ePerformance

HR Admin Job Aid

Contents

Accessing Performance Documents and Reviewing Performance Evaluation Goals 1

Reopening a Document 2

Canceling a Document 4

Deleting a Document 6

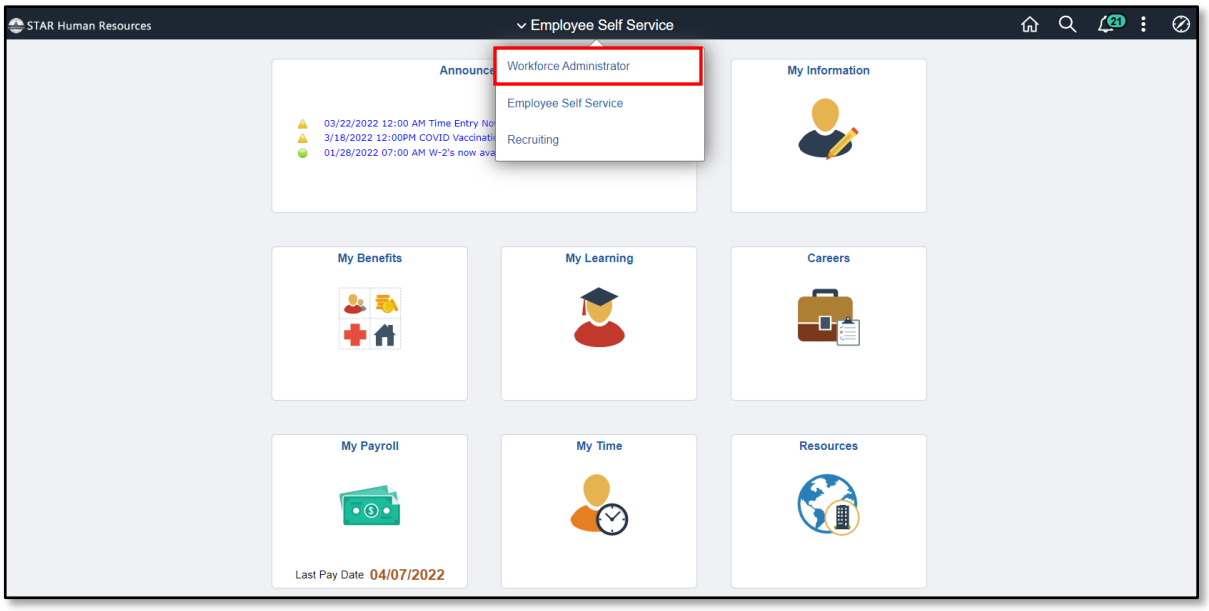
Transferring a Document 8

Viewing a Document 11

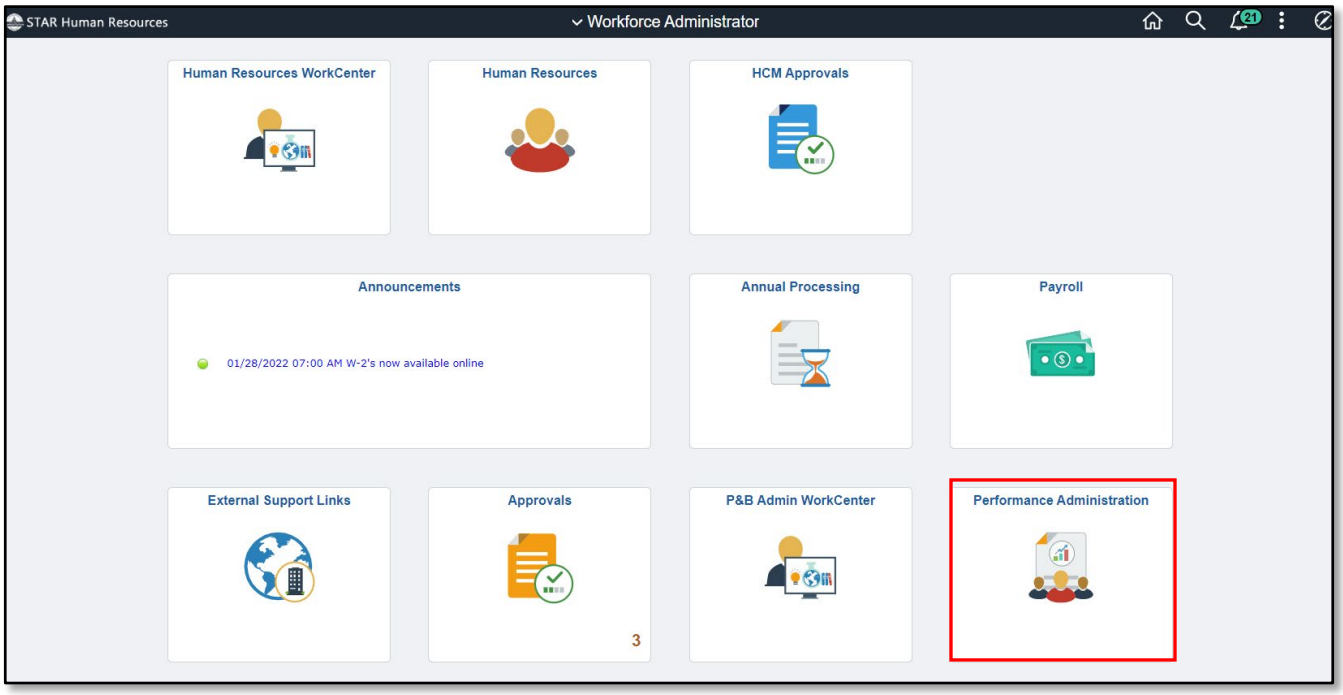
Approving a Document 13

Accessing Performance Documents and Reviewing Performance Evaluation Goals

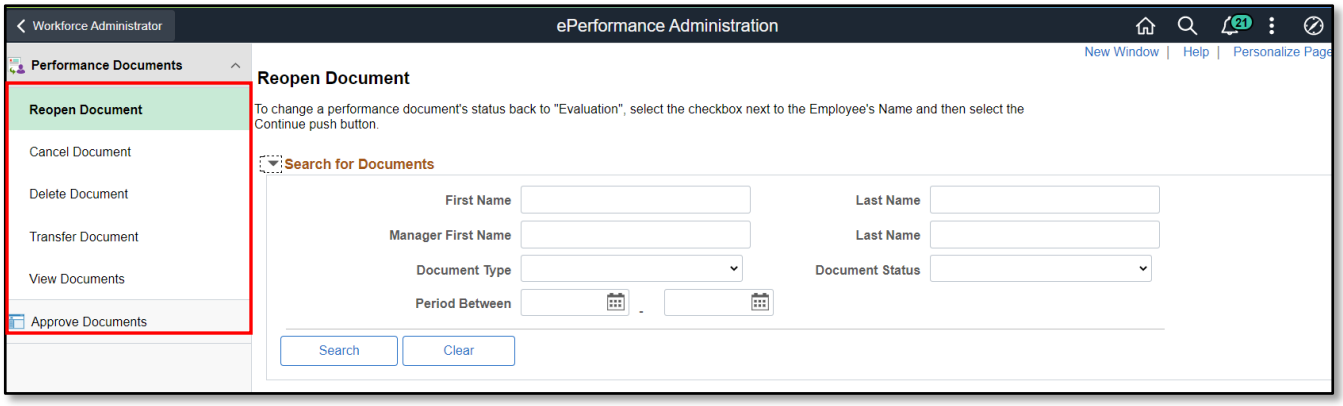
1. Log into PeopleSoft and go to the **Workforce Administrator** homepage if that is not already your default.



2. Click on the **Performance Administration** tile.

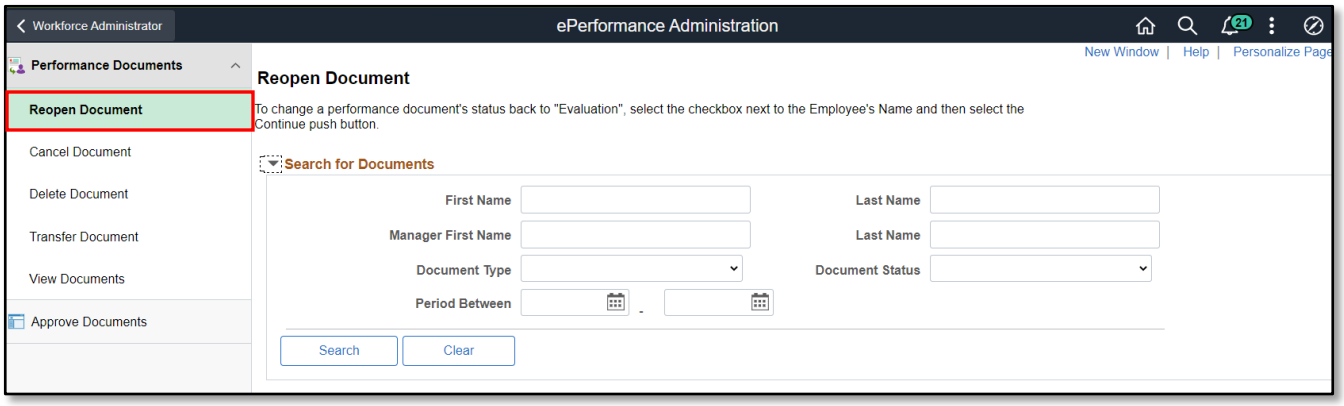


3. There, you will see all options available to you on the left side: **Reopen Document, Cancel Document, Transfer Document, View Documents and Approve Documents.** The page will automatically open up to the Reopen Document tab, highlighted in green. Click on any of the tab options to be taken to that option.

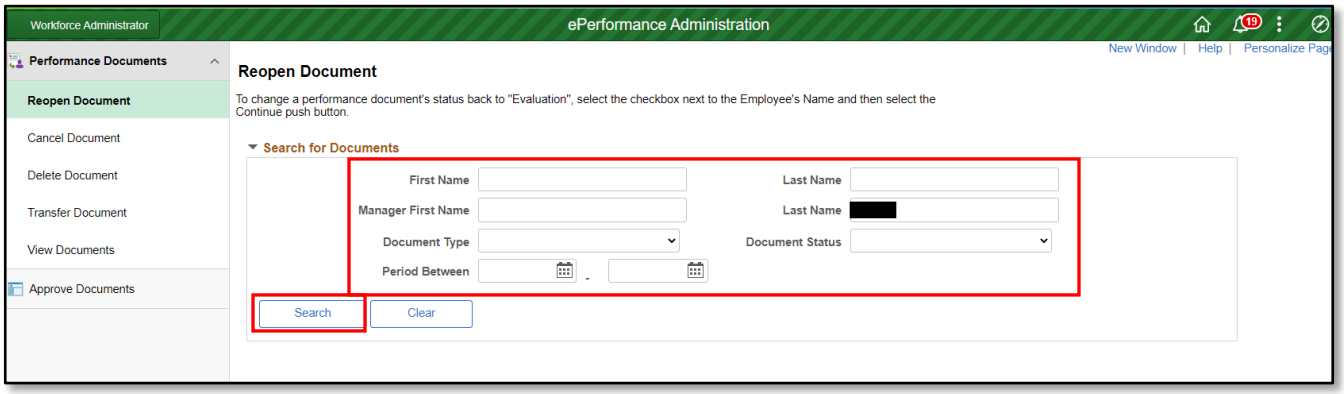


Reopening a Document

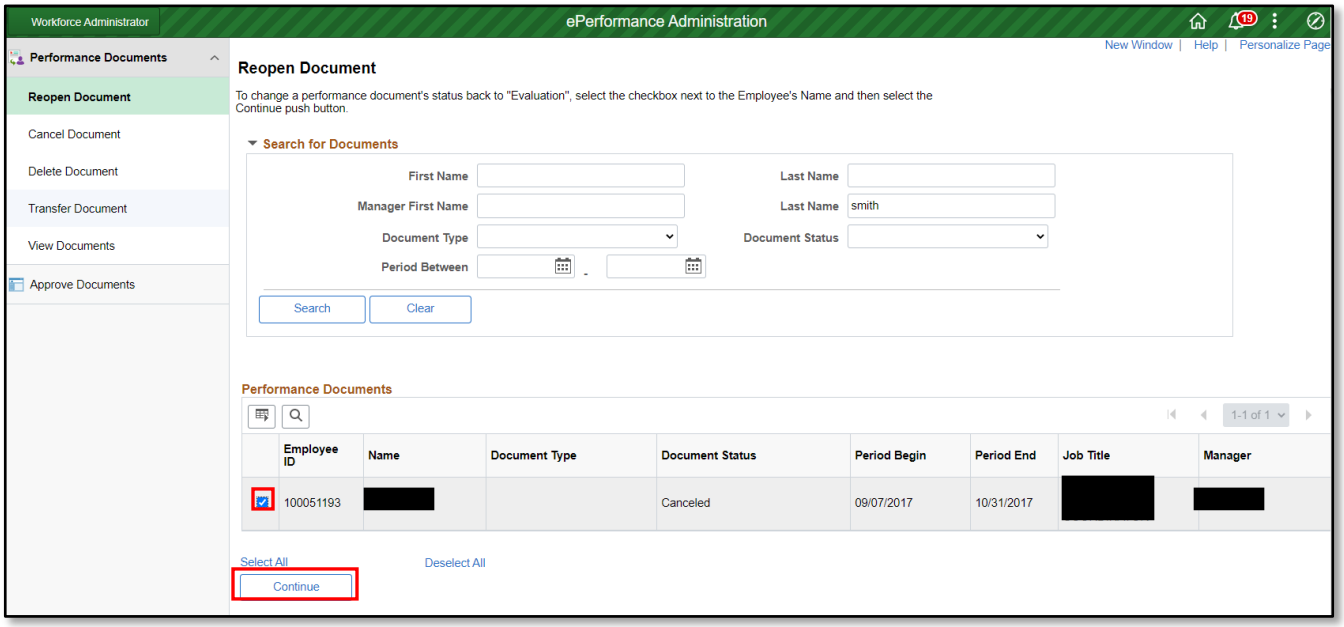
1. To reopen a document, you will use the above instructions to navigate to the Performance Administration tile. There, you will click on **Reopen Document** on the left side of the screen. *Note: it should automatically be open to the reopen document option.*



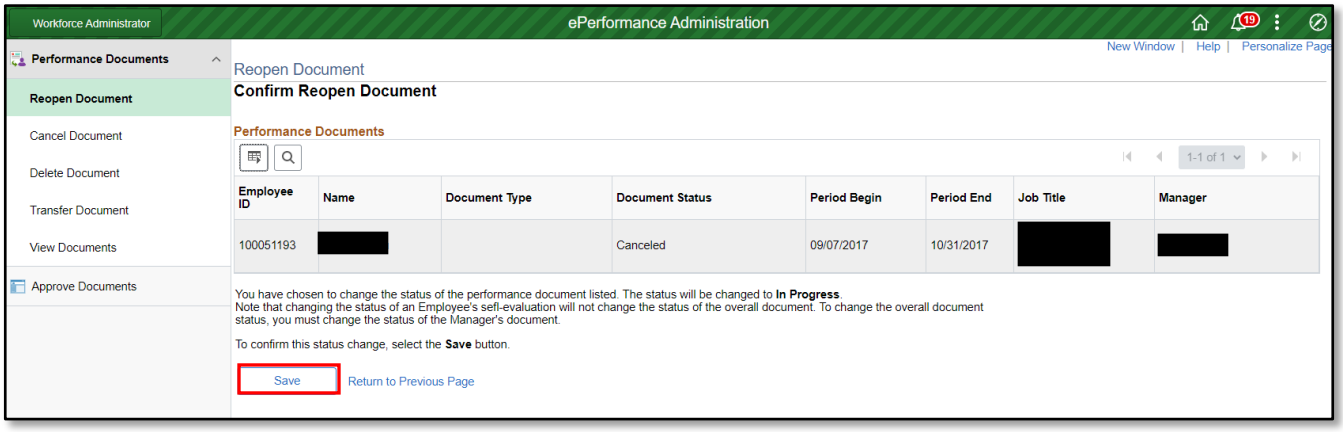
2. To reopen a document, use the search criteria to find the specific document you are looking for (employee first name, employee last name, supervisor first name, supervisor last name, etc.). Note: You do not need to fill in all of the boxes, just enough to find the document you are looking for. (In this example, the supevisors last name was put in the search criteria.) Once you have put in your search criteria, click **Search.**



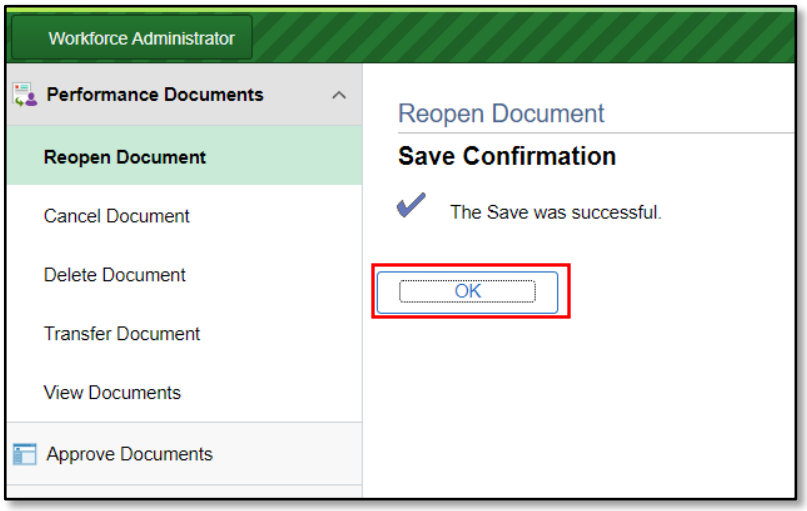
3. Then you will be brought to a document(s) that met your search criteria. Check the box next to the document you want to reopen, and click **Continue.**



4. The next screen will show a message to confirm that you wish to change the status of the document by reopening it. You will click **Save** to confirm and proceed with reopening the document.

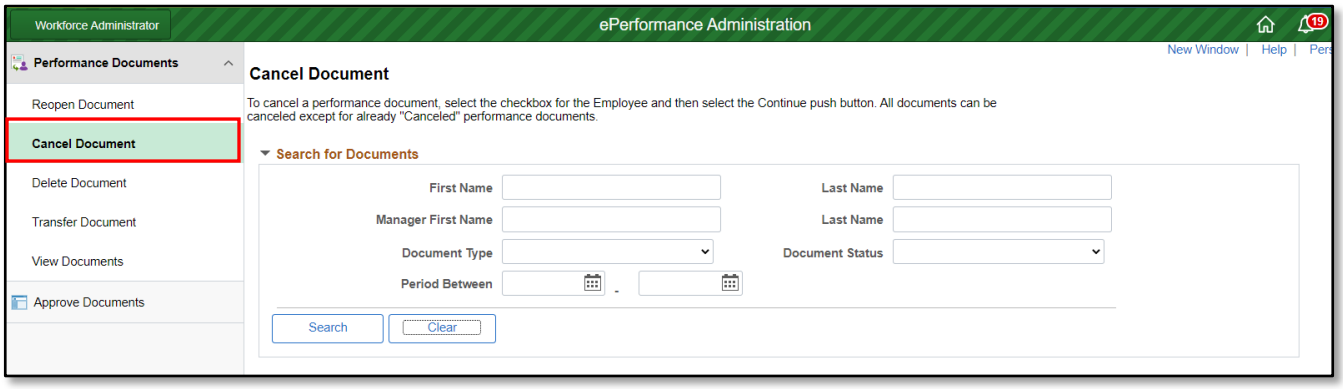


5. A confirmation will appear to tell you the document was successfully reopened, click **OK.**

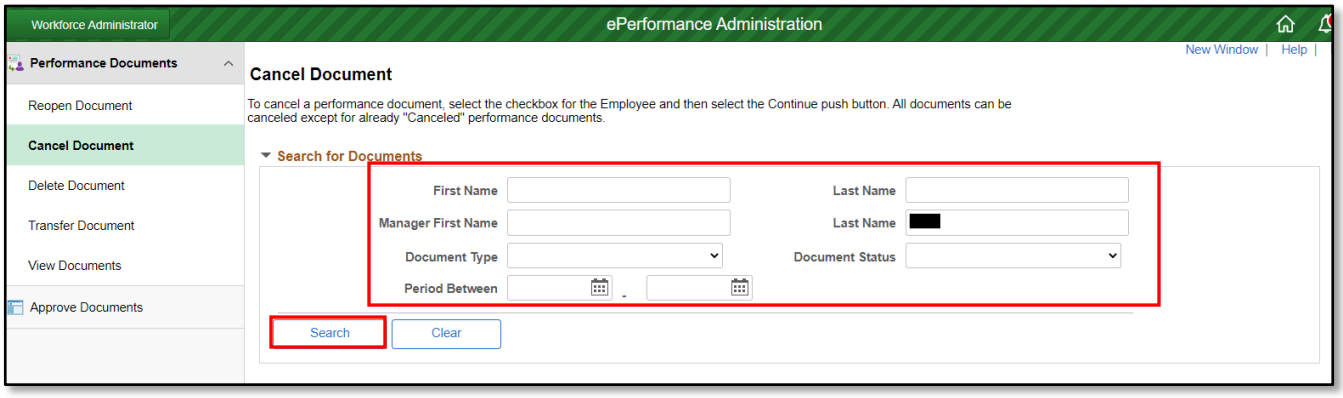


Canceling a Document

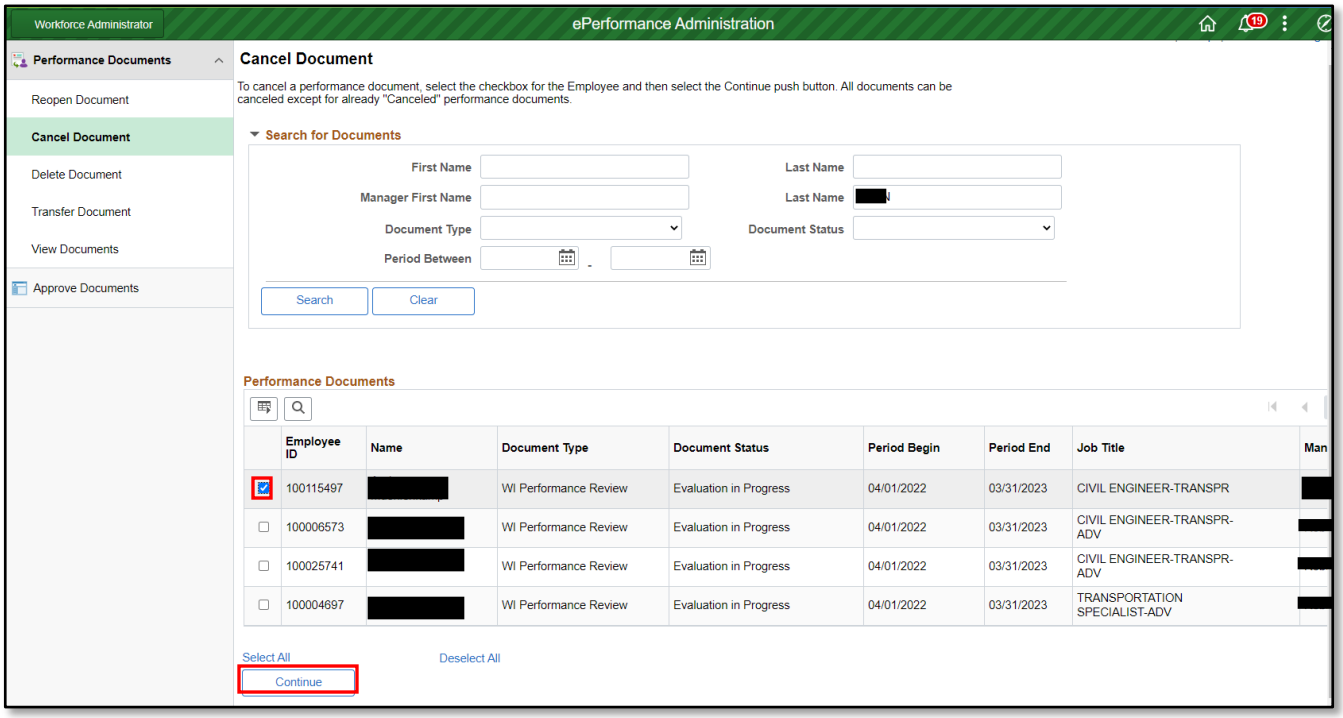
1. To cancel a document, you will use the above instructions to navigate to the Performance Administration tile. There, you will click on **Cancel Document** on the left side of the screen.



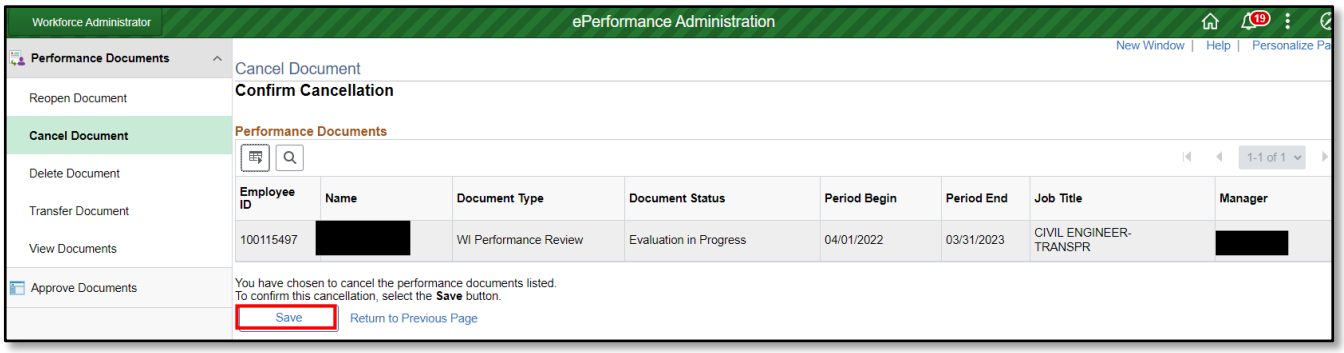
2. Use the search criteria to find the specific document you are looking for (employee first name, employee last name, supervisor first name, supervisor last name, etc.). Note: You do not need to fill in all of the boxes, just enough to find the document you are looking for. (In this example, the supevisors last name was put in the search criteria.) Once you have put in your search criteria, click **Search.**



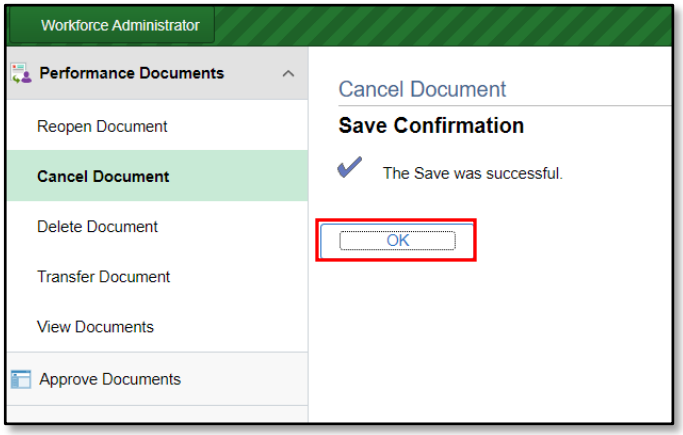
3. Then you will be brought to a document(s) that met your search criteria. Check the box next to the document you want to cancel, and then click **Continue.**



4. The next screen will show a message to confirm that you wish to cancel the performance document that was selected. You will click **Save** to confirm and proceed with canceling the document.



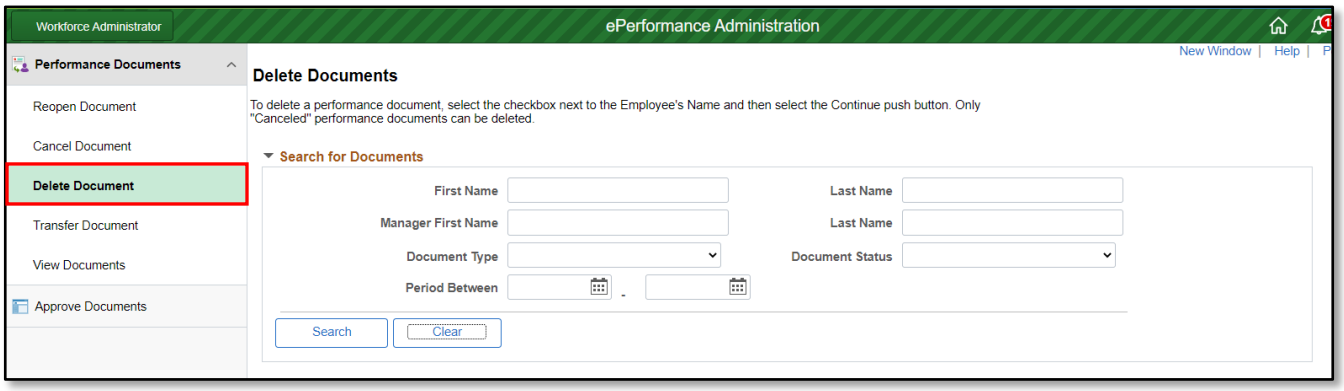
5. A confirmation will appear to tell you the document was successfully cancelled, click **OK.**



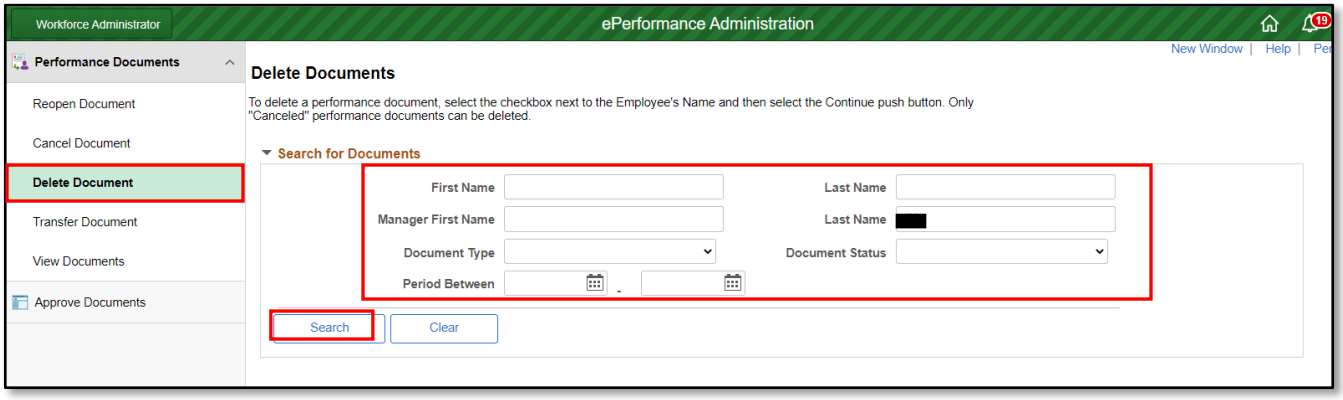
Deleting a Document

Note: In order to delete a document, it must first be cancelled. If it has not already been cancelled by the supervisor, follow the steps above to first cancel. Then follow the steps below to delete.

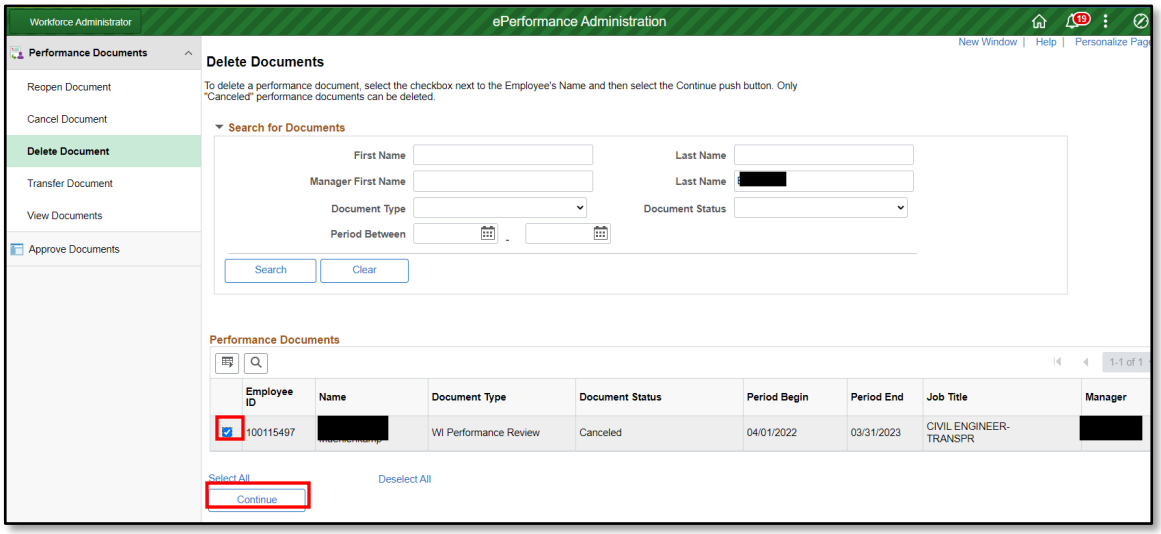
1. To delete a document, you will use the above instructions to navigate to the Performance Administration tile. There, you will click on **Delete Document** on the left side of the screen.



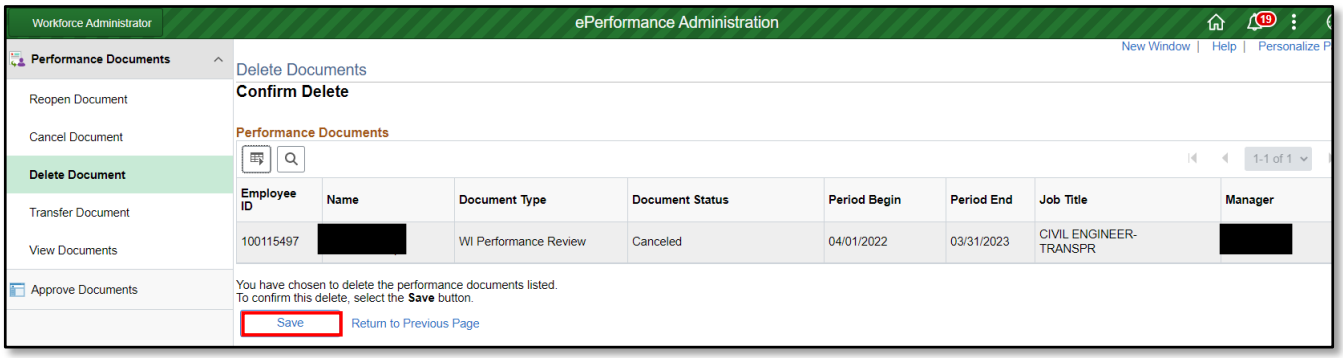
2. Use the search criteria to find the specific document you are looking for (employee first name, employee last name, supervisor first name, supervisor last name, etc.). Note: You do not need to fill in all of the boxes, just enough to find the document you are looking for. (In this example, the supevisors last name was put in the search criteria.) Once you have put in your search criteria, click **Search.**



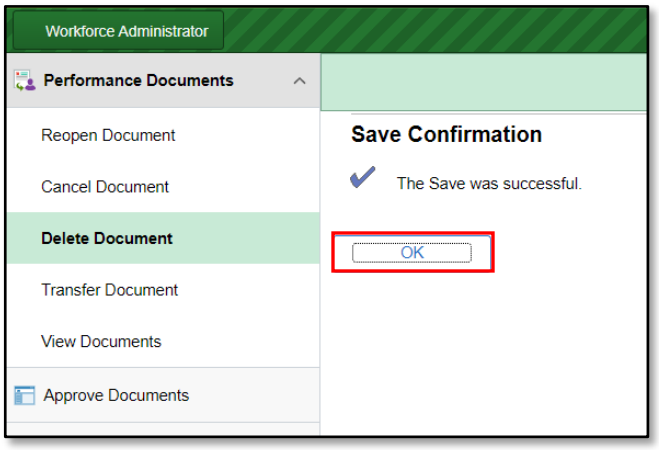
3. Then you will be brought to a document(s) that met your search criteria. Check the box next to the document you want to delete, and then click **Continue.**



4. The next screen will show a message to confirm that you wish to delete the performance document that was selected. You will click **Save** to confirm and proceed with deleting the document.

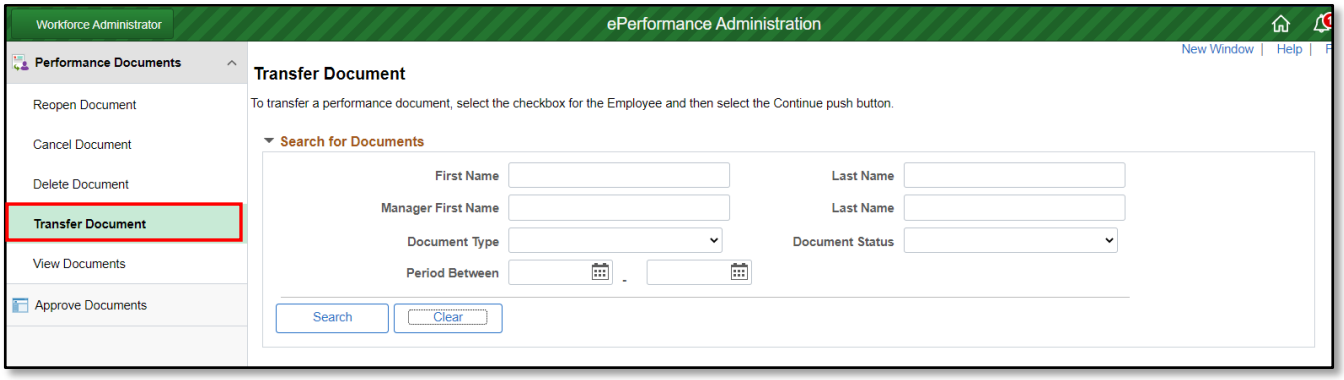


5. A confirmation will appear to tell you the document was successfully deleted, click **OK.**

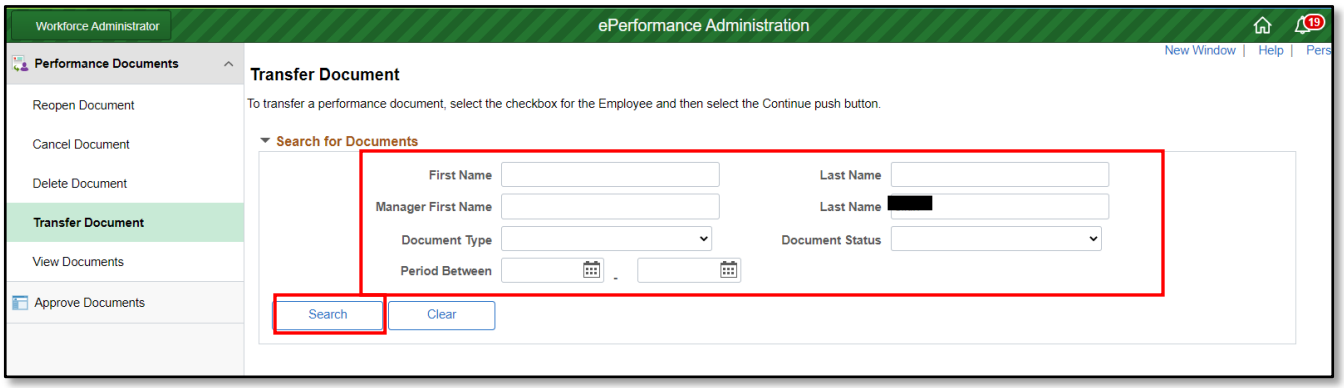


Transferring a Document

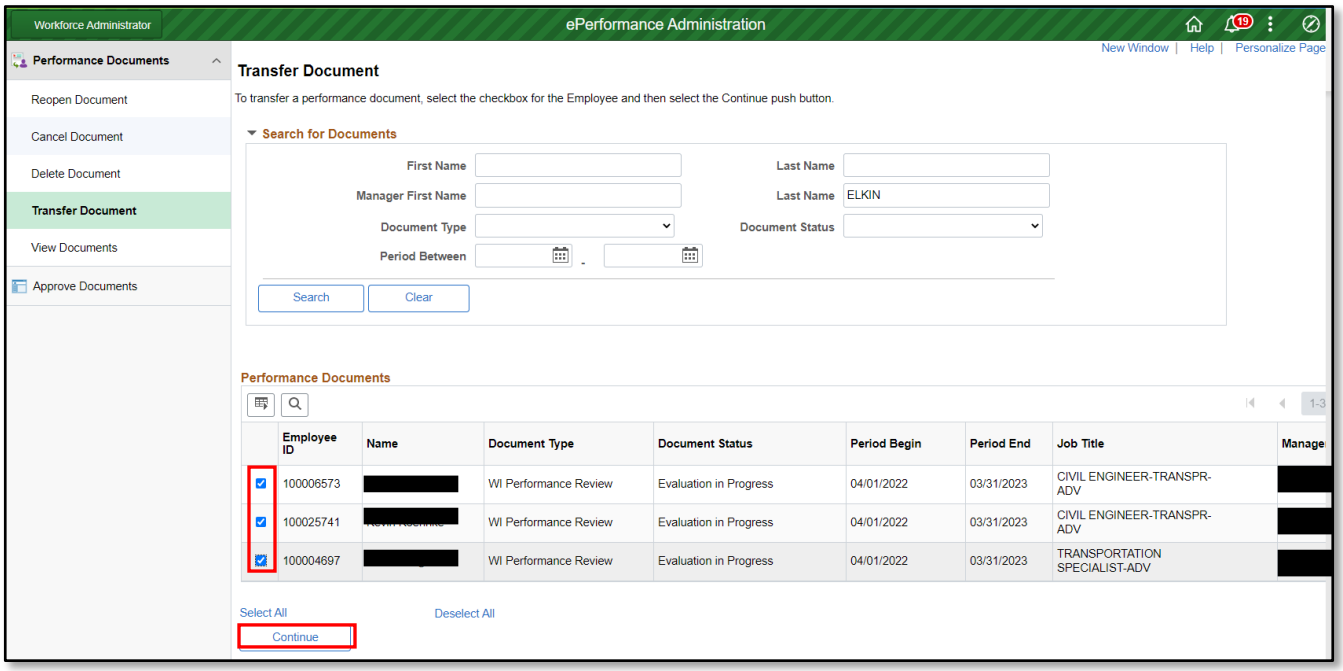
1. To transfer a document, you will use the above instructions to navigate to the Performance Administration tile. There, you will click on **Transfer Document** on the left side of the screen.



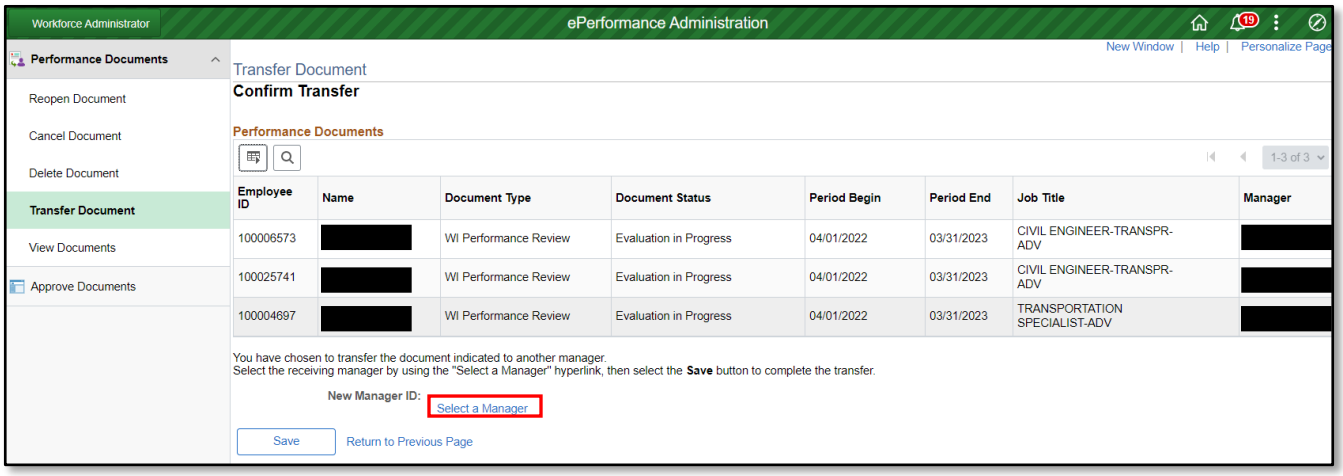
2. Use the search criteria to find the specific document you are looking for (employee first name, employee last name, supervisor first name, supervisor last name, etc.). Note: You do not need to fill in all of the boxes, just enough to find the document you are looking for. (In this example, the supevisors last name was put in the search criteria.) Once you have put in your search criteria, click **Search.**



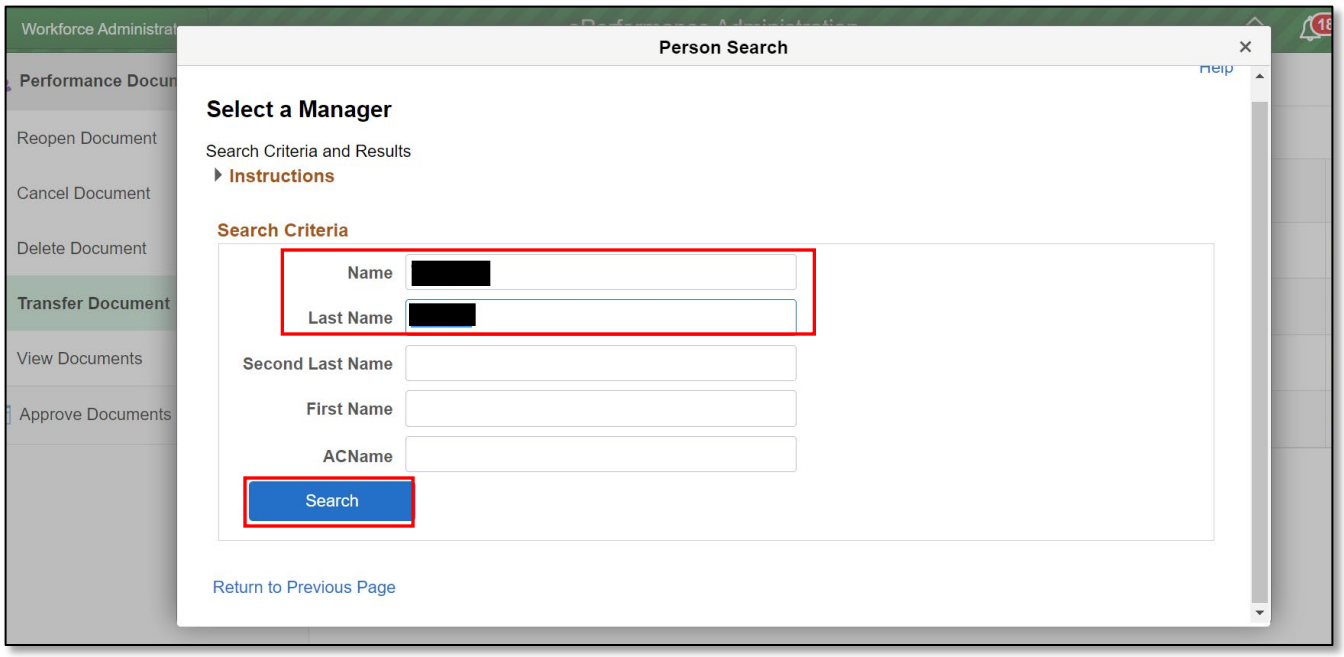
3. Then you will be brought to a document(s) that met your search criteria. Check the box next to the document(s) you want to transfer, and then click **Continue.** (In this example, multiple documents are being selected to transfer.)



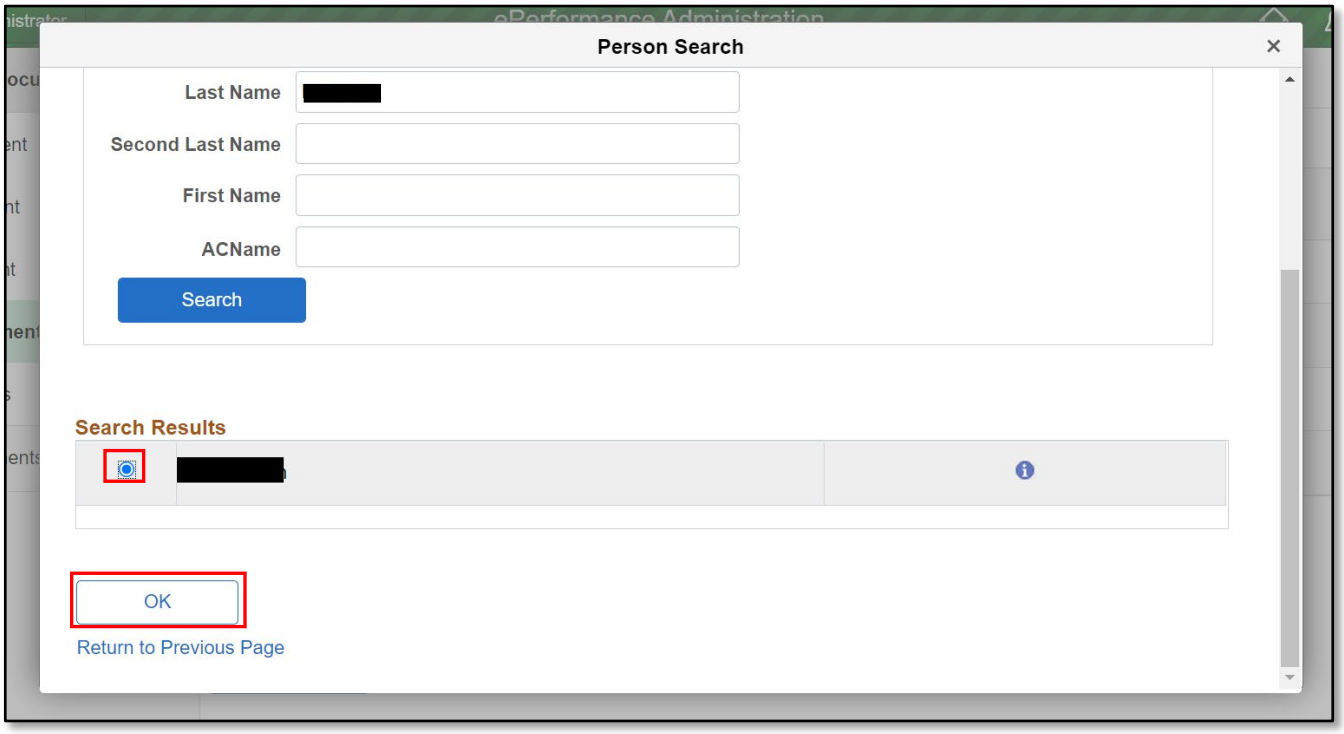
4. You will be brought to a page to confirm the transfer. Here, you need to select which manager to transfer the document(s) to. Click on the **Select a Manager** link.



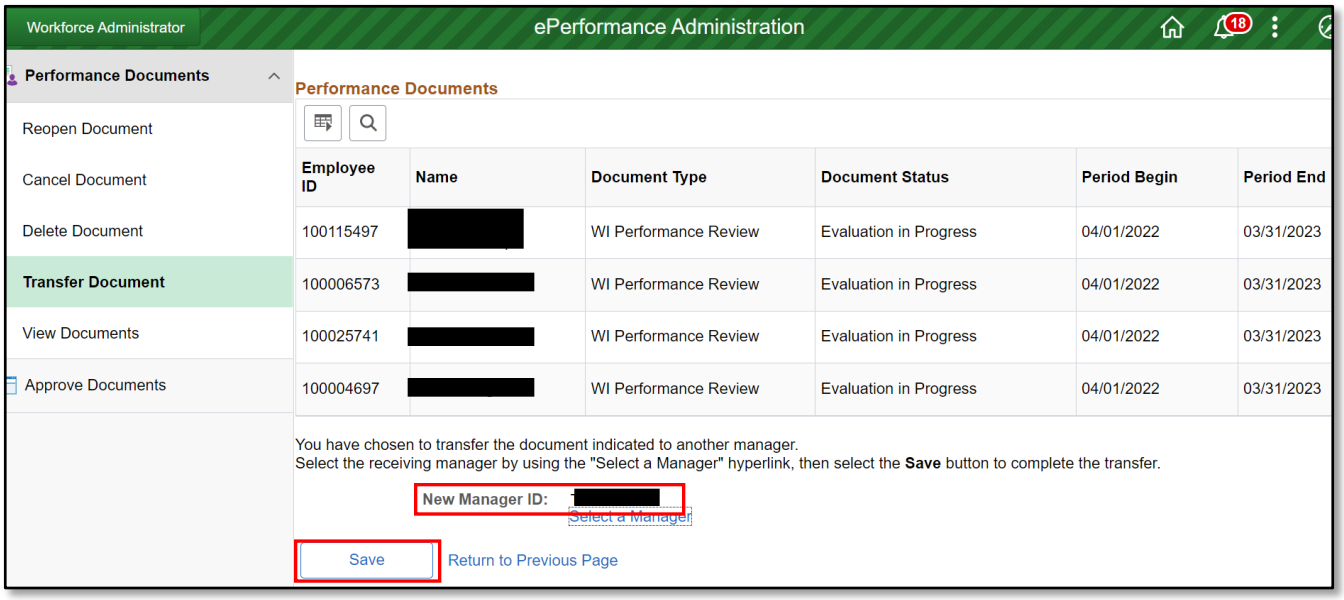
5. A pop up will appear for you to search for the manager you wish to transfer the document(s) to. Put that managers name in the appropriate fields and then click **Search.**



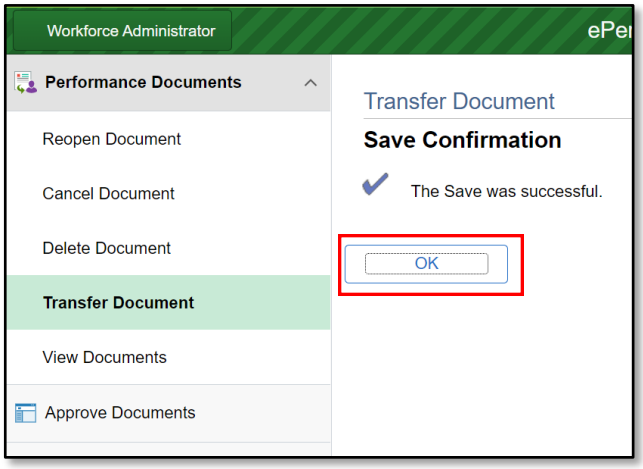
6. The Search Results will populate under the Select a Manager search box. Click on the bubble next to the correct managers name and click **OK.**



7. You will then be taken back to the performance documents screen. There, you will see the name of the manager that the documents are being transferred to next to the New Manager ID towards the bottom of the page. If this is correct, click **Save.**

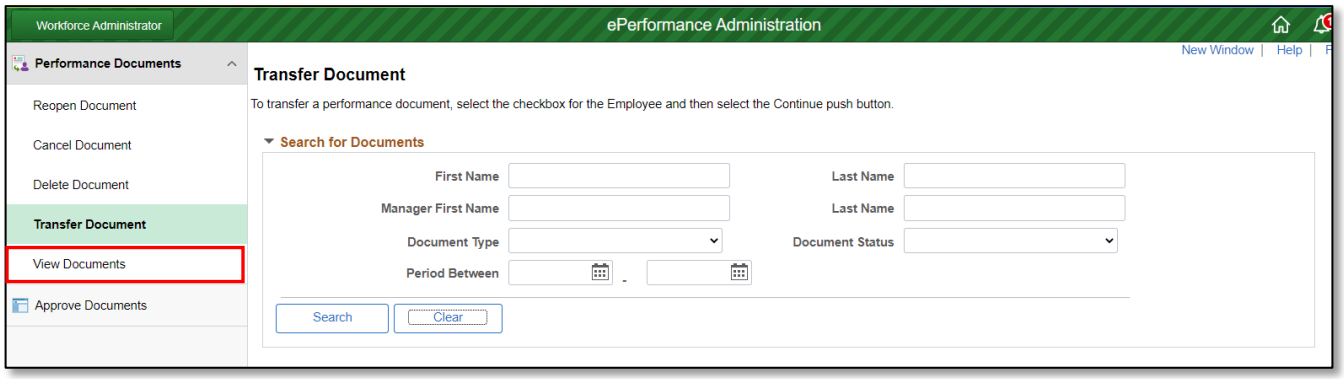


8. A confirmation will appear to tell you the document(s) was successfully transferred, click **OK.**

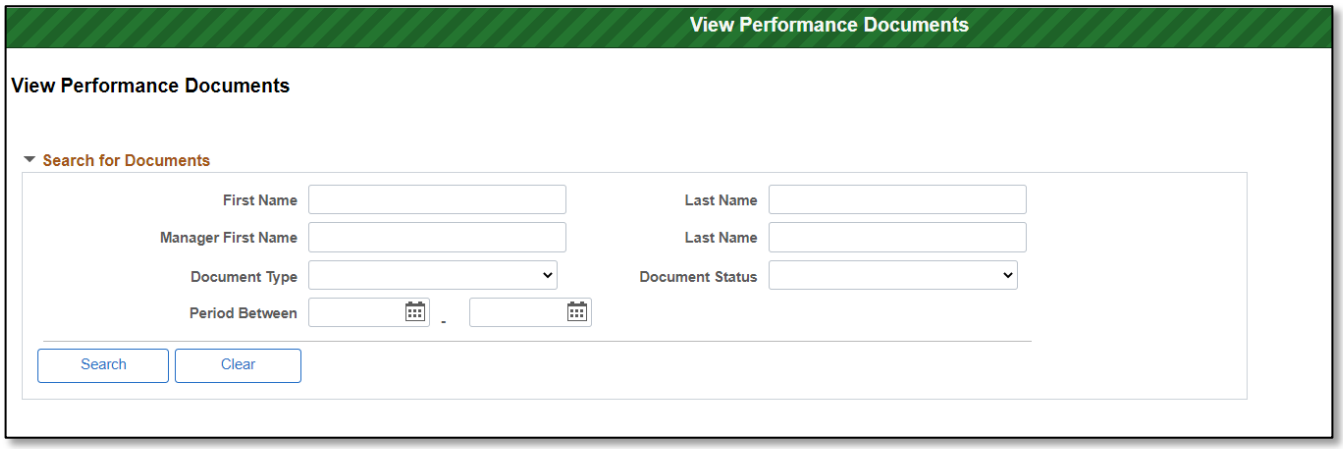


Viewing a Document

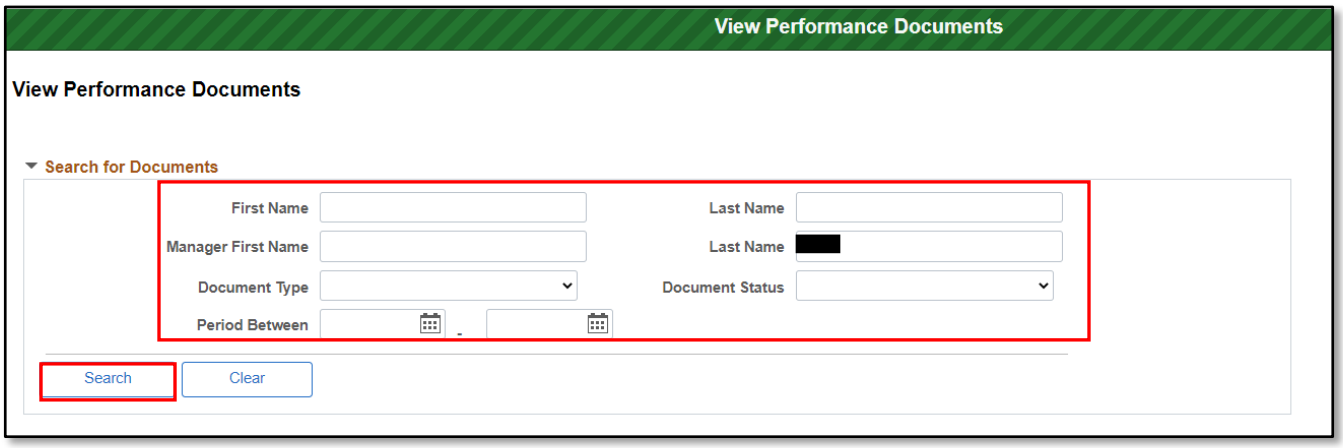
1. To view a document, you will use the above instructions to navigate to the Performance Administration tile. There, you will click on **View Document** on the left side of the screen.



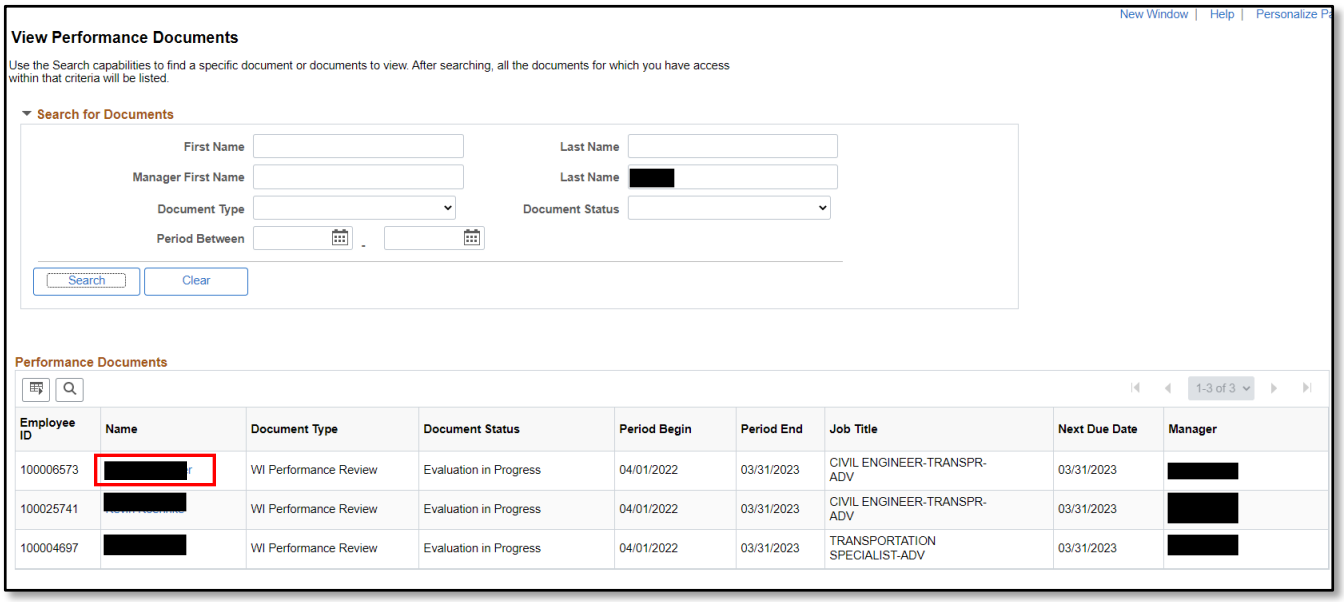
2. A new tab/internet window will open at the very top of your page. It will be the View Performance Documents page.



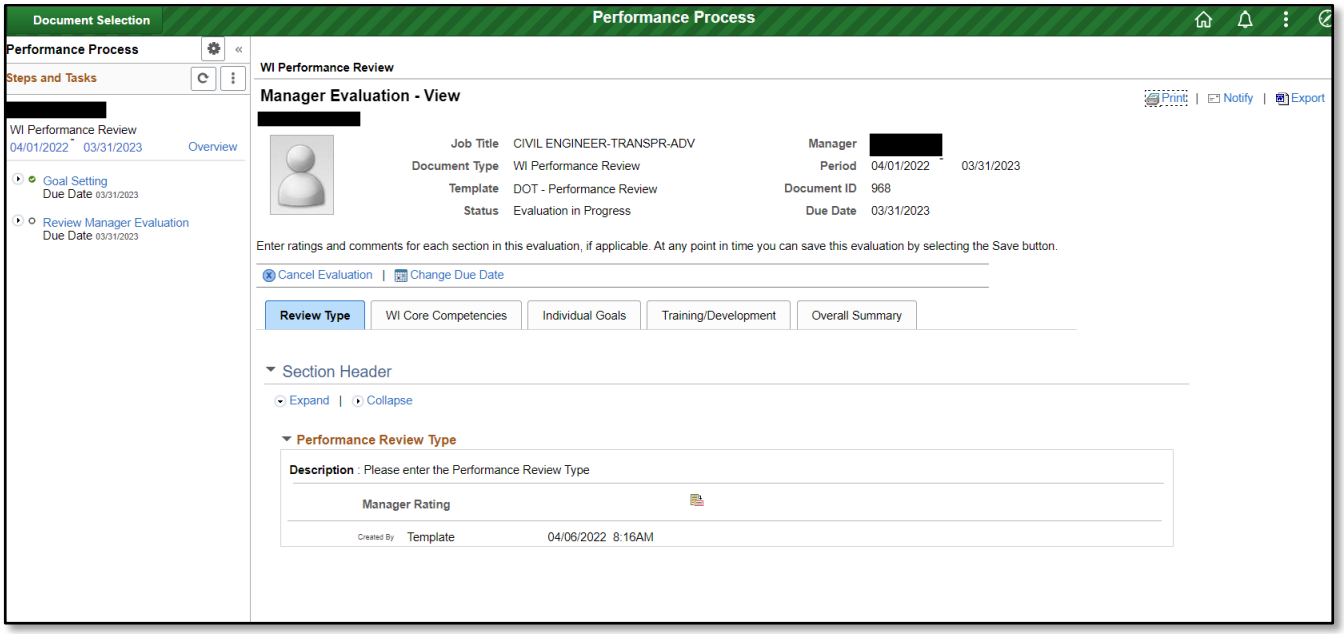
3. Use the search criteria to find the specific document you are looking for (employee first name, employee last name, supervisor first name, supervisor last name, etc.). Note: You do not need to fill in all of the boxes, just enough to find the document you are looking for. (In this example, the supevisors last name was put in the search criteria.) Once you have put in your search criteria, click **Search.**



4. Then you will be brought to a document(s) that met your search criteria. Click on the **employee's name** for document you want to view. *Note: If there is more than one document for a specific employee, use the period begin/period end date to differentiate between evaluations*.

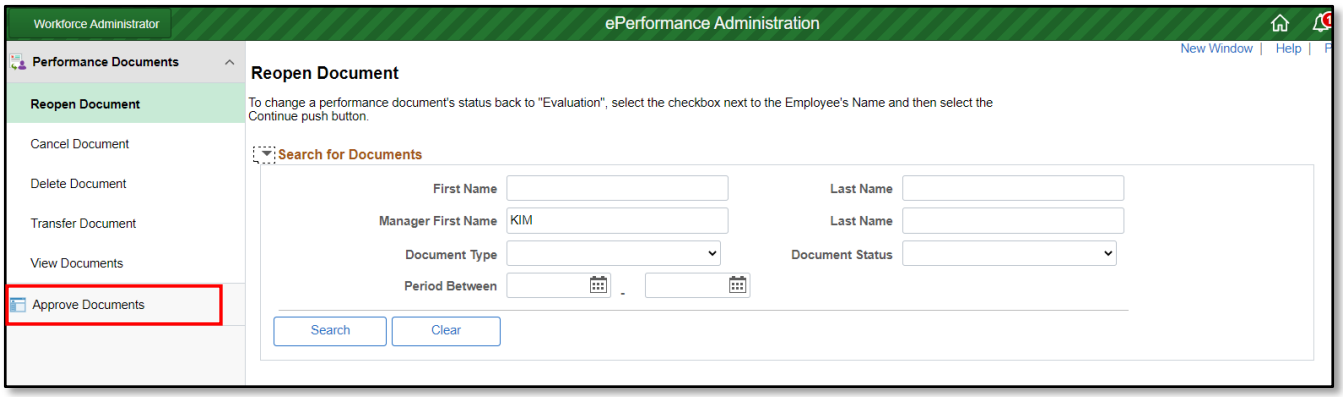


5. You will then be taken to that specific evaluation document to view. *Note: This is view only access, you cannot change the content of the goals or evaluation. To give feedback on goals or an evaluation, use the export button in the upper right-hand corner to export the document. Save the exported .rtf file as a Word document, make your changes/suggestions in track changes and then email that to the supervisor.*

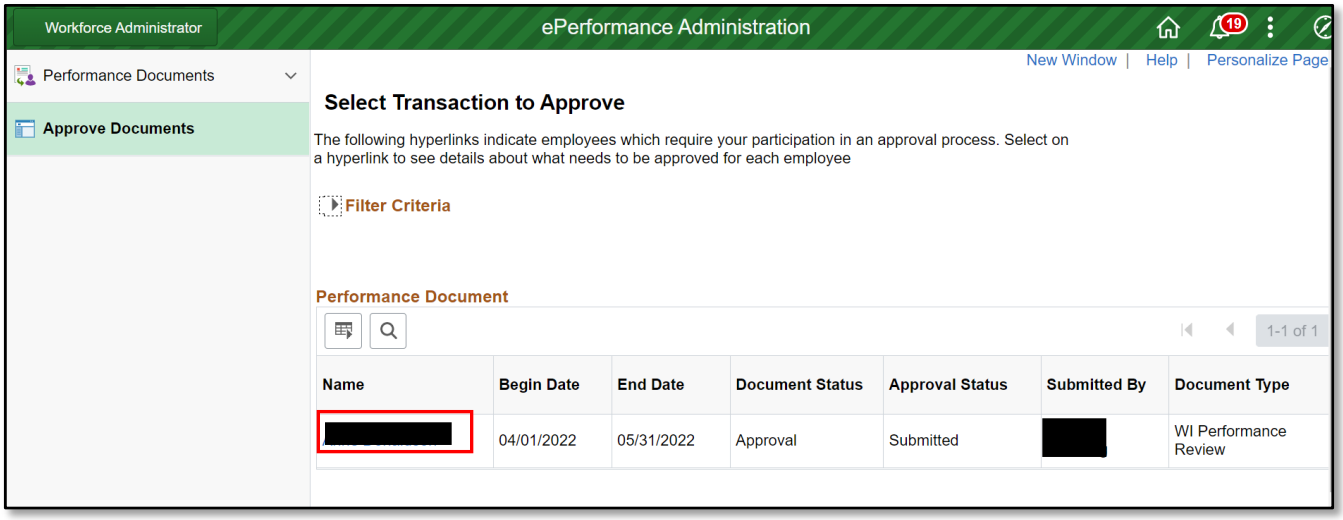


Approving a Document

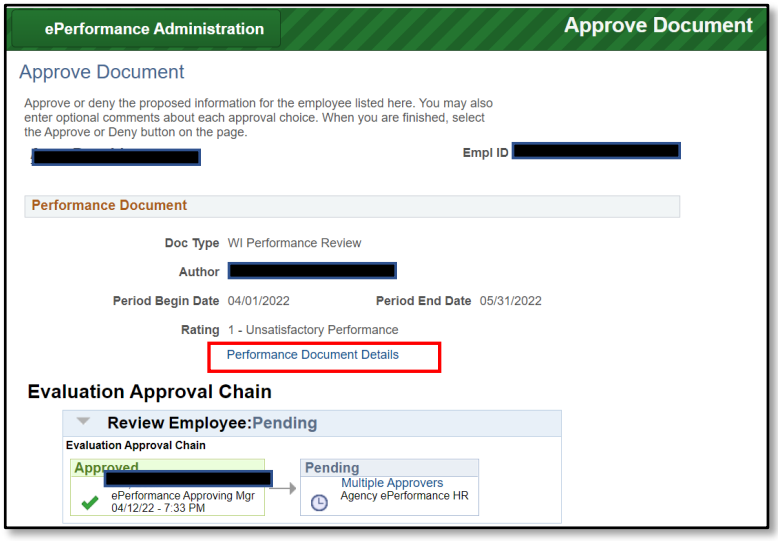
1. To approve a document, you will use the above instructions to navigate to the Performance Administration tile. There, you will click on **Approve Document** on the left side of the screen.



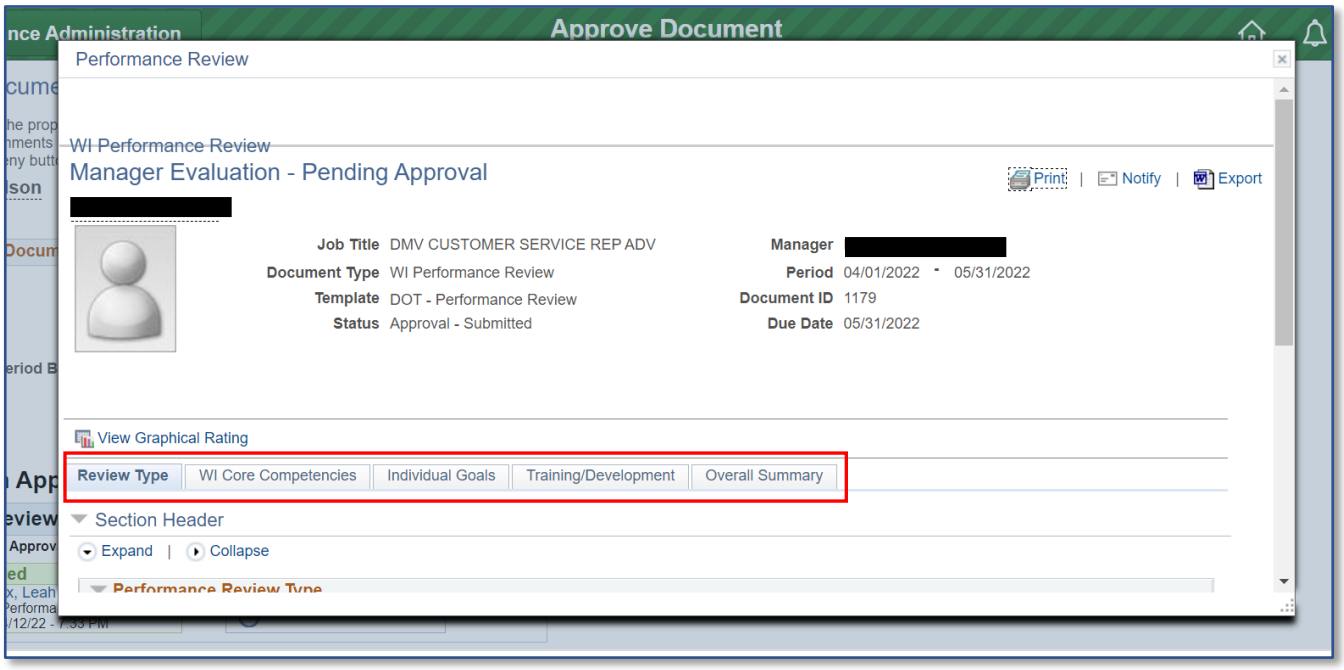
2. You will be taken to a page that has any outstanding HR Approvals (performance evaluations that have an overall score of unsatisfactory performance). Click on the **employee's name** (it is hyperlinked in blue) to be taken to the document to review.



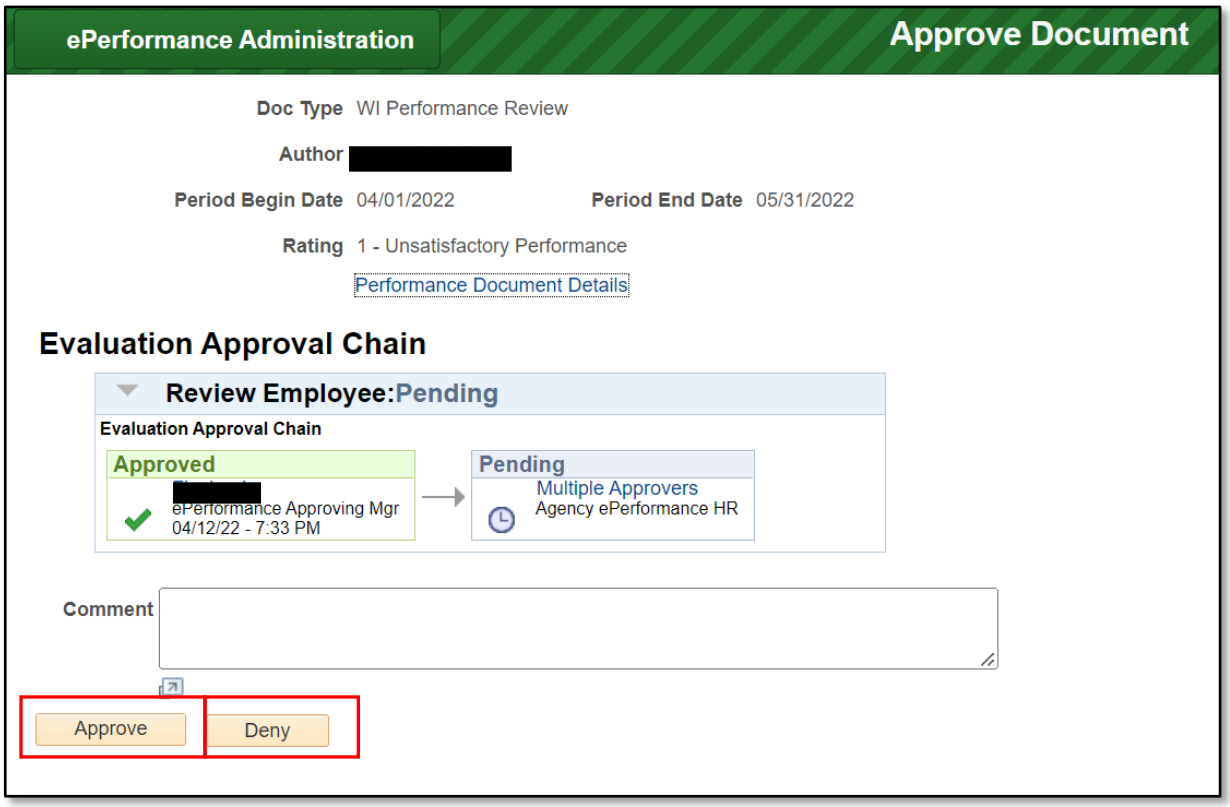
3. You will be taken to the Approve Document Screen. To view the performance evaluation document, click on the **Performance Document Details** link.



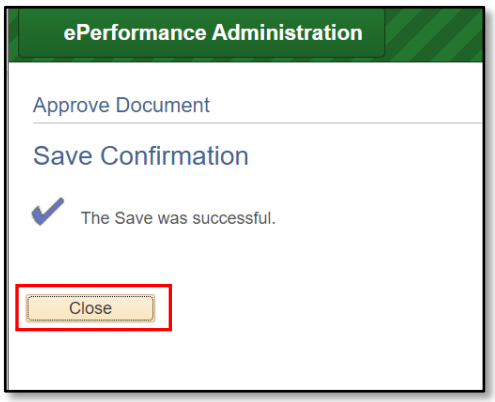
4. This will open a pop-up window. Here, you can use the tabs (Review Type, WI Core Competencies, Individual Goals, Training/Development and Overall Summary) to view the content of the performance evaluation.



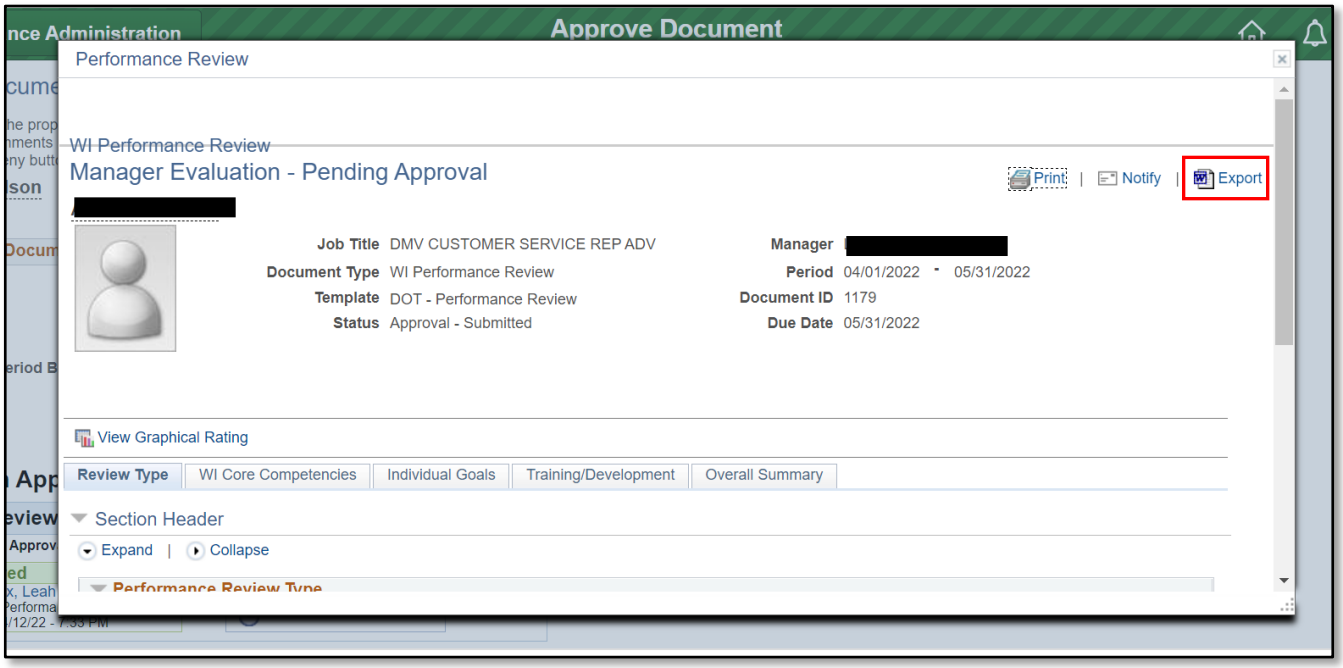
5. To approve the document, close the pop-up window and click **Approve or Deny** in the lower left-hand side of the page. Note: Do NOT put anything into the comment box. The comment(s) written in this box do not go anywhere. If you have feedback, it must be done outside of the system.



6. A pop- up will appear to show the Approval/Denial was successful. Click **Close.**



Note: If you need to give detailed edits/feedback, you will need to export the document using the export link in the upper right-hand side of the page.



It will download as an .rtf file in the lower left side of your page. Open the document and save as a Word document. Then, you can use the Track Changes function to add comments and make edits. You can then email that document to the supervisor who submitted it. Once they make the changes, they will need to start the approval process over again.