



County of San Bernardino
EMACS
ePerformance Procedures – Central Administrator

CENTRAL ADMINISTRATOR FUNCTIONS

Below are the procedures and what EMACS-HR, as the Central Administrators of the ePerformance module, can continue to expect to receive from departments who have transitioned to ePerformance.

Paper Form	Still required?	Procedures
Work Performance Evaluation (Probationary, Trainee, Annual, 1040 memo)	No	Departments who have fully transitioned to the ePerformance module will no longer be required to submit the paper WPE form
Pay Step Advance Notice Report	Yes	<p>When a pay step advancement is contingent on a “Meets...” or greater on an evaluation, run the below query to confirm an evaluation has been completed for the employee and meets the required criteria.</p> <p>For annual evaluations: EM_EPER_COMPLETED_DOCS_BY_EE</p> <p>For 1040 memos: EM_EPER_1040_STEP_MEMOS_BY_EE</p> <p>If results for the employee do not appear in either of the above queries, run the below query to track the status of the evaluation, as it is likely incomplete: EM_EPER_DOCUMENT_STATUS</p> <p>If the evaluation has not been completed, and the step advancement is contingent on the results of the evaluation, contact the department and inform them the step advancement cannot be completed until the ePerformance evaluation is complete.</p>
Job Status Update Report	Yes	Departments will continue to submit this form. Normal procedures apply.

Note – in lieu of running any query, ePerformance evaluations can also be viewed via the View Documents page, and searching by individual employee to review all current and prior evaluations for the individual

Path: Workforce Development > Performance Management > Performance Documents > View Documents

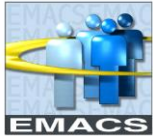


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EMPLOYEE EVALUATION PAGE

With the introduction of ePerformance, automated updates have been introduced to the existing Employee Evaluation page in an effort to reduce manual keying. The below evaluation updates are now automated:

Action	Description
Completion Date	<p>When an ePerformance annual, trainee, or probationary evaluation has been completed, the Completion Date field at the Employee Evaluation page is automatically updated for the corresponding row. This date is equal to the date the document was completed.</p> <p>Completion is defined as a document being formally acknowledged by the employee being evaluated, or by the manager on behalf of the employee.</p> <p>A comment is also inserted with the following details:</p> <ul style="list-style-type: none"> • The ePerformance action that triggered the update • The individual that performed the final ePerformance action • The ePerformance document ID number
Extend Probation	<p>When a manager performing an evaluation chooses the action of “Extend Probation” and selects a new due date, the following updates are automatically performed at the Employee Evaluation page once the ePerformance document has been approved by the reviewing official:</p> <ul style="list-style-type: none"> • Due Date field is updated with the new probation extension date • The Reason field is updated with the new translate value of “Extend Due Date-ePerf” • The comment field is updated with the information of the user who approved the probation extension, and the ePerformance document ID number <p>Note – The Completion Date field will be updated after the employee, or manager on behalf of the employee, formally acknowledges they have received and reviewed the document</p>
Cancel/Waive	<p>When the Department ePerformance Administrator cancels a document, the following updated are automatically performed at the Employee Evaluation Page:</p> <ul style="list-style-type: none"> • Waived box is checked • Reason = Department request • Waived Date is populated with the date the document was cancelled • The comment section is updated with the admin’s name and document ID



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Employee Evaluation Update Exceptions

- Only system generated Employee Evaluation rows are updated automatically

Every Payroll Processing week, run the below query to monitor the ePerformance documents that have been completed for the corresponding pay period. Validate that the employee evaluation page was updated accordingly. If you find that some updates did not carry over to the Employee Evaluation page, make the necessary updates manually.

Payroll Week Query: EM_EPER_DOCUMENT_STATUS

- Prompts by period end date
- Note – if the evaluation was a probation extension, the Due Date field reflects the updated date. The Period End Date will always reflect the original due date of the document.

TRANSITION PERIOD

As each department is introduced to ePerformance, there will be a transition period where both the paper WPE process and online ePerformance process will run in tandem. Employees with open evaluations that were generated prior to the ePerformance go-live pay period, must have those evaluations completed following the traditional paper WPE procedures and forms.

Once every employee within the department has had a new evaluation generated in ePerformance, the department will have fully transitioned away from the paper WPE process and on to the ePerformance module.



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QUERY SAMPLES

EM_EPER_COMPLETED_DOCUMENTS_BY_EE

Row	Doc ID	Descr	Name	ID	Empl Record	Dept ID	Descr	Job Code	Descr	Section	Descr	Position	Rating	Descr	Per Beg Dt	Per End Dt	Due Date	Manager ID	Name	Status	Sal Plan	Grade	Step	Job Status	Completion Date
1	17	SBCounty 10PP Probationary				12200	Business Solutions Development	01684	Business Systems Analyst III	SUMMARY	Overall Summary Section	00004014	B	B. Meets Job Standards	04/24/2020	07/03/2020	08/14/2020			Completed	ADM	67	6	Probationary Status	06/04/2020

EM_EPER_1040_STEP_MEMOS_BY_EE

Row	Doc ID	Descr	Name	ID	Empl Record	Dept ID	Descr	Job Code	Descr	Section	Descr	Position	Rating	Descr	Per Beg Dt	Per End Dt	Due Date	Manager ID	Name	Status	Sal Plan	Grade	Step	Job Status	Completion Date
1	26	1,040 Step Increase Memo				12302	Public Safety Communications	01672	Special Projects Leader	SUMMARY	Overall Summary Section	00006371	B	B. Meets Job Standards	04/24/2020	05/08/2020	05/08/2020			Completed	ADM	71	13	Probationary Status	06/04/2020

EM_EPER_DOCUMENT_STATUS

Per End Dt = 2020-07-03

View All | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

First 1-9 of 9 Last

Row	Doc ID	Descr	Name	ID	Empl Record	Dept ID	Descr	Job Code	Descr	Position	Per Beg Dt	Per End Dt	Due Date	Status	Sal Plan	Grade	Step	Job Status	Completion Date
1	25	SBCounty 18PP Probationary				12200	Business Solutions Development	01683	Business Systems Analyst II	00089844	04/24/2020	07/03/2020	07/03/2020	Evaluation in Progress	ADM	63	1	Probationary Status	
2	17	SBCounty 10PP Probationary				12200	Business Solutions Development	01684	Business Systems Analyst III	00004014	04/24/2020	07/03/2020	08/14/2020	Completed	ADM	67	6	Probationary Status	06/04/2020
3	21	SBCounty 11PP Probationary				12302	Public Safety Communications	03381	Communications Tech I	00088446	04/24/2020	07/03/2020	07/03/2020	Evaluation in Progress	TI	49	1	Probationary Status	
4	20	SBCounty 11PP Probationary				72090	HR Administrative Services	06051	Fiscal Specialist	00071805	04/24/2020	07/03/2020	08/14/2020	Completed	CLK	35	2	Probationary Status	06/08/2020