



Manager FAQs

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1. How do I access JeffSMART?

- a. **From Campus**, go to TJUH intranet and click on the Employee tab.
- b. Click on the JeffSMART link. This will invoke a new login window.
- c. Login with your campus key and password
- d. **From off campus**, login to RAP to create a secure session
- e. From the RAP home page, click on the TJUH Intranet link and then the Employee tab
- f. Click on the JeffSMART link. This will invoke a new login window.
- g. Login with your campus key and password

2. I cannot login to JeffSMART, what do I do?

If you were locked out of your account, it will automatically unlock in 15 minutes. If you are still having trouble logging into JeffSMART, please call the HR Service Center at 3-HRSC or e-mail HRquestions@jefferson.edu.

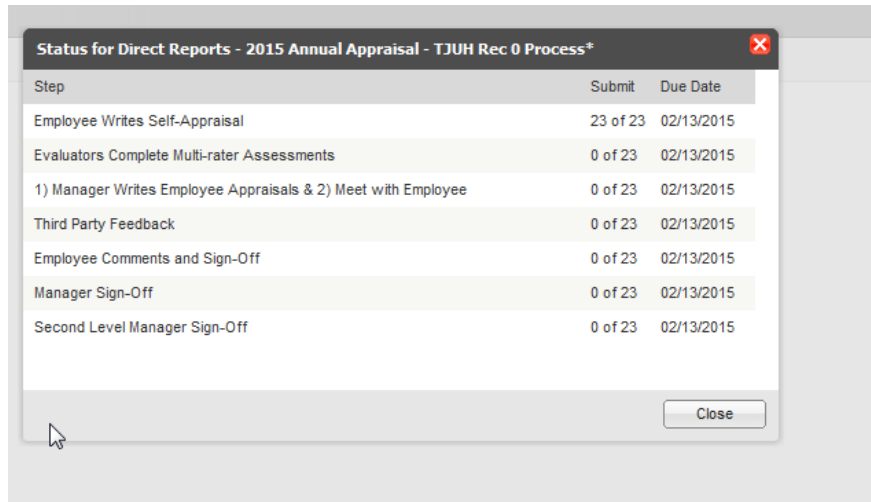
3. What are the supported internet browsers for JeffSMART?

- a. The following matrix lists the certified and supported versions. The difference between a certified version and supported version is a supported version is that not all system functionality is supported. Internet Explorer is highly recommended when using JeffSMART.

End-user client requirements -- 11.7		
Desktop client	Certified version	Supported versions
Windows		
MS Internet Explorer	9	7+
Chrome	-	29.0+
Firefox	-	11+
Mac OS X		
Safari	5	5+
Chrome	-	29.0+
Firefox	-	11+
All operating systems		
Adobe Acrobat Reader	11 (XI)	8+

4. As a manager, can you tell me how many of my direct reports have completed their self-evaluation?

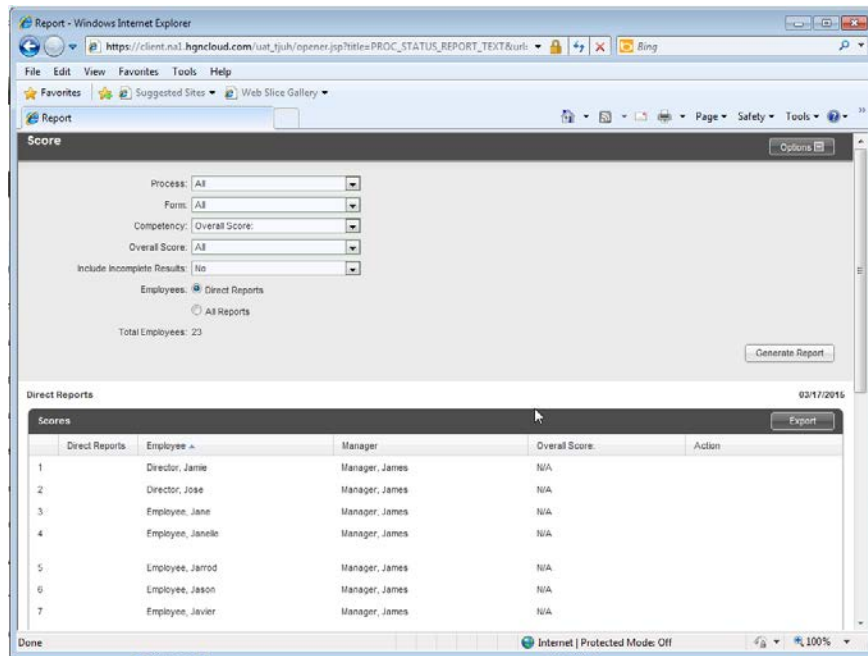
- a. Go to JeffSMART Home page
- b. Click on the status for the appropriate performance process
- c. Look at Submit for the appropriate step



Step	Submit	Due Date
Employee Writes Self-Appraisal	23 of 23	02/13/2015
Evaluators Complete Multi-rater Assessments	0 of 23	02/13/2015
1) Manager Writes Employee Appraisals & 2) Meet with Employee	0 of 23	02/13/2015
Third Party Feedback	0 of 23	02/13/2015
Employee Comments and Sign-Off	0 of 23	02/13/2015
Manager Sign-Off	0 of 23	02/13/2015
Second Level Manager Sign-Off	0 of 23	02/13/2015

5. As a manager, what are the scores for my employees?

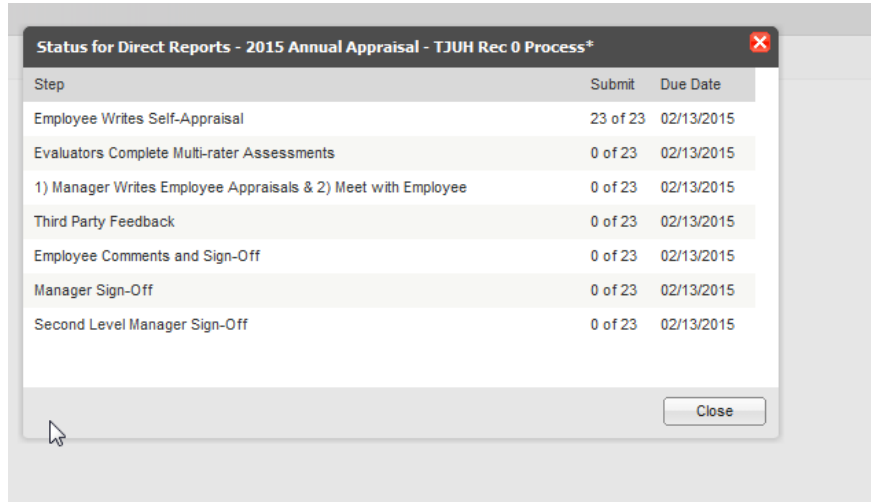
- Go to JeffSMART Home page
- Go to Reports
- Go to Score and click on the icon for Open Report (box with arrow)
- Select filter criteria under Score and click Generate Report



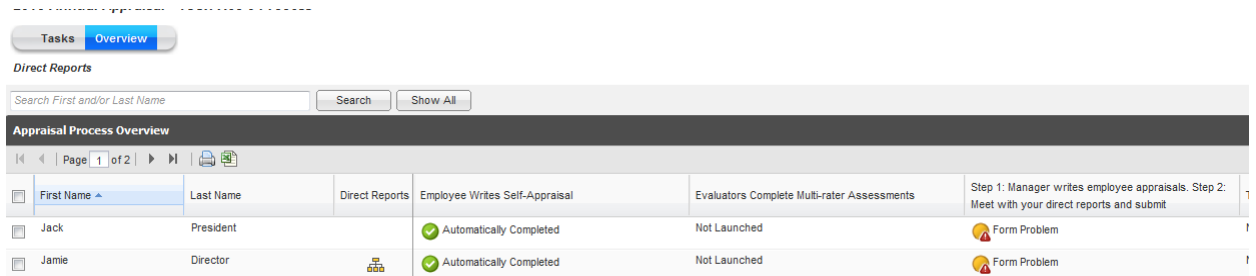
- You can use the Export button to do a data dump to Microsoft Excel

6. As a manager, how many of my direct reports do I still need to complete a manager evaluation?

- a. Go to JeffSMART Home page
- b. Click on the status for the appropriate performance process



- c. On the third step – Manager Writes Employee Appraisals & 2) Meet with Employee, Review the Submit button
- d. To drill down to individual employees, close the current window and click on the Task Status at the top of the page
- e. Go to Viewing Drop down field in the top right hand corner and select the appropriate performance process
- f. Click on the Overview button on the top left side of the page
- g. This will list each employee with the status of each in the process. You may need to scroll to the right to see each step.



7. As a second level manager, can I see the status of my indirect employees?

- Go to JeffSMART Home page
- Click on the Task Status
- Go to Viewing Drop down field in the top right hand corner and select the appropriate performance process
- Click on the Overview button on the top left side of the page
- Click on the Advanced Search button in the upper right corner and select All Report radio button and then click the Search button to see all employees
- Or, (instead of Step e), click on the hierarchy icon to drill down by individual managers

First Name	Last Name	Employee Writes Self-Appraisal	Evaluators Complete Multi-rater Assessments	Step 1: Manager writes employee appraisal. Step 2: Meet with your direct reports and submit Form Problem	Third Party Feedback	Employee Comments and Sign-Off	Manager electronic signature
James	Manager	Automatically Completed	Not Launched	Form Problem	N/A	James Manager	Jack Sheplett
James	Director	Automatically Completed	Not Launched	Form Problem	N/A	James Director	James Manager
Jane	Employee	View Self-Appraisal	Not Launched	James Manager	N/A	Jane Employee	James Manager
Janelle	Employee	View Self-Appraisal	Not Launched	James Manager	N/A	Janelle Employee	James Manager
Jarvis	HR Rep	Automatically Completed	Not Launched	Form Problem	N/A	Jarvis HR Rep	James Manager

8. How do I send my draft evaluation to my manager to review prior to completing it?

Please see manager guide “How to Utilize Third Party Feedback Feature” to assist you with this task.

9. As a manager, I can't see all my direct reports on the My Employees page, where are they?

- Go to JeffSMART home page
- Click on the My Employees tab to view currently listed direct (and indirect reports)
 - If you want to see indirect reports for a specific manager, then click on the hierarchy icon
 - If you want to see all indirect reports, then click on the Advanced Search and click the Radio button for All Reports and hit Search
- Note:** Direct reports added (transferred or promoted into your unit) after 3/31/2016 will not appear on your My Employees page until the evaluation process closes in August 2016

10. As a manager, I can't see all my direct reports on the Task Status page, where are they?

- a. Go to JeffSMART home page
- b. Click on the Task Status
- c. Click "Viewing" dropdown menu to select appropriate Appraisal process
- d. Click step name to view available employees within that step
- e. If employee is not listed, click "Viewing" dropdown to select another Appraisal process
- f. If employee is not listed in any Appraisal process, contact the HR Service Center

11. I see employees who don't report to me under the My Employees tab. What do I do?

- a. Please go to PeopleSoft Manager Self Service to review your direct reports. If an employee is listed here, but does not report to you, you may move the employee to the correct manager using Manager Self Service.
 - i. Visit Employee Self-Service (myhr.jefferson.edu), select Manager Self Service, select Job and Personal Information, select Request Reporting Change. You will then check the box next to the employee/s name/s who you are transferring. Press continue. Then enter the date of the change and the new supervisor's ID. You can look that up by selecting the magnifying glass.
- b. If there are any direct reports in JeffSMART that are not listed in Manager Self Service, contact the HRSC.
- c. Note: Direct reports to be removed (transferred or promoted out of your unit) after 3/31/2016 will not be removed from your My Employees page until the evaluation process closes in August 2016

12. As a manager, I have an employee with the wrong appraisal form. What do I do?

- a. Please contact the HRSC and let them know what is wrong with the template. Please specify the section that appears to be incorrect (job duties, unit/department/population specific competencies, etc.).
- b. Based on the above, the HRSC will investigate whether a change needs to be made to the performance document.

13. I hit “Submit,” but I made a mistake on my evaluation. (Or, after meeting with my employee, I would like to make a revision to my evaluation.) What do I do?

Please contact the HR Service Center for assistance.

14. I have a direct report on leave, when do I do the evaluation and how much time do I have to complete?

As a manager, you will do the evaluation when the employee returns from leave. If the employee returns earlier than 30 days from the performance end date, you are responsible for completing the performance evaluation within the current annual process with the August 14 due date. If the employee returns on or later than 30 days from the due date, the employee will be transferred to the LOA annual process and you have 30 days from the return date from leave to complete the evaluation.

15. I am a manager and have to go on leave during the evaluation process. What do I do with my evaluations?

- a. As a manager, if you go out on leave, your employee’s appraisals will move to the 2nd level manager.
- b. If you would prefer to move your employees’ evaluations to a different manager prior to leave, you may use the “Assign to Other Manager” feature in JeffSMART. (Instructions to use this feature are available.)

16. I am a manager and my last day is during the performance evaluation period. What do I do with the evaluations assigned to me? Can I transfer them to another manager before I leave?

- a. As a manager, if you leave Jefferson during the evaluation period, your employee’s appraisals will move to your 2nd level manager.
- b. If you would prefer to move your employees’ evaluations to a different manager prior to leave, you may use the “Assign to Other Manager” feature in JeffSMART. (Instructions to use this feature are available.)

17. My direct report, who is a manager, is leaving Jefferson during the performance evaluation period. Who completes the evaluation for his or her direct reports?

- a. If your direct report, who is a manager, leaves Jefferson, his or her employees' appraisals will automatically roll up to you (the second-level manager). You will be responsible for completing the evaluations.
 - i. You may delegate the reviews to another manager using the "Assign to Other Manager" feature in JeffSMART.
- b. The manager reporting to you may move his or her employees' evaluations to a different manager prior to leaving Jefferson, and use the "Assign to Other Manager" feature in JeffSMART. (Instructions to use this feature are available.)

18. As a manager, I had a direct report promote out of my unit after the evaluations launched, am I responsible for completing his or her evaluation?

- a. The manager assigned to the performance review at the time of launch is responsible for completing the performance review, so the employee review needs to be completed by you.

19. A terminated direct report is appearing in my list of evaluations to complete, how do I have him or her removed from the list?

- a. Please contact the HR Service Center for assistance.

20. I am a non-employee manager (contractor); can I do evaluations for my direct reports who are Jefferson employees?

You will be able to access the system in which your employees' evaluations reside, provided you are listed as their manager in PeopleSoft.

21. On what date were evaluation forms generated or “launched”?

Evaluation forms were generated using an “as of” date of **March 31, 2016** – this includes job information as well as reporting relationships.

22. As a Hospital manager, I have a direct report who recently transferred to me in early March from the University or JUP, do I complete this employee’s performance review in JeffSMART or should the previous manager complete the annual review in ePerformance?

The evaluation form will be generated in JeffSMART and has to be completed by you. Given that ePerformance and JeffSMART are not integrated, you would need to contact the previous manager by e-mail or phone for feedback about the employee’s performance prior to joining your team.

23. As a Hospital manager, I have a direct report who recently transferred departments within the Hospital or MAH in early March, do I complete the evaluation or does the previous manager complete the evaluation?

- a. The manager assigned to the performance review at the time of launch is responsible for completing the review even if the performance document reflects a new job. It is the responsibility of the manager to solicit feedback from the previous manager to complete the document.
 - i. You may:
 1. Transfer the document to the previous manager to complete, using the “Assign to Other Manager” feature, OR
 2. Complete the evaluation and send it to the previous manager for review, using the Third-Party Review feature (if necessary).
 - ii. There are instructions available to assist you with these features.

24. I am a University or JUP employee but my direct report is a Hospital employee, where do I do his or her evaluation?

The evaluation document is generated from the system in which the employee resides. You would complete this evaluation in JeffSMART.

25. I am a Hospital employee but my direct report is a University or JUP employee, where do I complete his or her evaluation?

The evaluation document is generated from the system in which the employee resides. You would complete this evaluation in ePerformance.

26. As a University manager, I have a direct report who transferred to me in early March from the Hospital or MAH, do I complete this employee's performance review in ePerformance or should the previous manager complete the annual review in JeffSMART?

The evaluation form will be generated in ePerformance and has to be completed by you. Given that ePerformance and JeffSMART are not integrated, you would need to contact the previous manager by e-mail or phone for feedback about the employee’s performance prior to joining your team.

27. What is the workflow for employee and manager sign-offs?

In JeffSMART, the process flow is as follows:

Process Step	Suggested Due Date
1. Performance Evaluations Launch	May 2, 2016
2. Employee Writes Self-Appraisal (required) NOTE: the "Union" process does not have a self-appraisal step.	May 13, 2016
3. 1) Manager Writes Employee Appraisals & 2)	July 15, 2016

Meet with Employee NOTE: this is the only step where a manager can add any comments for his or her employees.	
4. Employee Comments and Sign-Off NOTE: this is the only step where an employee can add any comments on his or her appraisal.	July 22, 2016
5. Manager Sign-Off	July 29, 2016
6. Second Level Manager Sign-Off	August 12, 2016
7. Performance Evaluations Close	August 14, 2016

28. I received a 90-day evaluation and an annual evaluation during the same time period. Do I have to complete both?

Managers who have a 90-day review and an annual evaluation in the same time period are not required to complete the 90-day review. The annual review is needed for anyone who is eligible for a potential merit increase in order to extract the evaluation score to process the increase. If you receive a 90-day review to complete, please contact the HR Service Center.