
USER MANUAL

PEOPLESOFT ePERFORMANCE

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OVERVIEW

INTRODUCTION

By utilizing ePerformance, we will accomplish several objectives: data centralization, employee performance tracking, workforce development and system storage. The goal of the User Manual is to make ePerformance as simple as possible for users (Employees and Managers) by providing step-by-step instructions.

PERFORMANCE REVIEW TEMPLATES

There are three Performance Review templates that are issued based on pre-determined job classification. They include:

1. Managerial
 - a. Employees with the following levels:
 - Senior Officer
 - Vice President
 - Director
 - Manager
2. Professional
 - a. Employees with the following levels:
 - Assistant Manager
 - Supervisor
 - Other Personnel
3. Employee
 - a. Employees with the following level:
 - Non-Management

PERFORMANCE REVIEW CONTENT

- 1) There are various sections of an employee review that depend on the template assigned. These include:
 - a. iSCORE Values

-
- b. Leadership Success Factors-*Managers Only*
 - c. Job Duties
 - d. Achievement of Goals
 - e. Future Goals

2) The Section Contents are as follows:

- a. iSCORE Value
 - Innovation
 - Service Excellence
 - Collaboration
 - Ownership
 - Respect
 - Empowerment
- b. Leadership Success Factors (*Managers only*)
 - Transforms
 - Engages
 - Executes
- c. Job Duties
 - System capture Job Duties entered from 2016
 - Manager adds, edits or deletes job responsibilities of an employee
- d. Achievement of Goals
 - System captures goals entered by Manager in 2017
 - Manager add, edits or deletes the goals for an employee
- e. Overall Summary Section
 - System compilation of iSCORE, Leadership Success Factors (if applicable), Job Duties & Achievement of Goals
- f. Employee Improvement Area: This section is only to be used if an employee receives an Overall Score of 'Opportunity for Improvement.'
 - Input by manager

3) Review Rating: There are three review ratings available for selection within each section:

- Exceeds
- Achieves
- Opportunity for Improvement

Below displays the score range that is used in the calculation of the numerical overall review rating and assignment of rating (Exceeds, Achieves, and Opportunity for Improvement).

		Score Range	
Review Rating	Basic Score	Minimum Score	Maximum Score
Opportunity for Improvement	1.00	1.00	1.99
Achieves	2.00	2.00	2.69
Exceeds	3.00	2.70	3.00

EPERFORMANCE PROCESS

- At various stages of the review process, employees and managers must complete steps to expedite the approval flow. These include the following:

Step	Action	Responsible Party(s)	Impact
A	Initiate Performance Documents	ePerformance	<ol style="list-style-type: none"> Available for employee's self-assessment Available for manager review
B	Edit Performance Documents	Manager	<ol style="list-style-type: none"> Ability to start the assessment Ability to nominate a peer (3rd party) to submit an assessment of employee Ability to forward Performance Review Update and share with Employee
C	Edit Performance Documents	Employee	<ol style="list-style-type: none"> Ability to start self-assessment Ability to communicate with Manager Review with Manager
D	Submit Self-Assessment	Employee	<ol style="list-style-type: none"> Employee Assessment available for manager review
E	Review Employee's Self-	Manager	<ol style="list-style-type: none"> Available for manager review

	Assessment		2. Request Acknowledgment from employee
F	Peer Review (if available)	Manager	1. Decision on whether to include peer review in assessment or not
G	Peer Review (if available)	Employee	1. Decision on whether to accept a nomination request
H	Update and Share	Manager	1. Makes the document available for employee review and acknowledgment
I	Acknowledgment	Employee	1. Employee ability to enter comments, in response to assessment, in 'Employee comments section' 2. Employee acknowledgment completes Review Process
J	Pending Acknowledgment	Manager	1. Non-acknowledgment by employee leaves document available for manager to complete
K	Submit Performance Review		1. Completion of Review Process

Review Templates					
Manager		Professional		Employee	
Section	FY17 Weight	Section	FY17 Weight	Section	FY17 Weight
iSCORE Values	50	iSCORE Values	50	iSCORE Values	50
Leadership Success Factors	15	--	--	--	--
Job Duties	15	Job Duties	30	Job Duties	30
Achievement of Goals	20	Achievement of Goals	20	Achievement of Goals	20

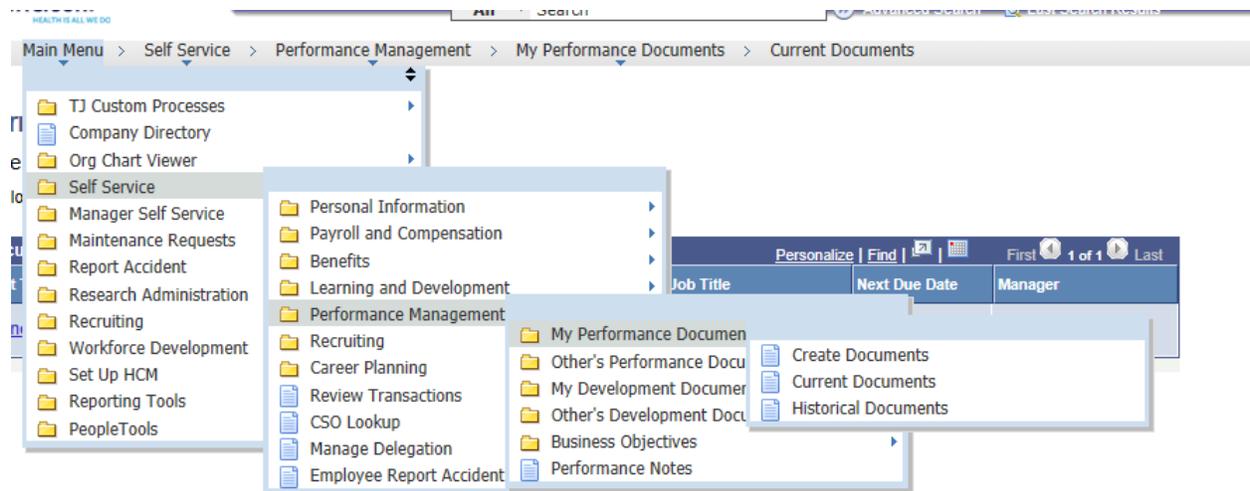
Overall Summary	100	Overall Summary	100	Overall Summary	100
Employee Improvement Areas*	--	Employee Improvement Areas*	--	Employee Improvement Areas*	--
eSignature	--	eSignature	--	eSignature	--

EMPLOYEE FEATURES

Accessing ePerformance as an employee

You can also access ePerformance through Employee Self-Service.

- Go to Employee Self-Service, Select Performance Management, Then My Performance Document and Current Documents



- Click on Performance Review to start your self-evaluation.

Performance Documents

Listed below are your current performance documents.

Your Documents							Personalize Find	First 1 of 1 Last
Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager		
Performance Review	Evaluation in Progress	07/01/2013	06/30/2014		06/30/2014			

Performance Review

Self-Evaluation - Update and Complete

Job Title	Manager
Document Type Performance Review	Period 07/01/2013 - 06/30/2014
Template	Document ID 7955
Status Evaluation in Progress	Due Date 06/30/2014

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the complete button to save your changes and send this document to your manager for review.

[Expand All](#) | [Collapse All](#) | [Calculate All Ratings](#)

Self-Assessment as an Employee

Below are the sections in which the Employees' self-evaluation will be based.

- ▶ [Section 1 - iSCORE Values](#)
- ▶ [Section 2 - Leadership Success Factors](#) **For Managers Only**
- ▶ [Section 3 - Job Duties](#)
- ▶ [Section 4 - Achievement of Goals](#)
- ▶ [Section 5 - Overall Summary](#)

Section 1- iSCORE Values

Section 1 - iSCORE Values

Expand | Collapse

- Innovation
- Service Excellence
- Collaboration
- Ownership
- Respect
- Empowerment

iSCORE Values Summary

Summary Weight 50 %

- To start your self-assessment, select 'Expand' to open each iSCORE value section.

Innovation

Description : To renew, change or create ideas, services, technologies and/or wa value.

Employee Rating 0.00

- Select the appropriate rating

Innovation

Description : To renew, change or create ideas, services, techn value.

Employee Rating

Employee Comments

Writing Tools

- Achieves
- Exceeds
- Opportunity for Improvement

For a definition of the review ratings, click on the box next to the ratings.

Proficiencies		
Rating	Numeric Rating	Description
<input type="radio"/> Opportunity for Improvement	1.00	Performance falls below expectations
<input type="radio"/> Achieves	2.00	Performance consistently meets the expectation
<input type="radio"/> Exceeds	3.00	Performance consistently achieves and frequently exceeds expectations

- Writing Tools: Availability of system-provided wording suggestions to use for comments. To use:

Click and select appropriate comments for each section.

	Suggested Results Text	Source
<input checked="" type="checkbox"/>	Leon suitably suggests better ways of completing own work.	Results Writer
<input type="checkbox"/>	Leon commonly demonstrates the ability to generate ideas organically or in a brainstorming session.	Results Writer
<input checked="" type="checkbox"/>	Leon routinely supports innovations that are introduced by team leaders and managers.	Results Writer
<input type="checkbox"/>	Leon typically seeks help to shape ideas into workable proposals for change.	Results Writer

- Click 'Add Comments'

Comments

That will pull the selected comments

Leon commonly demonstrates the ability to generate ideas organically or in a brainstorming session. Leon routinely supports innovations that are introduced by team leaders and managers. Leon typically seeks help to shape ideas into workable proposals for change.

Find Additional Content

- Click 'Save and Return' to pull into the comments section

Leon commonly demonstrates the ability to generate ideas organically or in a brainstorming session. Leon routinely supports innovations that are introduced by team leaders and managers. Leon typically seeks help to shape ideas into workable proposals for change.

You can add development tips to this stage of the assessment. Go to 'Find Additional Content' to related items to help improve employee development.

Writing Tools - Development Tips

Search for text

*Competency



Review Rating

Click the magnifying glass to select the correct competency

[Performance Review](#)

Writing Tools - Development Tips

The screenshot shows the 'Writing Tools - Development Tips' form. The 'Search for text' field is empty. The '*Competency' dropdown menu is open, showing three options: 'Achieves', 'Exceeds', and 'Opportunity for Improvement'. The 'Review Rating' dropdown menu is also open, showing three options: 'Achieves', 'Exceeds', and 'Opportunity for Improvement'. There are 'Search' and 'Clear' buttons at the bottom left of the form.

Select the appropriate development tip

Competency	Description	Competency Category
B0050	Knowledge of Organization	Knowledge
B0100	Operational Functions	Knowledge
B0150	Products and Services	Knowledge
B0160	Service Excellence	Knowledge
B0200	Business Markets	Knowledge

Choose the appropriate rating for the chosen competency

Suggested Results

[Personalize](#) | [View All](#)

Suggested Results Text

- Escalate complex customer service requests to appropriate person(s) within 1 hour of receipt.
- Increase customer satisfaction by 5%, as measured by an annual customer satisfaction survey
- Decrease time needed to respond to customer service requests by 5% over the next year.

Add to Comments, Save and Return

PS: You can type in other comments into the section, if you wish

- Once the ratings for all parts are entered, go the Summary section, hit the calculator button

iSCORE Values Summary

Summary Weight 50 %

(not less than 50%)

Employee Rating

0.00  

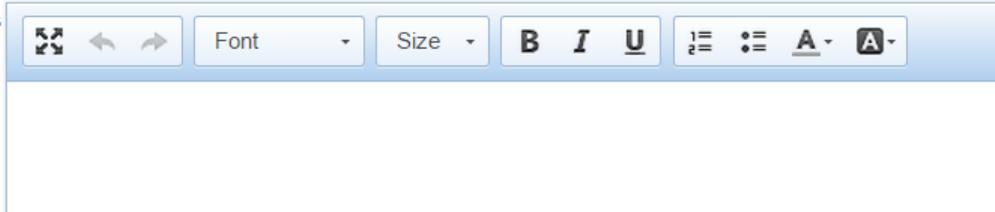
System will calculate the rating and score

Employee Rating **Achieves**

2.20  

Type in any comments related to the section

Employee Comments



A rich text editor toolbar with the following icons from left to right: a square with four arrows pointing outwards, a left-pointing arrow, a right-pointing arrow, a 'Font' dropdown menu, a 'Size' dropdown menu, a bold 'B' icon, an italic 'I' icon, an underlined 'U' icon, a bulleted list icon, a numbered list icon, a link icon with an 'A' and a minus sign, and an unlink icon with an 'A' and a minus sign.

Section 2 – Leadership Success Factors (for managers only):

1. Enter the ratings for each factor

▼ Section 2 - Leadership Success Factors

▼ Expand | ► Collapse

► **Transforms**

► **Engages**

► **Executes**

Job Duties - Section 2 (for non-managers) or Section 3 (for managers)

2. Job duties, if entered by Manager from last year's document, automatically captured in current appraisal.

Self-Evaluation

▼ Section 3 - Job Duties

 Add Item

Job Duties Summary

Employee Rating 0.00 

Summary Weight 50 % (not less than 50%)

3. Enter any additional job duties that you performed during the review period
4. At Select 'Add Item' then 'Add your own item' and enter a job duty.

Self-Evaluation

▼ Section 3 - Job Duties

 Add Item

Job Duties Summary

Employee Rating 0.00 

Summary Weight 50 % (not less than 50%)

Performance Review

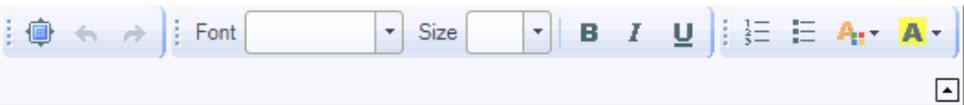
Add Item

- Add pre-defined item
- Add your own Item

Next

Below is the new job duty that is being added

*Title

Description 

Assists in the development and implementation of he accounting system to enure compliance with generally accepted accounting principles and auditing proceures.

Achievement of Goals - Section 3 (for non-managers) or Section 4 (for managers)

5. Enter the goals you had for the review period

Performance Review

Add Item

- Add pre-defined item
- Add your own Item

▼ Skill Training

Description :

Career building courses



Overall Summary - Section 5 (for non-managers) or Section 6 (for managers)

6. Enter your overall rating

▼ Section 6 - Overall Summary

Employee Rating



Other Notes:

7. You can save your assessment at any point by clicking 'Save'. All review ratings and comments will be saved and kept until you return and complete the assessment. You can resume your assessment at any time.
8. Should you have any questions for your manager as you complete your self-assessment you can select 'Notify' and send your questions via email. The email address for the employees' manager of record will automatically populate in the 'to' field.
9. The 'Save' and 'Notify' buttons are located on the top, right hand corner of the page.

[Return to Current Documents](#)

[Save](#)

[Complete](#)



[Print](#)



[Notify](#)

Sample email to Manager below.

Please enter your email message in the fields below and select the the send button.

To

Subject This is a notification regarding the Performance Review for Diana Straw.

Message Text

Complete Self-Evaluation

10. Once you have completed all sections for the review and added all of your comments, click 'Calculate All Ratings' on the top section of the page.

Document Type Performance Review Period 07/01/2015 - 06/30/2016
Template Employee Evaluation Document ID 13706
Status Evaluation in Progress **Due Date 08/14/2016** Self-Assessment due date

11. Next, select "Complete" to complete your review.

[Return to Current Documents](#) |

 Print |  Notify

12. Lastly, click "Confirm" to complete the evaluation. **Please be aware that once you click "Confirm" your evaluation is automatically sent to your manager.**

Favorites | Main Menu > Self Service > Performance Management > My Performance Documents > Current Documents

Complete Evaluation

>> You have almost finalized your self evaluation. If you have no further entries select confirm to complete this evaluation and send it to your manager for review.

» **Performance Review**
Confirmation - Document Completed

✔ You have successfully completed your evaluation.

After the manager has done the employee's evaluation, they will share it with the employee. That will generate an email to the employee.



Click on the link to get into PeopleSoft to review your manager's evaluation. Once in, click on 'Review with Manager' before your review is discussed.

Steps and Tasks

Anne Doe

Performance Review

07/01/2015 - 06/30/2016

[Overview](#)

▶ ✔ **Complete Self Evaluation**

Due Date 05/16/2016

▼ ⚠ **Review Manager Evaluation**

Due Date 08/14/2016

⚠ **Review with Manager**

Acknowledge

View

Participant Assessment

Should a manager select you to do an assessment of another employee, you will receive a request via email. Click on the link in the email to get you into the system.

This automatic notification is to inform you that a request has been submitted for your participation.

Navigate to http://terme.jefferson.edu:16005/psp/HR92MP11/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?

[EP_APPRAISAL_ID=6573&EP_REVIEWER_ID=000032126&EP_ROLE=E&EP_USER_ROLE=O&EP_DOC_USAGE=P&TRANS_NAME=NOM-SUBMIT](http://terme.jefferson.edu:16005/psp/HR92MP11/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=6573&EP_REVIEWER_ID=000032126&EP_ROLE=E&EP_USER_ROLE=O&EP_DOC_USAGE=P&TRANS_NAME=NOM-SUBMIT)

(Please do not respond to this automatic notification.)

That should take you into Self Service

Pending Evaluation Requests

Pending Evaluation Requests			
	Name	Document Type	Due Date
<input checked="" type="checkbox"/>	Anne Doe	Performance Review	05/16/2016

Select All

Deselect All

Accept

Decline

Accept or Decline to the assessment request.

MANAGER FEATURES

Accessing ePerformance as a manager

Managers who have direct reports will have access to Manager Functions of ePerformance. Once the performance review file is systematically created, you will receive notification via email. (See below).

Subject: Performance Review Created

This automatic notification is to alert you that the HR Department has created Performance Review performance documents for your team for the period beginning 07/01/2015 and ending 06/30/2016. For each employee, we have created both your manager's document as well as the employee's self-evaluation.

You may select this link to access the documents for your team:

http://cvm155.jefferson.edu:16025/psp/hr92mp11/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_CURRENT_MY_PRF.GBL

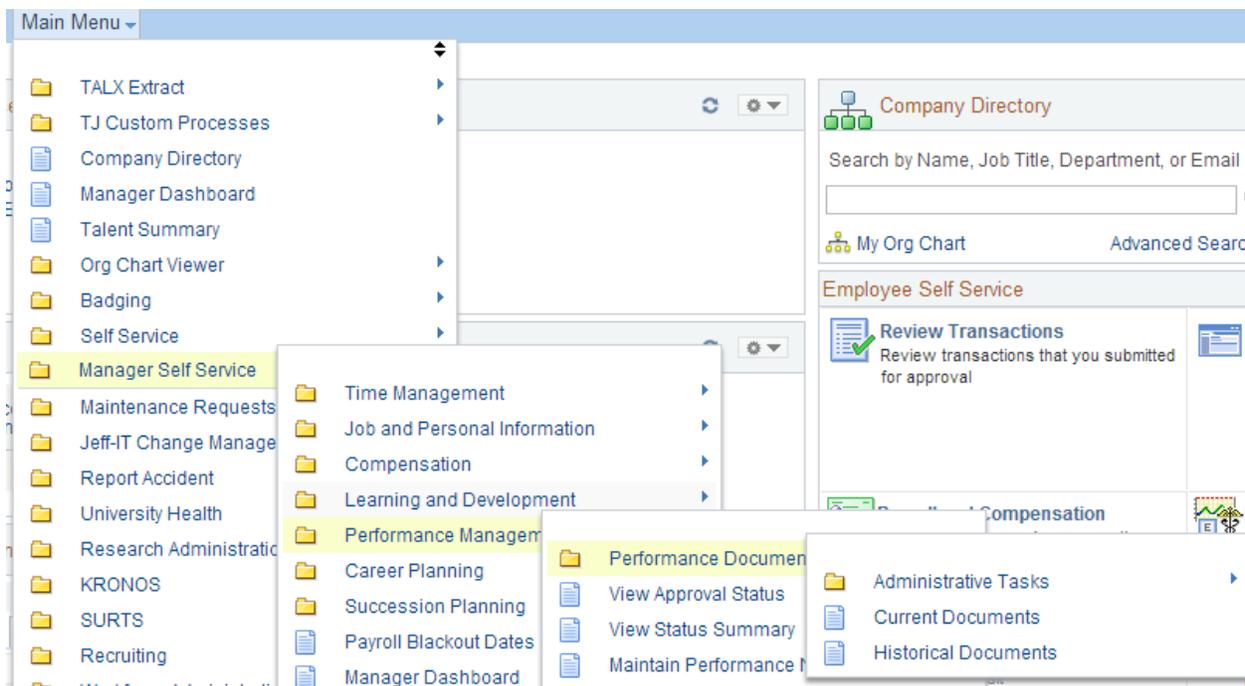
Performance Review documents were successfully created for the following employees:

Anne Doe (000039999)

Click on the link to log into PeopleSoft. You can also access PeopleSoft ePerformance by performing the following steps:

Log into the PeopleSoft with your campus key and password (screen shot on next page).

- Click on the Manager Self-Service
- Click on Performance Management
- Click on Performance Documents
- Click on Current Documents



- Once you select Current Documents, you will see a list of all employees assigned to you for completion of Performance evaluations. Click on the employee name to begin the evaluation.
- Please be aware that as the employee review proceeds, you can save the form (click on Save) at any time and continue your review in the future.

[Return to Current Documents](#)

[Save](#)

[Submit for Approval](#)

Current Performance Documents

Listed below are the current performance documents for which you are the Manager.

Filter Criteria						
Documents you own						
Employee	Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date
Employee 1	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014		06/30/2014
Employee 2	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014		06/30/2014
Employee 3	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014		06/30/2014
Employee 4	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014		06/30/2014

The name and Job Title of the Employee being reviewed is displayed on the top part of the review. The due date for the entire review is shown on top part of the review page. Below that are all the sections that make up an employee’s performance review. Within each section, click the ‘Expand’ button link, to take you to the section where you can then enter specific information.

Document Type Performance Review
Template Employee Evaluation
Status Shared with Employee

Period 07/01/2015 - 06/30/2016
Document ID 13706
Due Date 08/14/2016

Section 1- iSCORE Values

- Select expand to open each of the sections

Manager Evaluation - Update and Submit

Section 1 - iSCORE Values

Expand | Collapse

Innovation

Service Excellence

Collaboration

Ownership

Respect

Empowerment

Description : To take actions to control work and decision making to affect positive outcomes.

Manager Rating 0.00

Manager Comments

[Writing Tools](#)

Rich text editor toolbar with options for Font, Size, Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Text Color, and Background Color. Below the toolbar is a large empty text area for entering comments.

Section 2 – Leadership Success Factors (for managers only):

Section 2 - Leadership Success Factors

Expand | Collapse

Transforms

Engages

Executes

Leadership Success Factors Summary

Summary Weight 15 % (not less than 15%)

Job Duties - Section 2 (for non-managers) or Section 3 (for managers)

-
- If Job Duties were entered last year, they will be captured into this year's document for you to enter a rating and comments

▼ Section 2 - Job Duties

▼ Expand | ▶ Collapse |  Add Item

- ▶ **Technical Support for Ascent Modules**
- ▶ **Primary Tech. Developer & Support for Ascent Batch Schedule**
- ▶ **Primary Technical Developer and Support for Ascent/ORSOS**

- Should you not want a job duty from last year, it can be deleted. Just go to that particular job duty

▼ **Technical Support for Ascent Modules**

Description : This includes but is not limited to day to day support, customizations, projects approved by Sr. Mgmt., and the clients use of existing features that are not yet in play.

Click on the trash bin

- You can also add a new job duty by selecting 'Add Item'
- Click 'Next' to enter the Job duty title and description you are getting ready to make an assessment on.

Performance Review

Add Item

- Add pre-defined item
- Add your own item

Next

- Below is the new job duty that is being added

*Title

Description 

Assists in the development and implementation of he accounting system to enure compliance with generally accepted accounting principles and auditing proceures.

Click Add:

- The Job duty will appear on the review page and be ready for the Manager rating to be entered.

System Development

Description :

Assists in the development and implementation of he accounting system to enure compliance with generally accepted accounting principles and auditing proceures.  

Manager Rating 

Created By Ernest Elike 05/22/2014 2:21PM
Last Modified By Ernest Elike 05/22/2014 2:22PM

- Click 'Add Item' again to add another Job Duty.

Achievement of Goals - Section 3 (for non-managers) Section 4 (for managers)

▼ **Section 4 - Achievement of Goals**

Add Item | Participant Feedback

Achievement of Goals Summary

Manager Rating 0.00

Summary Weight 50 % (not less than 50%)

Manager Comments

- Annual Goals entered by managers will be automatically captured in the goals section of the performance document, for you to enter a rating and comments

▼ Section 3 - Achievement of Goals

Expand | Collapse | Add Item

- ▶ Continue the ORSOS Bi-Directional Support and Train Backup
- ▶ Oracle PeopleSoft Financials/SCM Upgrade
- ▶ Technical Support of PeopleSoft Modules

- Should you not want a goal from the Annual Goals, it can be deleted. Just go to that particular goal

Technical Support of PeopleSoft Modules

Description : Continue to expand knowledge and support other PeopleSoft modules, including Security, Portal and HCM projects.

Click on the trash bin

- At this stage, you can also add new goals for this year. To do that, click 'Add Item'. That will take you to page where you select 'Add your own Item'.
- Click 'Next' to enter the Employee Goals and description you are getting ready to make an assessment on

Performance Review

Add Item

- Add pre-defined item
- Add your own Item

Next

Overall Summary - Section 5 (for non-managers) Section 6 (for managers)

- This section is the overall rating for the employee, which is based upon the weighted calculations for each reviewed section.

▼ Section 5 - Overall Summary

Manager Rating

0.00  

Employee Improvement Areas - * Section 9 (for non-managers) or Section 10 (for managers)

- This section is only to be used for employees that received an overall rating of 'Opportunity for Improvement'. Managers should enter the steps employees should take to improve their performance.

SCOR Values Summary

Rating: Achieves 2.00  

Summary Weight: 25 % (not less than 25%)

Comments:

- Managers should enter comments with examples below the selected ratings to support the reason for the rating given.

Section 6 - Overall Summary

Rating: Achieves  

Comments: Sheryl High met all her job responsibilities with consistency. 

- Reviews can be saved so you may continue at another time and submit at a future date.

Once the employee's review rating have been completed, save and then click 'Share with Employee' at the top of the page.

[Return to Current Documents](#) | [Save](#) | [Share with Employee](#)

 [Print](#) |  [Notify](#)

Confirm to share

Share with Employee

Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.

The overall rating you have assigned to this employee is **Achieves**.

Upon selecting confirm your electronic signature will be added to this document.

This will send the document to the employee for their acknowledgment.

Once the employee acknowledges, the review will be completed.

-
- Nominate Participants**
Due Date 06/30/2017
 - Review Participant Evaluations**
Due Date 05/16/2017
 - Review Self Evaluation**
Due Date 05/16/2017
 - Complete Manager Evaluation**
Due Date 08/14/2017
 - Update and Share
 - Pending Acknowledgement

Performance Review- Manager

The manager will receive this email notification when the employee has completed their Self-Evaluation.

The Employee Self Evaluation for Performance Review has been completed:

[http://cvm155.jefferson.edu:16025/psp/hr92mp11/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?
EP_APPRAISAL_ID=13706&EP_REVIEWER_ID=000032126&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=EMPDOC-COMPLETE](http://cvm155.jefferson.edu:16025/psp/hr92mp11/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?EP_APPRAISAL_ID=13706&EP_REVIEWER_ID=000032126&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=EMPDOC-COMPLETE)

(Please do not respond to this automatic notification.)

There may be situations when another Manager is responsible for an employee's performance evaluation. In order to transfer the evaluation to another manager, follow the instructions below.

- Go to Manager Self-Service
- Performance Management
- Performance Documents
- Administrative Tasks
- Transfer Document

Select an employee to forward to a manager and click on continue.

Transfer Document

To transfer a performance document, select the checkbox for the Employee and then select the Continue push button. Only current documents can be transferred.

Documents you own						Personalize Find  
	Employee	Document Type	Document Status	Period Begin	Period End	Job Title
<input checked="" type="checkbox"/>	Employee 1	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014	<input type="text"/>
<input type="checkbox"/>	Employee 2	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014	<input type="text"/>
<input type="checkbox"/>	Employee 3	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014	<input type="text"/>
<input type="checkbox"/>	Employee 4	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014	<input type="text"/>

[Select All](#)

[Deselect All](#)

Click on 'Select a Manager'

- Enter the manager's name, hit search and select the Manager that you wish to transfer the employee to and select OK.

Person Search

Search Criteria and Results

Instructions

Search Criteria

Name

Last Name

Second Last Name

First Name

ACName

Search Results

<input type="radio"/>	Joseph Smith	i
<input type="radio"/>	Jane Smith	i

[Return to Previous Page](#)

Click Save to confirm the transfer

Transfer Document

Confirm Transfer

Documents you own Personalize | Find | First 1 of 1 Last

Employee	Document Type	Document Status	Period Begin	Period End	Job Title
Employee 1	Performance Review	Evaluation in Progress	07/01/2013	06/30/2014	<input type="text"/>

You have chosen to transfer the document indicated above to another manager.
Select the receiving manager by using the "Select a Manager" hyperlink, then select the **Save** button to complete the transfer.

New Manager ID: Joseph Smith
[Select a Manager](#)

[Return to Previous Page](#)

Transfer Document

Save Confirmation



The Save was successful.

OK

- An email confirmation will be sent to the manager that you transferred the employee to.

FW: A Performance Review for Employee 1 has been transferred to you.

Sent: Wed 5/28/2014 1:37 PM
To: Joseph Smith

-----Original Message-----

From: hr.selfservice1@jefferson.edu [mailto:hr.selfservice1@jefferson.edu]
Sent: Wednesday, May 28, 2014 1:36 PM
To: Joseph Smith
Subject: A Performance Review for Employee 1 has been transferred to you.

This automatic notification is to alert you that the Performance Review for Employee 1 (000000000) has been transferred to you. This document covers the period beginning 07/01/2013 and ending 06/30/2014. The completed and approved document is due by 06/30/2014.

- The manager's role is to do a performance review of the Job Duties section and return it to the originating manager.



- The manager can send an email to the employee during the review process to get information and clarification from the employee. Once all the review information has been entered by the Manager and Employee, they can meet to review and discuss the review information before it is submitted.

-
- Once employee review is ready for submittal, submit and confirm to finalize review.

Nominate Participants- Manager

A manager can nominate another employee to submit an evaluation of one of their direct reports. To do that, click on 'Nominate Participants'

Performance Process

Steps and Tasks

Anne Doe

Performance Review

07/01/2015 - 06/30/2016

  **Nominate Participants**

Due Date 06/30/2016

[Add Nominees](#)

[Track Nominations](#)

Click on Add Nominees

Anne Doe

Performance Review

07/01/2015 - 06/30/2016

  **Nominate Participants**

Due Date 06/30/2016

[Add Nominees](#)

Click on 'Add Peer'

◆ Participant Role: Peer

Minimum Required: 0 Maximum Available:3

Nominations

Currently there are no nominees in your nomination list.

 Add Peer

Enter the nominee's name and click Search

Search Criteria	
Name	<input type="text"/>
Last Name	<input type="text" value="APLOMB"/>
Second Last Name	<input type="text"/>
First Name	<input type="text" value="SALLY"/>
ACName	<input type="text"/>
<input type="button" value="Search"/>	

Search Results	
<input checked="" type="checkbox"/>	Sally Aplomb 

Click OK

Submit Nomination and confirm

Submit Nominations

Select confirm to submit nomination requests to the listed nominee's.

The nominee will receive an email notifying them about the nomination

This automatic notification is to inform you that a request has been submitted for your participation.

Navigate to http://terme.jefferson.edu:16005/psp/HR92MP11/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?

[EP_APPRAISAL_ID=6519&EP_REVIEWER_ID=000032126&EP_ROLE=E&EP_USER_ROLE=O&EP_DOC_USAGE=P&TRANS_NAME=NOM-SUBMIT](#)

(Please do not respond to this automatic notification.)

To track the nomination process, click track nominations

  **Nominate Participants**
Due Date 06/30/2015
[Add Nominees](#)
[Track Nominations](#)

Nominee	Status	Action
Sally Aplomb	Pending	Cancel

Should you wish to cancel a nomination, click Cancel and then confirm the cancellation. Once the nominee accepts/declines the nomination you will receive an email. You have a limit of 3 completed nominations per employee. Once a nomination is completed, you will receive an email.

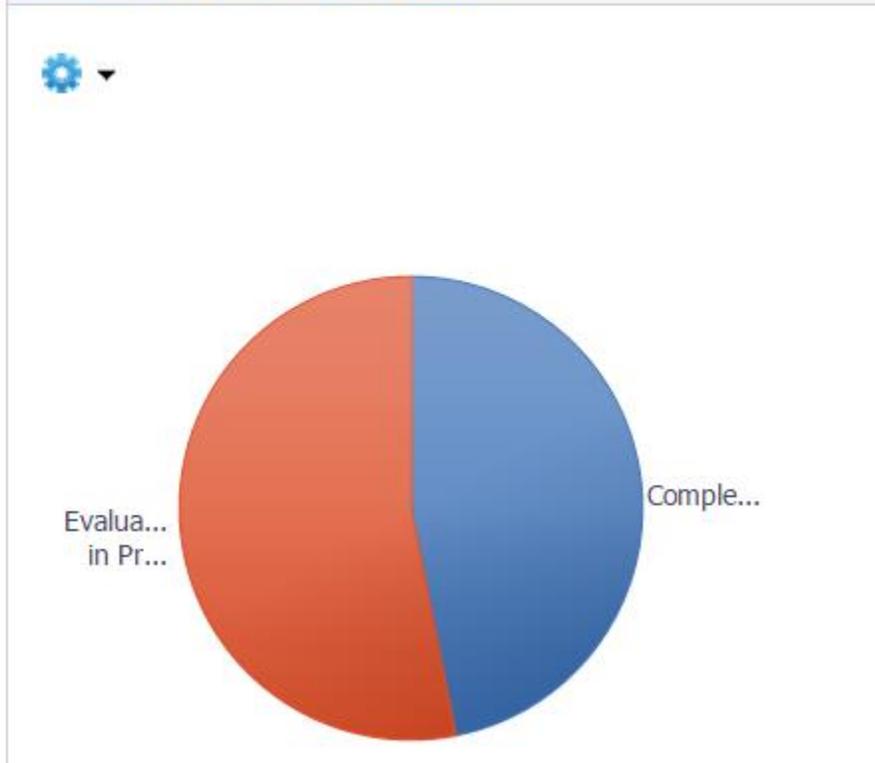
  From hrquestions@jefferson.edu
 To... [hrquestions svc;](#)
 Cc...
Subject: A nomination request has been accepted

This automatic notification is to inform you that a nomination request has been accepted for Robert Sander's Performance Review performance document. Navigate to http://terme.jefferson.edu:16005/psp/HR92MP11/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.EP_NOTIFY.GBL?
[EP_APPRAISAL_ID=6524&EP_REVIEWER_ID=000032126&EP_ROLE=M&EP_USER_ROLE=M&TRANS_NAME=NOM-ACCEPT](#)

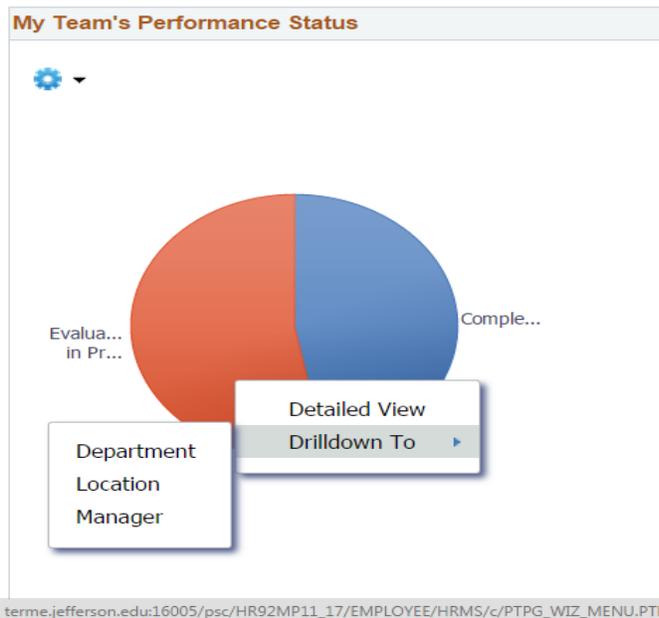
Performance Status- Manager

Managers can check the status of their direct or indirect reports in the system. Go to 'My Teams' Performance Status on the lower left hand side of the PeopleSoft homepage.

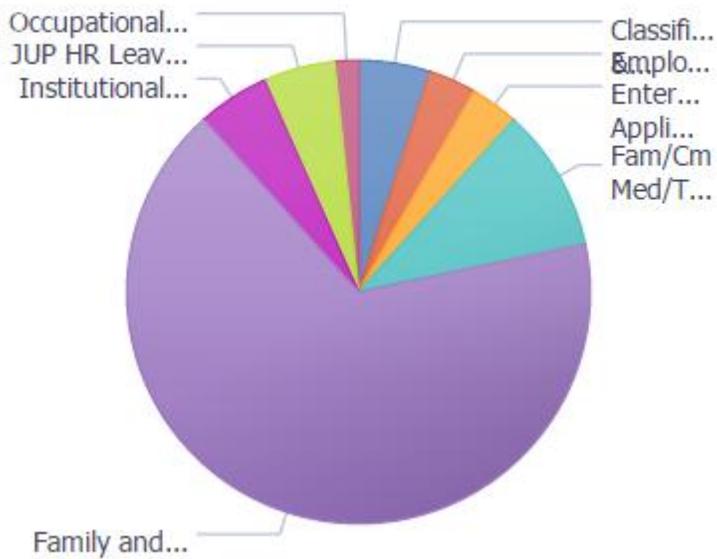
My Team's Performance Status



Click on any section of the pie chart



Click on 'Drilldown To' which will further segment by department, location or manager



Click on 'Detailed View' which will give details of employee that have that performance status

Detailed Data							
Personalize Find View All							
First 1-10 of 60 Last							
Employee	Actions	Manager	Status	Next Due Date	Department	Location	Document ID
Avery Booth	▼ Actions	Sally Aplomb	Evaluation in Progress	2015-04-30	Institutional Advancement	925 Chestnut Street (PMA)	3502
Avery Booth	▼ Actions	Sally Aplomb	Evaluation in Progress	2015-08-30	Institutional Advancement	925 Chestnut Street (PMA)	4615
Sally Aplomb	▼ Actions	Robert Kelly	Evaluation in Progress	2015-03-04	Institutional Advancement	925 Chestnut Street (PMA)	6512