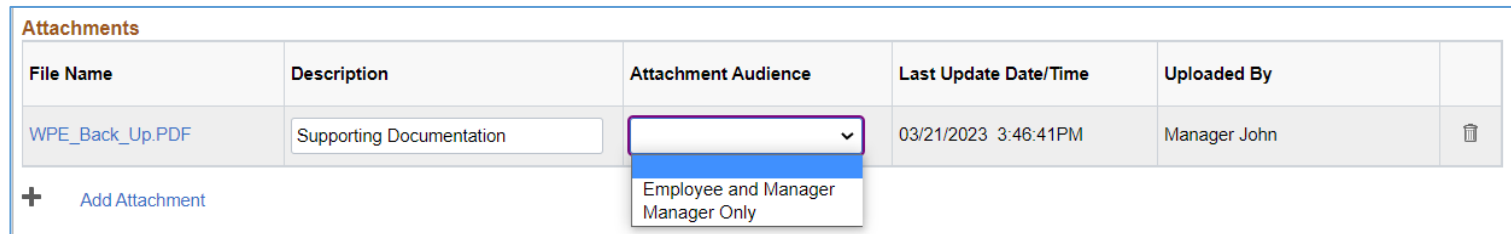
2. Click *Choose File* and select a file to upload



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


The screenshot shows a web application interface for 'Performance Process'. The top navigation bar includes a back arrow, 'Team Performance', and 'Performance Process'. On the right side of the navigation bar are icons for home, search, and a menu. Below the navigation bar, there are two buttons: 'Save' and 'Submit for Approval'. A red arrow points to the 'Submit for Approval' button. The main content area is titled 'Work Performance Evaluation' and 'Manager Evaluation - Update and Submit'. Below the title, there is a redacted area and an 'Actions' dropdown menu. The main content area is divided into two columns. The left column contains a profile picture placeholder and a list of details: Job Title (Employment Svcs Specialist Trn), Document Type (Work Performance Evaluation), Template (SBCounty Annual WPE), and Status (Evaluation in Progress). The right column contains a list of details: Manager (redacted), Period (07/29/2022 - 10/07/2022), Document ID (60269), and Due Date (10/07/2022). At the top right of the main content area, there are three icons: Print, Notify, and Export.

- 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

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

The screenshot shows a web interface for 'Team Performance' with a 'Performance Process' header. The main heading is 'Submit for Approval'. Below this, there is a confirmation instruction: 'Select confirm to submit this document for approval. Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.' A blue link provides assistance: 'Confirm the items being rated are within the scope of the employee's Job Classification. If assistance is needed, contact your Human Resources Business Partner.' A section titled 'Performance Standards/Competencies' lists five items, all marked as 'Meets Job Standards': 1. Customer Service, 2. Teamwork and Collaboration, 3. Communication, 4. Problem Solving and Decision Making, and 5. Time Management. A summary line states: 'The overall rating you have assigned to this employee is Meets Job Standards.' At the bottom, there are two buttons: 'Confirm' (highlighted with a red border) and 'Cancel'.

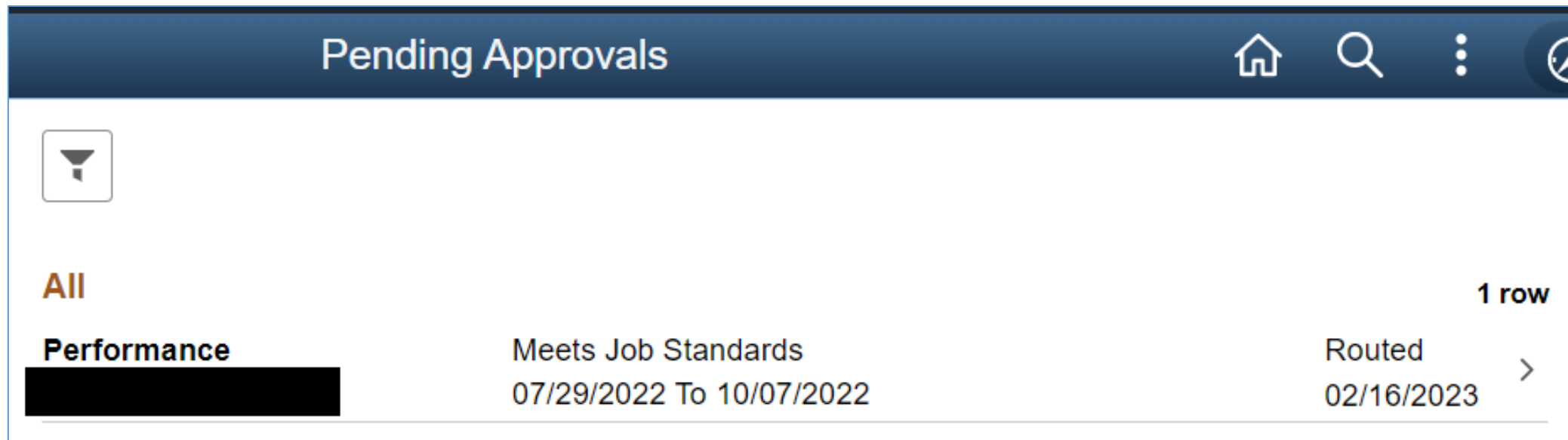
Step 11 – Approval/Denial by the Reviewing Official

- 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:



The screenshot displays a web interface titled "Pending Approvals". At the top right, there are navigation icons: a home icon, a search icon, a menu icon, and a refresh icon. Below the title bar, there is a filter icon (a funnel) and the text "All" in orange. To the right of "All" is the text "1 row". Below this, there is a table with one row of data. The first cell of the row is "Performance" with a blacked-out area below it. The second cell contains "Meets Job Standards" and "07/29/2022 To 10/07/2022". The third cell contains "Routed" and "02/16/2023". A right-pointing chevron icon is located to the right of the "Routed" text.

Pending Approvals			
			
All			1 row
Performance [Redacted]	Meets Job Standards 07/29/2022 To 10/07/2022	Routed 02/16/2023	>

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

The screenshot shows a mobile application interface for reviewing a performance document. At the top, there is a navigation bar with a back arrow, the text "Pending Approvals", the title "Performance", and icons for home, search, and settings. Below the navigation bar, there is a header section with a profile picture placeholder, the name "Employment Svcs Specialist Trn", and two buttons: "Approve" (in blue) and "Deny" (in white with a blue border). The main content area is titled "Performance Summary" and contains the following information:

Document Type	Work Performance Evaluation	Manager	[Redacted]
Period Begin Date	07/29/22	Period End Date	10/07/22
Rating	Meets Job Standards	View Performance Detail	

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

Work Performance Evaluation

Manager Evaluation - Share with Employee

Print | Notify | Export

Actions

Job Title	Employment Svcs Specialist Trn	Manager
Document Type	Work Performance Evaluation	Period
Template	SBCounty Annual WPE	Document ID
Status	Approval - Approved	Due Date

Employee Data

Expand All | Collapse All | View Graphical Rating | Reopen

Note – Reopening a Document

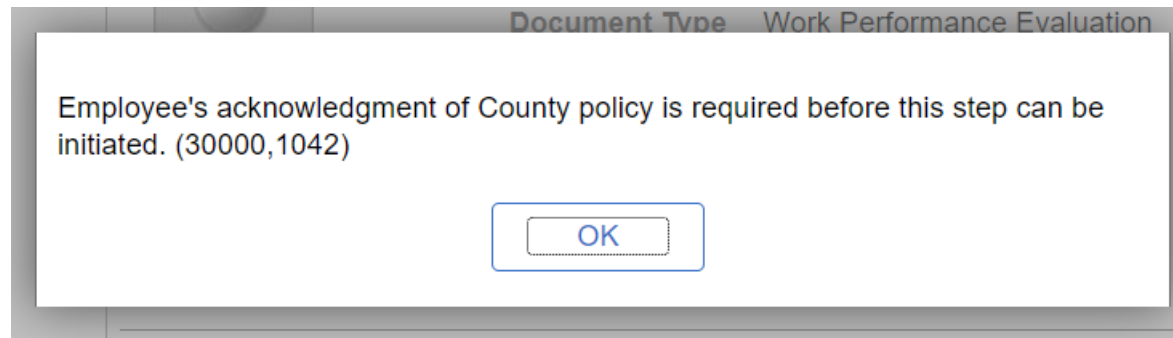
- At any time before the employee acknowledges the evaluation, the document can be reopened and edited
- Reopening a document resets the workflow and must be resubmitted for approval

The screenshot displays a 'Work Performance Evaluation' document interface. At the top right, there is a 'Share with Employee' button. Below the title 'Manager Evaluation - Share with Employee', there are 'Print', 'Notify', and 'Export' icons. A red arrow points from the 'Notify' icon to the 'Share with Employee' button. In the center, there is a table with the following data:

Job Title	Employment Svcs Specialist Trn	Manager
Document Type	Work Performance Evaluation	Period
Template	SBCounty Annual WPE	Document ID
Status	Approval - Approved	Due Date

Below the table, there is an 'Employee Data' section. At the bottom of the interface, there are several action buttons: 'Expand All', 'Collapse All', 'View Graphical Rating', and 'Reopen'. A red arrow points from the 'Reopen' button to the 'Share with Employee' button.

- 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:

The screenshot displays the 'Performance Process' interface. At the top, there is a dark blue header with the text 'Performance Process' and navigation icons (home, search, menu, refresh). Below the header, the main content area is titled 'Work Performance Evaluation'. On the right side of this section, there is a blue button labeled 'Acknowledge', which is highlighted by a red arrow. Below the 'Acknowledge' button, there are three action links: 'Print', 'Notify', and 'Export'. The main content area is titled 'Manager Evaluation - Acknowledge' and features a profile picture placeholder on the left. To the right of the profile picture, there is a table with the following data:

Job Title	Employment Svcs Specialist Trn	Manager
Document Type	Work Performance Evaluation	Period
Template	SBCounty Annual WPE	Document ID
Status	Pending Acknowledgement	Due Date

At the bottom left of the main content area, there is a dropdown menu labeled 'Employee Data'.

Manager Overrides Employee Acknowledgment

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

The screenshot displays a web interface for a Work Performance Evaluation. At the top right, there is a button labeled "Override Acknowledgement" which is highlighted with a red box and a red arrow. Below this, the document title is "Manager Evaluation - Pending Acknowledgement". The interface includes a "Print | Notify | Export" menu. A central section contains document details: Job Title (Supvsg ATC Payroll Technician), Document Type (Work Performance Evaluation), Template (SBCounty Annual WPE), Status (Pending Acknowledgement), Manager (redacted), Period (01/01/2022 - 12/31/2022), Document ID (60976), and Due Date (12/31/2022). An "Employee Data" section lists: Employee ID (redacted), Department (34320 - Central Payroll), Location (DL0009 - 0018-Auditor/Controller-Record), Position Number (00013185), Job Status (Active), Plan/Grade (SUP 45), and Step (14). A message states: "This document is currently awaiting the employee's acknowledgement. If the employee can not or does not acknowledge this document you can select the Override Acknowledgement button and indicate the reason why you are overriding the employee's acknowledgement." At the bottom, there are navigation options: "Expand All", "Collapse All", "View Graphical Rating", and "Reopen".

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

Override Employee Acknowledgement

You have chosen to override your employee's acknowledgement of this document. Please indicate the reason for doing so.

Employee Not Available

Employee Refused

Select confirm to move the document to the next status.
Upon selecting confirm your electronic signature will be placed in the employee's signature section on this document with the reason why you are overriding the employee acknowledgement.

- 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.